

# State Action

## Overview

This page controls how lead states behave — what fields are required, when check-ins are needed, and how state changes work.

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## Settings Reference

| Setting   | Description   |
|---|---|
| <b>Done Deal State</b>  | Defines which states are considered eligible to mark a lead as Done Deal.                     |
| <b>Done Deal Line Mandatory to Reservation Phase</b>          | When ON, a lead must be in Done Deal state before it can move to reservation.                 |
| <b>Keep Reassigned Leads in the Same State</b>                | When ON, reassigned leads stay in their current state. When OFF, they go back to Fresh Leads. |
| <b>States That Don't Require Time and Date in Next Action</b> | For these states, the salesman can log a next action without setting a date/time.             |
| <b>States Require Check-in</b>                                | A check-in must be logged when the lead is in one of these states.                            |
| <b>States That Require Contact Tool Field</b>                 | The contact method field (call, WhatsApp, etc.) is mandatory in these states.                 |
| <b>States That Require Reply Option Field</b>                 | A reply option must be selected in these states.  |
| <b>States That Require Segment Field</b>                      | The segment field is mandatory in these states.   |
| <b>States That Require Age Field</b>                          | The age field is mandatory in these states.   |
| <b>States That Require Purpose Field</b>                      | The purpose field is mandatory in these states.   |
| <b>States That Require Gender Field</b>                       | The gender field is mandatory in these states.  |
| <b>Select State Require Feedback</b>                          | Feedback is mandatory when moving a lead to these states.                                     |
| <b>Set Next Date Limitation</b>                               | Configures date constraints for next actions in selected states.                              |

| Setting  | Description  |
|--|--|
| <b>Show Reply Options in Next Action</b>                     | When ON, reply options appear in the next action form for selected states. |
| <b>States for Setup Meetings Location and Contact Guests</b> | These states allow setting a meeting location and adding guest contacts.   |
| <b>Set No-Action State Visible</b>                           | When ON, the "No-Action" state becomes visible to users.                   |
| <b>Require Check-in Before State Move</b>                    | When ON, a check-in must be completed before changing a lead's state.      |
| <b>Show Lead Info in Call Center Export</b>                  | When ON, lead details are included in call center export files.            |
| <b>Lead Sorting Method</b>                                   | Sets the default sorting order for leads across tabs.                      |

Add Lead & Duplication   **State Action**   Notifications   Rotation   Withdraw   CIL

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Done Deal State   Pending  
Following  
Coming-Visit  
Meeting

done deal lined mandatory to reservation phase    OFF

Keep Reassigned Leads in the same state    OFF

States that Don't require time and date in next action   Pending  
Following  
Coming-Visit  
Meeting   [SET NEXT DATE LIMITATION](#)

States Require checkin   Pending  
Following  
Coming-Visit  
Meeting

States that require all next action's fields   Pending  
Following  
Coming-Visit  
Meeting

Select state require feedback   Pending  
Following  
Coming-Visit  
Meeting

Show Reply Options in next action    ON

States for setup meetings location and contact guests   Pending  
Following  
Coming-Visit  
Meeting

Set No-Action State Visible    OFF

Require checkin before state move    OFF

Show lead info in call center export    OFF

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