Ironclad

Ironclad Contract Requestor Guide

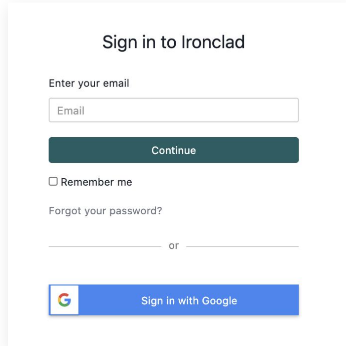
A walkthrough the basics of Ironclad to get you started

Logging in

First time sign in:

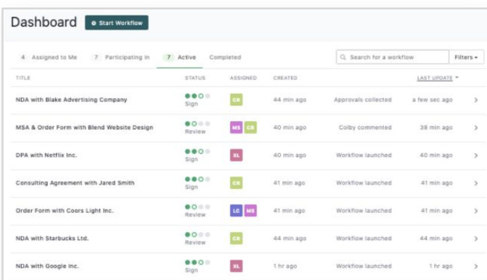
You will need to access Ironclad using your SSO credentials or the Ironclad token via your SSO applications manager. Your Ironclad profile will be prepopulated with your data from your SSO profile.

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



Example Ironclad sign in screen with SSO credentials

Dashboard & workflow selection



Ironclad Dashboard

Overview:

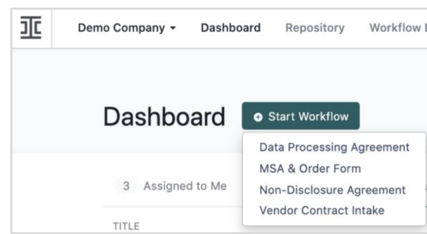
The **Assigned to Me** tab shows the agreements that are pending an action from you. The **Participating In** tab shows the agreements that you have active participants role in, even if your action is not up next. The **Active** tab shows the pipeline of agreements that you have visibility into, even 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.).



Start Workflow button and dropdown

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:

1. Create
Data collection
Contract generation
Contract upload

2. Review
Internal collaboration
Internal approvals
Redlining

3. Sign
Signature logistics
eSignature

4. Archive
Internal finalization

5. Repository
Automated contract storage

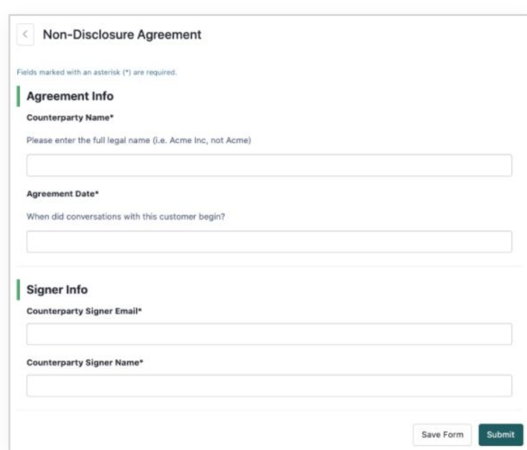
1 Create step: The Launch Form

Overview:

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.

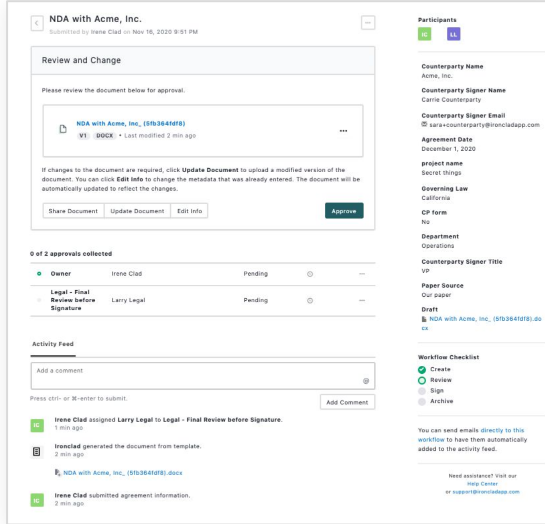
Not sure if you're ready submit yet?

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.



Ironclad Launch Form

2 Review step: Contract “command center”


The Review page

Overview:

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:

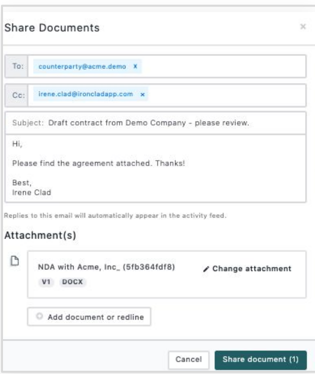
Click on the document title to preview the draft document.

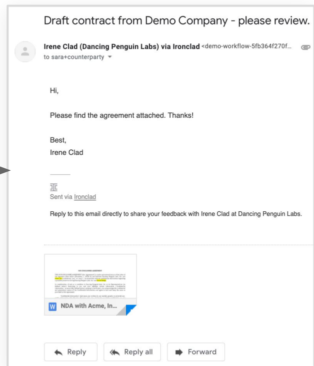
To make changes to the Launch Form answers:

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:

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.


The Share Document feature in ironclad


What the recipient will receive in their email

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

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

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:

- 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

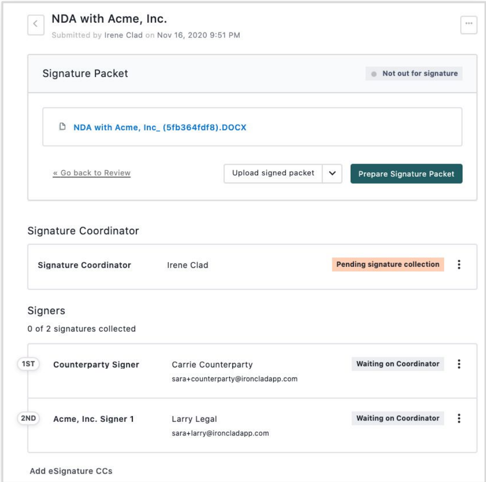
If the contract was signed outside of your eSignature (partial or full):

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.*


The Signature step (Signature Coordinator view)

4 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.

5 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.*