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
PAUSED
CANCEL

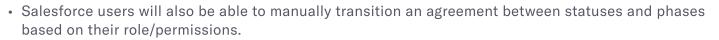
 Your legal team may now designate a starting status for your sales templates. You will be able to see and filter the templates by Starting Status. Consult with your legal team to learn more about where agreement Templates will start in the process.

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0 deleted user request	Request Form	Request Pending	ny	Choose
0001 signature template	Sign	Ready for Signature	ny	Choose
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	Document	JJ,	022-09-13.docx	Size	64 KB		Sales Demo created agreement · 7 d
		COUNTERPARTY REVIEW					Rob Dorgan was added • 7d
	Parent	Oppe READY FOR SIGNATURE	is	Updated	9/13/2022, 9:14 AM		Eric Shalyutin was added • 7d
		OUT FOR SIGNATURE					Stephanie Sader was added - 7d
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	t 1:01 PM Paused	FULLY SIGNED	xx		ksguares.com		Julianne Jeha was added • 7d
	19:30 AM Internal Review	DONE		Sales Demo			Aidan Sullivan was added • 7d
Feb. 6, 2020 at	9:03 AM Counterparty Review	PAUSED	кх	Sales Demo)		Joe Willer was added - 7d
Feb. 5, 2020 at	t 3:47 PM Internal Review	Warning: Changing the		Sales Demo)		
Feb. 2, 2020 at	t 12:14 PM Request	status will void the version currently being signed.		Sales Demo	>		GAidanSullivan please review Sales Demo - 7d
		carefully being agreed.					julianne jeha sent an email to cfarrell+sfdemo@linksquares.com,
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							Smart Values analysis and extraction started for j]Cardiff_Electric_inc Sales-2022-09-13.docx by • 7d
							Smart Values analyzed and extracted for II - Cardiff Electric, Inc

• 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.

Latest versio	n			× ×	Activity Info Tasks
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	Document	TestEO (1) (1).docx	Size	11 KB	N V was added • 68d
					l K created agreement • 68d
	Parent	Contract - 00000100	Updated	15/07/2022 15:18	ا K (Admin) completed task Approve latest versionsdjgn • 68d
			Ready for signate	ure! Send out for signature via	IK (Admin) completed task New Task • 68d
					K changed TestEO (1) (1).docx from Internal
	t Versions				Review to Ready for Signature • 68d
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LINKSQUARES



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.

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.

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



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:

🖻 JJ - C	Agreement Cardiff Electric, IncSale	es-2022-09-13			<u> </u>		
PAUSED	_	7 days in Paused	Author	Sales Demo		2	Activity Info Tasks
FROSED	Document	JJCardiff_Electric,_IncSales-2022-09-13.docx	Size	64 KB			Sales Demo created agreement • 7d
	Parent	Opportunity - Cardiff - New Business	Updated	9/13/2022, 9:14 AM			Rob Dorgan was added • 7d Eric Shalyutin was added • 7d
 Agreemen 	nt Versions			Generate New Version	t, Upload Files C	r drop files	Stephanie Sader was added • 7d
Status ↓		Document	Updated by				Andrew Manz-Siek was added • 7d
Feb. 9, 2020 at	1:01 PM Paused	Sunmedia2022-09-07.docx	cfarrell@links	quares.com		•	Julianne Jeha was added • 7d
Feb. 6, 2020 at	9:30 AM Internal Review		Sales Demo				Aidan Sullivan was added • 7d
	9:03 AM Counterparty Review	V Sunmedia2022-09-07.docx	Sales Demo Sales Demo			•	Joe Willer was added • 7d
	12:14 PM Request		Sales Demo				@AidanSullivan please review
	at Attachments				t, Upload Files C	r drop files	Sales Demo - 7d Julianne Jeha sent an email to cfarrel jjeha+sfdemo@linksquares.com • 7d
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To learn more about Enhanced Agreement Statuses in the Finalize App in Salesforce, check out our documentation <u>here.</u>