

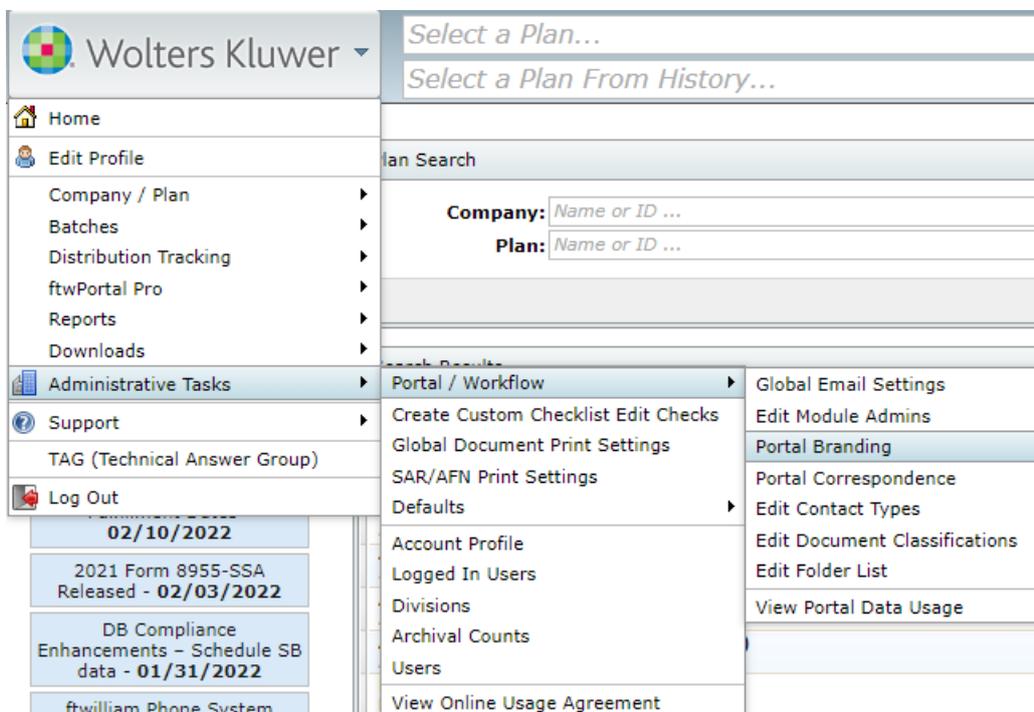
Portal Branding

01/14/2025 11:47 am CST

Portal Branding Video

How to Brand the Portal with Our Company's Logo

To set up Portal Branding, you have to be the Master Admin User or a Designated Admin. If you have these designations, you can access the Portal Branding via the Wolters Kluwer Logo>Administrative Tasks>Portal / Workflow> Portal Branding:



Portal Page Icon and Title: Enter the location of the page icon (aka the favicon) you would like to use with the portal. If one is not provided, ftwilliam.com's default icon will be used. We recommend using an icon file (which ends in .ico) for the favicon for full compatibility with Internet Explorer.

Favicon: This is the small image that that is associated with the web page. If you currently have a favicon, you should be able to type <http://yoursite.com/favicon.ico> and the image would display. If not, you should speak with your web designer to help you set one up.

Custom page title: If no title is provided, the default text, "ftwilliam.com Portal" will be used. This is the text that will appear as the title of the web page once your client goes to the portal. See "www.portaltest.com" as shown below:



5500 Portal Document Feature; 5500 Download Buttons: Checking this box will add a 5500, SAR, AFN, 8955-

SSA, and 5558 downloadable document buttons on the left-hand side of the Portal Screen where Applicable.

Portal Logo: If you would like to upload your company's logo, we recommend that the size be 200px x 50px and no larger than 500kb. The logo should also have a file type of .png, .jpg, or .gif.

5500 Portal Download Status Report Logo: Checking the box and uploading a logo will add the logo to the top of the downloadable 5500 Report when the Portal user goes to 'Check 5500 Status' and clicks on 'view as a PDF'. The recommended document header size is 650px x 50px. Recommended file types are .png, .jpg, or .gif. The header file size must be no larger than 500kb.

Font Family: You can choose from Arial, Arial Black, Comic Sans MS, Georgia, Lucidia Sans Unicode, MS Sans Serif, MS Serif, Palatino Linotype, Tahoma, Times New Roman, Trebuchet MS and Verdana.

Font Size: You can choose from small, medium, and large.

Theme Color: You can choose from silver, gray, black, cornflower blue, yellow, green, dark cyan, blue, orange, brown, red, and purple.

Portal Version Custom Welcome Message: Checking this box will allow you to enter a customized message that your client's will see once they log into the portal. The font will match the 'Font Family' selected previously. In this section you can identify the size of the font for your custom message, set formatting as bold, italic, underlined, or strikethrough as well as set message alignment, and enter hyperlinks.

Footer Text: Enter custom footer text. If no footer text is provided, the default text, "© 2007-2022 CCH Incorporated or its affiliates" will be used.

Portal Password Reminder Text: Enter custom password text. If no password text is provided, the default text 'Lost password? Use the 'Forgot Password; link on the login screen to reset your password.' Will be used.

Mask Portal User Help: Checking this box will mask the 'Help' buttons on the portal user's login screen, as well as the portal user's dropdown menu.

Mask 5500 Portal Change Name Button: Checking this box will mask the Change Name button on the Portal User's 5500 E-filing screen. Any alterations to the signers naming conventions would need to be requested by the client and updated within the Edit Portal User screen.

Add "I'm done" checkboxes to Portal ToDo list: Checking this box will provide checkboxes next to the tasks in the Portal User's ToDo list. For further information, see 'How Do I Prevent Portal User's Tasks from Automatically Closing?' in the Portal User's Guide.

Disable Cookies on Portal User Login Screen: Checking this box will bypass loading any branding information for the portal user's prior logins; if the portal user accesses a generic login link to the portal, (for example <https://www.ftwilliam.com/cgi-bin/WebPortal/WebPortal.cgi>) they will see the default 'Wolters Kluwer' branding on the login screen until they log into the Portal, at which time they will see you account's specific branding information.

Portal Edit Census Worksheet Instructions: The following text will be displayed in the 'Instructions' section of the Portal when editing a census worksheet.

How to Brand Divisions for the Portal Using Different Logos

To set up Portal Branding for Divisions, the Master Admin User must first set up Divisions. Once Divisions have been set up, the Master Admin User or a Designated Admin will be able to set up division branding.

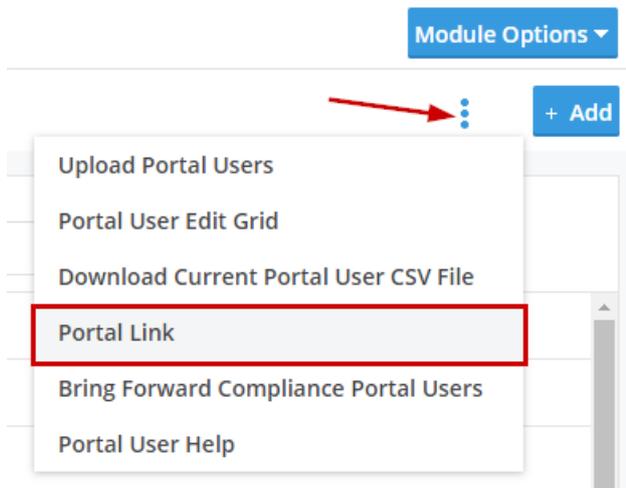
You can access the Portal Branding page through the Wolters Kluwer Logo>Administrative Tasks>Portal / Workflow> Portal Branding or through the Portal Global or Plan Level Dashboard> Module Options>Portal Branding. At the top of the screen, a drop-down list will appear to select the specific division to brand. **Note:** If you would like to use the “Default” divisions branding for one or more of your other divisions, you can check the box “Use default division” and click “Save”.



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

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
- [SAR/AFN Print Settings](#)
 - [Batch/WorkFlow](#)
 - [Upload and Download Center](#)
 - [View 5500 FAQs](#)
 - [55AutoFill](#)
 - [Bring forward 2022 data to 2023 for this plan only](#)
 - [Bring forward portal users to 2023 for this plan only](#)
 - [Clone 2023 Return/Report within 2023 for this plan only](#)

- Portal Menu
- [Work With Signers/Portal Users](#)
 - [Portal Manager](#)
 - [Portal Link 1](#)

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: DEFAULT ▼

[Load Defaults](#) **Branding ID:** eef05fe2c20c0d4 Portal Link