Ironclad CLM

Ironclad CLM provides access to create, manage, and store contracts. CLM also automatically extracts important contract data for verification when a customer uploads contracts to their repository. Includes API access for Okta and SCIM integrations.

Each Customer's first purchase of an Ironclad CLM subscription includes 10,000 Smart Import Uploads per year, 100 sent signature packets, and 10 Custom AI Clauses.

- The Smart Import Uploads entitlement resets each year and unused uploads do not roll over from the previous year.

- The signature packet entitlement is conferred per paid subscription.

- The Custom AI Clauses entitlement is conferred per paid subscription.

Ironclad CLM User Types

Requester Seats have the ability to:

- Create contract requests using workflow launch forms

- View, comment on, upload/download drafts, and search for contracts

- Approve contracts that they have launched

- Sign contracts

Standard Seats are for business users who interact with all aspects of the Ironclad platform, but do not make changes to admin settings or workflow configurations. In addition to the abilities of Requester Seats, they have the ability to:

- Edit contracts using Ironclad Editor, including the ability to redline documents or draft new clauses using AI Assist, powered by OpenAI

- Be designated as a workflow approver for any contracts in Workflow Designer

- Search, view, and upload contracts in the Repository and create custom Repository and Dashboard views

- Create and view reports in Insights

Administrator Seats 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 Standard Seats, they have the ability to:

- Create and maintain workflow configurations in Workflow Designer

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

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.

Ironclad CLM Add-ons

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

- Launch an Ironclad Workflow from a requisition request

- Automatically approve workflows in Ironclad based on Coupa approvals

- Automatically hold purchase order generation until a contract is executed in Ironclad

The Coupa Integration subscription includes access for 500 users.

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

The Salesforce Integration subscription includes access for 50 users.

Ironclad's **OneTrust Integration** streamlines the contract process with the ability to:

- Launch a workflow in Ironclad from a list of vendors pulled in from OneTrust

- Map specific metadata from OneTrust on the vendor that you want to include on specific workflows

- Launch a new engagement in OneTrust for that vendor

- Create a new vendor in OneTrust and prevent approvals of the contract prior to the vendor being approved in OneTrust

The OneTrust Integration subscription includes access for 500 users.

API Access: API Access includes access to REST endpoints, webhooks, authentication tokens, and Ironclad-side configuration settings for Ironclad Workflows and Repository. API Access is governed by the API Terms of Use at https://legal.ironcladapp.com/api-terms-of-use, which are incorporated by reference here. Purchasing API Access is required for any API use beyond the basic Okta and SCIM integrations included with Ironclad CLM. API Access does not include access to Ironclad Signature API endpoints.

Additional API calls: Additional API calls beyond the standard number that comes with API Access.

Additional Smart Import Uploads: Additional Smart Import uploads beyond the annual imports that come with an Ironclad CLM subscription.

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

Use of Ironclad's EU data center: Ironclad's European Union data center is based in Belgium with a backup center in Germany. This data center allows EU customers to store their data locally within the EU.

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

Using **Custom AI Clauses**, businesses can:

- Adapt the quality and accuracy of AI results as well as improve the ability to understand any unique data and domain knowledge and context. 10 Custom AI clauses are included.

- Train and fine-tune Ironclad AI models for improved performance on customers' most important clauses & provisions. Available to all Ironclad customers (NA & EUDC).

Ironclad Signature

Ironclad Signature facilitates contract acceptance by electronically delivering a contract to counterparties and capturing assent. Ironclad Signature consumes *completed* contracts. Contracts can be completed in a variety of ways, depending how assent is captured.

1. Application: When completed via the Ironclad Application (i.e. Ironclad CLM), a contract is "completed" when all signatures (acceptances) are collected and at least 1 signature (acceptance) is captured with Ironclad Signature. **Note: this is only available with Ironclad CLM.**

2. API: When completed via the Ironclad API (i.e. Activity API, Embedded Clickwrap), a completed contract includes up to ten (10) agreed events per session per signer. An agreed event occurs when a signer checks an embedded clickwrap checkbox or a separate template is agreed to per checkbox (eg, 2 templates are linked to 1 checkbox equals 2 agreed

events). **Note: this is only available with the Ironclad Acceptance API Access Fee.**

Ironclad Signature API Access Fee facilitates contract acceptance by providing the ability to generate and deliver documents, capture assent (including embedded clickwrap), and manage in-flight contracts programmatically using Ironclad APIs and the Embedded Clickwrap application. This includes the following:

- API (Application programming interface) access: Activity and REST APIs that facilitate document generation and acceptance functionality programmatically. API use is governed by the API Terms of Use at https://legal.ironcladapp.com/api-terms-of-use, which are incorporated by reference here. SDKs are also available.

- Embedded Clickwrap application: A web application that supports the creation and management of documents that can be rendered natively in external systems.

- JavaScript Snippet: A code snippet that enables rendering documents natively in external systems.

- Snapshots: Configure, manage, and capture visual evidence of documents rendered in external systems.

- Legal Centers: Web pages that Ironclad generates automatically to present legal contracts. They provide the ability to manage, publish, and host legal terms online and incorporate them by reference in other documents. One (1) legal center on a standard domain is included.

Additional features are available including dynamic and multi-language documents agreements, custom branding and domains, snapshot automation, developer sandboxes, and more.

Ironclad Public Workflows

Ironclad's **Public Workflows (Standard)** facilitate self-service contract generation and presentation via a publicly hosted URL. Public Workflows are triggered by a launch form and accepted using Ironclad Signature or an integrated eSignature provider.

Ironclad Legal Centers

Legal Centers provide the ability to manage, publish, and host legal terms online and incorporate them by reference in other documents. Package includes:

- 1 Legal Center link

- Branding with company logo

- Standard domain (No HTML/CSS customization)

Success Plans

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

- *24/7 Success Resources:* 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, Monday - Friday from 8AM-8PM EST through written cases.

- Technical Support first response times for issues as classified by Ironclad:

    - P0: 4 hours

    - P1: 8 hours

    - P2: 24 hours

    - P3: 48 hours

The **Priority Success Plan** helps you achieve your goals with self-guided resources and accelerated response times with our Technical Support team. Included in this package are:

- *24/7 Success Resources:* 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, Monday - Friday from 8AM-8PM EST through written cases.

- Technical Support first response times for issues as classified by Ironclad:

    - P0: 4 hours

    - P1: 6 hours

    - P2: 12 hours

    - P3: 24 hours

The **Premier Success Plan** provides you with access to success management assistance for adoption guidance during business hours as well as accelerated response times with our Technical Support team. Included in this package are:

- *24/7 Success Resources:* 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.

- *Success Management:* Aligned Success Manager to assist with adoption, best practices, and use-case optimization on the Ironclad platform. This includes 1:1 account and optimization reviews 2-3 times per year, in addition to an annual business review.

- *Technical Support:* Access to Ironclad Technical Support Experts, Monday - Friday from 8AM-8PM EST through written cases.

- Technical Support first response times for issues as classified by Ironclad:

    - P0: 2 hours

    - P1: 4 hours

    - P2: 12 hours

    - P3: 24 hours

The **Enterprise Success Plan** provides you with our highest level of access to success management assistance during business hours, including proactive health monitoring and adoption guidance.

- *24/7 Success Resources:* 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.

- *Success Management:* Aligned Success Manager for ongoing 1:1 personalized and recurring planning sessions, business reviews, and joint success plans centered around strategic goals and performance metrics.

- *Technical Support:* Access to Ironclad Technical Support Experts, Monday - Friday from 8AM-8PM EST through written cases and live chat.

- Technical Support first response times for issues as classified by Ironclad:

  - P0: 1 hour

  - P1: 2 hours

  - P2: 4 hours

  - P3: 8 hours

For all Success Plans, the following definitions apply:

- P0 - Ironclad production issue affecting all users, including system unavailability and data integrity issues with no workaround available. Software is materially non-functional.

- P1 - Significant or ongoing interruptions of use of critical software functions with no acceptable workaround available.

- P2 - Minor or limited interruptions of use of a non-critical software function. Issue affecting some but not all users. Short-term workaround is available.

- P3 - General questions and issues pertaining to the software. Information requested about software capabilities, usability, deployment or configuration.