

# How to Send Files Via the Portal Document Batch

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Note: To use the Portal Document Batch feature, you must set up the 'Document' email settings for 'Specify a Server'.

The purpose of Portal Document Batch is to allow you to send one file or multiple files to the portal users assigned to the plans within your batch.

*For example, if your firm sends a monthly newsletter, you can customize the files for portal users assigned to plans in your batch. You can also send multiple files to clients in a single batch.*

## Option 1:

To send the same files to all the plans within your batch:

1. Select 'Portal Documents' from the 'Batches' drop-down list on the home screen.
2. Create New Batch
3. Enter a Folder Name (optional). The file(s) that you send to the portal user will be in this folder.
4. Click on Add File to upload one file at a time.
5. Select a Classification (mandatory). When you add plans, only portal users who have permissions to the selected classification will display. You will have the option to choose a portal user if 'None' have permissions.
6. Check the 'ToDo' box if you would like the file(s) to appear in the portal user's ToDo list.
7. Expiration Date. You can add an expiration date for your client to be able to view the file(s).
8. You can enter a 'Message' to send in addition to the default email message.
9. Click on 'Add Plans' to select the plans you would like in the batch.
10. Once you have the batch set up with steps 1-9, you can Post your batch and if you wish to send e-mail invitations to your users, select the check box next to 'and send invites'. This will post files to all indicated plans at one time.

Batch Options

**Name:** SampleBatch Edit Name **Downloaded:** - **Posted:** Post Batch  
 and send invites

**Batch Type:** Portal Documents **Invited:** -

This form saves changes automatically.

**Email Template:** Default Upload Email Edit  Display email template in the portal?

**Folder:** Company Files Edit Folder List **Classification: \*** Other

**Files: \*** None **ToDo:**  Add to ToDo list

Add Files  **Encrypt** ?

Split zip file using plan IDs ? Edit File Format

Use the folders in the zip file  
[Plan File ID List](#) [Export Plan File ID List](#)

**Receive email confirmation when portal user downloads file**  
 Confirmation email default set to plan admin.  
**Confirmation Email Overrides**

Confirmation Name:   
 Default:  
 Confirmation Email:

**Expiration Date:**

**Description: \*** Monthly Newsletter

**Message:** Optional Information

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**2 Plans** Add Plans

	Plan Name	Portal Users	Customized	Posted	Invited	Downloaded
	ABC Company 401(k) Plan	<a href="#">ABC Company, +2 more</a>	<span>Not Customized</span>	<span>Post Batch</span>	-	-
	Example Company POST PPA	<a href="#">Jane Doe, +1 more</a>	<span>Not Customized</span>	<span>Post Batch</span>	-	-

## Option 2:

To customize files to all (or some) of the plans within your batch:

1. Follow Steps 1-9 under Option 1 above.
2. When you have added plans to your batch, you will see a 'Not Customized' button below the 'Customized' column. Click on the button to upload file(s) for the specific plan. Once you have 'customized' the plan and return to the 'Edit Batch' screen, the button will switch from 'Not Customized' to 'Customized'. Repeat this step for all plans you would like to 'customize'.
3. You may Post your batch and Send Invites once you have your file(s) uploaded.

## Customize Batch

Company: **ABC Company**

Plan: **ABC Company 401(k) Plan**

**Note:** The plan document options set below will only override the batch options if you have uploaded a file to the plan options below. If you specify a file, you must also specify a classification and description. If you previously uploaded a custom plan document file, clicking 'Remove' will remove it from the plan, causing it to use the batch settings again.

### Custom Plan Document

This form saves changes automatically.

Email Template:    Display template in the portal?

Folder:

Files: \* None   Encrypt

Receive email confirmation when portal user downloads file  
Confirmation email default set to plan admin.  
Confirmation Email Overrides

Confirmation Name:

Default:

Confirmation Email:

Classification: \*

ToDo:  Add to ToDo list

Expiration Date:

Description: \*

Message:

### Option 3:

To customize all plans within your batch using the Split Zip option:

1. Select Portal Documents from the Batches drop-down list on the home screen.
2. Create New Batch
3. Enter a Folder Name (optional). The file(s) that you send to the portal user will be in this folder.
4. Check the box to Split zip file using plan ids. The 'Add Plans' button will grey out.
  - Click on Plan ID List to view an online list of plan ids.
  - Click on Export Plan ID List to download the list of plan ids.
  - You will need to enter the plan id in front of the file names you plan to upload.
    - For example, Sample Plan will have the files 'sample.pdf', 'sample2.csv' and 'sample3.rtf' uploaded. The Plan ID for Sample Plan is "504883100". Before the files can be uploaded via split zip, the files must be renamed to include the plan ids '504883100-sample.pdf', '504883100-sample2.csv' and '504883100-sample3.rtf'. Next, the files must be zipped into a folder to upload. Click on "Add File" to browse for the zip folder.
5. Select a 'Classification' (mandatory). When you add plans, only portal users who have permissions to the selected classification will display. You will have the option to choose a portal user if 'None' have permissions.
6. Check the "ToDo" box if you would like the file(s) to appear in the portal user's ToDo list.
7. Expiration Date. You can add an expiration date for your client to be able to view the file(s).
8. You can enter a 'Message' to send in addition to the default email message.

9. Once you have the batch set up with steps 1-8, you can Post your batch at which time you will be able to view the plans you have added (based on the plan ids). Note: you may want to un-check the 'Send Invites' box when posting the batch. After you have verified that the plans have portal users assigned, you will have the option to send the invites.

Batch Options

Name: SampleBatch Edit Name Downloaded: - Posted: Post Batch  
 and send invites

Batch Type: Portal Documents Invited: -

💡 This form saves changes automatically.

Email Template: Default Upload Email Edit  Display email template in the portal?

Folder: Company Files Edit Folder List Classification: \* Other

Files: \* None Add Files  Encrypt ?  Split zip file using plan IDs ? Edit File Format  
 Use the folders in the zip file  
[Plan File ID List](#) [Export Plan File ID List](#)

Receive email confirmation when portal user downloads file  
Confirmation email default set to plan admin.  
Confirmation Email Overrides  
Confirmation Name:   
Default:  
Confirmation Email:

ToDo:  Add to ToDo list

Expiration Date:

Description: \* Monthly Newsletter

Message: Optional Information

0 Plans Add Plans

Plan Name	Portal Users	Customized	Posted	Invited	Downloaded
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