Ironclad

Ironclad Contract Requestor Guide

A walkthrough the basics of Ironclad to get you started

Logging in

First time sign in:

You will need to access Ironclad using your SSO credentials or the Ironclad token via your SSO applications manager. Your Ironclad profile will be prepopulated with your data from your SSO profile.

Subsequent sign in: You may access Ironclad after your first login by bookmarking <u>https://ironcladapp.com/dashboard</u> to access directly.

Sign in to Ironclad	
Enter your email	
Email	
Continue	
□ Remember me	_
orgot your password?	
or	
	_
G Sign in with Google	Example Ironclad sign in
	credentials

Dashboard & workflow selection

4 Assigned to Me 7 Participating In	Q, Search for a workflow		Filters -			
itue -	STATUS	ASSIGNED	CREATED		LAST UPDAT	-
IDA with Blake Advertising Company	eeo ti Sign	68	44 min ago	Approvals collected	a few sec age	
ISA & Order Form with Blend Website Design	O O O O Review	W5 CR	40 min ago	Colby commented	38 min age	
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consulting Agreement with Jared Smith	eeo o Sign	-	41 min ago	Workflow launched	41 min agr	
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IDA with Gospie Inc.			1 hr aso	Workflow lautched	1 br age	

Ironclad Dashboard

Overview:

The Assigned to Me tab shows the agreements that are pending an action from you. The Participating In tab shows the agreements that you have active participants role in, even if your action is not up next. The Active tab shows the pipeline of agreements that you have visibility into, even if you do not have an active role in them (i.e. your teams agreements – subject to permissions). The Completed tab shows all of the finished agreements, so you can look back at any time.

Selecting the Workflow:

In order to start workflow (request a contract) you can click on the **Start Workflow** button and choose the agreement type you would like to initiate. Your list will only include the contract types you have access too, if you believe you should have access to others, please ask your Ironclad Administrator.

Searching & Filtering:

If you're looking for a specific agreement, you can search using the **Search** bar or the **Filters** dropdown on the top right hand corner to narrow the agreements down (e.g. You can view all agreements stuck in Sign step, specific contract types, etc.).

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		Da	ita Processing A	greement	
	3 Assigned to Me	MSA & Order Form Non-Disclosure Agreement			c
	TITLE	Ve	ndor Contract I	ntake	_

Start Workflow button and dropdov

Workflow overview by step

As a business user, Ironclad will be where you initiate your contracts and have it run through a **workflow** which has been built with your business process in mind.

A workflow encompasses the following:

3. Sign

Signature logistics

eSignature

4. Archive

5. Repository Automated contract storage

Create step: The Launch Form

Overview:

1. Create

Data collection

Contract generation

Contract upload

This is a questionnaire that collects all information required to generate the agreement and/or upload external paper, route it for internal review, and collect signatures. Every question marked with an * requires an answer before it can be sent for Review or Signature. Depending on your answers, you may notice additional questions pop up. When you've completed all the questions, click Submit.

2. Review

Internal collaboration

Internal approvals

Redlining

Not sure if you're ready submit yet?

You can do one of two things: You can save your progress by selecting Save Form at the bottom of the launch form and retrieving it when you're ready via the Start Workflow dropdown in the Dashboard. You can edit your answers later in the next step: Review.

Non-Disclosule Agreement	
Fields marked with an asterisk (*) are required.	
Agreement Info	
Counterparty Name*	
Please enter the full legal name (i.e. Acme Inc, not Acme)	
Agreement Date*	
When did conversations with this customer begin?	
Signer Info	
Counterparty Signer Email*	
Counterparty Signer Name*	

2 Review step: Contract "command center"

Overview:

Share Documents

Best, Irene Clad

Attachment(s)

VI DOCX

O Add document or redline

D

To: counterparty@acme.demo ×

Please find the agreement attached. Thanks!

Depending on the contract type and your answers to the questions in the previous step, Ironclad will automatically pull in all internal Approvers to Approve each version of Ironclad before it can be sent out for signature. This approval process can be sequential or in parallel, so pay close attention to layering and sequencing in the Approval section.

If you're required to approve:

You will see a green Approve button and an Approval layer titled "Owner". You will also be notified on email.

To review the draft document:

aft contract from Demo Company - please

NDA with Acme, Inc_ (5fb364fdf8) / Change attachment

The Share Document feature in ironclad

Click on the document title to preview the draft document.

To make changes to the Launch Form answers:

Click Edit Info and it will open up a list of all the Launch Form questions so you can edit accordingly. The document will update and generate a new version, and you may need to seek re-approval from those already approved. With each version, you will be asked to leave a note which will be recorded in the Activity Feed.

Collaborate with the Activity Feed:

Draft contract from Demo Company - please review.

ene Clad (Dancing Penguin Labs) via Iron

In.

Reply Reply all Porward

What the recipient will receive in their email

If you have any internal dialogue regarding this agreement, use the **Activity Feed** section to collaborate. You may @mention a colleague (be sure to **Add Comment**) and they will be notified via email that they can reply directly to and click into to arrive at the workflow review page.

	Submitted by Iren	e Clad on Nov 16, 202	0 9:51 PM				
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							Acme, Inc.
P	Please review the do	cument below for app	Counterparty Signer Name Carrie Counterparty				
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The Review page

Negotiate with Share Draft:

When you're ready to share a version with your contracting party, you can use the Share Document button. Once selected, a preview of your email will pop up with a pre-populated message, the latest contract in .docx attached and your email CC'ed. You may customize all aspects of this message, including:

- Subject, recipients, message body
- PDF or .docx version(s) of the contract in discussion
- Redlines between versions
- Other documents you may have uploaded in the Launch Form

NDA with Acme, Inc.

The recipient will receive a standard email with attachments (so they will not be required to go into Ironclad at all) and will have the ability to reply back to the email directly which will be recorded in the **Activity Feed**. You can also see if your recipient has viewed the email within the **Activity Feed**.

Note: If your recipient replies back with a redlined version of the .docx contract, you have the option to add it as the new version. Please note that if you add the new version, your future updates in Edit Info will no longer reflect in the contract document.

3 Sign step: eSignature

Cancel Share document (1)

Overview: When you are ready to send the document for signature, click Send Signature Packet.

If you are the designated Signature Coordinator: You are responsible for managing the signature collection for this contract. This may include:

ND.

- Choosing when to Send Signature Packet to initiate the eSignature process
- Confirming any partial or fully signed packets that have been uploaded via Upload Signature Packet button (accessible to all internal participants of the workflow,
- Managing signers and signing order
- If contracting on external paper, placing eSignature tags on the document before sending
- Adding eSignature CC's to those who need to be notified but not actively participating

If the contract was signed outside of your eSignature (partial or full): You can use the **Upload Signature Packet** button

If you need to make edits to the template or there are further negotiations: You can revert back to the Review step by hitting **Go back to Review**. This will also reset all Approvals in the Review step.

Note: If you revert back to Review after sending the Signature packet, the eSignature packet will be voided and all parties will receive an email if the envelope if voided.

Archive step: Finalizing the completed contract for Repository

Overview: This step allows the designated Archiver to add information to the contract data for internal use before approving the contract for Repository. This is typically performed by someone in an Operational role, with minimal input from the business user.

Repository & Storage

Overview: Once the contract has gone through all the steps, it will be stored in multiple places – your organization's Cloud Storage, Salesforce and Ironclad Repository.

Ironclad Repository: A source of truth for all your contracts and the history of the workflow, this is where you may find information based on your **Search** query. If you need to refer to a particular set of search parameters frequently, you may **Save View**.

Note: This may be subject to permissions as set by your Ironclad Administrator.

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including filters, search results, and columns.	NDA with Acme, Inc.	Acme, Inc.	NDA	Dec 1, 2020
	NDA with acme corporat	acme corporation	NDA	Oct 31, 2020
T Filters Reset	NDA with Cladiator Ltd Co	Cladiator Ltd Co	NDA	Oct 22, 2020
Record type	NDA with Cladiator Ltd Co	Cladiator Ltd Co	NDA	Oct 21, 2020
Select	Statement of Work with	Cladiator Corp	Statement of Work	Jun 1, 2020
	Statement of Work with	Cladiator Corp	Statement of Work	Jun 1, 2020
Agreement Date Before After On Between	Statement of Work with	Cladiator Corp	Statement of Work	May 28, 2020
Select a Date				
Counterparty Name				
Value				

lov 16, 2020 9:51 PM Signature Packet Not out for signature D NDA with Acme, Inc. (5fb364fdf8).DOCX Upload signed packet 🗸 Signature Coordinator ling signature collection Signers 0 of 2 signatures col 1ST Counterparty Signer Carrie Counterparty tor Acme, Inc. Signer 1 Larry Legal ing on Coordinator Add eSignature CCs

The Signature step (Signature Coordinator view)

General Info