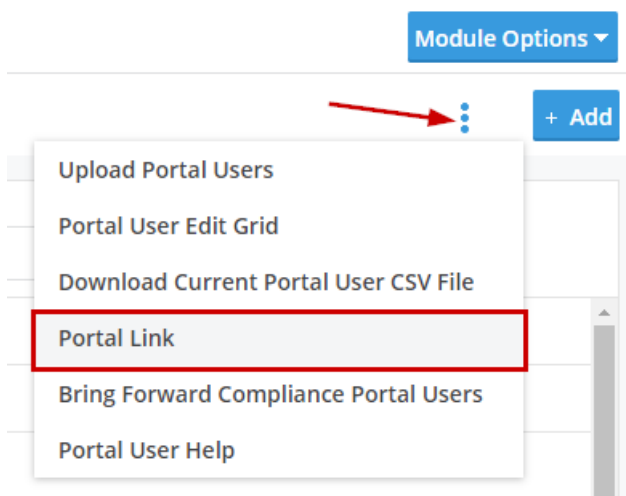


How to Find the Correct URL to Use on Our Company's Website

07/29/2024 4:03 pm CDT

If you wish to have a central location for your clients to log into the portal from your company's website, there are a few different ways to obtain a link.

1. The link can be accessed from the Global or Plan level dashboard by selecting the menu icon (tricolon) above the grid:



2. 5500 customers can select any company/plan and go to a specific plan year to click on "Portal Link". You can use this link for your website. See Option 3 below if you have divisions.

Company:	ABC Bank	ID:	Company ID only
Plan:	ABC Bank	ID:	
Checklist:	Non-Standardized 401(k) (Adoption Agreement Format) - POST		
Details:	EIN: 25-1533849 • PN: 215 • PYE: ???		

Edit Status:	Locked
Signed Status:	Signed
Acceptance Status:	Accepted Details Amend Filing History

5500 Menu

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Portal Menu

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3. Both Portal customers and 5500 customers may also go to the "Portal Branding" screen (click on "Admin Menu", "Portal Settings", then "Portal Branding") to obtain a general portal link. This is recommended if you use divisions to help ensure that you obtain the correct portal link for the desired division.

Portal Branding

Select Division:

Load Defaults

Branding ID: eef05fe2c20c0d4 [Portal Link](#)