

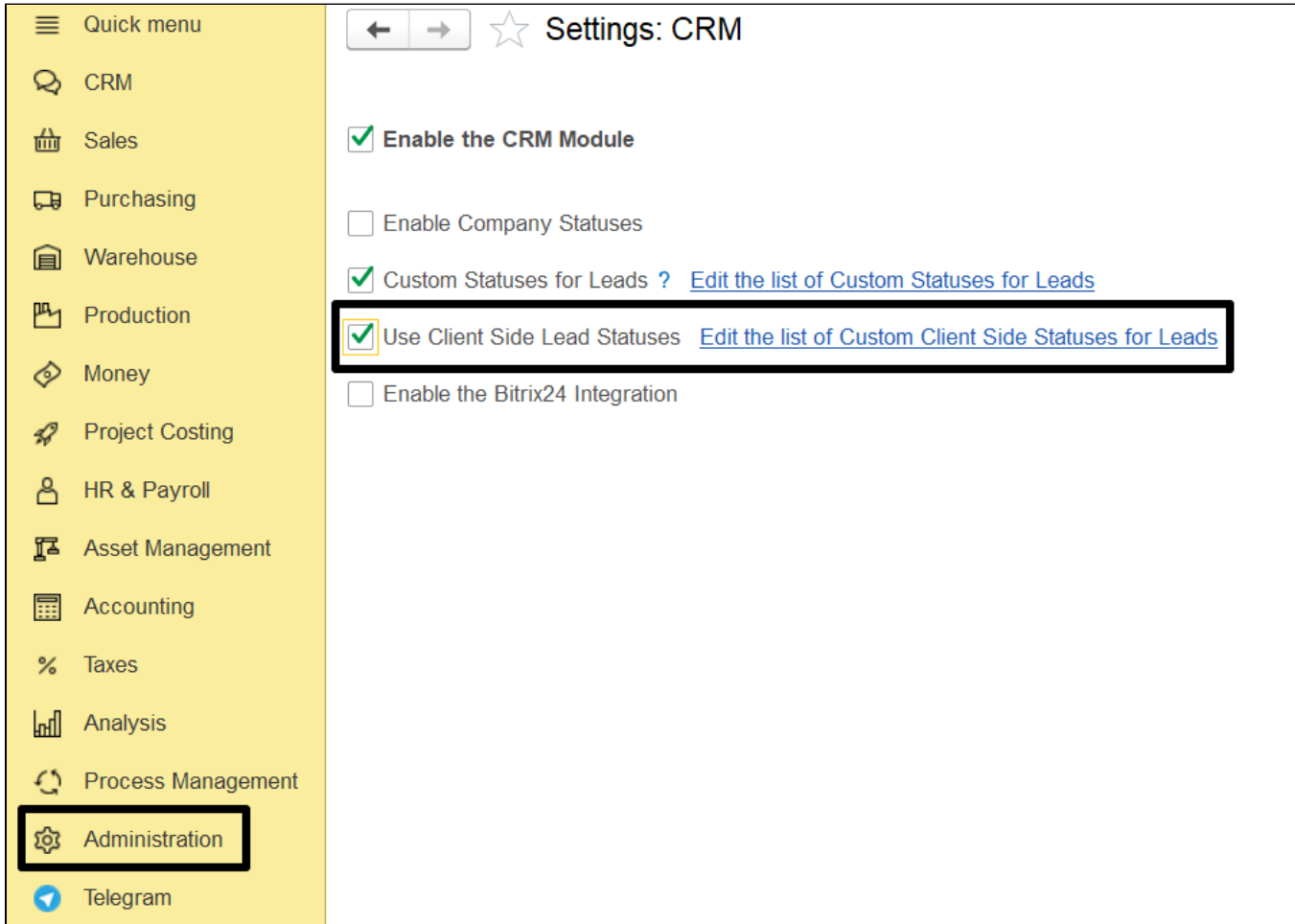
2.1.2. Client Side Lead Status

Client-Side Status in the context of leads refers to **custom status labels** that a company can define to track the progress or state of a lead from the client's perspective.

To display this field on the Lead page:

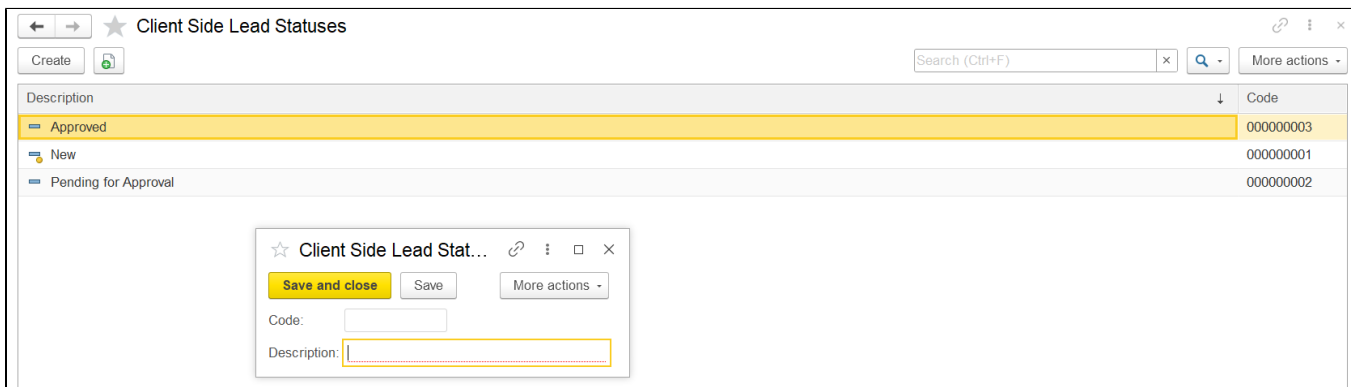
1. Go to **Administration CRM Settings**.
2. Enable the option **"Use client-side lead status."**

Once enabled, the client-side status field will appear on the Lead page, allowing users to view and manage it directly.



The screenshot shows the 'Settings: CRM' page. On the left is a yellow sidebar with a 'Quick menu' containing various modules: CRM, Sales, Purchasing, Warehouse, Production, Money, Project Costing, HR & Payroll, Asset Management, Accounting, Taxes, Analysis, Process Management, Administration (highlighted with a black box), and Telegram. The main content area is titled 'Settings: CRM' and contains several toggle options: 'Enable the CRM Module' (checked), 'Enable Company Statuses' (unchecked), 'Custom Statuses for Leads ?' (checked, with a link to 'Edit the list of Custom Statuses for Leads'), 'Use Client Side Lead Statuses' (checked, with a link to 'Edit the list of Custom Client Side Statuses for Leads' and highlighted with a black box), and 'Enable the Bitrix24 Integration' (unchecked).

Status types can be added using the Edit custom client-side statuses for leads hyperlink.



The screenshot shows the 'Client Side Lead Statuses' management interface. At the top, there are navigation buttons (back, forward), a search bar, and a 'More actions' dropdown. Below this is a table with two columns: 'Description' and 'Code'. The table contains three rows: 'Approved' (code 00000003), 'New' (code 00000001), and 'Pending for Approval' (code 00000002). A modal window is open in the foreground, titled 'Client Side Lead Stat...', with a 'Save and close' button, a 'Save' button, and a 'More actions' dropdown. The modal contains input fields for 'Code:' and 'Description:'.

On the lead page, this option is available on the right side of the screen. To assign a status, select one from the dropdown list of available statuses

Main Approvals History of Approval History of Object Status Changes Taken Decisions

Save and close Save Create Project Phone Call E-mail Meeting Generate

Status: Quotation Closed

Client Side Status New

Main Lead Documents

Topic: Villa Design and Fitout request Number: MELD23-0000004 From: MRB Engineering and Contracting

Source of Request: Google Entity: MRB Engineering and Contracting

Responsible: Nick Main Contractor:

Submit till Date: / / Consultant:

Create Project Budget of Lead: 0.00

- New
- Approved
- New
- Pending for Approval