

Enhanced Agreement Statuses for Finalize App in Salesforce



Enhanced Agreement Statuses are our updated status management system in LinkSquares Finalize. As part of these improvements, we will be introducing more granular agreement “statuses” that more closely align to how your legal team conducts its agreement creation process, allowing you to work the way you want. **Enhanced Agreement Statuses will go live in Finalize on November 5.**

The new version of the Finalize App for Salesforce with the Enhanced Agreement Statuses will be available for upgrade beginning on November 18. Your Salesforce admin will need to upgrade your Finalize App in Salesforce version so you can access these improvements.

What’s changing for Salesforce users? There are four key changes to know about:

- An expanded list of available agreement statuses – for example, **Internal Review**, **Counterparty Review**, and **Out for Signature** – and introducing agreement phases which will give Salesforce drafters and collaborators a clear idea of the next steps required to move the agreement forward.

Status

☐ REQUEST PENDING

☐ INTERNAL REVIEW

☐ COUNTERPARTY REVIEW

☐ READY FOR SIGNATURE

☐ OUT FOR SIGNATURE

☐ PARTIALLY SIGNED

☐ FULLY SIGNED

☐ DONE

☐ PAUSED

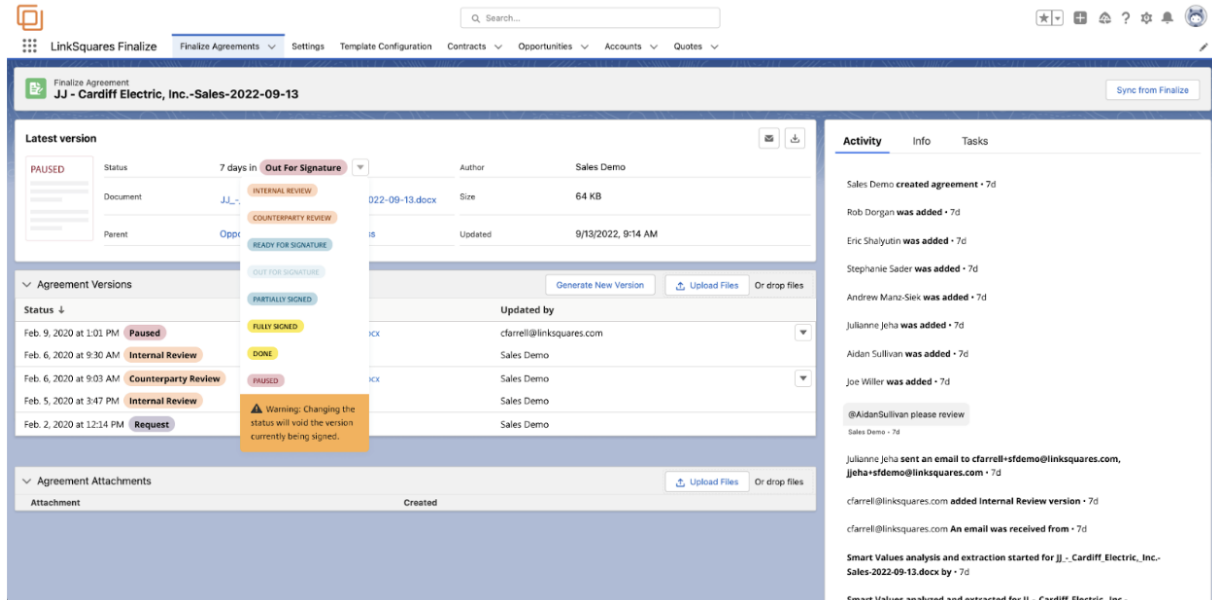
CANCEL CLEAR SUBMIT

- Your legal team may now designate a starting status for your sales templates. You will be able to see and filter the templates by Starting Status. Consult with your legal team to learn more about where agreement Templates will start in the process.

Template Name	Template Type	Initial Status	Description
0 deleted user draft	Draft	Internal Review	ny
0 deleted user intake	Intake	Internal Review	ny
0 deleted user request	Request Form	Request Pending	ny
0001 signature template	Sign	Ready for Signature	ny
0001 template	Draft	Internal Review	ny
001 Signature template many questions	Sign	Ready for Signature	ny
001 draft PDF toggle OFF check	Draft	Internal Review	ik
001 draft PDF toggle OFF check clone	Draft	Internal Review	ik
001 request PDF toggle OFF	Request Form	Request Pending	ik
01 Intake IK PDF ON	Intake	Internal Review	ik - PDF ON

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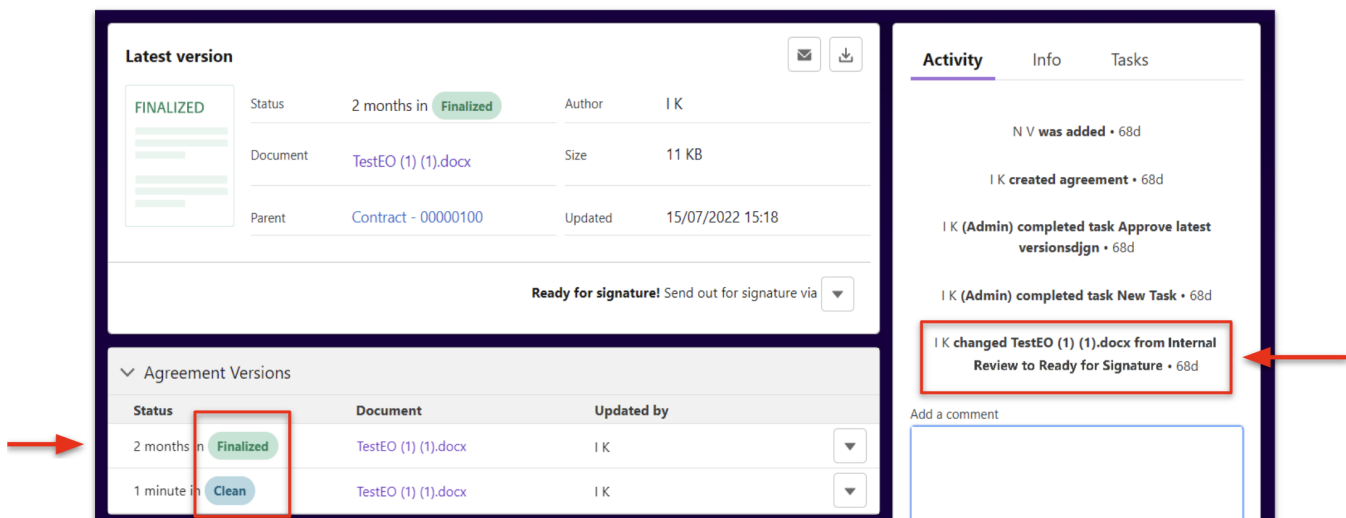
- Salesforce users will also be able to manually transition an agreement between statuses and phases based on their role/permissions.



- As a Salesforce Drafter, you will no longer be able to reject a Task. In order to advance an agreement into the next status, you will first need to complete all tasks and approvals associated with the current status.

What happens between November 5th and until you upgrade to the fully-compatible Salesforce Finalize application?

The Finalize App in Salesforce will still show the legacy Statuses such as Clean, Request and Finalized. However, the Activity Tab will show the new statuses such as Internal Review and Counterparty Review.



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You will have until the end of March 2023 to complete your upgrade of the Finalize App in Salesforce.

After March 31st, 2023, LinkSquares will not support the older version of the Finalize App in Salesforce, and any older Salesforce packages may have degraded or broken experiences.

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Here's how the SFDC statuses will map to the new Finalize statuses during the transition period:

Web Status	Map in Salesforce Status
Request Pending	Request
Internal Review	Clean
Counterparty Review	Clean
Counterparty Review & Pen with Counterparty	Redlines
Ready For Signature	Finalized
Out For Signature	Out For Signature
Partially Signed	Out For Signature
Fully Signed	Archived / Signed
Done	Archived / Finalized
Paused & Request Pending	Archived / Request
Paused & Internal Review	Archived / Clean
Paused & Counterparty Review	Archived / Clean
Paused & Counterparty Review & Pen with Counterparty	Archived / Redlines
Paused & Ready For Signature	Archived / Finalized
Paused & Out For Signature	Archived / Out for Signature
Paused & Partially Signed	Archived / Out for Signature

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In-App Experience After the Upgrade

Once you upgrade your Salesforce package, the Finalize Agreement Object in Salesforce will use the new Statuses. After you upgrade, you should also update your flows to match the new Statuses. If you need help mapping your flows, contact cs-integrations@linksquares.com for assistance.

Here is how Salesforce will look with the Enhanced Agreement Statuses once you update your Finalize App in Salesforce package:

The screenshot displays the LinkSquares Finalize app interface within a Salesforce environment. The top navigation bar includes the LinkSquares logo, a search bar, and a menu with options like 'Finalize Agreements', 'Settings', 'Template Configuration', 'Contracts', 'Opportunities', 'Accounts', and 'Quotes'. The main content area is titled 'Finalize Agreement JJ - Cardiff Electric, Inc.-Sales-2022-09-13'. It features a 'Latest version' section with a 'PAUSED' status, a '7 days in' timer, and a dropdown menu. Below this is the 'Agreement Versions' section, which lists several versions with their respective statuses: 'Paused', 'Internal Review', 'Counterparty Review', and 'Request'. The 'Agreement Attachments' section is also visible. On the right side, there is an 'Activity' feed showing a series of events, including 'Sales Demo created agreement', 'Rob Dorgan was added', 'Eric Shalyutin was added', 'Stephanie Sader was added', 'Andrew Manz-Siek was added', 'Julianne Jeha was added', 'Aidan Sullivan was added', 'Joe Willer was added', '@AidanSullivan please review', 'Julianne Jeha sent an email to cfarrell+sfid@linksquares.com', 'cfarrell@linksquares.com added Internal R', 'cfarrell@linksquares.com An email was rec', and 'Smart Values analysis and extraction stai'.

To learn more about Enhanced Agreement Statuses in the Finalize App in Salesforce, check out our [documentation here](#).