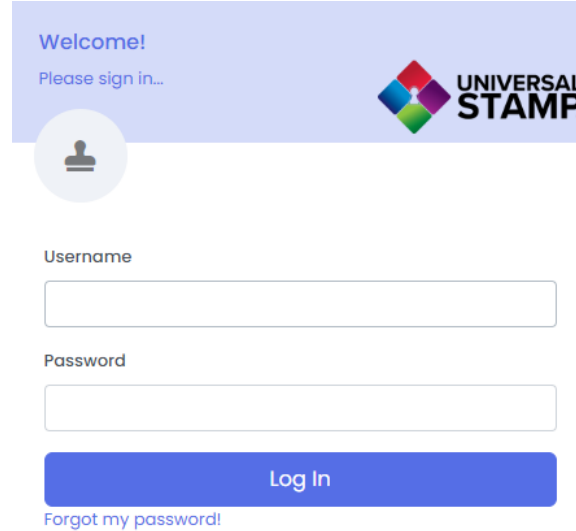


## Abstract



A guarantor participating in the digital U-STAMP program typically has one or more internal administrators. This document describes the app.universalstamp.com admin portal for guarantor admin users.

## Login

Any admin user can log into the app.universalstamp.com admin portal using the same credentials they would for logging into the Universal STAMP App for Windows. The login prompt looks like this:



**Welcome!**  
 Please sign in...

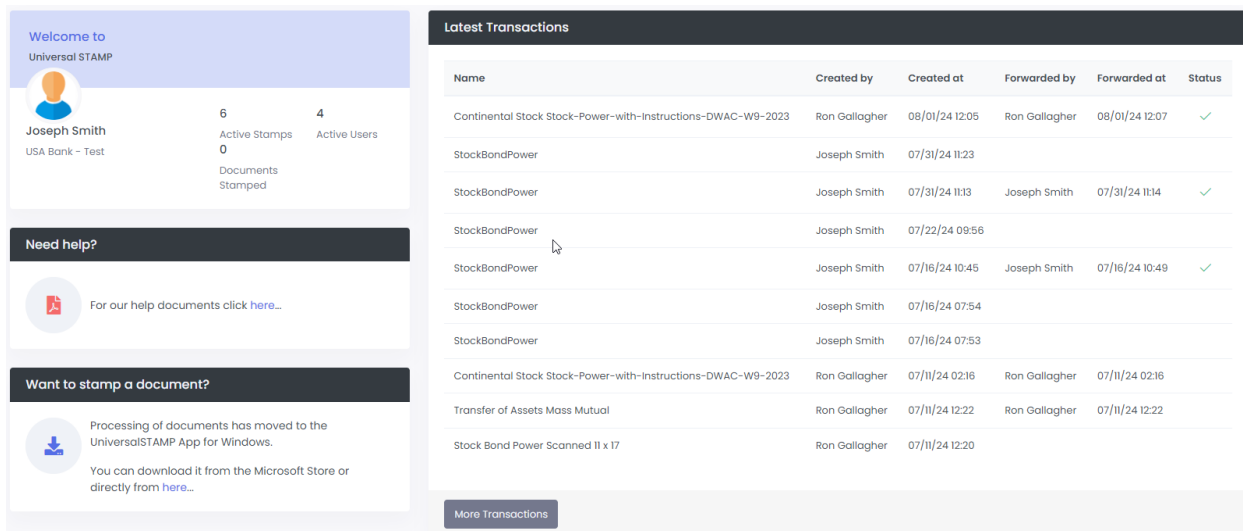
**Username**

**Password**


[Forgot my password!](#)

As in the Universal STAMP App for Windows, if Two Factor Authentication is enabled for the user trying to log in, the system will send a PIN code to the user's e-mail address and will prompt the user to enter it as part of the login process.

Once successfully logged in, the user is presented with the U-STAMP Dashboard:



**Welcome to**  
 Universal STAMP

  
**Joseph Smith**  
 USA Bank - Test

6 Active Stamps  
 4 Active Users  
 0 Documents Stamped

**Need help?**  
 For our help documents click [here...](#)

**Want to stamp a document?**  
 Processing of documents has moved to the UniversalSTAMP App for Windows. You can download it from the Microsoft Store or directly from [here...](#)

**Latest Transactions**

Name	Created by	Created at	Forwarded by	Forwarded at	Status
Continental Stock Stock-Power-with-instructions-DWAC-W9-2023	Ron Gallagher	08/01/24 12:05	Ron Gallagher	08/01/24 12:07	✓
StockBondPower	Joseph Smith	07/31/24 11:23			
StockBondPower	Joseph Smith	07/31/24 11:13	Joseph Smith	07/31/24 11:14	✓
StockBondPower	Joseph Smith	07/22/24 09:56			
StockBondPower	Joseph Smith	07/16/24 10:45	Joseph Smith	07/16/24 10:49	✓
StockBondPower	Joseph Smith	07/16/24 07:54			
StockBondPower	Joseph Smith	07/16/24 07:53			
Continental Stock Stock-Power-with-instructions-DWAC-W9-2023	Ron Gallagher	07/11/24 02:16	Ron Gallagher	07/11/24 02:16	
Transfer of Assets Mass Mutual	Ron Gallagher	07/11/24 12:22	Ron Gallagher	07/11/24 12:22	
Stock Bond Power Scanned II x 17	Ron Gallagher	07/11/24 12:20			

## Features

### Stamps

The dashboard shows a count of active stamps in the top left box



Clicking on the number of stamps, a list of active and inactive stamps is displayed.

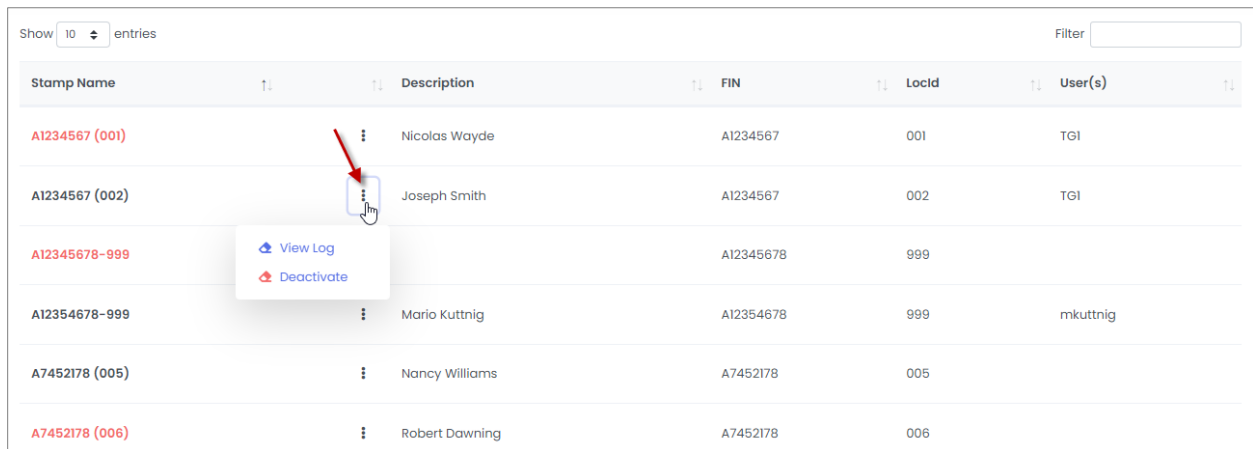


Table showing a list of stamps with columns: Stamp Name, Description, FIN, LocId, and User(s). The table includes a 'Show 10 entries' dropdown and a 'Filter' input field. A red arrow points to the three-dot menu icon for the stamp 'A1234567 (002)', which has opened a dropdown menu with options 'View Log' and 'Deactivate'.

Stamp Name	Description	FIN	LocId	User(s)
A1234567 (001)	Nicolas Wayde	A1234567	001	TGI
A1234567 (002)	Joseph Smith	A1234567	002	TGI
A12345678-999		A12345678	999	
A12354678-999	Mario Kuttnig	A12354678	999	mkuttnig
A7452178 (005)	Nancy Williams	A7452178	005	
A7452178 (006)	Robert Dawning	A7452178	006	

The icon for more options (three dots) allows for viewing a stamps log, or deactivating the stamp. Once deactivated, the stamp cannot be used anymore, and cannot be activated. A completely new stamp will be created. This mimics the process of physical medallion stamps.

### Users

Also in the top left box, a count of active users is displayed.



Clicking on that number, a list of users will be displayed.

Click on the number of active users, and you'll see a list of users in your organization.

Username	Full Name	E-Mail
TGI <span>Admin</span>	⋮ Joseph Smith	mario.kuttinig@hamptontech.net
RGallagher <span>Admin</span>	⋮ Ron Gallagher	ron.gallagher@hamptontech.net
rgallagher2 <span>Admin</span>	⋮ Ron Gallagher Admin	rgallagher@hamptontech.net
msmith	⋮ Mary Smith	rgallagher@hamptontech.net
jsmith	⋮ John Smith	rgallagher@hamptontech.net

This list indicates who is an administrator, the three dots (more options) allow for a user to be deactivated. Once a user is deactivated, they cannot log into the system anymore. Other than stamps, users can be re-activated by Kemark in case there is a need for it.

## Help

For convenience, there is a shortcut to Universal STAMP's help section. Clicking on it will open a page with useful documents and help videos.

### Need help?

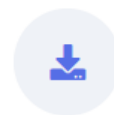


For our help documents click [here...](#)

## Download App for Windows

To simplify the download of the app for Windows, another shortcut is provided. This link will refer to the Microsoft Store. IN case, your organization does not work with the MS Store, there is an alternative link at the bottom of the page, which allows for a direct download of the MSIX install bundle.

### Want to stamp a document?



Processing of documents has moved to the UniversalSTAMP App for Windows.

You can download it from the Microsoft Store or directly from [here...](#)

## Transactions

The dashboard shows a list of the most recent transactions.

Latest Transactions					
Name	Created by	Created at	Forwarded by	Forwarded at	Status
Continental Stock Stock-Power-with-Instructions-DWAC-W9-2023	Ron Gallagher	08/01/24 12:05	Ron Gallagher	08/01/24 12:07	✓
StockBondPower	Joseph Smith	07/31/24 11:23			
StockBondPower	Joseph Smith	07/31/24 11:13	Joseph Smith	07/31/24 11:14	✓
StockBondPower	Joseph Smith	07/22/24 09:56			
StockBondPower	Joseph Smith	07/16/24 10:45	Joseph Smith	07/16/24 10:49	✓
StockBondPower	Joseph Smith	07/16/24 07:54			
StockBondPower	Joseph Smith	07/16/24 07:53			
Continental Stock Stock-Power-with-Instructions-DWAC-W9-2023	Ron Gallagher	07/11/24 02:16	Ron Gallagher	07/11/24 02:16	
Transfer of Assets Mass Mutual	Ron Gallagher	07/11/24 12:22	Ron Gallagher	07/11/24 12:22	
Stock Bond Power Scanned 11 x 17	Ron Gallagher	07/11/24 12:20			

Below this list, there is a button for “More Transactions”. Clicking on this button displays a search form. Searching for transactions in a certain period can be performed in this form. Also, the results can be restricted to stamps starting with a certain Letter (i.e. the stamp class).

From

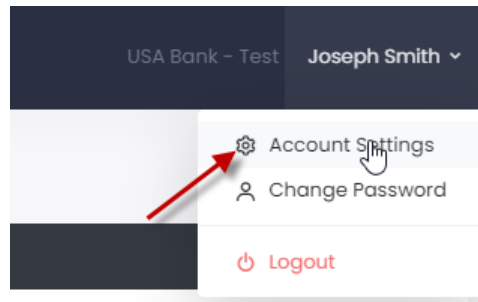
To

Stamp Class

Search

## Account Settings

At the top right of the screen, the accounts maintenance menu can be opened by clicking on the username. The submenu “Account settings” displays the settings for the current account.



### General

**Local Archive Path**

A file path (e.g. Q:\Documents) or UNC (e.g. \\server\share\folder)

**Acceptance Notification E-Mail**

If left blank, Acceptance Status e-mails will go to the user who assigned the document to a recipient.

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### Password Policy

Enforce Password Policy

Password must contain a  Number  Uppercase Letter  Special Character

Minimum Password Length

Password expires after  days

Previous  passwords cannot be re-used

Cancel

- **Local Archive Path**

An organization can choose to store documents in a local archive. This field holds the path or UNC to the local or network location documents are supposed to be stored. Whenever the user clicks on “Save to local Archive” in the Windows app, the document is stored at this location, using an internal ID as the filename. Thus, the app can find the document later.

- **Acceptance Notification E-Mail Address**  
Typically when a document is accepted or rejected by the recipient (TA), Universal STAMP sends a notification by E-Mail to the person who applied the stamp. This behavior can be overwritten using the Acceptance Notification E-Mail Address field. Any notifications will go to the E-Mail address provided here. There can be multiple E-Mail addresses separated by semicolon.
- **Password policy**  
Various rules can be set up to enforce a password policy on the users when changing their password. Changing or activating this policy will not affect existing passwords. The policy only applies when changing a user's password.

For technical questions please contact:

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