Managing Contract Substatuses

Contracts Admin Guide · https://evergreenworx.com/docs/managing-contract-substatuses/

Contract Substatuses in EvergreenWorx Contracts provide an additional layer of flexibility and control over how contracts are tracked and categorized. While the system status values (such as Active, Draft, and Inactive) are fixed by the platform and cannot be customized, Substatuses allow organizations to define more descriptive and meaningful status labels for their own operational needs.

This article explains how to manage Contract Substatuses, including how to add new ones, set defaults, and tailor them by business unit.

What is a Contract Substatus?

A Contract Substatus is a custom value that maps to one of the built-in system status values of a contract record. It allows your organization to create specific, descriptive statuses that better reflect the real-world state of a contract while maintaining compatibility with the platform’s required status model.

For example:

- A contract with the system status "Active" might have substatuses like "Signed by Vendor" or "In Execution"
- A contract with the system status "Draft" might have substatuses like "Awaiting Legal Review" or "Needs Internal Approval"

You can define multiple substatuses for each system status, but only one default substatus can be assigned to each.

How to Access and Manage Substatuses

1. In the app, click the Change Area dropdown (lower-left corner of the screen).
2. Select Settings.
3. Under Contracts, click Contract Substatuses.
4. Use the Active Contract Substatuses or Inactive Contract Substatuses views as needed.

How to Create a Contract Substatus

1. Click New to open the Contract Substatus form.
2. Enter a Name for the substatus (e.g., "Needs Internal Approval").
3. Select the System Status this substatus will map to (e.g., Draft, Active, Inactive).
4. Set the Default drop down to Yes if this should be the default substatus for the selected system status.
    - Only one default is allowed per system status.
5. Save and Close the record.

Once saved, this substatus will be available for use on contract records that share the same system status.

Optional: Business Unit-Level Customization

Contract Substatuses can be tailored by business unit using the built-in business unit-level security model in Power Apps. This allows different parts of your organization to define and manage their own sets of substatuses that better reflect their unique workflows or terminology.

To use this feature:

- Assign appropriate security roles and permissions at the business unit level.

- Set the ownership of the Contract Substatus to the correct business unit.

Best Practices for Managing Contract Substatuses

- Use substatuses to communicate clear, actionable states of a contract beyond the basic system statuses.
- Maintain one default substatus per system status to streamline record creation.
- Regularly review substatus values to ensure they align with process changes or organizational needs.
- Consider segmenting substatuses by business unit when different teams have distinct contract lifecycle workflows.
- Use deactivation instead of deletion to preserve history and prevent disruption to existing records.

Contract Substatuses help bridge the gap between system-level requirements and operational flexibility, giving your teams more control over how contract progress is tracked and understood.