

LESS BUSYWORK. MORE FORWARD MOTION.

What could your team stop doing manually?

Your interactive guide to finding the right Klarstig tools, building one useful workflow and taking the next step with confidence.

26 feature families • Clickable contents • Product links
English edition · Reviewed 17 November 2026

Explore the guide →

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Form Builder

Trade form-building busywork for a faster start. Describe what you need, then review a form your customers can complete anywhere.

Available · plan limits apply. Free, Starter and Pro; plan limits apply. Voice currently supports English and Spanish, not every language.

- **AI drafting:** describe the questions and process in plain language, then review the draft.
- **Voice input:** review the transcript before generating; typing remains available.
- **Conversational editing:** ask to change wording, fields and order; inspect saved edits.
- **PDF Converter:** give your paper forms a fresh start. Turn an existing PDF into an online form your customers can complete anywhere; review detected fields and check plan limits.
- **Conditional logic:** show or hide questions from earlier answers; included across plans.
- **Field types:** collect text, choices, dates, uploads and signatures; payment fields do not enable live payments.
- **Branding:** apply supported logo, colors and fonts; custom branding and badge removal require a paid plan.
- **Publishing:** share a public link, QR code or embed on your website after review.
- **Open and close controls:** set supported dates, capacity and a closed message.
- **Autosave:** supported forms let respondents resume unfinished work; test the actual form before launch.
- **Spam controls:** honeypot, rate limits and bot challenges reduce abuse, not a guarantee against all spam.
- **Accessibility:** labels, instructions, keyboard structure and readable errors support usable forms.
- **Language review:** create and review supported translations; multilingual intake is a Pro capability, not universal automatic access.

Your next step
Start with a template or describe your form, review it, then publish.

Learn how it works →

Start free →

Check current plans →

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Templates

Skip the blank page. Choose a useful starting point and make it your own, so your team can start collecting answers sooner.

Available · plan limits apply. Templates are included; your plan controls usage after copying a template. Library counts change.

Public library: browse the current published collection with individual preview pages.

Industry categories: find starting points for nonprofits, education, trades and professional services.

Task types: applications, registrations, consent, intake, feedback, orders, petitions and more.

Editable copies: customize your copy without changing the published original; private organization templates support reuse.

Nonprofit starters: volunteer applications, grant applications and event RSVPs; donation templates record pledges, not payments.

Your next step
Preview a template and make your own editable copy.

Learn how it works →

Start free →

Check current plans →

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Records, Intake & Reporting

Spend less time hunting for information. Bring submissions, linked files and next steps into a clearer review process.

Setup required. Submission review follows workspace permissions. Pro intake and deduplication need setup; advanced reports require confirmed access, not a promise of universal availability.

Intake Inbox: supported email and document intake requires a configured, verified workspace intake address.

One person, one record: Pro deduplication matches existing people and surfaces conflicting details for review; not an automatic import of all calls or meetings.

Status tracking: review recorded submission stages and next steps; available stages depend on the workflow.

Linked files: keep authorized uploads with the relevant submission or record.

Data Audit: metadata-only audit snapshots and PDF exports are access-controlled; not a complete export of every answer.

Funder Reports: report scope and access must be confirmed; do not assume every workspace has advanced reporting or automatic delivery.

Notifications: configure supported submission and workflow notices with your permissions and sender prerequisites.

Review and export: search and filter responses, inspect details, print supported views and export CSV.

Your next step
Start with submission review; ask for a demo of advanced intake and reporting.

Learn how it works →

Start free →

Check current plans →

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Completion Agent

Stop chasing missing information. Let Klarstig follow up so your team can focus on the work that matters.

Preview · confirm access. Pro preview requires confirmed workspace activation. Free and Starter show a locked preview. Current follow-up email template is English; localized pages do not mean localized agent emails.

- **Find gaps:** compare a partial submission with required fields.
- **Focused reminders:** ask for only missing items, with a secure response link and a bounded sequence.
- **Read replies:** validate proposed values from supported replies and attachments; never infer a signature.
- **Close the loop:** mark complete only after required items pass validation.
- **Workspace activation:** an authorized organization administrator configures the preview.
- **Identified sender:** organization name and postal address identify the follow-up.
- **Quiet hours:** follow respondent timing safeguards; unknown time zones need human review.
- **Human review:** uncertain or sensitive information goes to a person.
- **Stopping rules:** a final unanswered reminder ends automatic follow-up, not the record.
- **Opt-out:** a stop request prevents further automatic reminders.
- **Audit trail:** review what was requested, received and changed.

Your next step
Watch the example, then book a demo to confirm activation and language needs.

Learn how it works →

Start free →

Check current plans →

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Approvals & Workflows

Keep decisions moving instead of buried in email. Route each request to the right reviewer and carry the result into the next step.

Available · plan limits apply. Starter and Pro include approvals; reviewers need workspace access. Check current workflow limits on pricing.

- **Collect, route, decide, continue:** keep requests and decisions in one workflow.
- **Decision comments:** record approval or rejection and optional reasoning.
- **Sequential routing:** separate steps for multiple approvals, not parallel voting.
- **Continue after a decision:** supported PDF, email or status steps follow the result.
- **Workflow patterns:** purchases, time off, team requests and volunteer intake.
- **Workflow limits:** current plan and user limits apply; approval must be renewed when the reviewed document version changes.

Your next step
Build a request form and add a Request approval step.

Learn how it works →

Start free →

Check current plans →

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Document Generation

Stop copying the same answers into another document. Turn submitted information into a PDF your team can review, share or prepare for signing.

Available · plan limits apply. PDF allowances follow your plan. Review and signature preparation are distinct steps; no legal review is included.

- **Response-to-document:** generate PDFs from submitted information.
- **Branded output:** use supported document styling and organization identity.
- **Review checkpoint:** optionally request approval; AI suggestions need human acceptance.
- **Delivery and signing:** keep or email the document; a person prepares and sends a signature request.
- **Practical uses:** client intake summaries, approval records and program or volunteer documents.
- **Versions and allowances:** regeneration creates a new version; check pricing for monthly PDF limits.

Your next step
Add a Generate PDF step, inspect the result and choose delivery or signature preparation.

Learn how it works →

Start free →

Check current plans →

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Klarstig Sign

Keep agreements moving. Collect signatures and keep the completed document connected to the work, instead of chasing scattered attachments.

Available · plan limits apply. Included by plan. Pro adds multiple signers and signing order. A person sends requests; workflows do not send them automatically.

Prepare: review the actual document text and supported fields before sending; confirm file-import and field-placement requirements in setup.

Request: add signer names and emails and an expiry, then deliberately send.

Signing order: eligible Pro requests invite the next signer after the previous one completes.

Track: inspect recorded request and signer progress; do not confuse sent with signed.

Evidence: signing history and completion certificates follow the plan and completed request.

Connected record: keep the completed document and its signing history in the workspace.

Use cases: volunteer agreements, consent and onboarding paperwork.

Volume limits: consult current signature allowances and signer limits on pricing.

Your next step
Prepare the request, review what signers will see, add recipients and send after review.

Learn how it works →

Start free →

Check current plans →

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Payments & Billing

Plan a payment workflow without costly surprises. Separate what you can bill today from collection options that still need confirmation.

See availability details. Klarstig subscription billing is separate from customer payment collection. Form payments and online donations are not generally available.

- **Form payments:** Stripe collection is in production validation, not generally available.
- **Processor connection:** a setup screen or connected account alone does not establish live payment readiness.
- **Payouts and fees:** confirm processor terms if payment collection becomes available; no blanket payout or zero-fee promise.
- **Refunds and disputes:** do not assume customer refunds or disputes can be handled inside Klarstig today.
- **PayPal and installments:** not confirmed as available; do not plan a PayPal or pay-in-4 launch from this guide.
- **Invoices and purchase orders:** subscription billing uses its supported secure billing flow; invoice or purchase-order purchasing is not promised.

Your next step
Review payment readiness with the team; use templates for pledges without collecting card details.

Learn how it works →

Start free →

Check current plans →

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Email Campaigns

Stay in touch without starting every message from scratch. Prepare relevant updates for people who asked to hear from you.

Preview · confirm access. Drafts and audiences are available. Sending requires an eligible opted-in audience, verified business sender, Reply-To and postal address, and workspace activation.

- **Permission-based audiences:** an email on a form is not automatic marketing consent.
- **Four-step creation:** goal, audience, branding, review and authorized sending.
- **Templates and editing:** prepare welcome messages, updates and invitations with reviewed AI writing.
- **Scheduling:** scheduling and sequences require explicit enablement and sender readiness.
- **History:** inspect delivery outcomes; do not equate queued, delivered and read.
- **Plan allowances:** included drafting and future sending allowances follow pricing; unsubscribe and suppression apply.

Your next step
Prepare a draft and review sender readiness before scheduling.

Learn how it works →

Start free →

Check current plans →

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Surveys

Turn scattered opinions into a clearer next decision. Start with focused questions and review useful patterns in private results.

Available · plan limits apply. Survey forms count toward plan limits. Results and exports are owner-only; anonymous responses are the default.

Survey starters: NPS, satisfaction, events, volunteers, program evaluation, community needs, training and pulse.

Private results: only the workspace owner can view answers and exports; no public results page.

Four-step flow: copy, review, share by link or QR, read results.

Summaries: counts, averages, NPS and CSV; funder sharing needs explicit anonymous-sharing consent and approved redacted quotes.

Your next step
Choose a survey, review questions, publish and inspect owner results.

Learn how it works →

Start free →

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Customer Service AI

Give routine questions a useful answer and complex issues a human path. Explore guided service that follows your configured knowledge and rules.

Setup required. Guided demo and assisted setup, not universal self-service activation. Actions depend on configured knowledge, policies and permissions.

Voice conversations: explore natural dialogue in the demo; confirm supported deployment channels before rollout.

Policy-bound actions: only configured permitted actions, never unrestricted payments or bookings.

Human escalation: unresolved matters need a person with the relevant context.

Guided software support: review permitted work and test proposed corrections; examples are not proof an action ran.

Customer and team views: the demo illustrates both perspectives without creating real cases.

Your next step
Watch the simulated example, then confirm the scope in a demo.

Learn how it works →

Start free →

Check current plans →

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Social Media Manager

Spend less time rewriting the same announcement. Turn one idea into reviewed posts and artwork for your supported, connected accounts.

Setup required. Included across plans. Drafting is available; publishing requires a supported network set up for the workspace and your own connected account. AI backgrounds follow Pro limits.

Included tools: draft copy and artwork in the existing workspace, subject to plan limits.

Create, adapt, approve: a deliberate review step before publication.

AI copy: draft, rewrite, shorten and edit your own announcement.

Branded artwork: templates, logo, colors and optional Pro AI backgrounds.

Network versions: adapt text and image format to supported connected accounts.

Approval: owners or authorized reviewers approve; later edits need fresh approval.

Publish and schedule: only after connection readiness; inspect delivery status, not assumed success.

Networks: Facebook Pages, LinkedIn, X, professional Instagram, Threads, Pinterest and YouTube have setup requirements; Google Business Profile is not a confirmed publishing destination. YouTube video upload is distinct from other post formats.

Your next step
Draft, adapt, review and approve; confirm each network before scheduling.

Learn how it works →

Start free →

Check current plans →

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Engagement Campaigns

Give your campaign a consistent message without promising every channel at once. Plan tailored versions and confirm which tools are ready for your team.

Preview · confirm access. Cross-channel orchestration must be confirmed in a demo. Existing email and social tools retain separate readiness and approval requirements.

One idea, tailored versions: plan related form, service and social copy; not automatic publishing everywhere.

Review flow: describe the goal, draft versions, review content, choose available channels and inspect results.

Shared workspace: existing accounts do not imply a universally enabled cross-product approval queue.

Your next step
Bring a campaign goal and ask which channels are ready for your workspace.

Learn how it works →

Start free →

Check current plans →

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Coordinated Updates

Change the plan without repeating the same edits. Review linked event or listing materials together, then track the approved changes.

Setup required. Explicitly link supported items. Existing permissions, sender readiness and review rules still apply.

One review: compare old and new information before applying supported changes.

Linked details: forms, scheduled posts, Live information and notices must be explicitly connected; no web-wide discovery.

Approve and track: approval covers the reviewed version and items; failures stay visible.

Less duplicate editing: submitted answers and signed documents stay unchanged; published posts may need manual correction.

Your next step
Create an event or listing, link its materials, review the proposed changes.

Learn how it works →

Start free →

Check current plans →

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Concierge

Find your next step without searching every page. Describe your goal and get practical guidance on the tools and workflow that fit.

Available · plan limits apply. Visitors can ask product questions. Creating or editing work requires sign-in and existing permissions; publishing requires confirmation.

- **Process planning:** explain the goal and ask for a useful sequence.
- **Form drafts:** authenticated customers can request supported draft creation.
- **Form refinement:** request supported field and wording edits and inspect the result.
- **Product guidance:** explore benefits, availability, prerequisites and relevant links from this catalog.
- **Troubleshooting and reuse:** explain the issue or ask about earlier permitted work; never assume an action occurred.
- **Review and act:** open the guide, describe the outcome and verify any proposed or completed change.

Your next step
Open Concierge and describe the outcome you want.

Learn how it works →

Start free →

Check current plans →

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Klarstig Live / TV

See what needs attention before it slows your team down. Put shared progress within everyone’s view on a desktop or eligible paired TV.

Setup required. Free includes the summary. TV boards and expanded views depend on plan, permissions, connected sources, internet and a compatible browser.

- **Live summary:** available form, campaign, social and completion activity in one view.
- **Desktop and paired TV:** share aggregate progress without giving the screen editing access.
- **Attention signals:** spot recorded outstanding work; missing sources are not invented.
- **Included by plan:** the summary is included; TV access is not universal across plans.

Your next step
Sign in, choose available modules, then pair an eligible TV board.

Learn how it works →

Start free →

Check current plans →

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Integrations

Reduce re-entry without replacing the tools you trust. Connect supported services and move approved information where your team needs it.

Setup required. Check each directory card: available to connect, preview, or assisted setup. Use your own provider account; provider fees and permissions are separate.

- **Connector directory:** catalog listing does not prove a validated or active connection.
- **Workflow examples:** approved submissions to spreadsheet rows, permitted CRM updates or team notices depend on supported actions.
- **Webhooks:** eligible plans send documented events to approved destinations.
- **Signed messages:** the receiving system must verify the webhook signature.
- **Setup help:** use Platinum for supported field mapping and safe testing, not a guarantee every provider is ready.

Your next step
Choose a directory card, confirm its status and test one permitted workflow.

Learn how it works →

Start free →

Check current plans →

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Developer Platform

Build a reliable connection instead of another manual handoff. Use documented APIs and webhooks to move permitted data between systems.

Setup required. REST API requires Pro; webhooks follow eligible paid plans. Use documented endpoints and organization-scoped permissions.

REST API: documented programmatic access within plan and organization permissions, not unrestricted platform access.

Authentication: follow the documented API-key and signature requirements; keep credentials private.

Connection checklist: access, data mapping, authentication, test delivery and error handling.

HTTPS and retries: use secure destinations, inspect logs and retry only when safe.

Your next step
Confirm access, map fields and verify one safe delivery before scaling.

Learn how it works →

Start free →

Check current plans →

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Security & Privacy

Choose with confidence, not assumptions. Compare documented safeguards and limits with the data your organization needs to protect.

See availability details. EU-only residency, customer-held encryption keys, HIPAA/BAA, SOC 2 and ISO 27001 certification are not available. Do not collect protected health information requiring a BAA.

HTTPS/TLS: protects information in transit, distinct from stored-data encryption.

Customer-held keys: not available; platform storage protections are not customer-managed encryption.

Storage encryption: protects stored platform data within the documented scope.

Form privacy: private submissions are distinct from public form links.

Access controls: workspace roles, MFA and supported organization policies protect access.

Audit history: review recorded activity within authorized scope, not a certification.

Rate limits: reduce automated abuse without promising complete prevention.

Private files: authorized access protects customer uploads; public marketing assets are separate.

Bot challenges: supported public forms use bot protection alongside other abuse controls.

European privacy: rights and transfer obligations are separate from residency. EU data residency is not available.

Honest fit: no HIPAA/BAA, SOC 2 or ISO 27001 claim; self-assessments are not independent certifications.

Your next step
Read the current security page against your procurement and data requirements.

Learn how it works →

Start free →

Check current plans →

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Accessibility

Help more people finish the task without avoidable barriers. Use clear form structure and test the experience with the people who rely on it.

Available · plan limits apply. Accessibility is ongoing. Automated or structural checks are not independent certification; Pro form reports follow entitlement.

- **Usable structure:** meaningful labels, instructions and keyboard-friendly controls.
- **WCAG-oriented practice:** readable contrast, focus and errors, not a universal compliance guarantee.
- **Barrier reporting:** share the page, task and assistive technology with support.
- **Public statement and reports:** consult the accessibility statement; Pro reports describe performed checks.

Your next step
Test your actual form with keyboard and assistive technology; report barriers.

Learn how it works →

Start free →

Check current plans →

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Languages

Reduce language friction at the first step. Explore the site in English, Spanish or French, then confirm the language support your workflow needs.

See availability details. Website and catalog: English, Spanish and French. Pro multilingual intake, reviewed form translations, voice and follow-up have different availability.

Respondent languages: multilingual intake is Pro; review supported translations rather than promising every language on every plan.

Localized website: EN, ES and FR pages and Concierge guidance; some destinations remain English-only and are labelled.

Language-specific messages: review campaign translations; current Completion Agent email preview is English and voice input supports English and Spanish.

Your next step
Choose a site language and confirm the languages required by your actual workflow.

Learn how it works →

Start free →

Check current plans →

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Plans & Pricing

Start with the work you need, not a bigger plan than you need. Compare Free, Starter and Pro and grow when your usage calls for it.

Available · plan limits apply. Use the current pricing page for exact prices, quotas, renewal terms and discounts; this guide does not duplicate changing numerical allowances.

Free plan: a real ongoing plan, not a time-limited trial; usage limits apply.

Platinum Plus: optional scheduled assistance, separate from plan subscription and one-time services.

Education eligibility: approved institutions may receive the published annual-plan discount; exclusions apply.

Nonprofit eligibility: verification is required; annual discounts do not apply universally to monthly plans or add-ons.

Promotional offers: special offers require current eligibility and confirmation, not an automatic entitlement.

Compare plan limits: users, active forms, submissions, AI, PDF conversion, generated documents, signatures, workflows, branding, webhooks, REST API, Completion Agent and support have separate limits or prerequisites.

Your next step
Compare Free, Starter and Pro against users, volume, approvals and API needs.

Learn how it works →

Start free →

Check current plans →

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Platinum Service

Get past setup uncertainty with a person beside you. Use practical guidance to build, review and test a workflow that fits your team.

Available · plan limits apply. Included sessions are a one-time organization allowance, not per user or renewed monthly. Appointment availability and supported scope apply; check current terms.

- **Included sessions:** shared by the new organization across Free, Starter or Pro; see current session allowance.
- **Start confidently:** consultation, account setup and testing before launch.
- **Build to fit:** forms, migration guidance, branding and website embedding within supported scope.
- **Make work flow:** workflow, document, signature and integration setup, training and troubleshooting; no bespoke development or certification.
- **Platinum Plus:** optional continued scheduled help, subject to appointment availability and published support hours.

Your next step
Describe your goal and book help for a supported setup task.

Learn how it works →

Start free →

Check current plans →

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Help & Academy

Get unstuck without a long search. Find a focused lesson, practical example or guide for the job you want to finish.

Available · plan limits apply. Public learning resources are available; language coverage varies by destination. Examples do not activate features.

- **Help Center:** searchable guides on forms, workflows, accounts and setup.
- **Product tour:** sample-data walkthrough before creating your own work.
- **Academy:** short task-based lessons with video and written guidance.
- **Blog:** practical articles and product ideas.
- **The Clear Path:** newsletter for useful ideas and updates.
- **Comparisons:** compare alternatives and confirm current plan details before deciding.
- **Workflow examples:** explore onboarding, grant review and volunteer intake.
- **Solution pages:** small-business and nonprofit starting points.
- **Why Klarstig:** overview video and product context, not a guarantee of promotional eligibility.
- **Paperwork Tax Calculator:** estimate time spent on repetitive work using your own inputs.
- **Status:** check current published service status; not an uptime guarantee.

Your next step
Search the guides or follow an Academy lesson for the job you want to do.

Learn how it works →

Start free →

Check current plans →

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Pipeline & Prospector

Spend less time piecing together the next opportunity. Explore inbound lead context and evidence-backed public research before your team follows up.

Setup required. Public product pages and sign-in entry paths exist. Customer access currently provides setup information, not self-service activation. Prospector is research-only; outbound sending is not enabled.

Pipeline: explore inbound inquiry context, lead scoring, briefs and follow-through in a guided demo.

Prospector: public-source organization research with recorded evidence, not purchased lists or guessed addresses.

Review and handoff: evaluate opportunities before human follow-up; research does not automatically enroll or send to contacts.

Access paths: Open Pipeline and Open Prospector lead to sign-in and role-appropriate access or setup information; no extra permissions are granted.

Your next step
Read both product pages and book a demo to confirm current access and setup.

Learn how it works →

Explore Prospector →

Start free →

Check current plans →

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Customer App Builder & Unreleased Capabilities

Avoid planning around a promise. Check future-facing capabilities before committing time, and choose a ready workflow for the work you can start now.

Not available. These items are not activated by this catalog. No release date, entitlement or implementation commitment is implied.

Customer App Builder: multi-page apps, push notifications, embed controls, app subscriptions and delivery history are unreleased customer capabilities; not offered as ready self-service tools.

Prospector outreach: automated outbound sending is not enabled; research and customer setup discussions are distinct.

Regulated uses: HIPAA/BAA is not available, and this guide makes no certification or future delivery promise.

Your next step
Ask for current availability before planning a rollout.

Learn how it works →

Start free →

Check current plans →

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Start with one task.
Get time back for the rest.

Choose the repetitive job your team most wants to stop doing. Build a first form, connect a clear next step and review it before sharing.

Start free →

Try a real Free plan. Usage limits apply; preview and setup-required capabilities are not automatically activated.

Take the product tour →

See the experience with sample information before you build your own.

Book a demo →

Bring your goal and confirm the access, setup and scope your team needs.

Ask Concierge →

Get a practical next step, in English, Spanish or French.

This guide describes capabilities, not a promise of activation or a service commitment. Current pricing and product pages govern availability. Security limits are explicit at klarstig.ai/security.

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