Account Contract Status Types Screen

Contracts & Commitments · https://learn.logisense.com/docs/591757615/

Last verified with: 10.8.6.0

Contract Status Types are configured in Setup / Product Catalog / Contracts / Status Type

Overview

Account contract status types are used to define the statuses that can be applied to contracts. These status types help identify where a contract is in its lifecycle, such as whether it is active or canceled, and they control how those options are presented when contracts are maintained elsewhere in the product.

This screen is used to create and maintain the named contract status values that users can later select when working with contracts.

Prerequisites

There are no required prerequisite setup steps before creating account contract status types.

Account Contract Status Types Panel

The Account Contract Status Types panel on the left displays the available contract status types. Selecting a status type loads its details on the right so you can review or update it.

Actions

Icon	Description
	Deletes the selected status type if not in use
	Adds a new status type

Edit Account Contract Status Type Panel

The Edit Account Contract Status Type panel displays the selected status type and is where its settings are maintained.

Fields

- **Name**: The descriptive name for the contract status type.
- **Status**: Determines whether the contract status type is treated as an active status or a canceled status.
- **Sort Order**: Controls the order in which contract status types appear in status selection lists. Lower values appear earlier in the list.

Status Values

The **Status** field on this screen is limited to the system's contract-status groupings for:

- **Active**
- **Canceled**

Status types configured as **Active** are used where an active contract status is appropriate. Status types configured as **Canceled** are used where a contract has ended or been terminated.

References Tab

The **References** tab shows where the selected contract status type is already in use. This helps determine the impact of changes and whether the status type can be deleted.

Where references exist, the tab lists the related contract records by name.

Guides

Adding Status Types

- In the Account Contract Status Types panel, click the add icon.
- Enter the status type details.

- Select the appropriate **Status** value.
- Enter the **Sort Order**.
- Click **Save**.

Editing Status Types

- In the Account Contract Status Types panel, select the status type you want to update.
- Modify the status type details as needed.
- Click **Save** when you are finished.

Deleting Status Types

Note: Status types that are configured on account contracts are in use and cannot be deleted. In order to delete a status type in use, first determine which contracts are configured with the type using the '*References*' tab and then edit those contracts to use an alternate status type.

- In the Account Contract Status Types panel, select the status type you want to delete.
- Review the **References** tab if you need to confirm where it is used.
- Click the delete icon.
- On the confirmation dialog, click **Yes**.