How to Send Documents to the Portal That Were Prepared in ftwilliam.com

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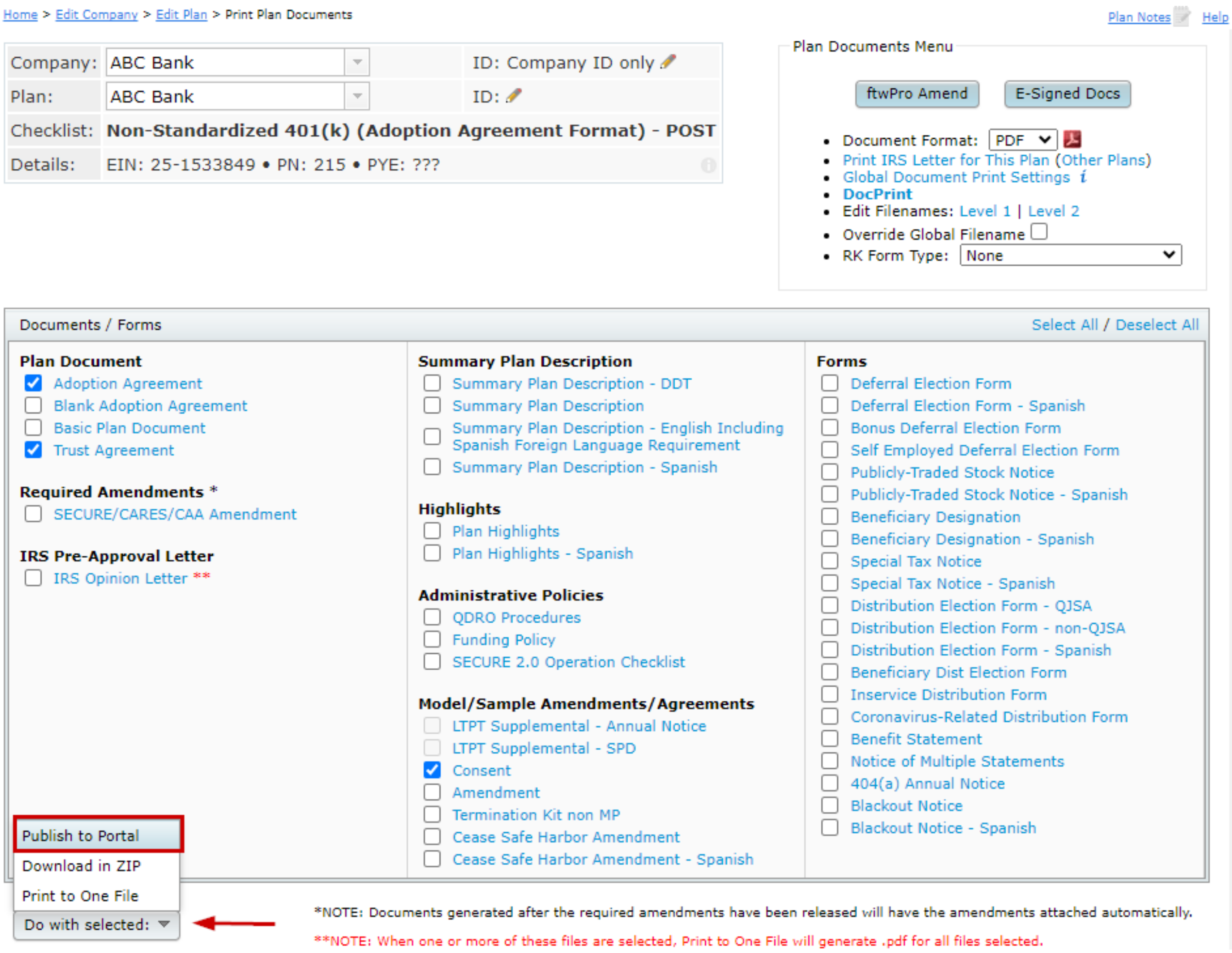
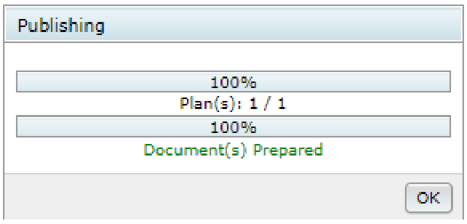
If you subscribe to both the Documents and Portal modules you may use the "Publish to Portal" option found on the "Print Plan Documents " screen to post files to the Portal.

To begin, select the Plan Documents module and indicate the items you wish to publish to the Portal, by putting a checkmark next to the intended document. **Note:** *You can select the document format: PDF or Word. The Plan Document, and any items marked for signature will always publish in PDF format.*

Once the documents to publish have been indicated, select the the “Publish to Portal” option within the “Do with Selected” button on the bottom left:



A new window will populate showing the documents have been prepared to send. **Note**: This step does not actually publish documents or send anything any notifications to Portal Users.

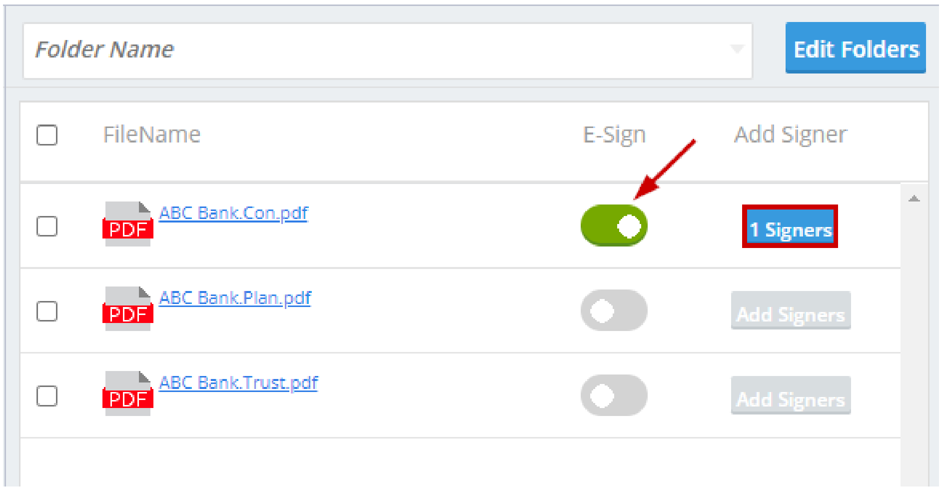


After selecting 'Ok', the Communications Manager screen will populate. Aside from first marking items for e-signature we recommend reviewing this screen from top to bottom.

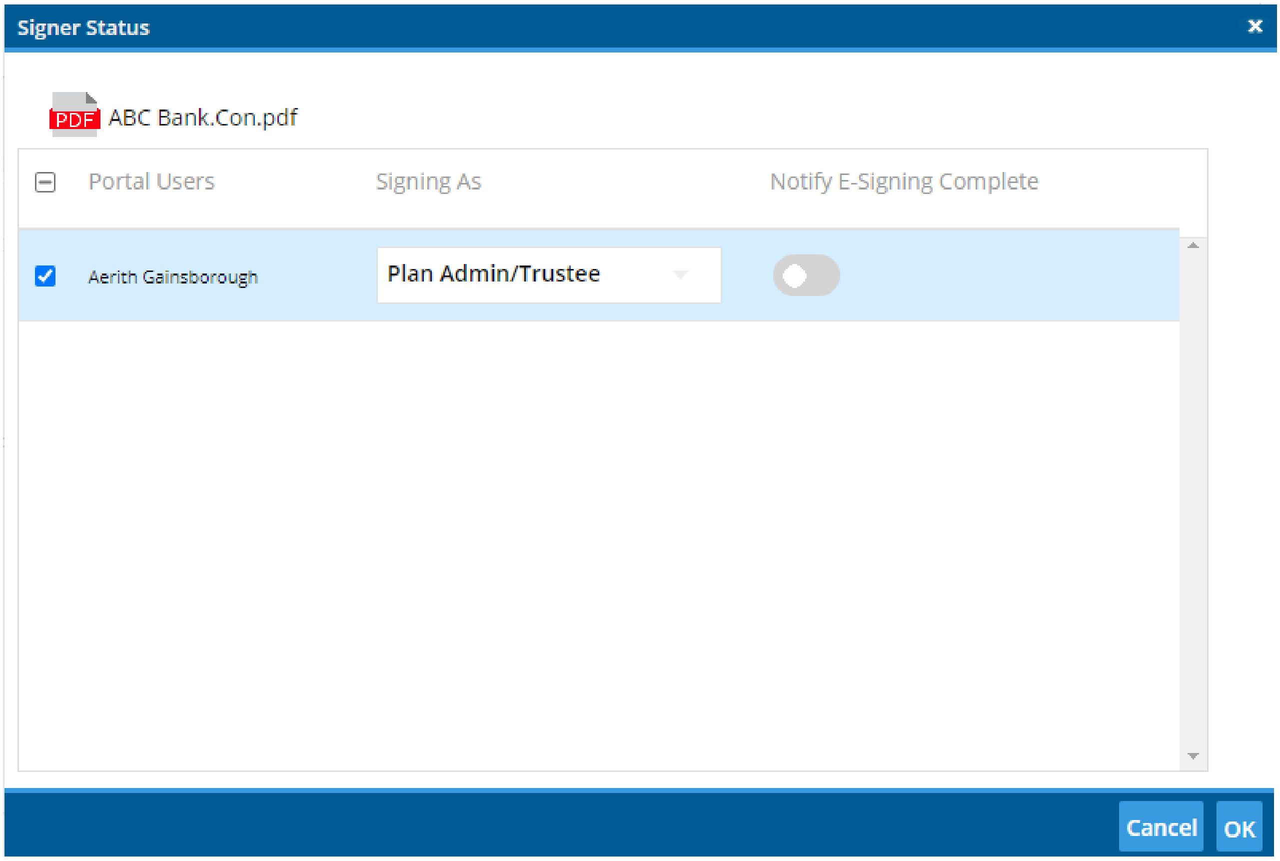
**** We recommend setting items for e-signature when applicable, prior to making other alterations as this will impact the available e-mail templates.**

A list of files that were selected in the Documents Module will appear to the right listed by the "File Name".

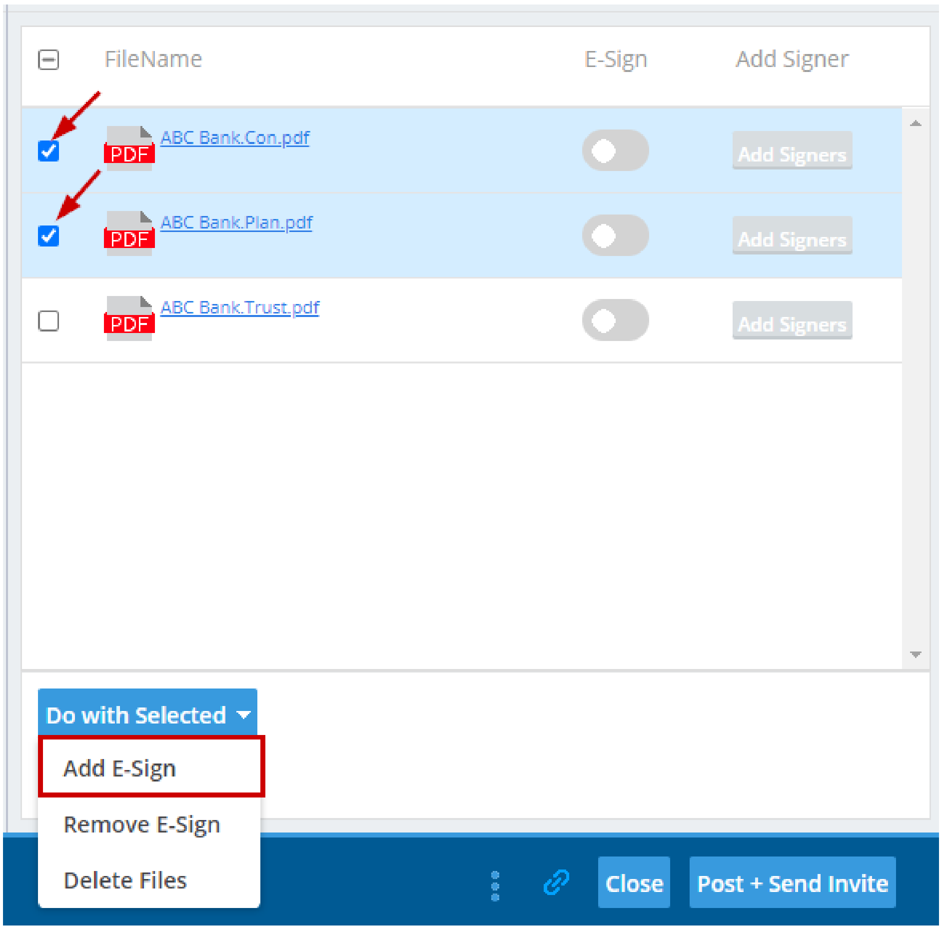
- **Setting Single Items for E-Signature:** If you wish to set e-signing per document, you may do so by selecting the e-sign toggle to the right of the document name. When this is selected the document will be converted to a .PDF, the toggle will turn green, and the number of available signers for the plan (those set with signing permissions) will populate to the right of the toggle:



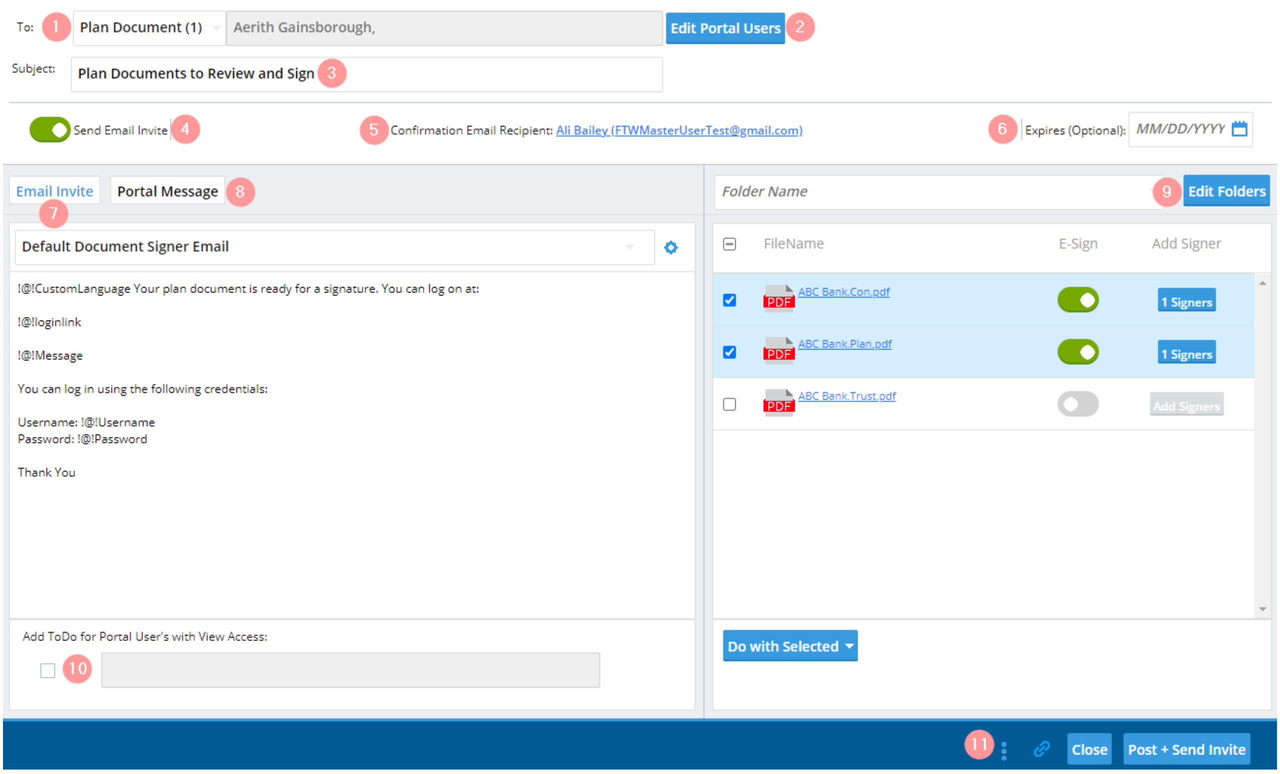
Selecting the "#Signers" button will open a window that allows users to see who is set for signing as well as their signing designations, other Portal Users may be added if needed, and set up additional confirmations (the confirmations are available if you do not have Global confirmations set for documents):



- **Setting Multiple Items for E-signature:** If you have multiple items you would like to mark for e-signature, you may select the check box next to the file name, then click on "Do with Selected", and "Add E-Sign". The Documents will then be converted to .PDF, the E-sign toggle will turn green, and you will see the number of available signers and their designations by selecting the "# Signers" button to the right as indicated in the above instructions for setting e-signature for individual documents.



If attachments are not marked for e-signature, or e-signature selections have already been made, we recommend reviewing the communication from top to bottom in the following order:



1. **Classifications:** If you are publishing more than one document with different types of "Classifications", the classification type of "Plan Forms" will be used. If you have just one type, for example, Amendments, the classification type of "Required Amendment" will be used.

2. **Edit Portal User:** The Users listed in the “To” field are those that have permissions to view the documents in the communication. You can add or remove user permissions by selecting the Edit Portal Users Link to the right of this field.

3. **Subject:** Each communication needs a subject for it to be sent.

4. **Send Email Invite**: This toggle option indicates whether a communication will be sent to the portal user that the items are available, or you can choose to simply publish the items to the portal without sending them an email invitation.

5. **Confirmation Email Recipient**: This field indicates who will receive a confirmation that the Portal User has downloaded or e-signed the documents in the communication (this will either be the Admin associated with the plan or the Master User on the account)

6. **Expiration Field**: this field allows you to set an expiration date. Once this date has passed these documents will no longer be on the Portal Users Portal. (this is an uncommon field, as most users would like their portal users to have access to these documents in an ongoing basis).

7. **Email Invite:** This is the field that indicates what template to use when sending the invitation to your portal user to inform them they have items to review or sign. You can select from system generated or custom templates by selecting the dropdown icon in this section. You are also able to create or edit templates by selecting the gear icon to the right of the template dropdown. You also have an option to add information to the

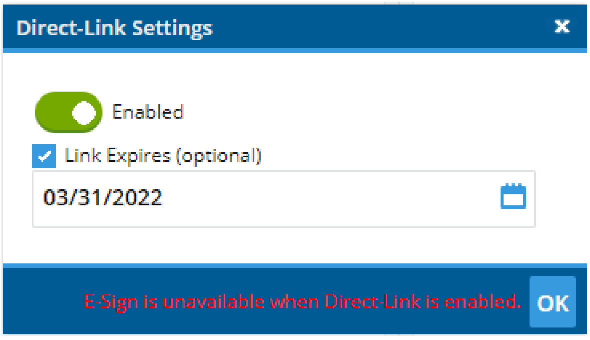
8. **Portal Message**, which is the message that displays within the portal view for your users. This can be left blank, you may be able to enter a custom message, or you can elect to have the e-mail invitation copied to the Poral messages by marking the indicated box below.

9. **Folder Name:** This allows you to specify a folder for the documents you are publishing to portal. This is often used to help organize documents by specific years or item type.

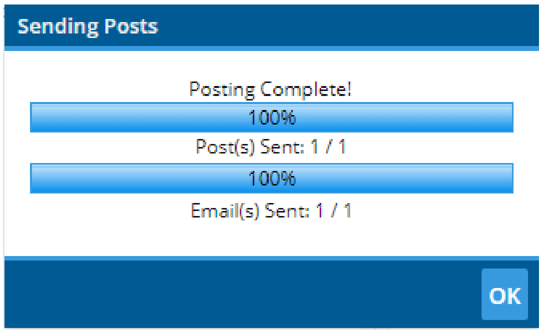
10. **Add ToDo with Portal Access:** Users can add non-action items to a client’s ‘To Do’ list, triggering reminders, if set in Global Email Settings. E-signing tasks will appear on the To Do list, but viewing the document for non-signers will not unless the box is checked.

11. **Finishing Options/ Post + Send**: The tricolon allows users to preview the communication before posting and sending them. The Direct Link option (indicated by to linked chains) lets Portal Users access documents within the communication without logging into the portal. When enabled the link will turn green. **Note: Direct Link cannot be used when sending items for e-signature.**

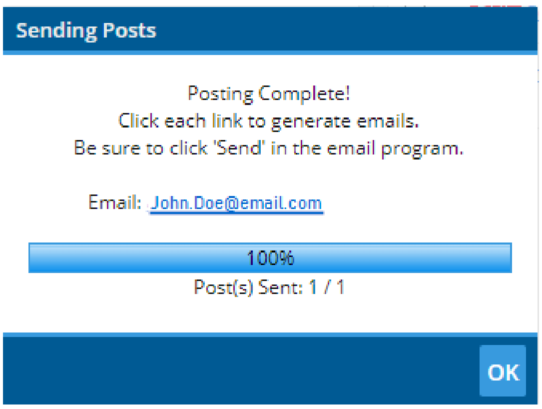
When Using Direct Link, you can also set an expiration for how long the link is viable:



Dependent upon your e-mail settings, and which option you choose, you will receive a pop-up progress bar window. In the following instance documents were published to portal and an e-mail communication was sent using the Specify a Server settings:



If you are utilizing the Preparer's Email settings when sending communications, the progress window will populate with e-mail addresses to select to send the communication. **You must select the email hyperlink on this window to open the email and send to your clients**:



When you select the Email address from the progress window, the e-mail will populate in your e-mail provider for you to send:

Send

To John.Doe@email.com

Cc

Bcc

Subject Your Plan Document is Ready to Be Signed

Your plan document is ready for a signature. You can log on at:

https://www.ftwilliam.com/cgi-bin/sp.cgi?id=TI3PE22&addl=6eb4181e-9341-11ec-b9ea-000d3aeed00b

You can log in using the following credentials:

Username: ExampleUser
Password: Lost password? Use the 'Forgot Password' link on the login screen to reset your password.

Thank You