



STATUS HISTORY

Click on Status History to view a grid of the client's Status History records

Client: TESTERSON, TEST A
Face Sheet: \$0.00
Events
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This is a grid view of all of a client's Status History Records. Click Insert to create a new Status History record.

Insert Status History

Status History	
Date:	<input type="text" value="09/12/2023"/> 
Status:	<input type="text" value=""/> 
Notes:	<div style="border: 1px solid gray; height: 100px; width: 100%;"></div>

Select a Status dropdown value and click Save

- ✓
- Active
- Archived
- Expired
- Inquiry
- Referral
- Resigned

View

Edit

View Status History

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Status History

Date: 09/01/2023

Status: Referral

Notes:

The most recent Status History record will show as view only on the client's Face Sheet

Status: Referral

Status Date: 09/01/2023 |