

# Ironclad CLM

**Ironclad CLM** provides access to create, manage, and store contracts through Ironclad's Dashboard, Repository, and Workflow Designer. The following features are also included:

- **Smart Import**, which automatically extracts important contract data for verification when a customer uploads contracts to their Repository
- **Clickwrap for CLM**, which enables:
  - Click-to-Accept - a mode of acceptance within Workflow Designer
  - Public Workflows - self-service, publicly hosted contracts triggered by a launch form

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

- The included **Smart Import Uploads** entitlement replenishes annually, and unused uploads will not roll over from the previous year.
- The included **signature packet** entitlement is a one-time offer and unused packets will not roll over from the previous year.
- The included **Custom AI Clauses** entitlement is fixed and the clauses may be used through the duration of the Agreement.

*\*Additional Smart Import Upload, Ironclad Signature, and Custom AI Clause bundles are available for purchase.*

Each Customer's purchase of an Ironclad CLM subscription includes the ability to access the following external integrations:

- **eSignature providers**: Docusign, Adobe Acrobat Sign, Dropbox Sign (formerly HelloSign)
- **Cloud Storage**: Google Drive, OneDrive, Box, DropBox, Egnyte
- **SSO**: SAML based single sign on

## Ironclad CLM User Types

**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 workflows in Workflow Designer
- Manage Groups, API Access, User Management, and Integration settings

**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. 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
- View contracts in the Repository and Dashboard

- Be designated as a workflow signer or approver in workflow designer

In instances where Salesforce or Coupa integrations have been enabled, users with Standard Seats will be able to perform some/all of these functions via Salesforce or Coupa too.

**Viewer Seats** are for users who do not request or approve contracts, but may view and/or act as the final signer on documents executed via Ironclad. They have the ability to:

- View contracts in the Repository and Dashboard
- Download reports from the Repository and Dashboard
- Be designated as a workflow signer in workflow designer
- Collaborate on active workflows via editor and activity feed comments

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

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

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

**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. API Access does not include access to Ironclad Clickwrap API endpoints for interacting with Ironclad's clickwrap transaction platform.

**Additional API calls:** Additional API calls beyond the 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.

**Additional Click-to-Accepts (CTAs):** Additional CTAs beyond the annual CTAs 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.

**AI Assist** allows Legal teams to safely redline a document with a single click or draft a new clause using generative AI, powered by OpenAI. Once purchased, AI Assist can be configured for all users and groups with access to Ironclad's Editor, using the Users & Groups page under Company Settings.

**Ironclad Signature** facilitates contract acceptance by electronically delivering a contract to counterparties and capturing assent (electronic signature / eSignature). Ironclad Signature is a configuration in Workflow Designer, and includes the ability to tag documents, capture assent (including Click-to-Accept), and manage in-flight contracts.

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).

**Obligation Management Module:** The Obligations Management module unlocks a powerful set of tools designed to help teams capture, assign, and track obligations with ease. This module includes:

- Structured obligation creation using predefined, out-of-the-box types and properties—no custom configuration required
- The ability to assign ownership to Ironclad users and update key obligation details like type, name, description, status, and owner
- Full access to the centralized Obligations Dashboard, where you can filter by key fields, save custom views, and monitor all obligations in one place
- The flexibility to view obligations directly within individual contract records or across your organization via the dashboard
- For customers using Entities, the added ability to organize and view obligations by entity for even deeper compliance visibility

## Ironclad Clickwrap

Ironclad Clickwrap packages include access to APIs, the JavaScript Snippet, and SDKs; configurable clickwrap layouts and styles; Snapshots; and the ability to manage online terms with Legal Centers.

- Embedded Contracts: Your license will include a set number of embedded contracts, sold by location
- API (Application programming interface): Ironclad Clickwrap provides activity and REST APIs for customers to access clickwrap functionalities programmatically. 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.

- [JavaScript Snippet](#): The code snippet to be embedded on the customer website to display clickwrap agreements
- [SDK \(Software development kit\)](#): SDKs are wrapper for customers to access Ironclad Clickwrap APIs in their programming languages
- [Snapshots](#): Snapshots allows users to configure, manage, and capture visual evidence of the clickwrap acceptance records
- [Legal Centers](#): Web pages that Ironclad Clickwrap generates automatically to contain your legal contracts

Higher tier packages also include features like additional API access, dynamic and multi-language clickwrap agreements, custom branding and domains, Snapshot automation, and more.

Additional entitlements can be purchased, and are outlined in the section “Ironclad Clickwrap Add-Ons”.

## Ironclad Clickwrap Add-ons

**Additional Embedded Contract Locations** provide additional configurations to track separate, distinct locations of clickwrap agreements such as clickwrap agreements for different brands, applications, websites, or mobile apps. Purchase of an additional Embedded Contract location also provides additional Snapshot configurations at that location.

## Success Plans

The **Standard Success Plan** helps you achieve your goals with self-guided resources and access to Technical Support. 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 24 hours a day, Monday through Friday, through written cases.

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 from 24 hours a day, Monday through Friday, through written cases.

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:

- *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. 1:1 account and optimization reviews, in addition to annual business review.
- *Technical Support:* Access to Ironclad Technical Support Experts 24 hours a day, 7 days a week, through written cases.

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.

- *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.
- *Enterprise Success Management:* 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 24 hours a day 7 days a week, through written cases and live chat.

## Jurist

**Jurist** is a generative AI-powered legal assistant specialized in drafting, editing, brainstorming, reviewing, and more. Built on top of the Ironclad CLM infrastructure, Jurist combines extensive legal knowledge with advanced AI technology. Jurist is offered as a standalone product or in conjunction with Ironclad CLM.

A Jurist seat is required for access. **Note: An Authorized User account is associated with a single individual's email address. Multiple individuals may not share the same Authorized User account unless those individuals also have their own independent accounts.**

Customers will have access to self-implementation guides available via Ironclad Academy including tutorials on how to implement Jurist for use in your organization.

If you are a current Ironclad Customer you will receive the same technical support services available as described in your signed Agreement.

If you have purchased Jurist as a standalone service you will receive technical support services aligned with the Standard Success Plan. Additionally, one Authorized User will be provisioned as an Ironclad Administrator Seat and will have the ability to administer the access to Jurist for other Authorized Users within the Customer organization. **This Administrator Seat will have access to Ironclad CLM but use of Ironclad CLM by the Administrator Seat would incur additional fees.**