Custom Statuses

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You can add and edit existing statuses to reflect the true flow of work throughout your organization. Utilizing your own unique statuses can provide quick and easy insight into the progress of campaign, project, task, and proof work while keeping your teams in sync.
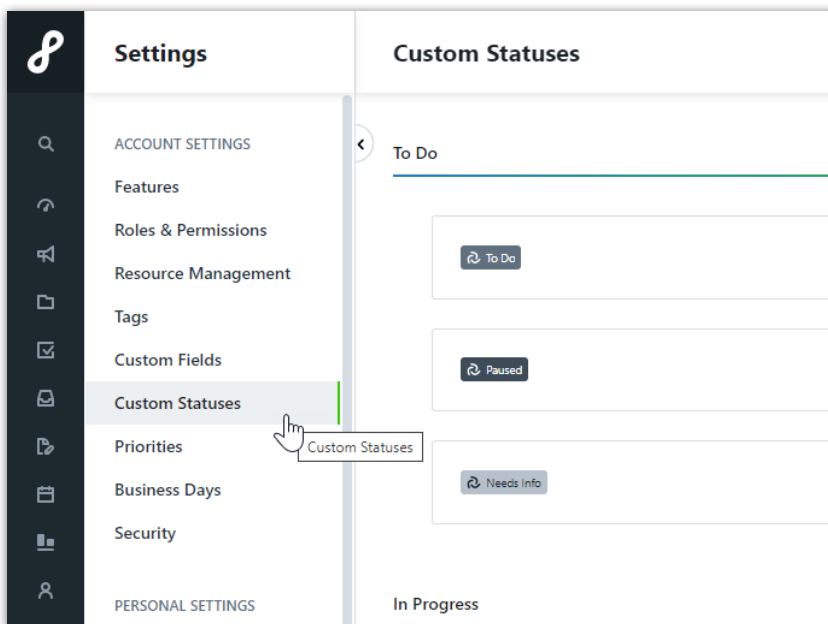
Custom Statuses are only available for Business and Enterprise customers.

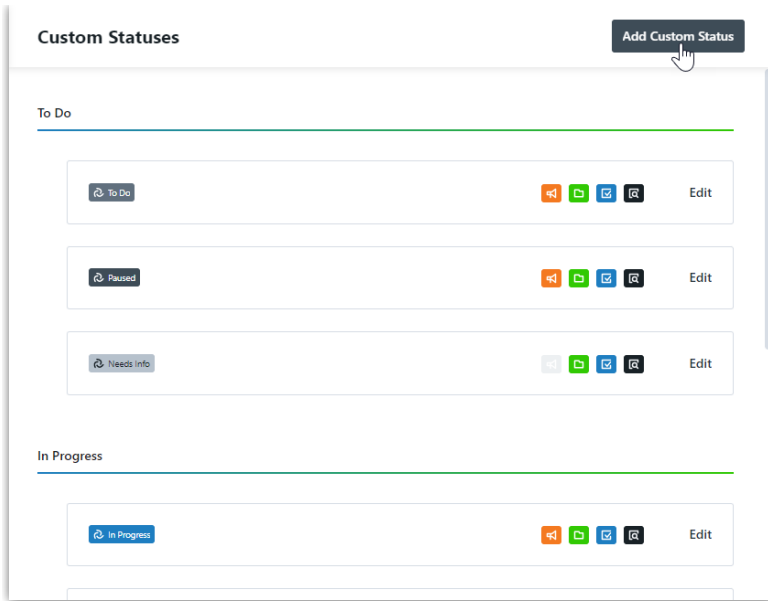## Adding a New Custom Status

> Access to Account Settings is managed by the permission **Manage Account Settings.**
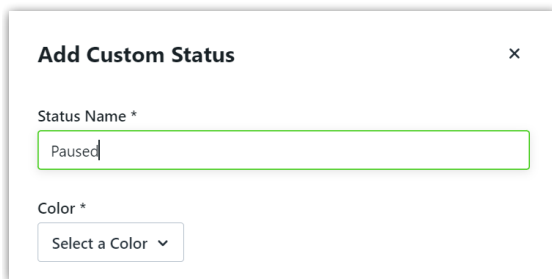
Navigate to **Account Settings** and select **Custom Statuses** from the **Settings** sub-navigation to access your custom statuses.


Select **Add Custom Status** in the top right corner to add a new status.

Enter a name for your custom status that will be easily recognizable to your organizations and correlates with the status stage.
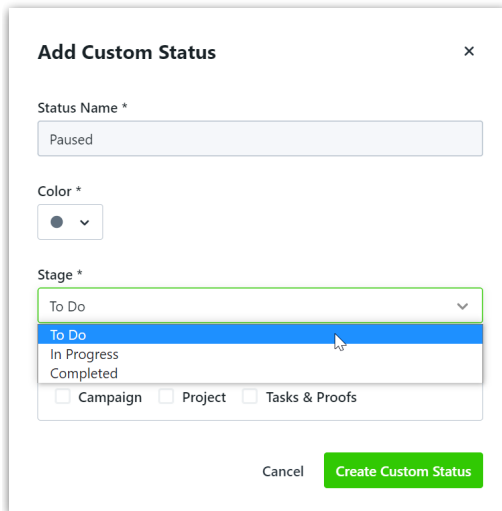

Click **Select a Color** to choose a color for your status. This color will be reflected in the status button, status selector, and custom views. Consider how your users will associate your status with a color. We recommend using similar colors within each stage.
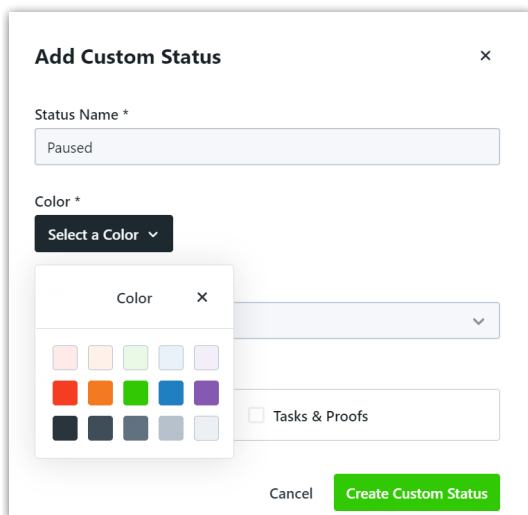
Click the the dropdown under **Stage** to select your status stage.**Statuses cannot be shifted from one stage to another** so we recommend taking time to consider which stage best defines your status. The stages are generally defined as follows:

- **To Do** - Work has not yet started. Some examples of custom statuses in this stage might be *Paused, Needs Info, Waiting.*

- **In Progress** - Work is active and underway. Some examples of custom statuses in this stage might be *At Printer, Proof Uploaded.*

- **Completed** - Work was finished. Any status belonging to the completed stage will function the same in terms of filtering (https://lytho.knowledgeowl.com/help/global-search) and request management. (https://lytho.knowledgeowl.com/help/final-delivery) Some examples of custom statuses in this stage might be *Ready For Billing, Approved.*

Add Custom Status   ×

Status Name *

Paused

Color *

● ⌄

Stage *

To Do   ⌄

To Do
In Progress
Completed

☐ Campaign   ☐ Project   ☐ Tasks & Proofs

Cancel   **Create Custom Status**

ⓘ If your team has either the "Require the Completion of Projects in Campaigns" or "Require the Completion of Work in Projects" restriction enabled under **Features**, your custom statuses must be assigned to the **Completed** stage in order to be used when closing out work.

Below **Applicable To** select if your custom status can be used for Campaigns, Projects, and/or Tasks & Proofs. Select **Create Custom Status** to confirm your selections.

Reorder your statuses using the drag and drop handles to the left of each status. The order of your statuses determines the order within the status selection menu. The first status in a stage will also determine the new status for tasks and proofs that are moved into a To Do, In Progress, or Completed stage within Kanban views (https://guide.lytho.com/help/kanban-views).

## Editing an Existing Custom Status

Navigate to **Custom Statuses** in the Account Setting sub-navigation and click **Edit** to the right of the custom status you wish to edit.
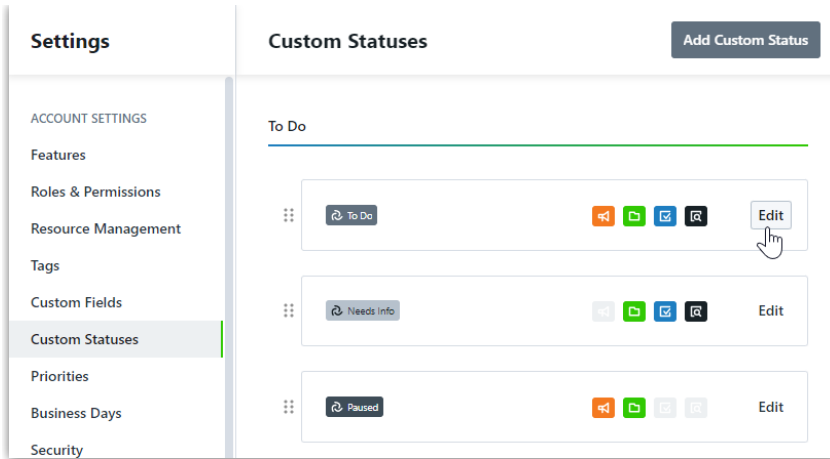
You have the ability to update the **Status Name** and **Color**. Once saved, these changes will be reflected in any status that is currently in use. You also have the ability to update which items your status is applicable to. When removing a status from an item, the status can no longer be selected, but will remain the status for any items where it is currently applied.
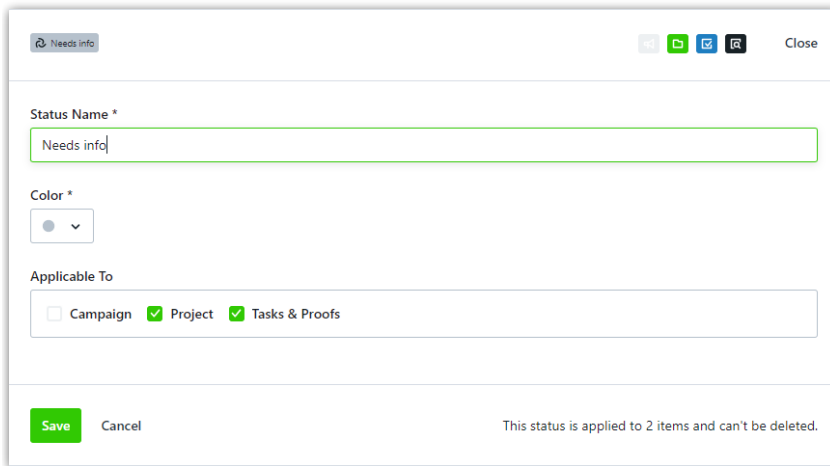
Statuses cannot be edited to shift from one stage to another. If you find that a status you have created needs to belong to a different stage, we recommend going through the steps to delete the status and then re-create in the desired stage.
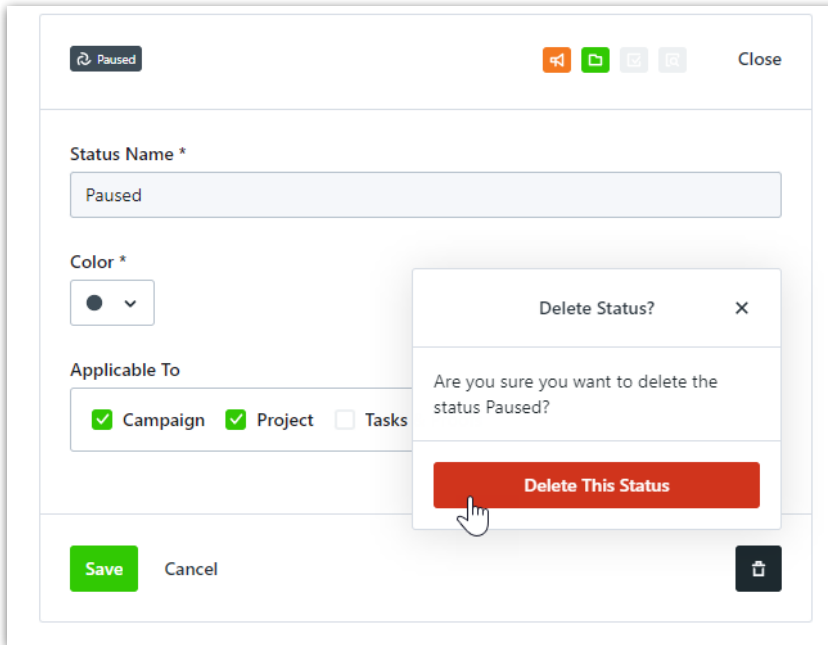
Deleting a Custom Status

Each stage must have at least one status. Once a stage has more than one status, you can remove a custom status as necessary. **The system will not allow you to delete any status that is currently applied to an existing campaign, project, task, proof, or template.**

> If you need to remove a status that is currently in use, first edit the status and uncheck all for Applicable To. This will ensure the status will no longer be used, but will not remove the status from any items where it is currently applied. Update any current items manually and remove from any project and/or campaign templates.

When editing a status, you will see a trash icon in the bottom right corner if your status is not currently applied. Click the trash icon and confirm your choice to delete a status.

Applying a Custom Status

By default, any new campaign, project, task, or proof will be given the first status listed in the 'To Do' stage. Make changes to the status by selecting the status in the top right corner and choosing from the dropdown list.