

## Ironclad CLM User Types

**Power Users** may be provisioned as Administrator or Standard Seats.

- **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
- **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:
  - Manage and update contract versions using Ironclad Editor, Share Document, and document upload/download functionality
  - Search and view contracts and workflows
  - Be designated as a workflow approver in Workflow Designer
  - Create and view reports in Insights

**Sell-Side Module Users** have the ability to:

- Create contract requests using workflow launch forms
- View, comment on, and upload/download drafts within workflow
- Approve their own workflows
- Electronically sign contracts in any workflow
- Search and view contracts and workflows

**Note:** Sell-Side Module Users may access Ironclad workflows to sell products and services.

**Buy-Side Module Users** have the ability to:

- Create contract requests using workflow launch forms
- View, comment on, and upload/download drafts within workflow
- Approve their own workflows
- Electronically sign contracts in any workflow
- Search and view contracts and workflows
- Access Ironclad's Coupa and OneTrust integrations

**Note:** Buy-Side Module Users may not access Ironclad workflows to sell products and services.

**Intake Module Users** have the ability to:

- Create contract requests using workflow launch forms
- View, comment on, and upload/download drafts within workflow
- Approve their own workflows
- Electronically sign contracts in any workflow
- Search and view contracts and workflows
- Access Ironclad's Coupa and OneTrust integrations

**Note:** Intake Module Users may not access Ironclad workflows to sell products and services.

**Salesforce Managed Package Users** have the ability to access Ironclad's Salesforce Managed Package through Ironclad's ISV partnership with Salesforce, 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 CLM Add-Ons**

**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 capped at the total of 100 API calls per user per 24-hour period times the number of seats on your Ironclad CLM platform. API Access does not include access to Ironclad Clickwrap API endpoints. Purchases of the API Access add-on are governed by the API Terms of Use at <https://legal.ironcladapp.com/api-terms-of-use>, which are incorporated by reference here.

**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

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

**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

**Security and Data Pro Package:** Security and Data Pro Package enables customers to monitor and trace Authorized User activity through an exportable audit history log, plus receive activity reports by calling Ironclad's Activity Feed API. Customers can take greater control of data encryption key management through Ironclad's Bring Your Own Key or Hold Your Own Key services.

**Custom AI Clauses:** 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.
- Train and fine-tune Ironclad AI models for improved performance on customers' most important clauses & properties.

**Advanced Encryption:** Advanced Encryption allows customers to take greater control of data encryption key management through Ironclad's Bring Your Own Key or Hold Your Own Key services.

**AI Contract Credits:** AI Contract Credits are used on a per-document basis when importing or running a model against a document in the repository. A single document will never be charged more than one credit. Customers may purchase additional AI Contract Credits beyond those included with an Ironclad CLM subscription.

**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

**Clickwrap Workflows:** Annual subscription that enables contract generation through Clickwrap workflows, allowing customers to display preset and dynamic contracts on their own websites, apps or other, in an embedded fashion with a “check box” acceptance.

**Public Workflows (Standard):** 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.

## **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.

## **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 Signature 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 Clickwrap Add-Ons**

**Legal Center:** Legal Center provides 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)

**Public Workflows (Standard):** 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.

## **Success Plans**

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. A short-term workaround is available.
- **P3** - General questions and issues pertaining to the software. Information requested about software capabilities, usability, deployment or configuration.

**Phone Support:** Upgrade your **Enterprise Success Plan** with **24/7 phone support**. This premium add-on provides Administrator Seats with direct access to our expert support team via phone, ensuring real-time assistance and personalized guidance around the clock.