Information

Signing Product Schedule

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Portwood e-signature licensing and terms for senders, external recipients, consent, authentication, evidence records and retention.

This page is an informational overview. Customer-specific agreements, quotes and any required signatures are handled privately with Portwood.

When it applies: Applies when a signed Portwood quote or other accepted Order covers e-signatures and expressly incorporates this schedule. Customer is responsible for recipient disclosures appropriate to the applicable transaction.

1 Acceptance scope and licensed users

This Signing Product Schedule supplements the Portwood Master Subscription and Services Agreement (MSA) and applies only when a signed Portwood quote or other accepted Order covers e-signatures and expressly incorporates this schedule and its version. Publication, installation, receipt of a signing invitation or a discovery call does not purchase a subscription. The MSA governs formation, liability, remedies and other general terms; variations follow its agreed amendment and precedence rules.

Document generation, automation, and e-signatures are included in the Portwood package. Standard per-user pricing is $13 per user per month. Per-user licensing requires one additional Portwood user license at the same rate for the Salesforce guest user used for external signing. The Founder’s Site License is quoted for the organization and covers all users, including the signing guest user. A sender must be authorized under the Order to send signature requests. External recipients may receive and sign requests without individual Portwood licenses. Recipient access remains subject to the configured authentication, consent and document-access process.

The accepted Order states the licensing model, covered users or organizations, any signing-site license, license quantities and rates, billing frequency, total fees, supported Salesforce configurations, subscription dates, assignment rules, automation and integration use, seat changes, renewal and cancellation terms. No automatic renewal or payment authorization is created by this schedule alone. Existing signed agreements and applicable Apache rights retain their terms.

2 Sender responsibilities

Customer determines whether a document and transaction are appropriate for electronic execution in each applicable jurisdiction, obtains required permissions and disclosures, and supplies accurate recipient details. Customer is responsible for the document's content and legal effect, the signer's authority, required witnesses or notarization, any excluded transaction categories and required identity assurance.

Customer configures its Salesforce Site, guest permissions, authentication options, document access, link expiry and audit retention using supported instructions. Customer must not share live signing links or authentication codes in public issues or community channels. Portwood provides the supported functionality and assistance stated in the agreement; it does not act as a notary, legal adviser or qualified trust-service provider under this schedule.

3 Recipient consent and electronic delivery

Customer provides recipients with a clear choice and an appropriate method to consent to electronic signatures and records. Where consumer law requires written information to be delivered electronically, Customer supplies the applicable prior disclosures, obtains and records affirmative consent in the required manner, and provides required withdrawal, paper-copy and access procedures.

A generic signature checkbox or a link to this vendor schedule does not by itself establish compliance for every transaction. Customer is responsible for appropriate, legally reviewed recipient disclosures and verifies that the configured workflow presents and records them. Portwood's public legal and pricing pages do not capture recipient consent or accept a customer contract.

For transactions subject to consumer electronic-delivery requirements, transaction-specific disclosure arrangements address the sender and contact details, applicable jurisdiction and transaction type, covered documents or record categories, paper alternatives, withdrawal and contact-update procedures, paper-copy availability and any disclosed fee, hardware and software access and retention requirements, evidence of access to the actual electronic format and affirmative consent, and changed access requirements. Retention ownership and the treatment of pending requests and completed records remain subject to the agreed service terms. These arrangements are handled privately for the applicable transaction.

4 Evidence records and retention

Customer controls retention of documents, consent evidence, audit records and verification records in its Salesforce environment and should preserve an accurate, accessible copy suitable for its legal and business retention requirements. Customer evaluates available audit information and authentication methods against its transaction requirements; a document hash or recorded email address does not independently establish every aspect of identity or authority.

Ownership of Customer Data and Portwood's use of it remain subject to the MSA. Customer records and completed signing evidence do not become Portwood property when an e-signature entitlement begins or ends. Authorized support access and any shared materials are handled under the applicable agreement, DPA and Privacy Policy.

5 Expiry suspension and pending requests

Before activation, the Order records how pending signature requests, link access, completed records and any transition assistance are handled at expiry or suspension. Any continued service for pending requests, export assistance or transition support must be expressly included in the Order. This schedule does not promise a technical grace period or continuing subscription functionality after the agreed entitlement ends.

Subscription expiry does not itself authorize deletion of customer-owned documents or completed audit records, revoke applicable open-source rights or change an existing signed agreement. Commercial entitlements, notices and remedies follow the accepted Order and MSA. Uninstalling software does not itself cancel the subscription or change the agreed payment commitment.

6 Support security and privacy

Standard product support is included with an active commercial software subscription. Optional managed support and hands-on work follow the selected plan and incorporated Support and Maintenance Schedule; larger implementation work is separately scoped.

Each party performs its obligations under the MSA and any applicable DPA. Customer is responsible for recipient privacy notices and the lawful basis for collecting signer information. Portwood accesses signing material only as authorized for the agreed service. Incident notification and investigation follow the applicable agreement and law.