

Administrator Guide

For workspace administrators: setup, people and roles, numbering, approval rules, security and records.

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About this guide

As a Clause360 administrator you set up the foundations everyone else works on: who can sign in, what they can do, and the reference information contracts are built from. This guide covers each task in the order you will meet it.

You own: people and roles, groups, approval rules, the organisation profile and signatories, contract numbering, lists, request types, sign-in and integration settings, and records governance (legal hold, retention, the audit log).

Others own: the wording of templates and playbook positions (Legal), creating and negotiating contracts (the business and Legal), and signing (authorised signatories). If you are asked to change the wording of a contract, send the request to its owner: changes made through the contract keep a version history.

Where administration lives: everything below is under **Settings**. Use the section links across the top of the Settings page to jump straight to a section. Only people with the **Admin** role see Settings.

For everyday contract work, give people the *Clause360 User Guide*.

Setup order

Set up a new workspace in this order: each step uses what the one before it created, so working out of order means going back.

1. **Organisation profile and signatories.** Your legal name and default signatory fill in your side of every contract.
2. **Contract numbering.** Choose the format before the first contracts are created; numbers never change once given.
3. **Lists.** Add the standard lists, then set the contract types and their number prefixes with Legal.
4. **People.** Invite Legal first, so they can build templates and the playbook while you invite everyone else.
5. **Groups.** Create Legal reviewers, Finance approvers and similar groups before writing approval rules.
6. **Approval rules.** Route contracts to groups by type, value and AI risk.
7. **Request types.** Decide what the business can ask for, and what is approved automatically.
8. **Letterhead and company stamp.** Upload them so exports and signed copies carry your branding.
9. **Sign-in, AI and integrations.** Company sign-in, provisioning, the AI switch, and any webhooks or API keys.
10. **Hand over to Legal** for templates, the playbook and precedents.

Steps 1 and 5 are the ones most often skipped. Missing signatories leave gaps in contracts; approvals that name individuals stop when someone is away.

Organisation and contract numbering

Organisation profile

Under **Settings, Organisation**, enter your full registered legal name, trading name, registration (CR) number, VAT number, registered address, country and contact details, then click **Save organisation details**.

Once saved, every new contract automatically lists your organisation as **our side** in its Parties panel, and templates can use these fields, which fill in when a contract is created:

Field in a template	Filled with
[organization.legal_name]	Full registered legal name
[organization.registration_no]	Registration number
[organization.vat_no]	VAT number
[organization.address]	Registered address
[organization.signatory_name]	Default signatory's name
[organization.signatory_title]	Default signatory's title

Signatories

In the same section, add the people who sign for your organisation with their name, title and email. The first one added becomes the **default**; use **Make default** to change it. The default signatory is pre-filled as your signer when a contract goes for signature, and can be changed for any single contract.

Contract numbering

Under **Settings, Contract numbering**, every new contract receives a number from the format you set. Numbers are assigned once and **never change**.

Part	Meaning	Example
{TYPE}	The contract type's prefix (set under Lists)	MSA
{YYYY} or {YY}	The year	2026 or 26
{CP}	The counterparty's code from the directory, when known	FAL
{SEQ:3}	A running number per type and year, padded to 3 digits	001
{PARENT} and {CHILD:3}	For related agreements: the parent's number and a running number	MSA/2026/001/CHD-001

The default format `{TYPE}/{YYYY}/{SEQ:3}` gives numbers such as **MSA/2026/001**. Click **Save numbering** to see an example. **Number existing contracts** gives a number to every contract created before numbering was set up; this cannot be undone, so confirm the format first.

Lists

Under **Settings, Lists**, you manage the choices people pick from. Click **Add standard lists** once to start with sensible values, then adjust them with Legal.

List	Used for
Contract types	The type chosen when creating a contract; each has a prefix used in contract numbers (for example MSA, NDA, LSE)
Departments	People's departments, chosen when inviting them
Currencies	Contract values
Jurisdictions	Governing law references
Categories	Grouping contracts for reporting
Tags	Suggestions when tagging contracts

Retire, never delete. A value that is no longer used should be retired with **Retire**: it disappears from choices but contracts that already use it still display correctly. **Bring back** restores it. Agree contract type prefixes before contracts are numbered, because existing numbers do not change when a prefix does.

People and roles

Roles

Role	Can
Admin	Everything, including Settings and the audit log
Legal	Draft, negotiate, review, approve and manage templates, the playbook and precedents
Approver	Approve or reject contracts routed to them, and read contracts
Requester	Submit requests, create and track their own contracts

Law-firm workspaces also have **client** users, who see only the documents shared with them in the client portal. **Custom roles** (Settings, Custom roles) remove specific abilities from a role, for example a Legal user who must not send for signature.

Inviting people

Under **Settings, People, Invite someone**, enter the person's full name, work email, role, department and job title, then click **Send invitation**. They receive an email from hello@clause360.com with a link that works for **7 days** and can be used **once**. They choose a password (at least 12 characters), then set up two-step verification with an authenticator app at their first sign-in.

Until they accept, the person shows as **Invitation sent** with a **Resend invitation** button. Resending makes the previous link stop working.

Inviting from a spreadsheet

Open **Invite several people from a spreadsheet (CSV)** and upload or paste a file with a header row and these columns: email, name, role, department, job title. Roles can be written as admin, legal (or reviewer), approver, or requester (or creator). Up to 200 people can be invited at once; rows with problems are listed with the reason, and the other rows are still invited.

Details, sign-in and leavers

- **Edit details** changes a person's department and job title.
- **Last sign-in** shows when each person last signed in.
- **Reset two-step** lets someone who has lost their phone set it up again at their next sign-in.
- **Deactivate** signs a person out everywhere immediately and stops them signing in. Their contracts, comments and history stay intact. Use it the day someone leaves.

If company sign-in is set up (see Security and sign-in), people can also sign in with their Microsoft, Okta or Google account.

Groups and approval rules

Groups

Under **Settings, Groups**, click **New group**, give it a name such as *Legal reviewers* or *Finance approvers*, tick its members and save. When an approval step goes to a group, **every member is asked and the first to act decides**; their name is recorded on the decision. Change membership here when people join, leave or go on holiday, instead of editing every rule.

Approval rules

Under **Settings, Approval rules**, each rule names a step and who approves it, with optional conditions:

Condition	Example
Contract type	Only employment contracts
Minimum value	Only contracts above SAR 500,000
Minimum AI risk	Only contracts the AI review rates medium or high

The approver is a person or a group. When a contract is submitted for approval, every rule whose conditions match adds a step, in step order. A new workspace starts with one rule: an admin approves everything.

A typical setup: step 1, *Legal reviewers* for every contract; step 2, *Finance approvers* above SAR 500,000; step 3, the chief executive above SAR 1,000,000.

Two safeguards apply automatically: a contract with unresolved tracked changes cannot be submitted, and returning a contract to draft cancels its pending approvals, with the reason recorded.

Templates, playbook, requests and counterparties

These are usually maintained by Legal, but an administrator sets them up first.

Templates

Under **Templates**, click **Add starter templates** for a mutual NDA, services, supply, employment and consultancy agreement, then adapt them. Templates can be simple (fill in named fields) or **guided**: a short questionnaire that includes only the clauses that apply. Organisation fields such as `[organization.legal_name]` fill in automatically.

Playbook

Under **Playbook**, click **Add starter playbook** for 16 balanced positions with fallbacks, covering liability, payment, confidentiality, personal data and the PDPL, intellectual property and governing law. AI review compares every draft and every counterparty change against these positions.

Request types

Under **Settings, Request types**, decide what the business can ask for. Each type has an optional template, the person who receives it, and optional **automatic approval**:

Request type	Typical setting
NDA	Mutual NDA template, approved automatically (no value limit)
Supplier agreement	Supply template, approved automatically up to a value such as SAR 50,000
Other contract	No template; goes to Legal to draft

Automatic approval needs a template, so only standard wording is ever approved without Legal. Requests outside the limits wait in Legal's queue under **Requests, Queue**.

Counterparty directory

Under **Counterparties & projects** (in law-firm workspaces, **Clients & matters**), add each company you contract with, and use **Edit details** for its registration and VAT numbers, address, country, contacts and a short **code** used in contract numbers (for example FAL). When someone adds the other party to a contract, choosing the company from the directory fills in its details and primary contact. Check primary contacts' emails carefully: they receive negotiation links and signing invitations.

Security and sign-in

Built in for everyone: two-step verification at every sign-in, automatic sign-out after 30 minutes without activity, and sign-out everywhere when a password changes or a person is deactivated. Each workspace's data is kept apart by the database itself.

Setting (under Settings)	What it does
Company sign-in and provisioning	Lets people sign in with Microsoft Entra ID, Okta, Google or another standard identity provider, and creates or deactivates accounts automatically from your directory (SCIM)
Microsoft sign-in	A quick set-up for Microsoft 365 organisations
AI	Switches external AI on or off for the whole workspace. Names and personal details are removed before any text is sent for analysis
Letterhead and company stamp	Your letterhead on every Word and PDF export, and your stamp on signed documents
Integrations	API keys for your own systems and signed webhooks that notify them when contracts change
Microsoft Teams	Posts approval and signing notifications to a Teams channel

Keep API keys secret: create one per system, name it clearly, and revoke it when that system is retired.

Records

Legal hold

Under **Records**, place a **legal hold** on a contract (or a matter) when it may be needed for a dispute or investigation. Held contracts cannot be deleted or disposed of until the hold is released, and both actions are recorded.

Retention

Retention rules dispose of contracts a set number of years after they end, by contract type. Each disposal leaves a record of what was disposed of, when and under which rule. Contracts on legal hold are never disposed of.

Audit log

The **Audit log** lists every significant action: sign-ins, contract changes, approvals, signatures, settings changes and exports, with who did it and when. It cannot be edited or deleted, by anyone. Each day it is sealed into a tamper-evident chain, and Clause360 can also timestamp it with an independent authority, so you can prove later that it has not been altered.

Running the workspace

Routine

How often	Check
Weekly	The request queue and approvals waiting; contracts ending soon on the dashboard
Monthly	People: deactivate leavers, resend unaccepted invitations, review group membership
Quarterly	Approval rules and request limits still match your policy; lists are up to date

Go-live checklist

- Organisation profile and default signatory saved
- Contract numbering format confirmed
- Contract types and prefixes agreed with Legal
- Legal team invited and signed in
- Groups and approval rules in place, tested with one contract
- Request types set up, tested with one request
- Letterhead and company stamp uploaded
- Starter templates and playbook reviewed by Legal
- Everyone else invited

Troubleshooting

Problem	What to do
An invitation did not arrive	Ask them to check spam, then use Resend invitation
Someone lost the phone with their authenticator	Reset two-step in Settings, People
A contract cannot be submitted for approval	It has tracked changes still open: accept or reject them first
An approval is stuck	Check the approver is active, or that the group has members
The other party did not receive a link	Check the contact email in the contract's Parties panel
A message says the workspace is paused or suspended	Contact hello@clause360.com

Quick reference

Task	Where
Sign in	app.clause360.com
Organisation, numbering, lists, groups, people	Settings
Approval rules, request types	Settings
Templates, playbook, precedents	Their own menu items
Counterparties	Counterparties & projects
Legal hold and retention	Records
History of every action	Audit log
Help	hello@clause360.com