# The Ironclad CLM Platform

enables you to create, manage, and store contracts. Included with your platform are access to:

- Editor

- Native eSignature and click-to-accept

- Ironclad Connect

- Public workflows

- Advanced dashboard, repository and reporting

- Smart Import, which automatically extracts important contract data for verification when you upload contracts to your Repository

- REST endpoints, webhooks, authentication tokens, and Ironclad-side configuration settings for Ironclad Workflows and Repository.

Note: API Access is capped at 100 API calls per user per 24-hour period and API Access does not include access to Ironclad Clickwrap API endpoints for interacting with Ironclad's clickwrap transaction platform.

# User Types

**Administrators** have full access to Ironclad's platform, allowing them to control user permissions, workflow configurations, integrations, and other admin settings. In addition to the abilities of Collaborator/Approvers, they have the ability to:

- Create and maintain workflows in Workflow Designer

- Manage Groups, API Access, User Management, and Integration settings.

**Collaborator/Approvers** are business users who interact with all aspects of the Ironclad platform, but do not make changes to admin settings or workflow configurations. They have the ability to:

- Create contract requests using workflow launch forms

- Manage and update contract versions using Ironclad Editor, Share Document, and document upload/download functionality

- Collaborate and track workflow steps using Activity Feed, @mentions, and ad-hoc approvals

- View contracts in the Repository and Dashboard

- Be designated as a workflow signer.

In instances where a Salesforce integration has been enabled, Collaborator/Approvers will be able to perform some/all of these functions via Salesforce too.

**Viewer/Signers** do not collaborate directly on workflows, but act as the final signer on documents executed via Ironclad. They have the ability to:

- View contracts in the Repository and Dashboard

- Be designated as a workflow signer.

Note: For all user types, a user account is associated with a single email address. Multiple individuals may not share the same user account unless those individuals also have their own independent accounts.

# Add-ons

Ironclad's **Coupa Integration** streamlines the contract process for procurement with the ability to:

- Launch an Ironclad Workflow from a requisition
- Automatically approve workflows in Ironclad based on Coupa approvals
- Automatically hold purchase order generation until a contract is executed in Ironclad.

Ironclad's **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 within Salesforce using a custom Lightning Web Component 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.

**Additional API calls** per user per 24-hour period beyond the standard 100 API calls per user per 24-hour period.

**Non-production Separate Instance**: Ironclad instance for non-production uses such as training and testing.

**Use of Ironclad's EU data center**, located in Google's Belgium Region. Available to Ironclad customers with locations in the European Union, the EU data center is designed for compliance with GDPR and Schrems II by (1) storing customer data within the European Union, and (2) separating the EU and US production instances of Ironclad.

**Additional 1TB of Storage**: Additional storage beyond the standard 1 TB amount.

# Success Plans

The **Standard Success Plan** helps you achieve your goals with self-guided resources and access to 8AM-8PM EST Technical Support. Included in this package are:

- *Community Success:* Unlimited access to live and self-paced training available on Ironclad Academy and Knowledge Base content in the Ironclad Help Center, and access to the Ironclad Community forums.
- *Technical Support:* Access to Ironclad Technical Support Experts from 8AM-8PM EST.

The **Premier Success Plan** provides you with access to success management assistance during business hours, including proactive health monitoring, adoption guidance and 24x7 technical support for mission critical incidents. Included in this package are:

- *Community Success:* Unlimited access to live and self-paced training available on Ironclad Academy and Knowledge Base content in the Ironclad Help Center, and access to the Ironclad Community forums.

- *Digital Success Management:* Access to on-demand success resources to assist with adoption, best practices and use-case optimization on the Ironclad platform.

- *Technical Support:* Access to Ironclad Technical Support Experts from 8AM-8PM EST including 24x7 access for mission critical incidents.

The **Enterprise Success Plan** provides you with our highest level of access to success management assistance during business hours, including proactive health monitoring, adoption guidance and 24x7 technical support for mission critical incidents.

- *Community Success:* Unlimited access to live and self-paced training available on Ironclad Academy and Knowledge Base content in the Ironclad Help Center, and access to the Ironclad Community forums.

- *A Designated Success Manager:* Direct access to a designated Customer Success Manager, responsible for leading business reviews with usage metric analysis.

- *Technical Support:* Access to Ironclad Technical Support Experts from 8AM-8PM EST including 24x7 access for mission critical incidents.