



User Guide

For everyone who works with contracts: requests, drafting, negotiation, AI review, approvals and signing.

clause360.com/help · hello@clause360.com

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Getting started

Sign in at app.clause360.com. Your administrator invites you by email: open the invitation from hello@clause360.com, choose a password (at least 12 characters), then sign in with your workspace name, email and password. At your first sign-in you set up two-step verification: scan the code with an authenticator app such as Microsoft or Google Authenticator, and enter the six-digit code it shows. From then on, every sign-in asks for a fresh code. Clause360 signs you out after 30 minutes without activity.

The dashboard is your starting point. Across the top, the number of contracts at each stage; below that, active contract value, contracts ending in the next 90 days, overdue key dates and requests waiting; then charts by stage, by type and by month; then upcoming key dates and your contracts. Each contract shows its number, such as MSA/2026/001.

What you see in the menu depends on your role. If something you need is missing, ask your administrator.

Asking for a contract

If you need a contract but do not draft them yourself, use **Requests, New request**:

1. Choose the type of request, for example NDA or Supplier agreement.
2. Enter the other party, their email, the value and the date you need it by.
3. Answer any questions the template asks.
4. Click **Submit request**.

Standard requests within your organisation's limits are **drafted and approved at once**: open the contract and send it for signature. Others go to Legal, and you get an email when they accept or decline it (with the reason). **My requests** shows where each request stands: with legal, in approval, ready to sign, out for signature or signed.

Creating a contract

Under **New contract**, choose how to start:

Start from	When to use it
A template	Your organisation's approved wording; guided templates ask a few questions and include only the clauses that apply
Upload a document	A Word or PDF file, such as the other party's paper
AI draft	A first draft from a short description, for Legal to review

Your organisation's details and the contract number fill in automatically. Add the **contract type**, and under **Details** the value, start and end dates; the end date drives expiry notices.

Editing and versions

Click **Edit contract** to change the text. Every save creates a new **version**; nothing is ever overwritten. **Compare with previous** shows what changed between versions.

Downloads:

- **Word with tracked changes:** for reviewing changes in Word.
- **Clean Word copy:** the current text with no markup.
- **Download PDF:** with your organisation's letterhead.

Return to draft (with a reason) takes a contract back for more work and cancels any approvals in progress. A draft that has never been shared or signed can be deleted.

Parties, numbers and tags

The **Parties** panel on each contract lists both sides: legal name, registration number, address, contact and signatory. Your side is filled in from your organisation's profile. For the other side, choose the company from the **counterparty directory** to fill in its details, or type them. Party contacts and signatories are used for negotiation links, signing invitations and expiry notices.

Add **tags** (for example Strategic or Vendor) to find and report on contracts later.

Negotiating with the other side

Click **Negotiate** to share the contract through a secure link. The other side needs **no account**: they confirm a code sent to their email.

- Let them **suggest changes** (the default), or only view and comment.
- Their edits arrive as **tracked changes**, with their comments. Each round they send back is a new version.
- Open **Review changes** to accept or reject each change, then send the contract back with a message, or move on.

A contract with tracked changes still open cannot be submitted for approval, so every change is decided first.

AI review and your playbook

The AI panel on each contract can:

Action	What you get
Review	Risks against your organisation's playbook, with what to do about each
Redlines	Suggested changes in line with your playbook positions and fallbacks
Ask	Answers to questions about the contract
Summary	The key terms on one page

When the other party sends their own paper, Clause360 can review it against your playbook automatically. Names and personal details are removed before any text is analysed. AI suggestions are a starting point: you remain responsible for the final wording.

Approvals

When the contract is ready, click **Submit for approval**. Your organisation's rules decide who approves, for example Legal reviewers for every contract and Finance approvers above a value. When a step goes to a group, the first member to act decides.

If you are an approver, contracts waiting for you appear on your dashboard. Open one and choose **Approve**, **Request changes** or **Reject**; a reason is needed for the last two. Every decision is recorded.

Signing

Approved contracts show **Ready to sign**. Open the signing panel:

1. Check the signers: your signatory and the other party's are filled in from the Parties panel.
2. Choose whether they sign in order or in any order.
3. Click **Send for signature**.

Each signer receives an email, confirms a one-time code, reviews the document and signs. When everyone has signed, all parties receive the signed PDF, with your company stamp and a **certificate** listing each signature. Anyone can check that a signed PDF has not been changed at **app.clause360.com/verify**. If your organisation uses DocuSign, it can be used instead.

After signing

- **Key dates:** the end date and other dates appear on the dashboard and under **Coming up**. Clause360 emails you and the other party's contacts 90, 30 and 7 days before the end date.
- **Renew** or **Mark as terminated** when the time comes; contracts past their end date are marked expired automatically.
- **Related agreements**, such as a statement of work under a master agreement, are numbered under their parent, for example MSA/2026/001/CHD-001.
- **Search** finds contracts by any word in them; **Reports** filter by status, counterparty, type or end date, with an Excel export and an optional weekly summary by email.

Quick reference

I want to	Go to
Ask for a contract	Requests, New request
Start a contract	New contract
Share with the other side	The contract, then Negotiate
Check risks	The contract's AI panel, Review
Get approval	Submit for approval
Get it signed	The signing panel, Send for signature
See what is ending	Dashboard or Reports
Check a signed PDF	app.clause360.com/verify
Get help	Your administrator, or hello@clause360.com