

# TSPlus License Request

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## Purpose

TSPlus is a third party provider of remote desktop access licenses. SedonaOffice cannot run in a virtual environment on its own, thus it requires an additional solution for users that access the SedonaOffice server for:

- SedonaOffice
- WeSuite
- Reporting
  - Custom Reports
  - Excel Reports
  - Vivid Reports

Every new SedonaOffice Cloud implementation will require an Unlimited user license for TSPlus. This ensures that all user server access needs are addressed without the need to quote/install additional licenses. For existing customers, an Add On User license sale project will require an upgrade to an Unlimited user license if they are not already on one.

The Advanced Security option allows the customer's admin to quickly whitelist their users as needed. It is now mandatory on all TSPlus sales. For net new customers, it will be included at time of sale. For existing customers that do not already have Advanced Security, sales will include it with next customer quote as a mandatory upgrade.

The purpose of this document is to provide PMO resources with the information necessary to correctly request the setup of the AWS server(s) TSPlus licenses by the Infrastructure team in conjunction with the AWS server spin up task.

Infrastructure can start the server setup process using a trial license if necessary, however, it is only for 5 users and only valid for 14 days. The actual license will need to be available before the end of the trial expiration and will require an additional task to install the actual license if a trial license is used.

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# User Count

TSPlus licenses will now be purchased as an Unlimited license for all sales. A blanket PO will be setup with the vendor for each year's projected sales by the Procurement team. Infrastructure will get licenses from the vendors website, and the vendor will invoice Evercommerce against the blanket PO.

PMO resources will need to confirm what has been sold on the OAF/SOW vs what the customer currently has to ensure the correct items have been sold prior to requesting the AWS Server spin up using the User Count Tools.

## User Count Tools

The following tools can be used to understand the required user count and the customers current user count:

- [SedonaOffice License Database](#)
  - Contains information on existing customer user count, TSPlus Advanced Security status, and TSPlus licensing type/count
  - Maintained by Sales Ops/Infrastructure resources
- SO Hosted Server and TSPlus Decision Tree
  - Flow chart to determine quote items to order based upon customers status
    - [New Customers](#)
    - [Existing Customers](#)

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## Request Licenses

If the customer is net new or migrating from on prem to SedonaOffice Cloud, there is a requirement to order advanced TSPlus license prior to setting up the AWS server. Each site needs an advanced license to track # of users.

1. The PM should create a case to request the advanced TSPlus license
  - a. Account Name should be added
  - b. Case Origin: Sales order
  - c. Priority: High
  - d. Product: SedonaOffice
  - e. Subject: TSPlus Advanced License – User Could X (based on the sales order)
  - f. Description: TSPlus Advanced License – User Could X (based on the sales order)
  - g. Assign to the Infrastructure Team
2. Once this is completed, the Infrastructure Team will obtain the license and then close the case.

# Deploy Licenses

For new customer implementations, follow the [AWS Server Spin Up](#) instructions.

For existing customers purchasing TSPlus Unlimited Licenses and/or Advanced Security follow the steps below:

1. Confirm with customer
  - a. Contact name for installation
  - b. Admin user name and information for Advanced Security (1 required)
  - c. Inform customer there will be a 30 minute down time to reboot the server for license changes to take effect
2. Create a case for Infrastructure to install Advanced Security and/or TSPlus Unlimited/Advanced Security licenses
  - a. From the customer's account card, click Cases
  - b. Click New from the top right of the screen
  - c. Update the following fields:
    1. Secondary Case Owner = yourself
    2. Account Name = Enter the customer's name
    3. Contact Name = customer's contact person
    4. Case Origin = Support Center
    5. Priority = Critical
    6. Impact = Critical
    7. Subject = include items to be installed:
      1. Install Advanced Security, or
      2. Install Unlimited TSPlus License, or
      3. Install Advanced Security and additional TSPlus Unlimited License
    8. Description = Copy the Subject field and add the following notes
      1. Update Secondary Case Owner by @mention
      2. When case closed
      3. Actual hours spent
  - d. Save the case
3. Open the case
  - a. Change the case Owner
    1. Select Queues from the drop-down
    2. Select Infrastructure
    3. Click Change Owner
4. Copy the case number, adding it to the project task for the AWS Spin Up task to track progress

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