



Financial Services

# SaaS Administrator Guide

TSoftPlus™

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This publication was written for TSoftPlus™

### Publication Information / Version

Document Title: TSoftPlus SaaS Administrator Guide

Date Edited: August 2021

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## What's New for Administration

The following describes key enhancements and important changes made to the Administration product.

Date	Description
9/11/2017	<ul style="list-style-type: none"><li>■ The topics for Accounts, Users, Roles, Permissions and IP Filtering can be found in the new Security Administration Guide.</li></ul>
12/11/2015	<ul style="list-style-type: none"><li>■ The ability to block or allow Internet Protocol (IP) Addresses through the IP Address Whitelist has been added. Additional details can be found on the Security help page.</li><li>■ When copying an existing account, the account can be copied with or without the document content associated to the existing account.  At this time, select YES when asked the question “Do you want to use the same content repository as source Account?” in order to receive the same content associated to the source account. If your existing account has custom content and you do not want the same custom content associated to the new account, please contact us.  In the future, we will be enhancing this feature to accommodate the option of copying content and excluding the custom content if desired when copying an account by selecting NO.</li></ul>
10/15/2015	<ul style="list-style-type: none"><li>■ Emails sent from Administration to users now inform them of the ability of account administrators to solve user creation, permission, and password issues.</li></ul>
09/23/2015	<ul style="list-style-type: none"><li>■ When using the <b>Share with ORGs</b> function, the Select check box for all organizations did not work properly when an <b>Account</b> had more than 100 <b>Organizations</b>. This has been resolved.</li></ul>

# Getting Started

## Supported Browsers

Wolters Kluwer Financial Services (WKFS) products require the following:

- Monitor Resolution: 1024x768 or greater
- Browser: Compatible with the following:
  - Internet Explorer 11 or later
  - Google Chrome

## User Timing Out

To protect against unauthorized use, you will be logged out of your session when either of the following occur:

- After 20 minutes of inactivity
- When remaining on the same page for more than 20 minutes.

## Locked Out Users

You will be locked out of your account when following occurs:

- Two failed challenge question responses

Account Administrators can unlock users.

## User Profile

Installed users: your Account Administrator will complete the necessary information to create your user registration.

A user may access their **USER PROFILE** and **PRODUCT ACCESS** by clicking on their username link in the upper right corner of all screens.

**USER PROFILE** allows the user to access their user information, change their password, and edit their challenge questions.

**USER INFORMATION** allows the user to add personal information to their account. The user is required to supply a valid email address, First Name, Last Name, and Password.

**CHALLENGE QUESTIONS** are required, and are used in the event that a user forgets their password. Questions and answers should be unique and easy to remember.

**ACCOUNT ACCESS** allows a user to see all accounts that they have permissions for. By selecting the icon for an account, a list of account administrators appears.

**PRODUCT ACCESS** allows a user to access the URL(s) for product(s) they have permissions.

# Passwords

Resetting Passwords can be done in three different ways. The user can: select **Forgot Password?** on the main login screen; contact an Account Administrator to reset a password; or select **Change Password** on the user's **USER INFORMATION** section of their **USER PROFILE**.

## Password Requirements

Feature	Description
Password	<ul style="list-style-type: none"><li>■ Eight characters long</li><li>■ Contain three of the four character groups:<ul style="list-style-type: none"><li>■ At least one uppercase character (A-Z)</li><li>■ At least one lowercase character (a-z)</li><li>■ At least one numeric character (0-9)</li><li>■ At least one special character, consisting of the following: ! " # \$ % ' ( ) * + , - . / : ; = ? @ [ \ ] _ ` {   } ~</li></ul></li><li>■ Passwords can only be changed once every 48 hours.</li><li>■ Passwords must be changed every 90 days.</li></ul>
Unsuccessful Login	<ul style="list-style-type: none"><li>■ You will be locked out of the system after five failed login attempts. Contact your account administrator or customer support to have your profile unlocked.</li></ul>

## Organizations

**ORGANIZATIONS** provide a way to group information for an account. An organization may be a financial institution, a branch or a separate location. It may be a holding company or a specialized group within a company that may have different information for transactions.

Feature	Description
<b>Legal Name</b>	Used on legal documents to identify the organization.
<b>Short Name</b>	An internal identifier used to identify a branch office or could be the same as the <b>Legal Name</b> .
<b>FIRS ID</b>	FIRS ID number for the lender as assigned by the SBA PIMS system.
<b>750 Date</b>	The date the SBA Form 750 Loan Guaranty Agreement between the Lender and the SBA was signed.
<b>Lender Status</b>	Lender program approved for the lender: <ul style="list-style-type: none"><li>■ Non-Delegated</li><li>■ Delegated</li></ul>
<b>Service Fees Agent</b>	The agent type acting for the lender, as found on SBA Form 159: <ul style="list-style-type: none"><li>■ Lender</li><li>■ Loan Broker</li><li>■ Loan Packager</li></ul>

Depending on licensed products, information can be shared with an organization to assist with correspondence (**CONTACTS**), document preparation (**CONTACTS** and **ADDRESSES**), and transaction creation (**FEES, CHARGES, POLICIES, and TEMPLATES**).

## Contacts

Contacts available to be defined for an organization consist of the following:

Contact	Description
<b>AUTHORIZING OFFICER</b>	The <b>AUTHORIZING OFFICER</b> is used as an organization's Approving or Certifying PLP Lender Official. This person signs the Form 1920 and prints on the PLP Lender Checklist and PLP Loan Authorization Transmittal Form. This contact may be an Entity or an Individual.
<b>DOCUMENT RETURN TO</b>	The <b>DOCUMENT RETURN TO</b> is used as an organization's designated contact to receive recordable documents and returned correspondence. This contact may be an Entity or an Individual.
<b>RESPONSIBLE OFFICER</b>	The <b>RESPONSIBLE OFFICER</b> is used as an organization's representative for signing on behalf of the lender. This contact may be an Entity or an Individual.

# Policies

POLICIES allow an Account Administrator to set up and save options, defaults and preferences for your organizations.

## Copying an Existing Policy

When copied by an Account Administrator, the resulting policy will be shown in edit mode. All items will be in the new policy as in the original policy and the name will be defaulted to "Copy of <Policy Name>".

Defined policies may be shared with an existing organization by using the SHARE WITH ORGS function.

## TSoftPlus™ Policies

Feature	Description
Program Type	Allows selecting 504 or 7(a) program types.  If 7(a) is the Program Type, an additional section is visible that will include check boxes for 7(a) programs: <ul style="list-style-type: none"><li>■ CAPLine</li><li>■ Express Loan</li><li>■ Small Loan Advantage</li></ul> The additional section allows one program to be selected.