SAF USER GUIDE

HOW TO GUIDES
Select the quick link from the below list

How to register your organisation

How to assign a Master Administrator

How to set up new branches/sites

How to set up and archive users

How to assign the SAF Expert test

How to check total test passes for your organisation

How to check the user progress and test status of your users

How to Apply for SAF Approved Status

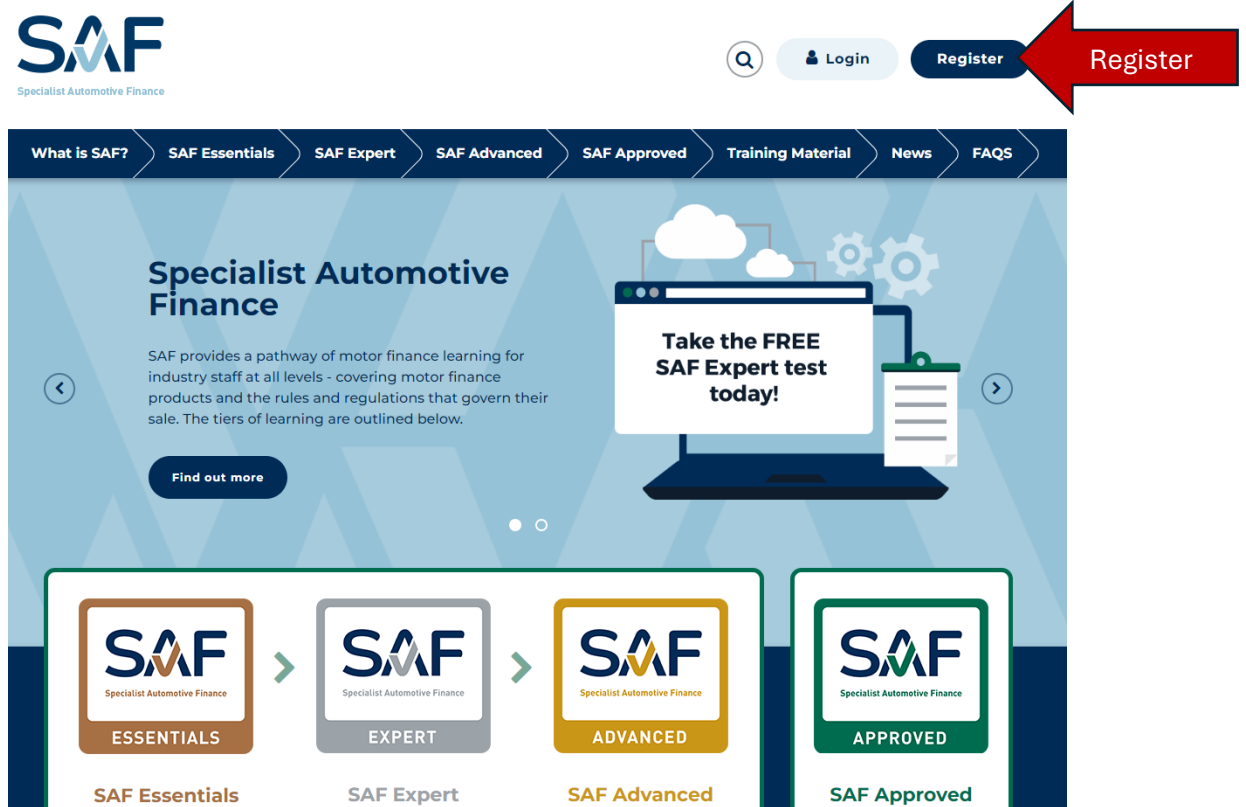**Where to find your company SAF Approved Certificate**

How to unlock a failed SAF Expert test
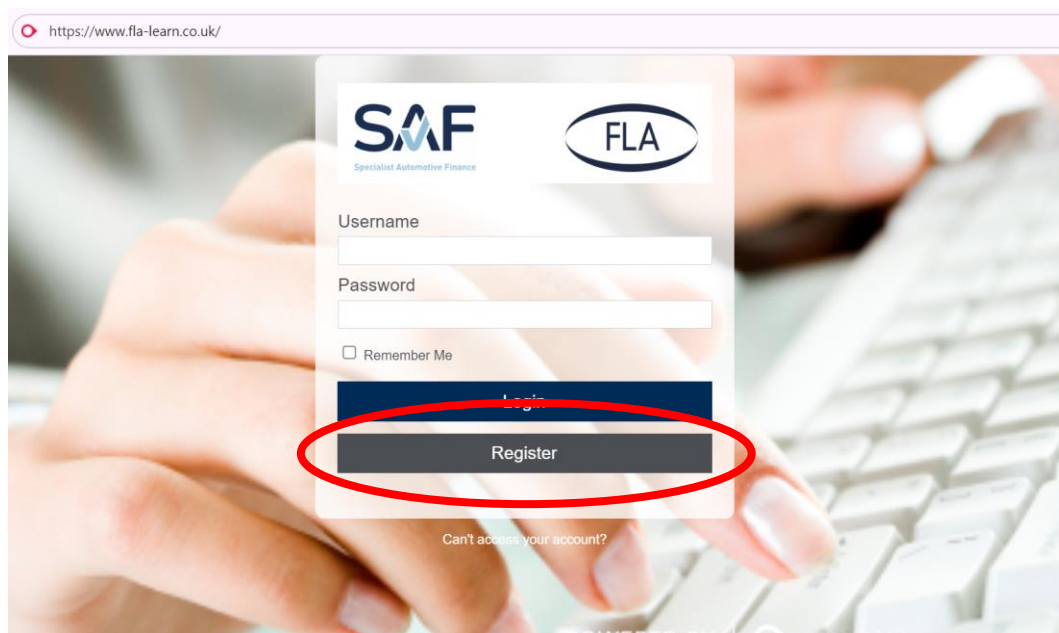
How to change a user's branch

August 2024

How to Register your company for a SAF account

1. Either go to www.fla-learn.co.uk OR from the SAF website www.specialistautomotivefinance.org.uk, click on "Register" on the top right corner of the screen.

2. You should see the below page. Press "Register"

3. Enter your Organisation name, your company FCA Firm Registration Number (FRN) and select your country.

4. Enter your name and email address and create a password.

5. Click on "Create Account" and this will log you in, ready to set up your "Master Administrator" and your users.
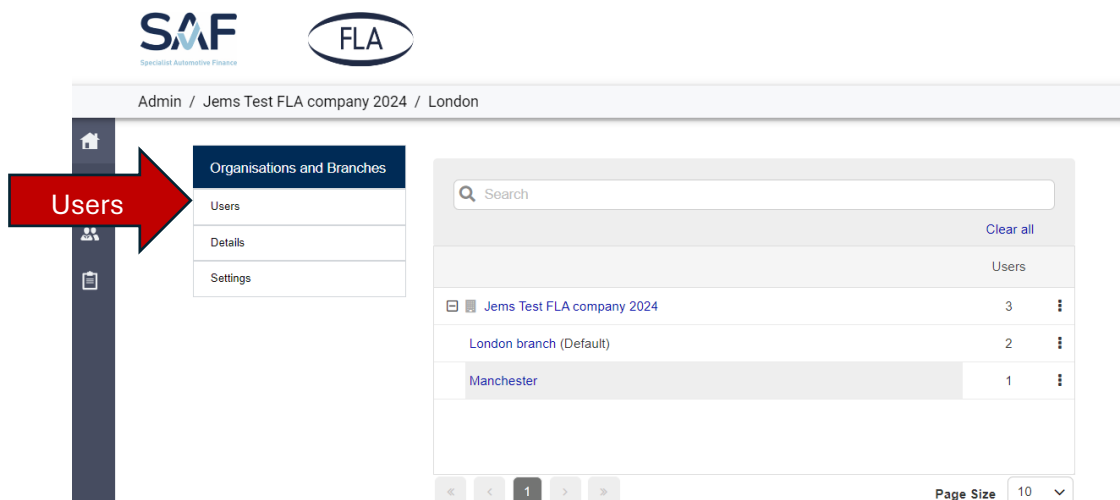
Assign a Master Administrator

Master Administrators have access to the Company SAF Approved Compliance Statement. **There should only be one Master Administrator per organisation**. Multiple master administrators will cause confusion as to your company SAF Approved status.

> **Please note,** if you are SAF Approved and you are changing the master administrator, please ensure the new Master Administrator makes a note of the SAF Approved renewal date. The new master administrator will not receive the reminders to renew this, as the form is tied to the person who completed it last.

1. Log in to your account and click on "User Admin"
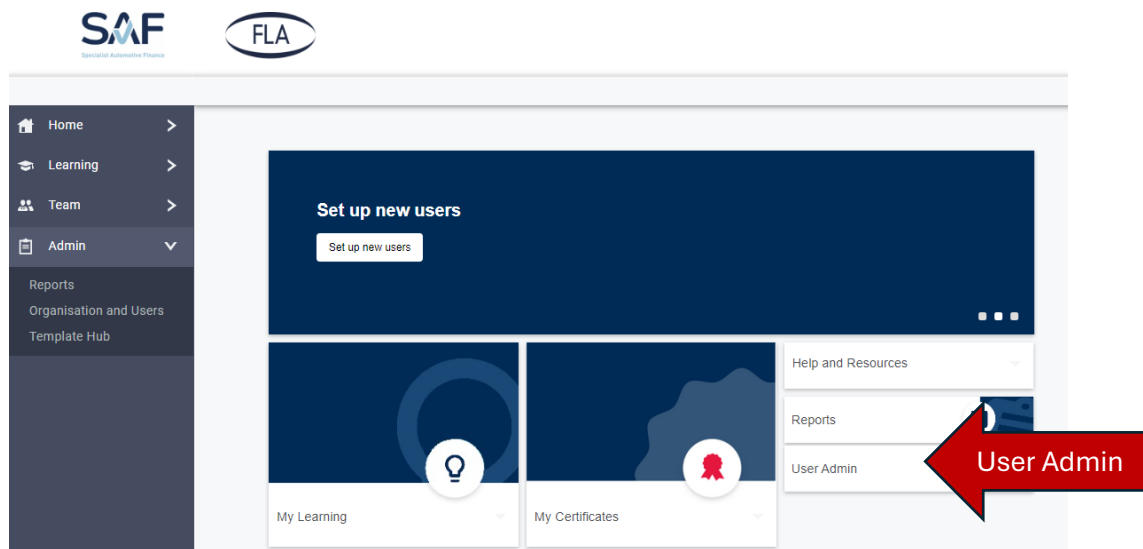
2. Click on "Users" on the left hand menu

3. Click on the username of the person who you want to make the "Master Administrator". This will open their user record.

Click on username to open record

4. Select "Master Administrator" on the left hand menu

Click on "Master Administrator"

5. Click on either the plus symbol, or the "Assign Category" button
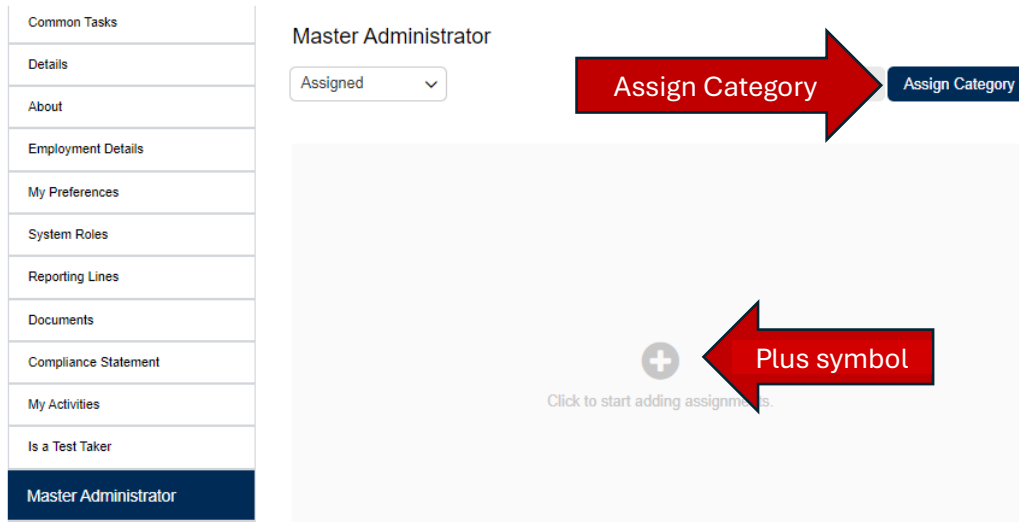
6. Double click on "Yes" or drag "yes" to the right "Selection" column on the right.
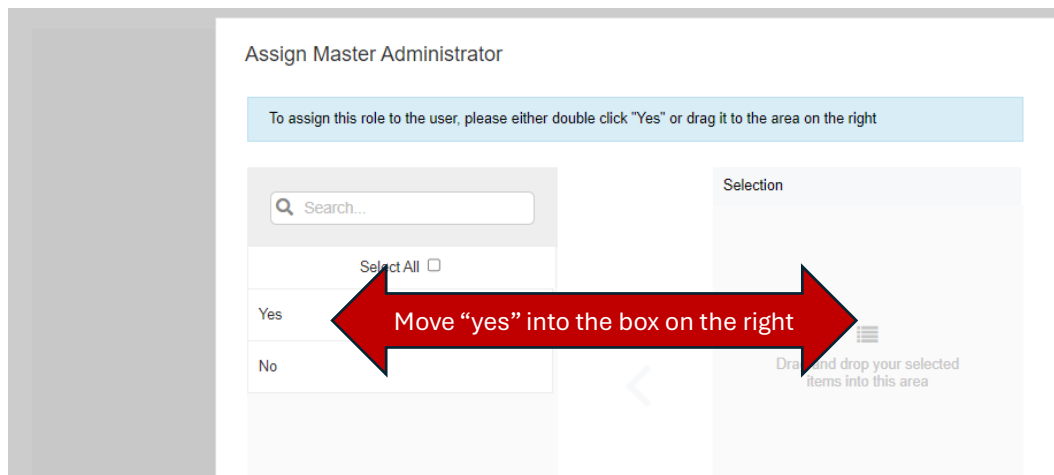
7. Press "Confirm"
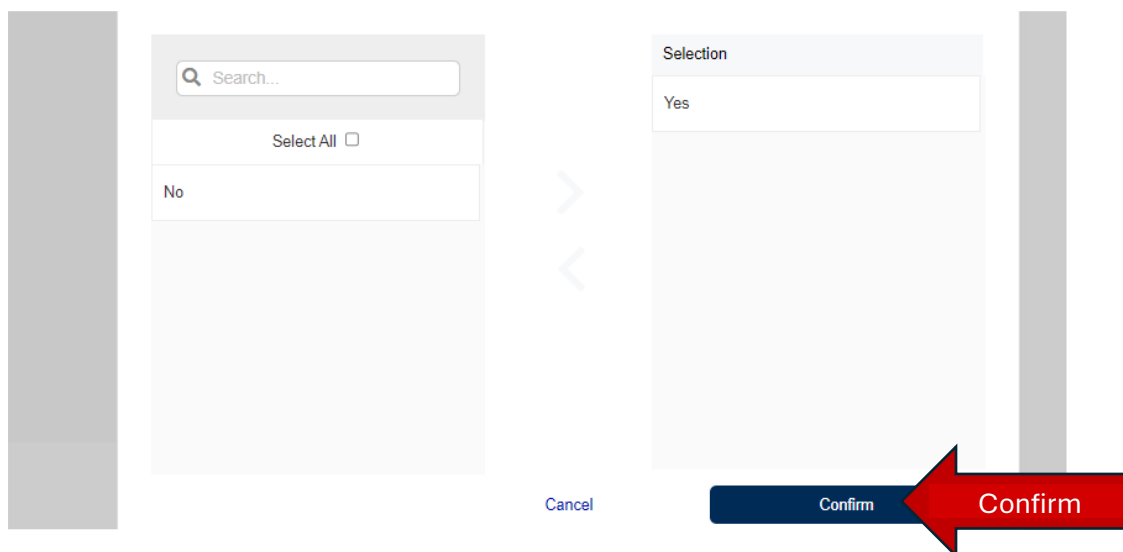
How to set up branches/sites on your account

You can set up multiple branches/sites on your account by following the below instructions.

Please note, when you apply for SAF Approved Status, this is for ALL branches/site for the company (as it is registered with the FCA).

1. Log in and click on "User Admin" from the home page or "Admin – Organisation & Users" from the left hand menu.
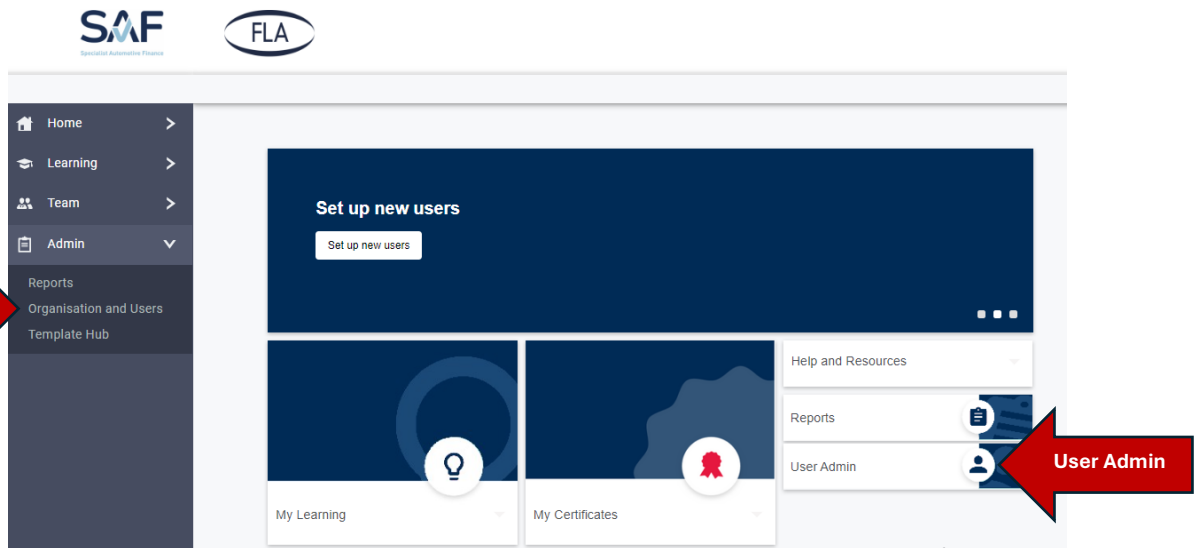
2. Click on the three little dots to the right of your company name and click on "+Branch"
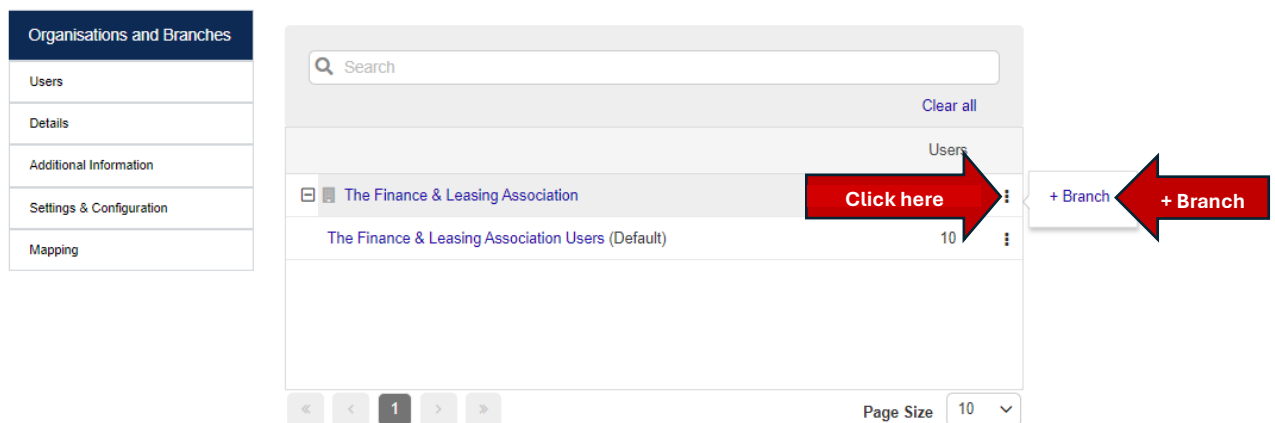
3. Enter your branch/site details and press "save"

Users

Details

Additional Information

Settings & Configuration

Mapping

New Organisation Branch

Name

FRN

Type

Division ▾

Identifier

Place or Building Name

Street Address

City

Postcode

Country

Save   Cancel

Page S

How to set up and archive users

Administrators can set up new users and archive users who have left.

To set up a new user record:
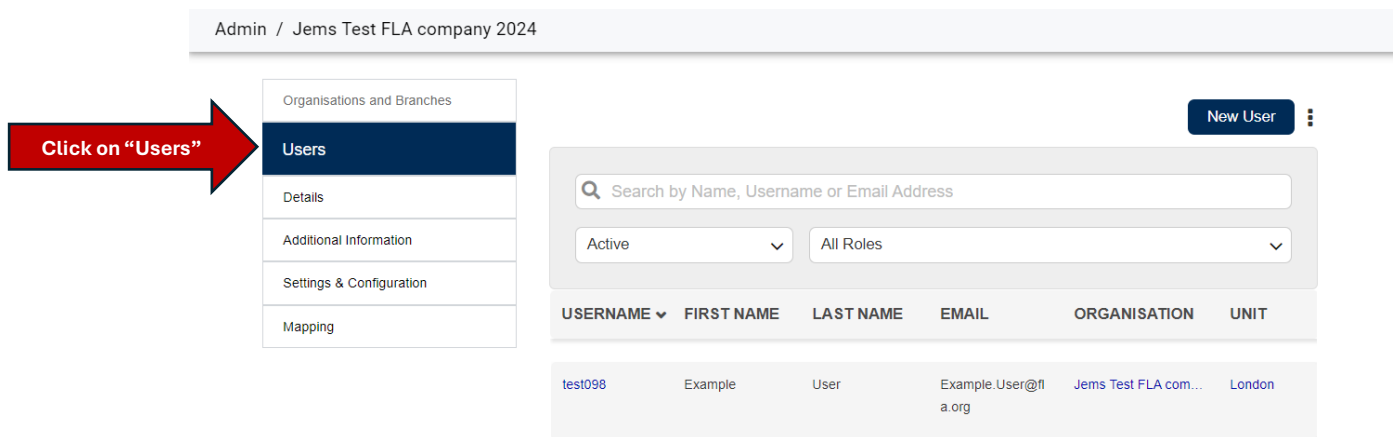
1. Please log in and click on "**User Admin**" from the dashboard. You can also access this page by clicking on "Organisation and Users" on the left hand menu.
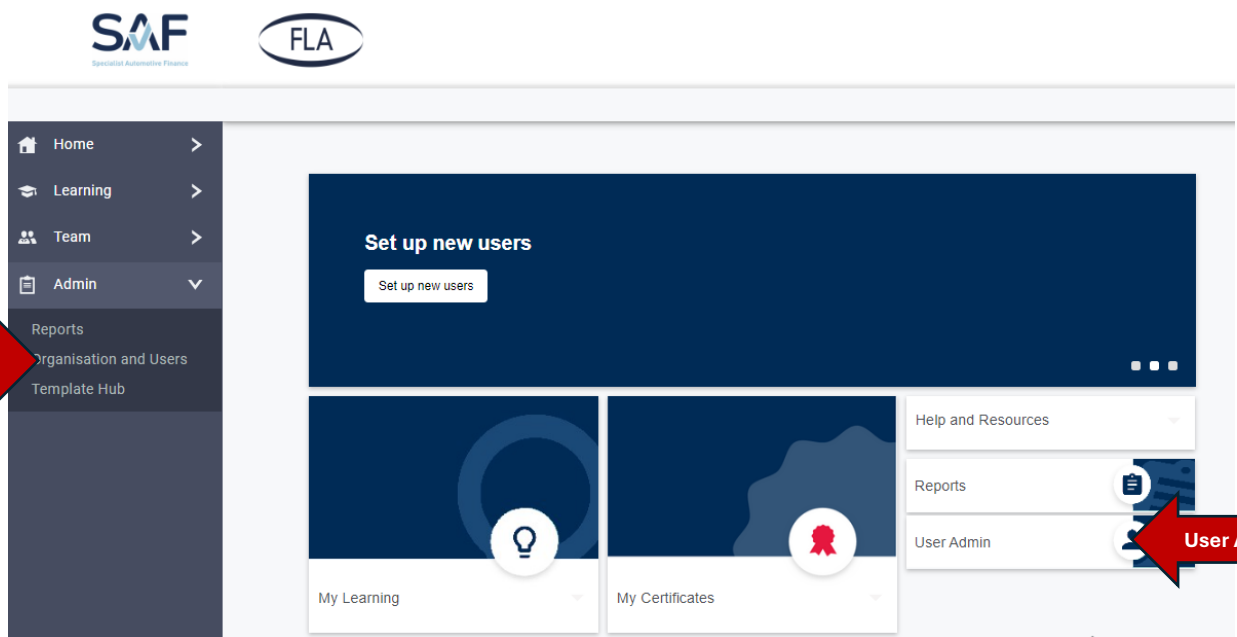
2. Click on "Users" on the left hand menu.

3. Click on the "New User" button on the top right hand corner

Admin / Jems Test FLA company 2024

Organisations and Branches	New User ← **New User**
Users	
Details	🔍 Search by Name, Username or Email Address
Additional Information	
Settings & Configuration	Active ▼ All Roles ▼
Mapping	

USERNAME ⌄	FIRST NAME	LAST NAME	EMAIL	ORGANISATION	UNIT
test098	Example	User	Example.User@fla.org	Jems Test FLA com…	London

4. Fill in the form with the users details and press Next.

You will need to create a unique "Username". We recommend using the users email address.

*be cautious that your internet browser hasn't pre-populated your password in the password box. Please leave the password box blank to provide the user with a system generated password

Step 1 Details

Step 2 Confirmation

First Name

Last Name

Use the users email address as a Username →

Username ⓘ

Email Address

Password ⓘ

Please leave the password fields blank if you would like to provide the user with a system generated password.

Confirm Password

Role

If a role is not selected the user account will be created with the default user role.

☐ Reporting Administrator

☐ Content Creator

☐ Trainer

☐ Administrator

Organisation and Branch
Jems Test FLA company 2024 > London branch Change Branch ⓘ

Next   Cancel

Reporting Administrator will allow the user to view Reports

Administrator will allow the user to view the administration pages and the reports

Content Creator and **Trainer** do not do anything, please leave these blank.

5. Check the correct branch is selected, or change branch if required.

Please leave the password fields blank if you would like to provide the user with a system generated password.

Confirm Password

Role

If a role is not selected the user account will be created with the default user role.

☐ Reporting Administrator

☐ Content Creator

☐ Trainer

☐ Administrator

Organisation and Branch

Jems Test FLA company 2024 > London branch Change Branch ⑦ **Check/Change branch**

Next → Next Cancel

6. Press "Next"
7. Check the details are correct. Select the check box to send a registration email to the user. The registration email will contain their log in information.

Step 1	Details
Step 2	**Confirmation**

First Name
Example

Last Name
User

Username
Example.user@email.com

Email Address
Example.user@email.com

Password
(hidden)

Organisation
The Finance & Leasing Association

Organisation Branch
The Finance & Leasing Association Users

Role
Default user

Tick the box to send a registration email → ☐ Please tick the box if you want to send a registration email to user. ⑦

Previous Finish Canc **Finish**

8. Press Finish

Assign the test to your user

Administrators can Assign or Un-Assign the test from any user by editing the users "is a test taker" category.

1. Please log in and click on "User Admin"
2. Click on "users" and search for the user for whom you want to assign/un-assign the test.

Admin / Jems Test FLA company 2024

	Organisations and Branches				New User ⋮

Click on "Users" →

Users

Details

Additional Information

Settings & Configuration

Mapping

🔍 Search by Name, Username or Email Address ← Search for a user

Active ▾   All Roles ▾

USERNAME ⌄	FIRST NAME	LAST NAME	EMAIL	ORGANISATION	UNIT

Click on their username →

test098   Example   User   Example.User@fla.org   Jems Test FLA com...   London

3. Click the users "username" to open their user profile.
4. Select "Is a Test Taker" from the left hand menu
5. Click on "Assign Category"

Common Tasks

Is a Test Taker

Click "Assign Category" →   Edit   **Assign Category**

System Roles

Reporting Lines

Documents

Compliance Statement

My Activities

Click on "Is a Test Taker" →   **Is a Test Taker**

Master Administrator

Categories

Certificates

➕
Click to start adding assignments.

6. To ASSIGN the test, move YES into the selection box on the and press "Confirm"

Assign Is a Test Taker

To assign this role to the user, please either double click "Yes" or drag it to the area on the right

Search...

Select All

Move the "YES" selection into the box on the right

No

Selection

Yes

Cancel   Confirm   Click Confirm

7. Please note, it may take 15-20 minutes for this to update. Ask the user to log in and out again to prompt the update.

To Remove the Test from a user

Click on "Categories" on the left hand menu and un-tick the "Yes" box next to "Is a Test Taker" and Save Changes.

Common Tasks

2. Untick "Yes"

Employment Details

My Preferences

System Roles

Reporting Lines

Documents

Compliance Statement

My Activities

Is a Test Taker

Master Administrator

1.Categories   Categories

Certificates

Below is a list of categories which have been assigned to this user. Use the search box below to add the categories, or un-tick the ones that are listed to remove them.

☑ Yes   Is a Test Taker

Save Changes   3. Save Changes

Filter   Go

Group   All Groups

☐ Select all below

☐ No

☐ No

☑ Yes

☐ Yes

Assign Admin and reporting privileges to a user

1. Please log in and click on "**User Admin**" from the dashboard. You can also access this page by clicking on "Organisation and Users" on the left hand menu.
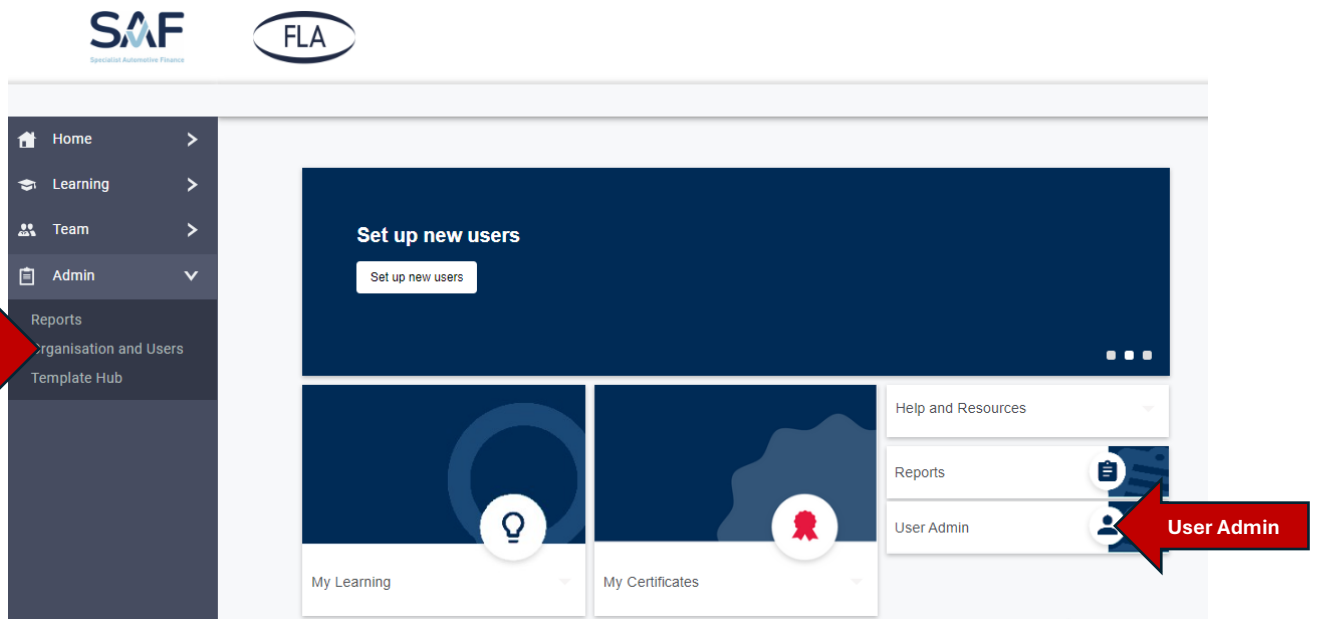
2. Click on the username of the person who you want to assign Administrator/Reporting privileges to. This will open their user record.
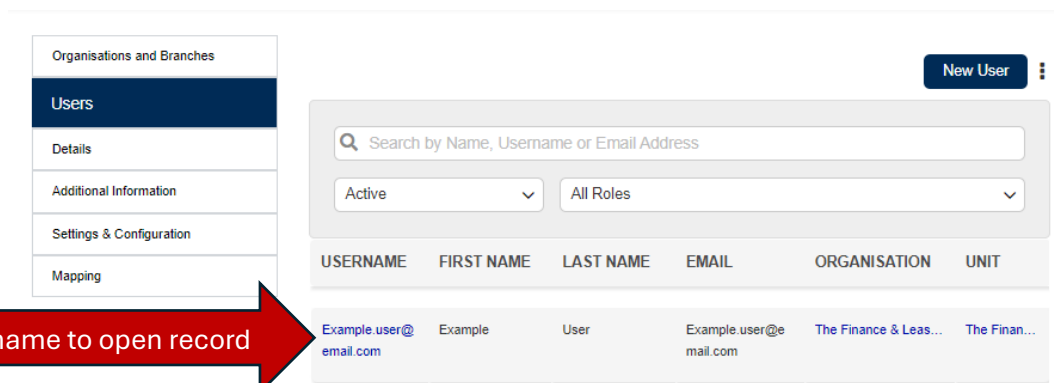
3. Click on "System Roles" on the left hand menu
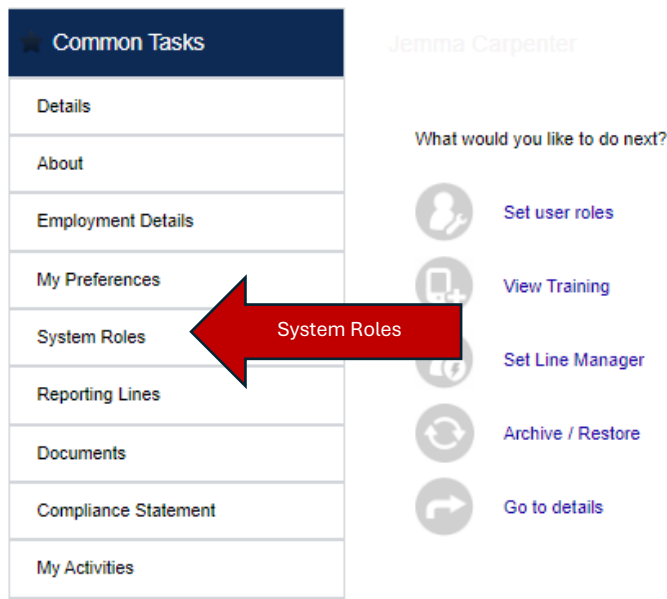
4. Select if you want the user to be an Administrator or a Reporting Administrator. An administrator can do admin, like set up users, as well as view reports, a reporting administrator can only view the reports. They will only be able to see the users in their "reporting scope".
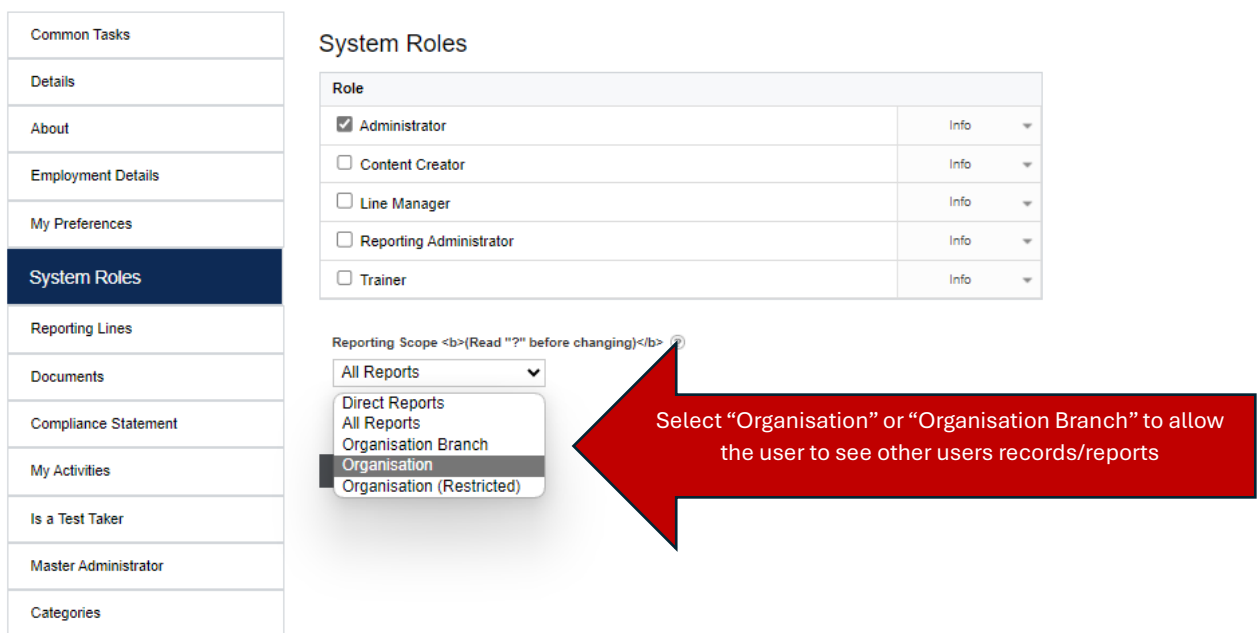
5. Please ensure you select the correct "Reporting Scope".

Reporting Scope

Organisation = views all user records within the organisation.

Organisation Branch = views only users within the same branch as the user.

Direct Reports and **All Reports** will not give the user access to see any user records. Please do not select these options if you want the user to view admin/reports.

How to check total user passes for your organisation

Before you apply for SAF Approved status, you need to ensure that all eligible users within your company (all employees involved in the sale or provision of information of motor finance), have a valid SAF Expert certificate.

Please note, only users who have been set as either "Administrators" or "Reporting Administrators" can view the reports. Check this setting within "User Admin".

1. Log in and click on "Reports", either from your dashboard or from the left hand menu
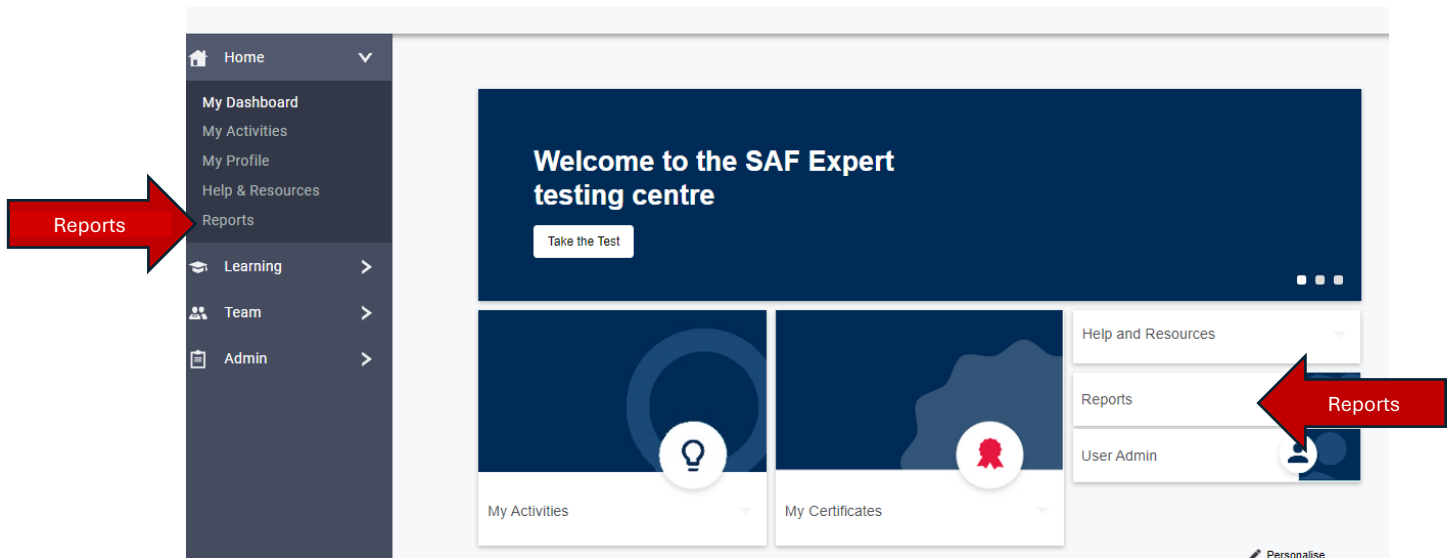
2. Click on "Organisation Completion stats".
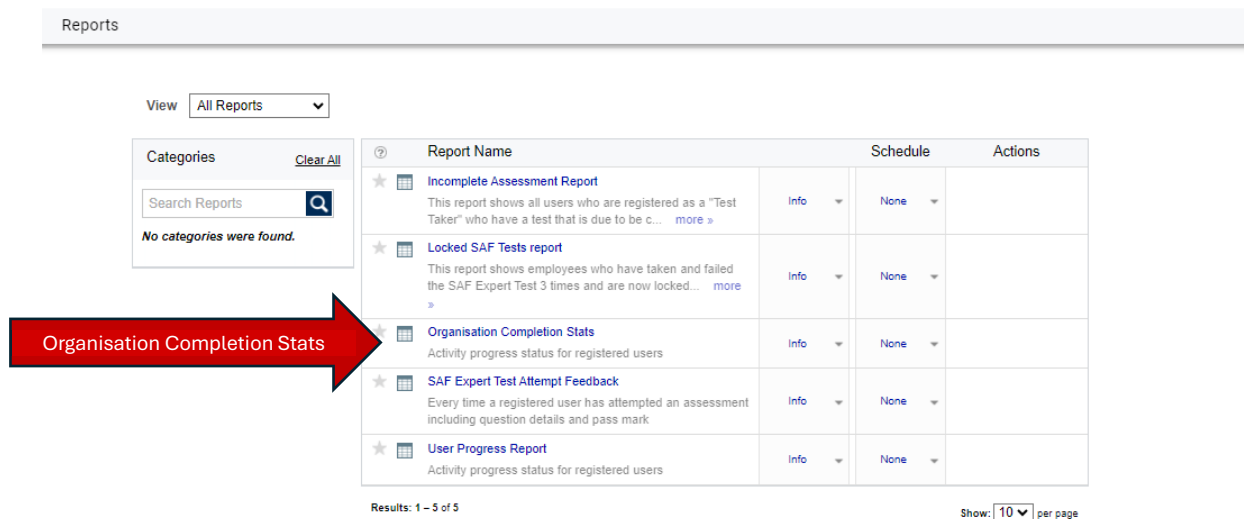
Here you can see how many users in total are Certified, Expired, Due to expire and Not Certified.

Your total staff passes, will be the number of "Certified" PLUS the number of "Due to expire".

If ALL of your eligible users have a valid certificate, you are eligible to apply for annual SAF Approved status.

How to check the test status of your users

Please note, only users who have been set as either "Administrators" or "Reporting Administrators" can view the reports. Check this setting within "User Admin".

3. Log in and click on "Reports", either from your dashboard or from the left hand menu
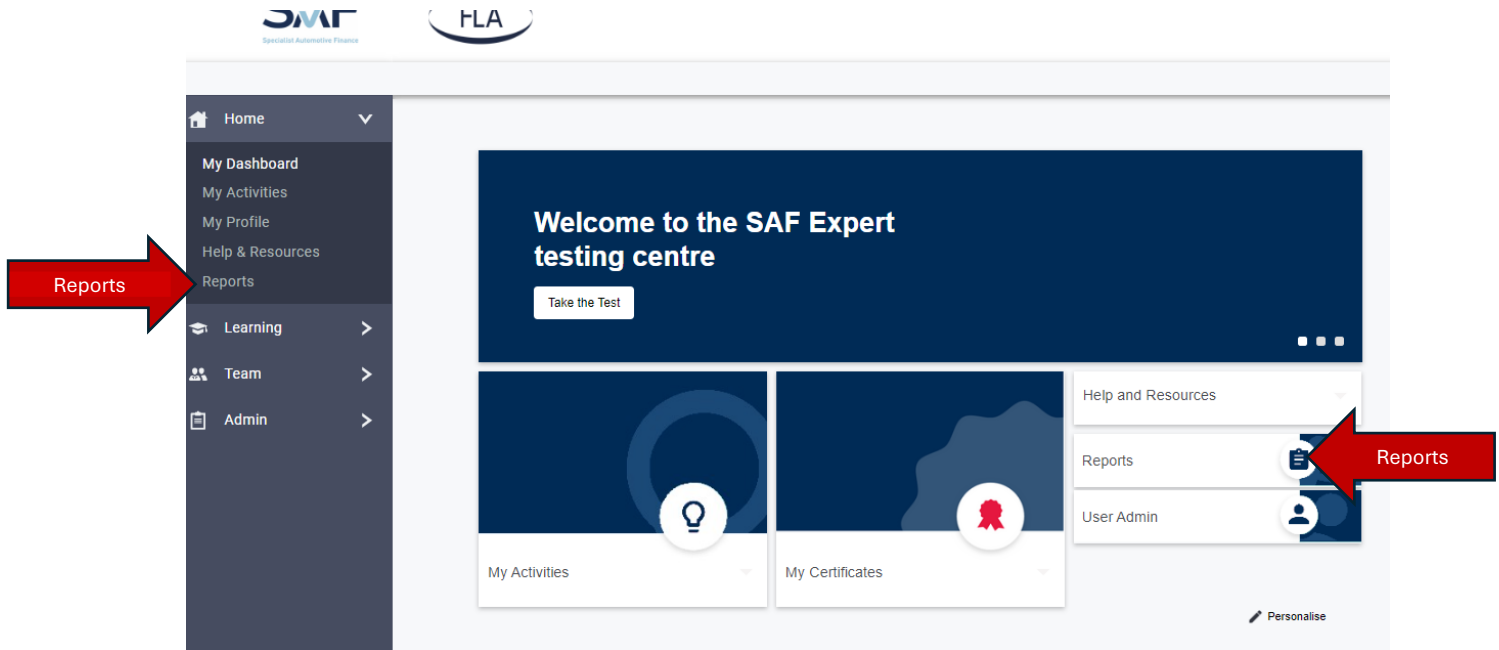
4. Click on "User Progress Report"
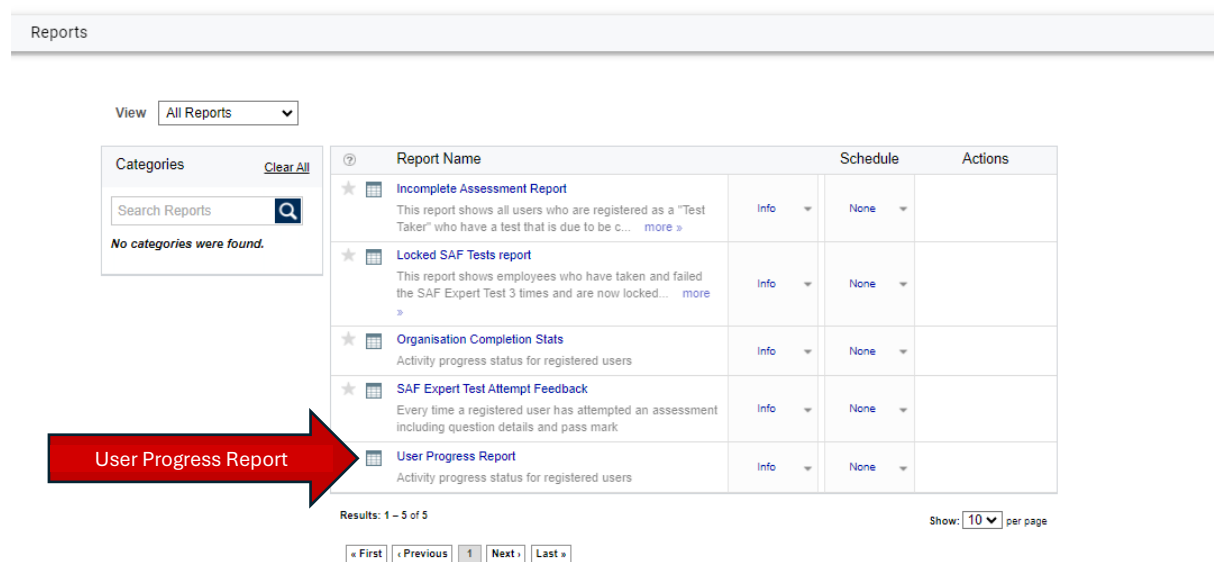
You will see the users on your report on screen, and this will detail if the user is currently "certified" or if their certificate has expired or not been attempted.

We recommend downloading the report onto a spreadsheet so you can check that all of your users are certified.

5. To download the report, please select the file type (eg XLSX (Microsoft Excel)) and press "Go".

When the report is in a spreadsheet like Excel, you are able to sort the spreadsheet by "Certificate Expiry Status" (column F) to see which of your users are certified.

How to apply for Company SAF Approved Status

Only users who are set to the MASTER ADMINISTRATOR will have access to the compliance statement. Please ensure only 1 user is allocated master administrator status to avoid duplicate applications.

To apply for annual SAF Approved Status for your Organisation, you are required to complete and return a statement of compliance to the FLA.

SAF Approved status is granted for the whole organisation, not by branch/site.

You will be asked to complete a declaration to confirm the total number of customer facing staff are in the organisation, who are involved in the sale, or provision of information of motor finance. All of these users must have a valid pass to be awarded SAF Approved status.

You will be asked to declare that you will ensure that all eligible staff within your organisation, pass the SAF Expert test within 4 weeks of joining/previous test expiry.

Before you apply:

1. Establish the total number of "SAF Eligible staff" your organisation has (this is the total number of all staff who are involved in the sale, or provision of information of motor finance)
2. Ensure all of your eligible staff have been set up on the SAF Assessment system and have a valid SAF Expert test pass (confirm by checking the user progress report).
3. Have your FCA Firm Registration Number (FRN) to hand (we use this to accurately report to the Finance companies as to which organisation are SAF Approved).

How to apply:

When you are ready to send in your SAF Approved compliance statement, please follow the below instructions:

1. Log in to your SAF Expert account.
2. Click on "My Learning"
3. Select and open the SAF Approved Statement of Compliance

4. Complete each section of the form. You will need to enter your organisation name as it appears on your account, your FCA Firm Registration Number (FRN) and select which finance companies your organisation uses. You will also need to declare the total number of "SAF Eligible users" your organisation has here.

5. Submit form to The FLA
6. The FLA will either,
   a. Approve the form. You will see in your "Completed activities that the form is now completed" **The due date will appear 4 weeks before this is due to be renewed**.
      OR
   b. Send it back to you for more information. You will need then to review the FLA feedback given (this might be that you don't have as many test passes as your declared eligible user number) and re-submit the form.
7. When the FLA are satisfied that you have enough valid SAF Expert test passes, they will sign off your compliance statement as "completed" and your form will be filed under "Completed" until it becomes due to renew.

How to find your SAF Approved company certificate

Please note, only the master administrator on the account can access the company SAF Approved certificate.

SAF Approved certificates are only available SAF Approved applications from 2024 onwards. If you were SAF Approved in 2023, your certificate from the Proficiency Solutions system is still valid until it's expiry date.

1. Log in to your SAF Account.
2. Either go to "My Profile" or click "My Certificates" from the home page
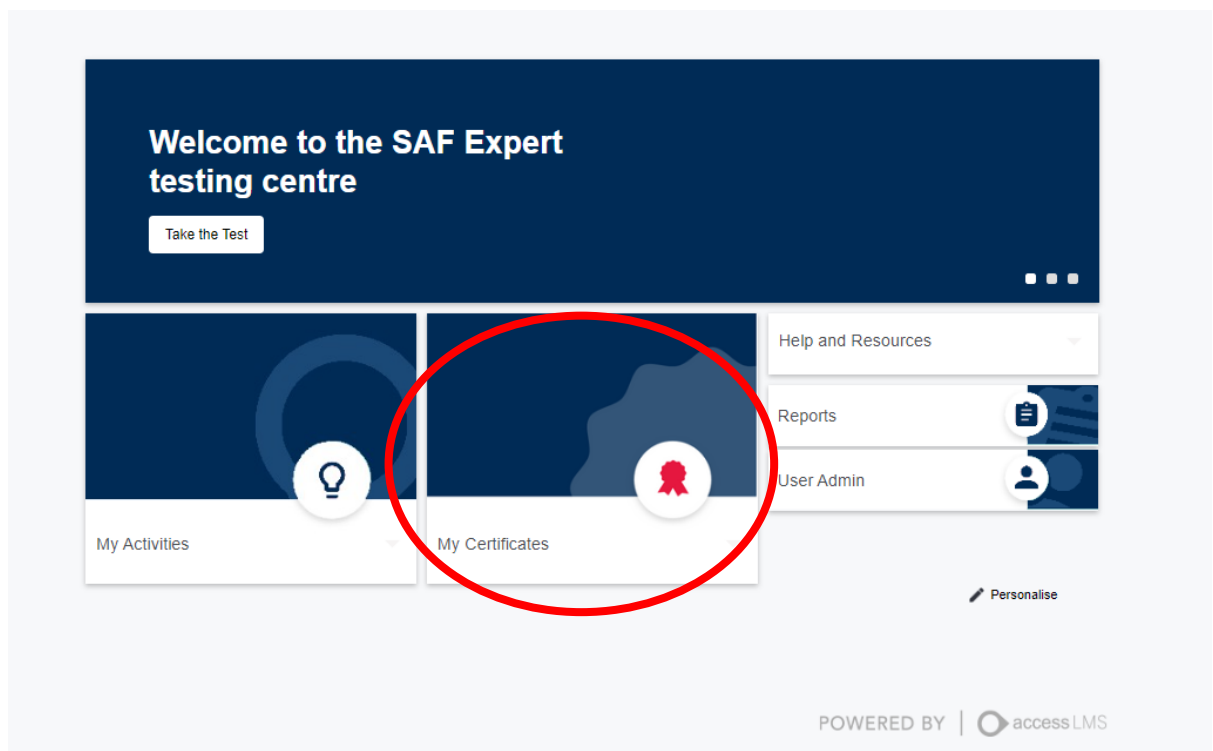
3. Click on "Certificates" on the left hand menu

4. Click on the green "print" icon

If there is no certificate there, and you are the master administrator, please see the "How to check if you're SAF Approved" guide.

How to Unlock a failed SAF test

If a user has failed the SAF Expert test 3 times, they will be unable to have any further attempts and the test will "lock".

Administrators will need to check the **locked SAF test report** to check if any users require their SAF test to be "unlocked".

Unlocking the test, will reset the users test status and they will have 3 further attempts.

HOW TO SEE WHO HAS A LOCKED TEST

Any administrator/Reporting administrator can view and open the "Locked SAF Tests report" from the Reports menu.

Users who have failed the SAF test 3 times and are now locked out will appear here:
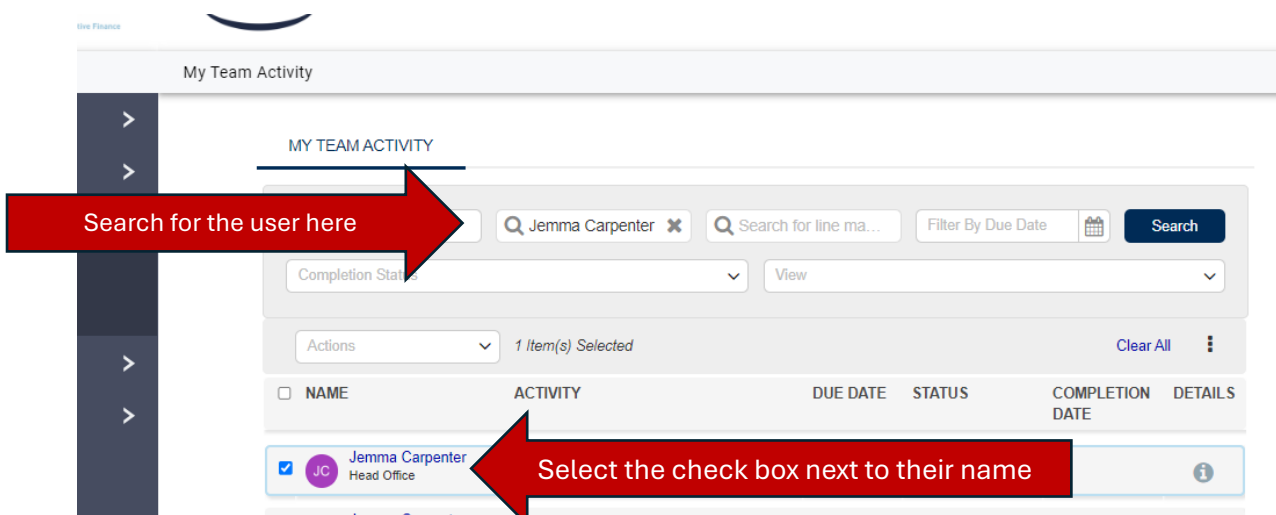
HOW TO UNLOCK THE USERS TEST

an administrator will need to log in and follow the below steps:

1. **Click on Team Activity**
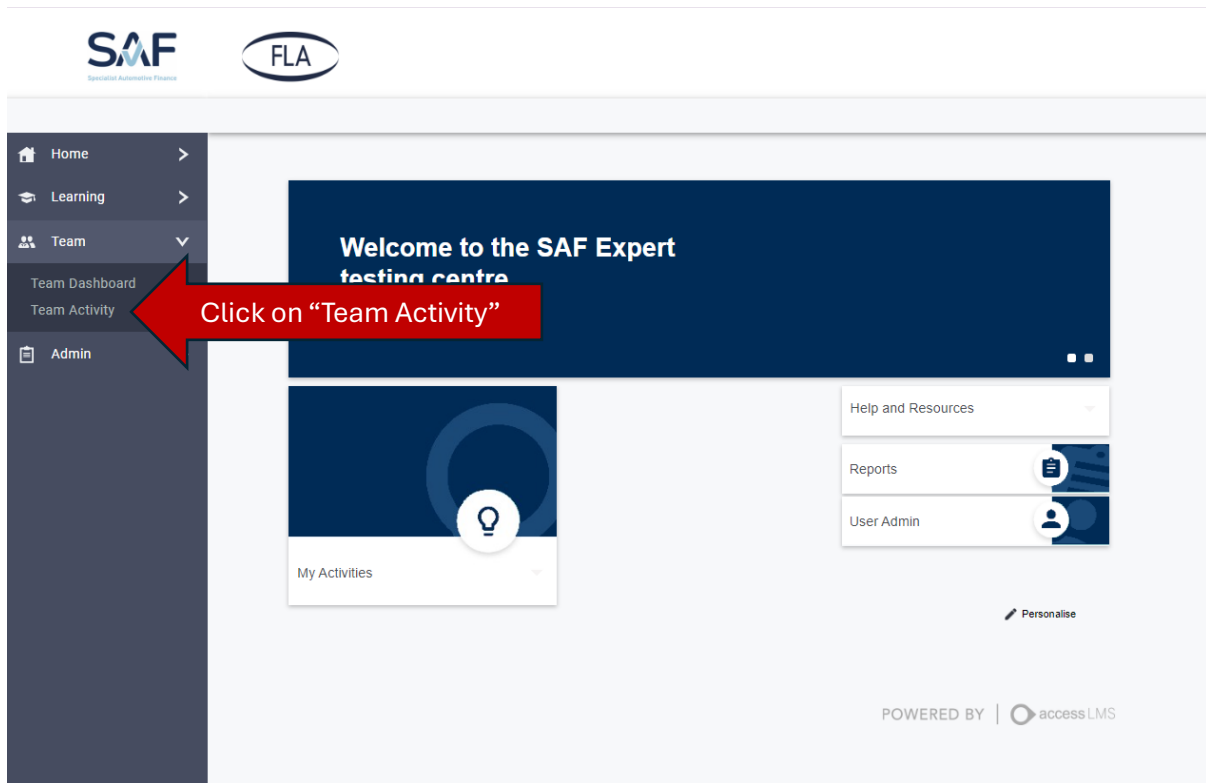
2. **Search for and select the user by ticking the checkbox next to their name**

3. **Click on the drop down "Actions" menu and select "Reset Status"**
   This will automatically reset the users test status to "Not Attempted" and they will be able to take the test 3 more times.

FYI

The user will get the below pop up notification if they try to take the test when this is locked.
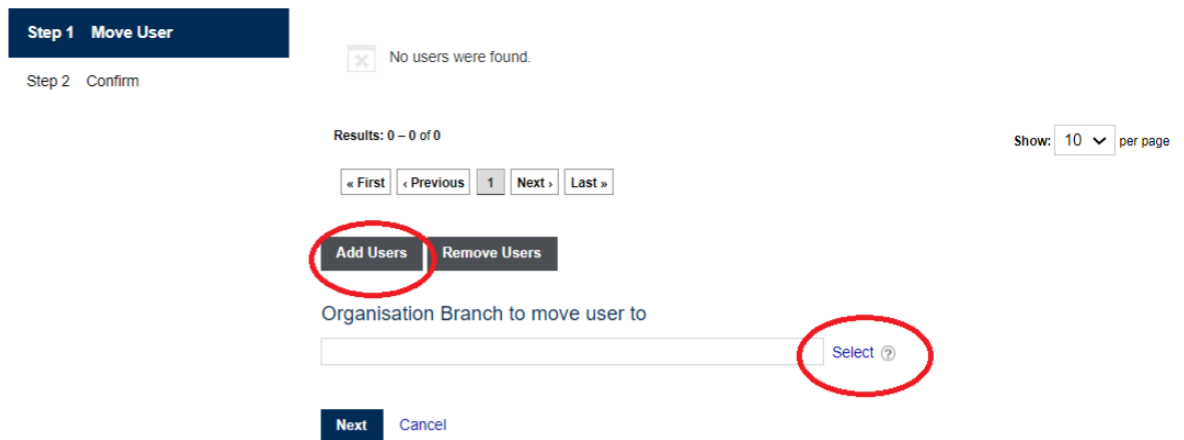
How to update a users branch/site within your company

Users can be moved by administrators set up on the account.

1. Please log in and click on "User Admin"
2. Here you will need to click on the 3 little dots located on the top right, next to the "New Users" button.
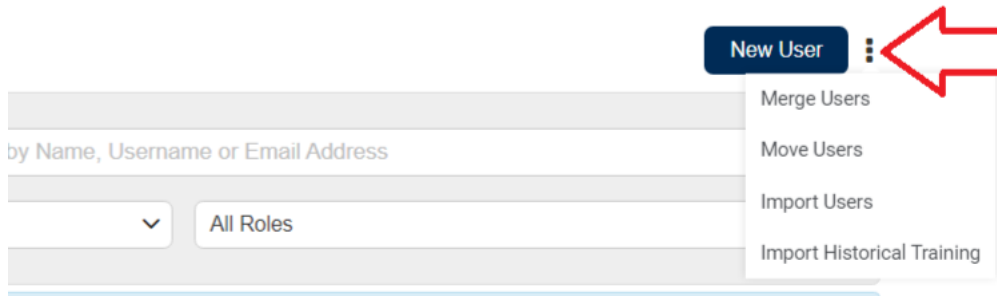
3. Click on "Move Users"
4. Select Add users and select the users you want to move.

5. Select the branch you want to move the users to.