

ORDER FORM - TRUSTPORTAL SERVICES

BETWEEN

- (1) **TrustPortal Solutions Ltd** incorporated and registered in **England** with company number 10559389 whose registered office is at 32 Paradise Road, Richmond, Surrey TW9 1SE (the **“Supplier”**); and
- (2) _____ (**“Customer”**).

Supplier has agreed to provide Services to the Customer on the terms and subject to the conditions set out in this Agreement, which incorporates the **TrustPortal Solution General Terms and Conditions for SaaS Services (GTC)** (April 2025 or later), and the **TrustPortal SaaS Service Description** (April 2025 or later).

Current versions of these additional documents can be found here:

[TrustPortal Solution General Terms and Conditions for SaaS Services](#)

[TrustPortal SaaS Service Description](#)

TERM	12 months from the Effective Date (Initial Term). The Initial Term shall be extended by up to two further 12-month periods (each a Renewal Term) unless Customer notifies Supplier that it doesn't intend to review at least 30 days prior to the end of the Initial Term (or any Renewal Term, as the case may be).
EFFECTIVE DATE	As per date of order on AWS Marketplace
AGREED START DATE	Same as Effective Date
FEES	See Schedule 2
PAYMENT TERMS	7 days
CUSTOMER AFFILIATES	Per clause 2.4 GTC.
CUSTOMER POLICIES	Per clause 3.3 GTC.
CUSTOMER ADDRESS FOR NOTICES	Per clause 25 GTC.
SERVICE DESCRIPTION/ENVIRONMENTS	As set out in the TrustPortal SaaS Service Description
SERVICE LEVEL AGREEMENT	See Schedule 1

Signed by _____

for and on behalf of **SUPPLIER**

.....

Director

.....

Dated

Signed by _____

for and on behalf of **CUSTOMER**

.....

Director

.....

Dated

Schedule 1

SERVICES

Services are broken down into a number of components:

- SaaS Scope
- SaaS Setup
- SaaS Provision
- Licences
- Other Costs (e.g. training, consulting)

SaaS Scope

The scope of this Order is provision of:

- 1 x Prod TrustPortal SaaS up to 10 concurrent users/connections
- 1 x Dev SaaS

SaaS Setup

The SaaS costs include setup activities to connect TrustPortal SaaS with Customer on-premise or cloud-based Agentic or RPA environment

Scope Includes:

- Server setup and TrustPortal Install for Prod
- Server setup and TrustPortal Install for Dev
- Test connectivity of TrustPortal Prod env to appropriate Agentic / RPA environment
- Test connectivity of TrustPortal Dev env to appropriate Agentic / RPA environment(s)
- Setup of standard operations (e.g. backup, monitoring etc)

SaaS Provision

The summary of the scope of the SaaS provisioned under this Agreement is described below, and further described in the in the “TrustPortal SaaS Service Description” as described above

Any changes to the standard SaaS service description, are described below

	In Scope?	Bespoke Requirements Possible?	Comments
Single Tenant	Single tenant by default		
Primary Data Centre / Availability Zones	TBC as part of AWS Marketplace order		
DR Data Centre / Availability Zones	Not applicable		
Hours of Operation	9am – 5pm, Mon-Friday for defined location and with agreed maintenance windows and SLA		
SLA	99.5% availability during scheduled hours of operation		
P1 Response	Initial Response 4 hrs Updates every 12 hr		

P2 Response	Initial Response 4 hrs Updates every 12 hr		
P3 response	Initial Response 48hr Updates every 2 days or as agreed in issue		
P4 response	Initial Response 48hr Updates every 2 days or as agreed in issue		
Maintenance Window	8 hours/month total, any nights 8pm local time		
DR Recovery Time Objective (RTO)	Not applicable		
Upgrades	Max 1 per year with times to be agreed. Upgrades may be needed to keep current with TrustPortal Software End-of-Life (2 years)		
Channel Connections	Standard connections permitted to customer browsers and Agentic / RPA digital workers	Integrations to Amazon Connect IVR and Desktop are downloadable, and additional training/coaching can be purchased	
VPN Setup	No VPN's will be used in creating connection from customer to SaaS		
DR Testing	Not applicable		
Backup	Full backup at VM level (7 days retained) Nightly backups, up to 1 days data loss		
Backup/Recovery Testing	On initial installation, then annually		
Data Encryption in transit	AES256 PPK with individual user keys, over HTTPS		
Data Encryption at rest	AES256 PPK with individual user keys. Encrypted VM images and disks		
Customer AD/SSO Integration	Standard, including TrustPortal User Management (TPUM) integration	Only with training/coaching package	
Data Auditing/Export	Not possible – TrustPortal doesn't have keys to encrypted data		
Availability Reporting	Standard AWS Reporting		
Performance Reporting	Standard TrustPortal Reporting		
Firewall Setup to support Protocols	HTTPS (Port 443)		
Periodic Penetration Testing	Support for annual customer-initiated pen testing only		
Internal Audits incl. access, risk, regs and controls	Performed annually		
External Audits	Not supported as standard		
Regulatory Reviews	Annually		

Hosting Provider Switching	Not in standard scope		
Specific network routing	Not in standard scope		
Infrastructure Documentation	Provided on installation		
Exportable VM images	Not in standard scope		
Other Customer Specific requirements		Not applicable	
Infosec Contacts	See Schedule 5 for key roles that should be defined		
Escalation Contacts	See Schedule 5 for key roles that should be defined		
Issue Reporting	Via TP Portal at https://trustportalhelp.zendesk.com		

Implementation Plan

Further Milestones and Deliverables:

Phase	Start Date	End Date
SaaS Design & Setup	Effective Date, through use of standard templated SaaS	Within 5 working days of Effective Date
SaaS Acceptance Test (No later than Agreed Start Date plus 10 days)	Within 5 working days of Effective Date	Within 10 working days of Effective Date
Training/upskilling of developers	TBC: Only if Training/Coaching package purchased	TBC: Only if Training/Coaching package purchased

Further Assumptions

Includes

- Service provision as described in “TrustPortal SaaS Service Description” referenced above, as modified by the table above

Training Costs

- [Optional] Standard 5-day training and coaching package up to 5 people, using Customer Dev Environment

Schedule 2

CHARGES

All Fees are in GBP.

SaaS Setup Costs

One-off costs:

Component	Cost (excl. expenses)
Architecture design & review	included below, unless change to SaaS scope
Setup Dev/Test	included below, unless change to SaaS scope
Setup Prod	included below, unless change to SaaS scope

SaaS Services

Provision of Dev and Prod SaaS as described in Schedule 1

Component	SaaS Charge (excl. expenses, and applicable taxes)
Yearly costs (payable annually in advance)	\$ 15,000

Training Costs

- [OPTIONAL – Ordered separately via AWS Marketplace] Standard 5-day training and coaching package up to 5 people, using Customer Dev Environment

One-off cost:

Component	Cost (excl. expenses, and applicable taxes)
5-Day Training Package [OPTIONAL]	\$ 10,000

Ad-hoc Consulting

Customer can request additional consulting support e.g. for process review, best practice advise etc, and will be provided on a best-endeavours basis

Component	Cost (excl. expenses, and applicable taxes)
Daily Rate - Consultant	\$ 1300/day
Daily Rate – Principal	\$ 1700/day

Totals (excl. expenses and applicable taxes)

Component	Year 1 Costs	Year 2 (if contract extended)	Year 3 (if contract extended)
Environment Setup	Included in SaaS	Included in SaaS	Included in SaaS
SaaS Provision	\$15,000	\$15,000	\$15,000
Licences	Included in SaaS	Included in SaaS	Included in SaaS
Training	\$10,000 (Optional)	\$0	\$0
Non-Standard Changes			
Totals	\$15,000 (no training) \$25,000 (with training)	\$15,000	\$15,000

Schedule 3
DATA PROCESSING ACTIVITIES

Categories of data

Please specify the Personal Data that will be processed by the Supplier

All personal data is encrypted and block-signed, with Supplier not having access to the encryption keys.

Supplier cannot see or modify Personal Data in the SaaS Service, so is not a processor of the Customer's customer personal data within the SaaS Service.

Supplier will process business contact information of Customer employees in order to provide the SaaS Service.

Categories of Data Subjects

Please specify the categories of data subjects whose Personal Data will be processed by the Supplier

As above.

Customer employees who receive support and information from TrustPortal during the Term.

Processing Operations

Please specify all processing activities to be conducted by the Supplier

As above.

Location of Processing Operations

Please specify all locations where the personal data will be processed by the Supplier

All personal data which TrustPortal collects is stored in the United Kingdom.

Identity of sub-contractors

Please provide details of all permitted sub-contractors, including full legal name, registered address and location where processing of Personal Data will occur and processing operations

Amazon Web Services (based in Frankfurt).

Purposes

Please specify all purposes for which the Personal Data will be processed by the Supplier

Supplier processes Customer personal data in order to provide the SaaS Service and to fulfil its contractual obligations to the Customer.

Duration

Please specify the length of time for which data processing activities will be carried out by the Supplier

Throughout the Term.

Retention Period

Please specify the length of time for which the Personal Data is required to be retained

Throughout the Term. Business contact details included in Customer contracts will be retained for the length of the Term plus seven years.

Implementation Acceptance Test

Standard acceptance test to include:

- Setup of TrustPortal Agent and connection to Customer Agentic / RPA environment
- Testing TrustPortal Example Processes end-to-end
- Creating users and tiles via TPUM

SCHEDULE 4.1
SAAS RESTRICTIONS AND FAIR USAGE

1. SOFTWARE MODULES USED ON SAAS

1.1 The following TrustPortal software will be supported on the SaaS.

Initial versions may be upgraded as part of the SaaS service, but will not be downgraded below the initial version:

Module	Licensed / Free	Initial Version	Comment
TrustPortal	Licensed	V2.5	Must be licensed as described in Schedule 1, and subject to fair usage limits (see below)
API MiniBot	Free - included with license	V2.5	Included in SaaS cost, but subject to fair usage limits (see below)
Tasks MiniBot	Not available	V2.5	
TrustPortal Studio	Free – included with license	V2.5	Included in SaaS cost, but subject to fair usage limits (see below)

2. SOFTWARE RESTRICTIONS

2.1 No additional Software restrictions

3. FAIR USAGE

3.1 The following fair usage restrictions apply to the provision of the SaaS, over and above license limitations

Module	Fair Usage	Comment
TrustPortal	Storage in the SaaS shall not exceed an average of 50Mb per TrustPortal user	
API MiniBot	Only 1 API MiniBot provided, may not use more than 25% of system resources	
Tasks MiniBot	No Tasks MiniBot provided	
TrustPortal Studio	Max 3 developers, client must provide API key to their own ChatGPT or other LLM environment	

SCHEDULE 4.2 MANDATORY POLICIES

1. CUSTOMER RESPONSIBILITY – NETWORK/RELEVANT SYSTEMS

These are the specifications for the networks and relevant systems to enable the TrustPortal Service:

Desktop:

Software is accessed through a web browser or mobile device so Customer must ensure they adhere to the following supported browsers (not limited to):

Microsoft Edge V15+

Chrome V49+

Firefox: V52+

Mobile:

mobile comms: 4G or better

iOS 10+

Android: KitKat V4.4 and above

LAN/WAN:

6.1Mb/sec up and down speed

Latency: 1 sec maximum

The software does not place high demands on bandwidth but adequate connectivity to access the software is required.

2. PASSWORD POLICY

- 2.1 Policy will not allow or suffer any User to be used by more than one individual user unless it has been reassigned in its entirety to another individual user, in which case the prior user shall no longer have any right to access or use the Services and/or Documentation.
- 2.2 Each End User shall keep a secure password for his use of the Services and Documentation, that such password shall be changed no less frequently than that defined in the Mandatory Policies and each End User shall keep his password confidential.

SCHEDULE 5
GOVERNANCE AND REPORTING

Example roles and responsibilities

Role	Contact name	Company	eMail	Meeting Freq (M=Monthly/Q=Quarterly)	Work Phone / Mobile
Customer Business Owner					
Service Manager					
Procurement / Vendor Manager					
Customer Intelligent Automation Team (First Line Support)					
Customer IT Support Team (Second Line Support)					
Distribution list to be used by TrustPortal when notifying Customer teams of service issues / changes					
Customer nominated					

contacts to call TrustPortal					
Commercial					
Executive Escalation	Chris Lamberton (CEO)	TrustPortal	chris@trustportal.org	N/A	07711872233
Customer Onboarding	<Insert here>	TrustPortal	<Insert here>	As per project plan	<Insert here>
Support Helpdesk		TrustPortal	Issues logged via Zendesk	M	0808 1694367
Support Escalation	David Linten (CTO)	TrustPortal	David@trustportal.org	M	<Insert here>

Example Meetings:

➤ Monthly Service Review

1. Introductions and Personnel Changes
2. Review of Previous Minutes
3. SLA Delivery Performance
4. Issues/Incidents
5. Invoices
6. Change
7. AOB

➤ Quarterly Governance Review

1. Introductions (New Attendees and Personnel)
2. Company announcements
3. SLA Delivery Performance (review and forecast capacity)
4. Incident management (Supplier issues/3rd party issues)
5. Financials (current PO/Invoices)
6. Operational Governance
 1. Contract
 2. BCP
 3. Security/certification
 4. Compliance
 5. DPA breaches
 6. Risk management
7. Service Improvements (delivered/proposals)

8. Planned updates/ changes (next 3 months on both sides)
9. Projects and change requests (new projects and CR)
10. AOB and next meeting

➤ **Annual DR Review**

1. Introductions and Personnel Changes
2. Review of Previous Minutes
3. DR and BC planning
4. DR test review
5. DR change requests
6. AOB

SCHEDULE 6

Bespoke terms agreed between Customer and Supplier

Not Applicable