



# Ironclad Software Guide for Improved Operational Efficiency

Reduce risk, and increase productive with greater contract management insight and oversight.



# Introduction: optimize your ROI

Ironclad is a software platform that provides a comprehensive set of tools designed to streamline and optimize the ROI of your contract lifecycle management. Ironclad provides organizations with a single source of truth for their contracts and contract metadata. Before a contract is completed, Ironclad automates administrative work around creating, negotiating, and obtaining approvals and signatures, drastically speeding turnaround times and improving accuracy. After a contract is completed, Ironclad automatically stores and names completed contracts. It also extracts important metadata and makes contracts full-text and metadata-searchable. The result is a contract management software solution that allows organizations to increase ROI by enabling employee engagement, productivity and collaboration, mitigates risk, and simplifies compliance.



## Workflow Designer, contract workflow builder

Ironclad's Workflow Builder, called Workflow Designer, allows for revolutionary and intuitive custom contract workflows by enabling:

- Uploading contracts and rendering them as DocX files
- Drag-and-drop tagging
- In-platform help text creation
- Instantaneous, self-service testing and deployment

## Contract workflow capabilities

Ironclad's workflow engine includes automation tools for contract management that enables:

- Creation of legal requests from the organization
- Uploading and performing intake on third-party paper
- Collection of information and documents from appropriate parties

- Activity Feed for maintaining concurrent visibility on contract activities
- Audit trail
- Generation of template documents and deployment
- Native versioning of files in a cloud storage service (e.g., Box, Dropbox, OneDrive, Google Drive, Egnyte)
- Programmatic naming of files according to a given scheme
- In-application redline generation
- Insertion of fallback language after redlines have been provided
- Automatic approval collection, including:
  - Ability to dynamically assign approvers at the start of the workflow
  - Ability to collect approvals on behalf of Legal
  - Ability to collect approvals on behalf of Legal
  - Sequential and parallel approvals
  - Ability to launch separate workflows to capture information and processes in other departments
- Signature collection, including:
  - Integrations with Dropbox, HelloSign, and Adobe Sign

- Customizable signature blocks for third-party paper

→ IronSign, a best-in-class e-Signature tool

→ Configurable notifications on all contract events

→ Granular access controls and permissioning

## Integrations

Ironclad is a public API that integrates with:

→ Salesforce, including:

- Ability to control what metadata about a contract gets uploaded to Salesforce

- Ability for customers to decide, on a contract-type by contract-type basis, whether a contract PDF is itself uploaded, or if only some of the metadata is uploaded

→ E-signature providers: Dropbox, HelloSign, Adobe Sign

→ Storage services: Box, Dropbox, OneDrive, Google Drive, Egnyte

## Search and repository

Ironclad Records associate legal documents with structured properties of the content of the legal document. Features include:

→ Automatic storage and naming of completed contracts in the correct folders

→ Metadata search

→ Filtering search

→ Free-text search

→ Granular access controls and permissioning

## Data collection and reporting

→ Automatic metadata collection

→ Automatic process data collection

→ Process Metrics Reporting, with exportable dashboards and results in Excel



Contact us at [hello@ironcladapp.com](mailto:hello@ironcladapp.com) for a demo or to continue the conversation.  
We'd love to chat!