Quote for Ulster County Econ Dev 9-12-2024

Portfol Loan Management Software

10 Active Loan SAAS subscription

Includes

    a. Online subscription to Portfol Software as a Service for 12 months

        i. Includes

            1. Loan Management
            2. Payment Processing
            3. Loan Restructuring
            4. Reporting
            5. Project and Deal Tracking (ticklers, Follow-up File)
            6. Borrower Portal

    b. Training for staff and support for 12 months

First Year Cost

    $4,500.00   Portfol Loan Management System

Following Year Annual SAAS Subscription fee

    $2,500/year
    (note includes online subscription to Portfol SAAS for 12 months and support)

25 Active Loan SAAS subscription

First Year Cost

    $6,000.00   Portfol Loan Management System

Following Year Annual SAAS Subscription fee

    $4,000/year
    (note includes online subscription to Portfol SAAS for 12 months and support)

Portfol Loan Management Cloud

Technical Overview

Portfol Cloud is an Infrastructure as a Service offering. Your Portfol data and software is hosted on Microsoft Azure. Uptime, maintenance, updates, and backups are managed by Portfol support.

User Access Requirements

For users to access Portfol Cloud there are a few requirements:

- **Microsoft 365 License – Business Premium, E3, or E5** – Portfol requires one of these licenses as we leverage "shared activation" in our Azure Remote App environment. Up to 10 of these licenses can be secured for free as a nonprofit organization.
- **OneDrive / Sharepoint** – To sync documents from the Portfol Cloud Environment to local workstations we use document sync services like OneDrive and Sharepoint. We have used Dropbox and Google Drive if requested by the client.
- **Microsoft Remote Desktop Client** – Portfol will be deployed to users via a Remote App. This allows Portfol to not only be run on Windows computers, but MacOS and iOS devices, too. https://docs.microsoft.com/en-us/windows-server/remote/remote-desktop-services/clients/remote-desktop-clients

Security

All data is encrypted at rest and in transit.

User access to the Remote App requires a Portfol.net account (username@companyname.portfol.net). These accounts require complex passwords and MFA.

Backups

Backups are conducted daily and maintained for 30 days. If there are additional backup requirements we can discuss.