Workflows are processes configured in Workflow Designer to create, review, sign, and archive contracts. Workflows can accommodate multiple templates, depending on Customer's business process and templates, but, as a best practice, Ironclad recommends limiting a single workflow to no more than three unique contract templates.

Standard Users have the ability to:

- Create contract requests using workflow launch forms or via the Salesforce integration, if applicable.
- Manage and update contract versions using Ironclad Editor, Share Docu, and document upload/download functionality.
- Collaborate and track workflow steps using Activity Feed, @mentions, and ad-hoc approvals.

Power Users have the same permissions as Standard Users and the abilities to:

- Be designated as a workflow approver or signer
- Create and maintain workflows in Workflow Designer
- Manage Groups, API Access, User Management, and Integration settings.

Salesforce Integration includes access to Ironclad's Salesforce Managed Package through the Salesforce AppExchange and access to Ironclad-side configuration settings to configure the following functionality:

- Workflow Launch: Launch workflows from Salesforce using a custom button and map Salesforce fields to Ironclad workflow attributes.
- Workflow Sync: Sync Ironclad process data to Salesforce via a custom object and provide users with the ability to refresh Ironclad workflows with updated source data from Salesforce.
- Record Sync: Sync completed contracts and properties from Ironclad's Repository to Salesforce's standard Contract object or a custom object.

API Access includes access to REST endpoints, webhooks, authentication tokens, and Ironclad-side configuration settings for Ironclad Workflows and Repository. API Access is capped at 100 API calls per user per 24-hour period. API Access does not include access to Digital Acceptance API endpoints for interacting with Ironclad's clickwrap transaction platform.