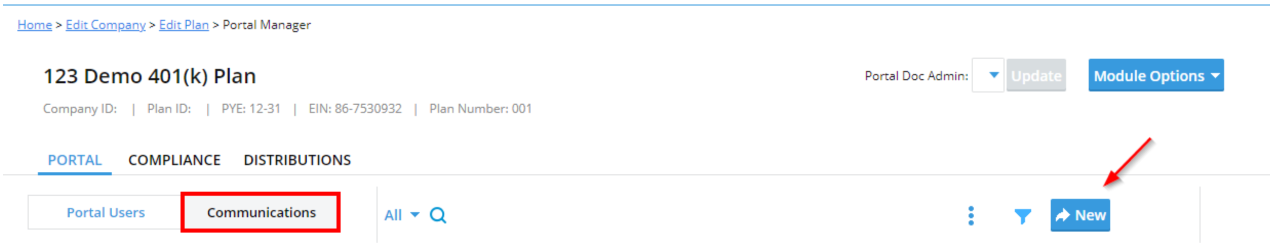
How to Publish a Document to the Portal for E-Signature That Does Not Originate in the FTW Software

07/29/2024 4:00 pm CDT

Similarly, to publishing an item to the portal from within the document's module, you are also able to publish items that do not originate within the ftwilliam.com software to the portal for your clients to view or e-sign.

In these instances, navigate to the Plan level Portal Dashboard, and select the Communications tab, and select New:

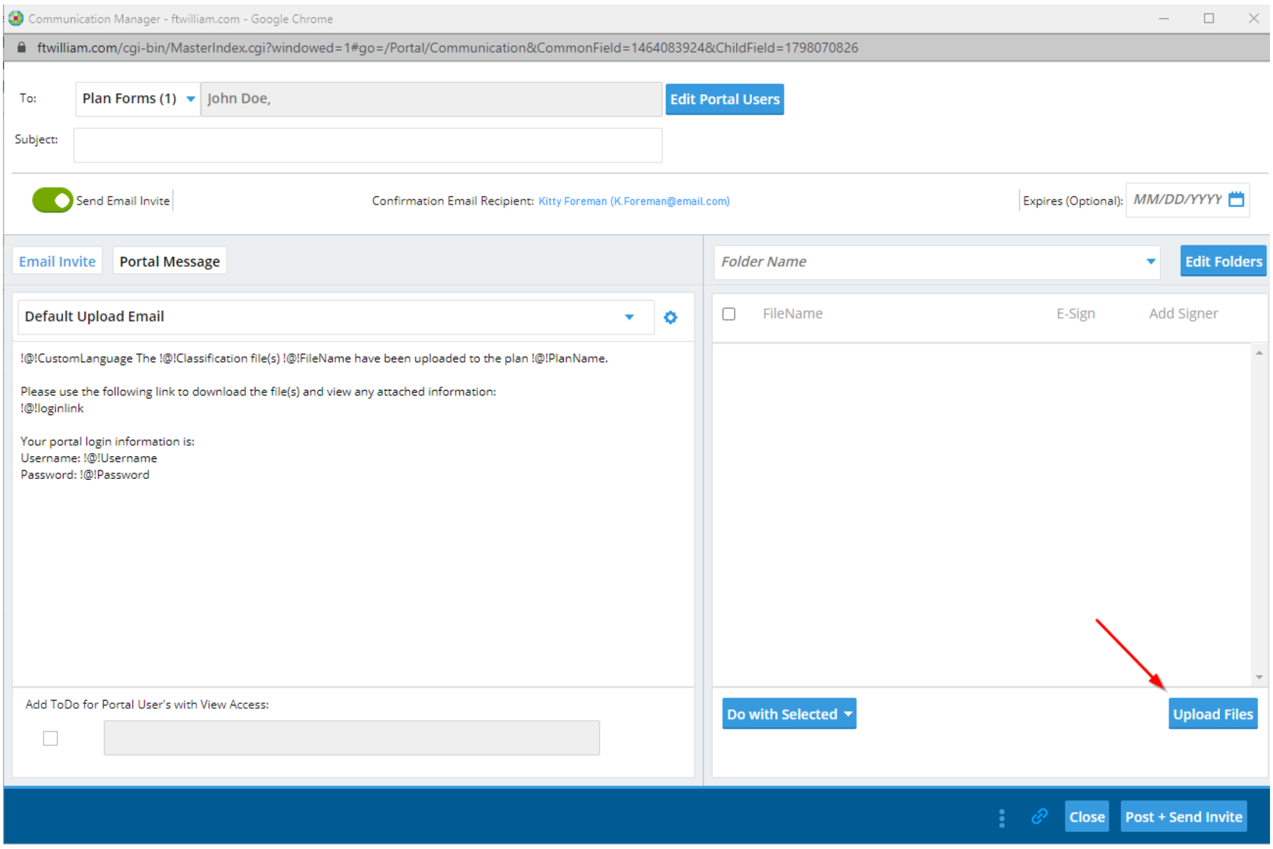


We recommend reviewing the communication from top left to bottom right (with the caveat of adding e-signature to items) **starting with the communication Classification:**

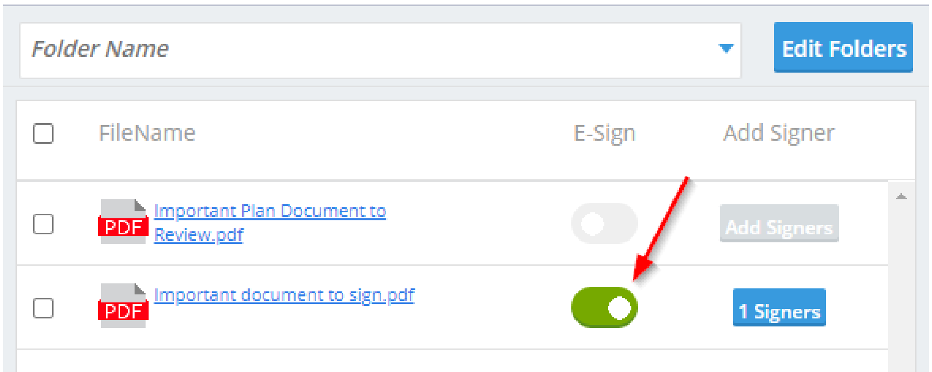
A. Classifications: When you create a new communication within the portal module from either the Global or Plan level dashboard, this will automatically be set to Direct Message. You will want to alter this first prior to adding documents to share or items for e-signature. This field will identify each portal user within the plan who has permissions for that Classification.

Once this is updated, we suggest you then add any items for e-signature prior to making additional selections as this will impact the available e-mail templates.

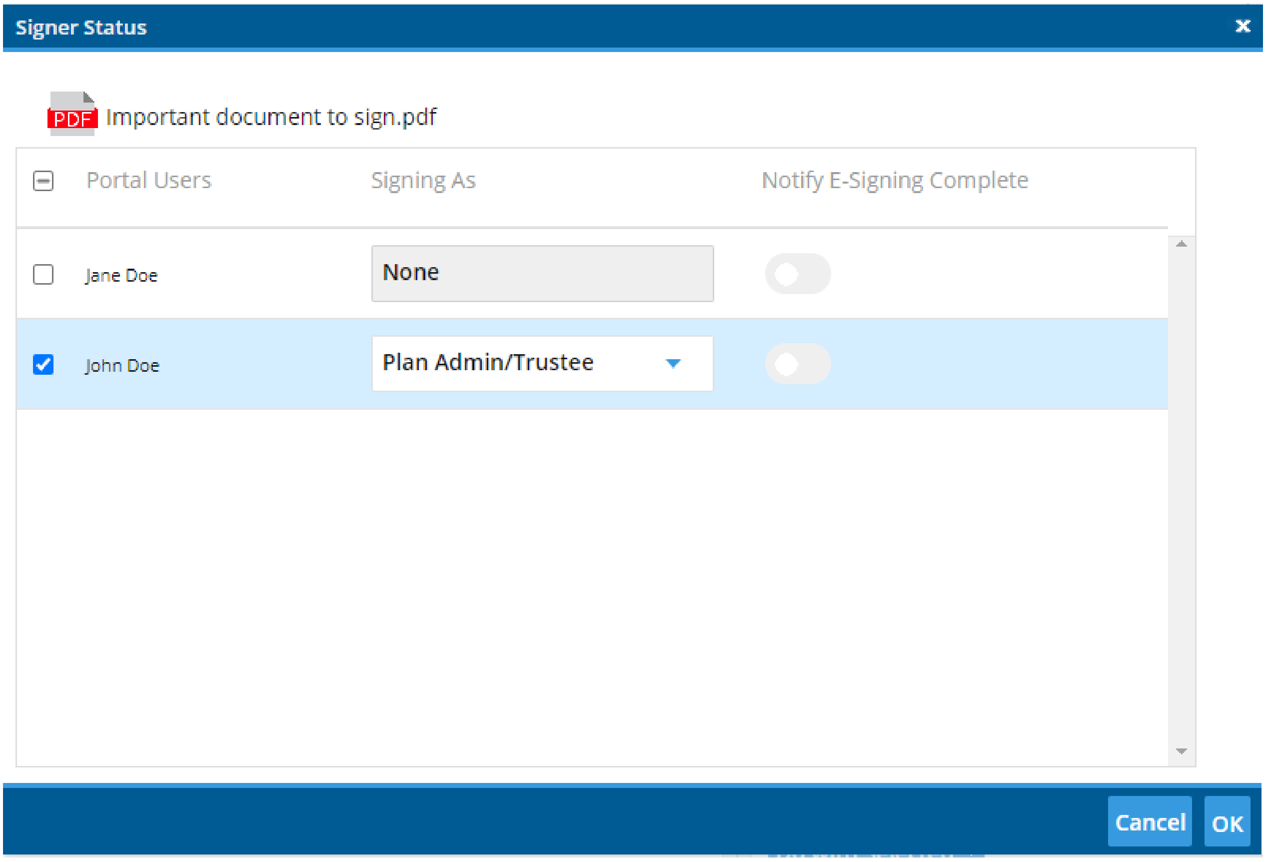
You may add your documents by selecting the Upload Files link in the communications bottom right corner. A window will then popup for you to select the files from your computer to import.



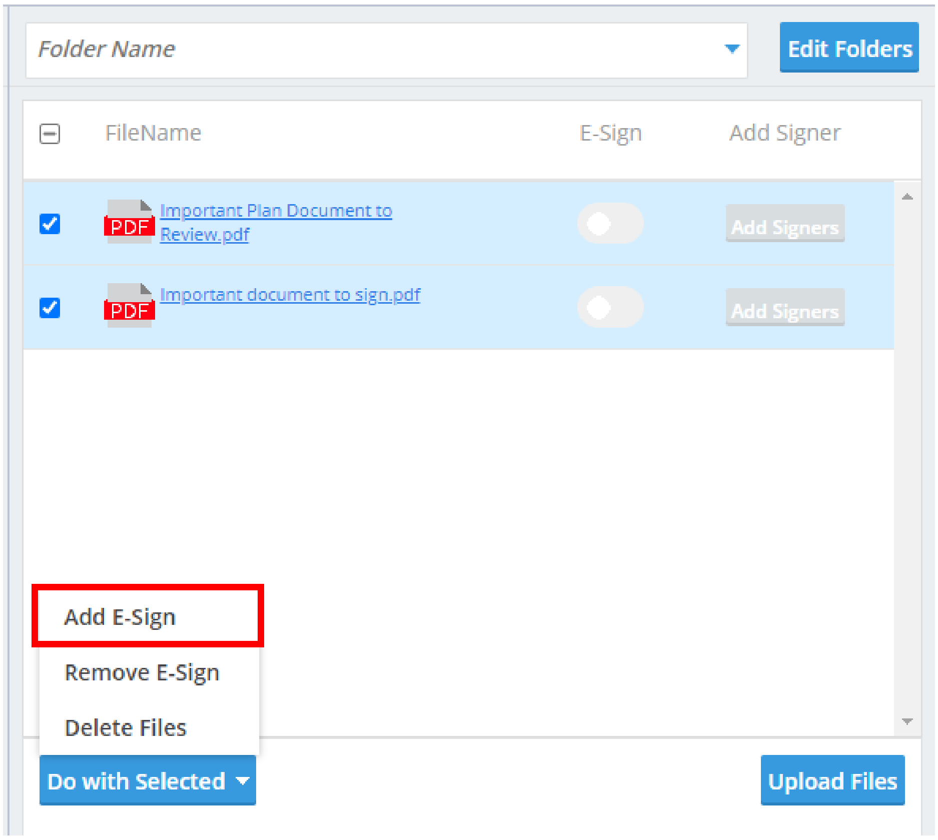
Setting Single Items for E-Signature: If you wish to set e-signing per document, you may do so by selecting the e-sign toggle to the right of the document name. When this is selected the document will be converted to a .PDF, the toggle will turn green, and the number of available signers for the plan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



If you select the "#Signers" button you will be able to see who is set for signing as well as their signing designations, you may add other users 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 you are not setting any items for e-signature, or if you have already made your e-signature selections, we recommend you continue to review the communication from top to bottom in the following order:

B. 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.

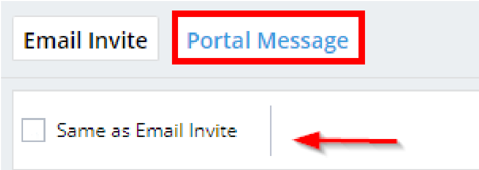
C. Subject: Each communication needs a subject for it to be sent.

D. 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.

E. 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)

F. 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.)

G. 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 **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.

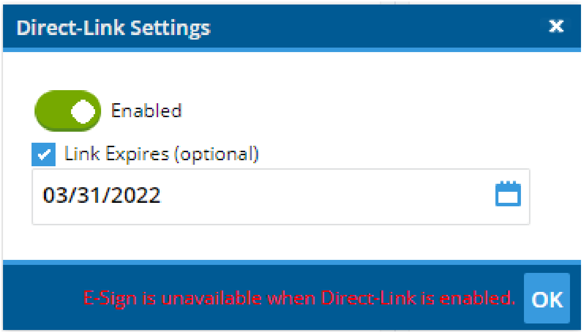


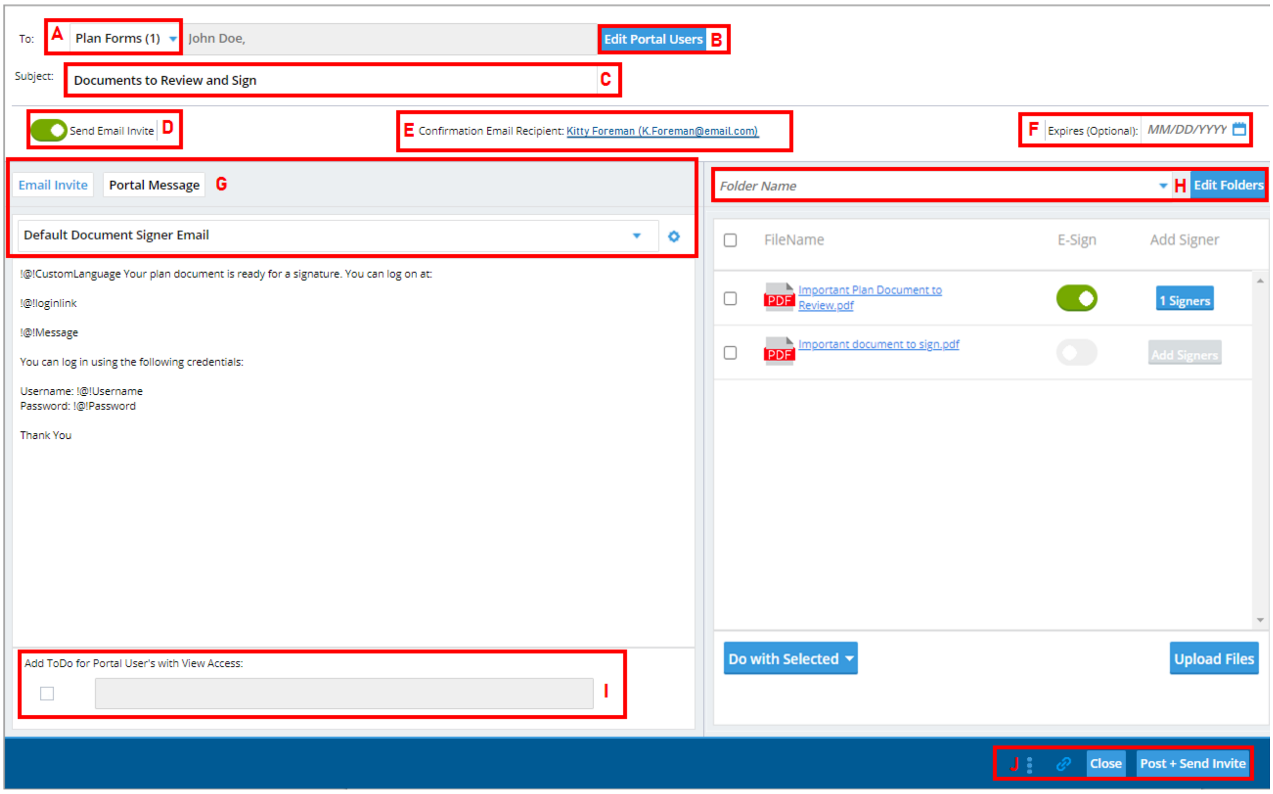
H. Folder Name: This allows you to specify a folder for the documents you are publishing to portal. This is often used to help organize documents by specific years or item type.

I. Add ToDo with Portal Access: this allows you to add items that do not require actions to a client's 'To Do' list. Adding items to the To Do list will also trigger reminders if reminders are set in the Global Email Settings. The task of E-Signing a document will appear on the portal user's To Do List. Yet, allowing the portal user to have view access to the document after E-Signing will not. If you would like to add viewing the document to the user's To Do List after E-Signing, be sure to check the box.

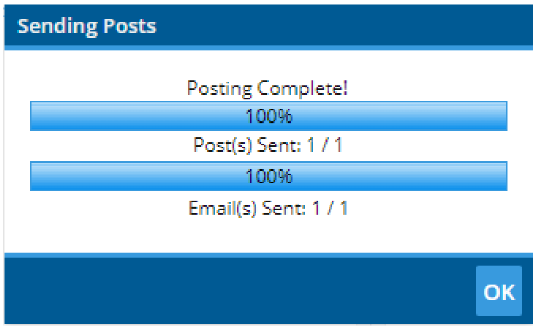
J. This field contains the ability to **Preview** your communication as well as create a Direct Link, the direct link option (that looks like two chains linked together) offers users the ability to access the documents within the communication/Direct Message without having to log in to the Portal. **Please Note:** Direct Link cannot be used for items set for e-signing. When Direct Link is enabled, the link will turn green:

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

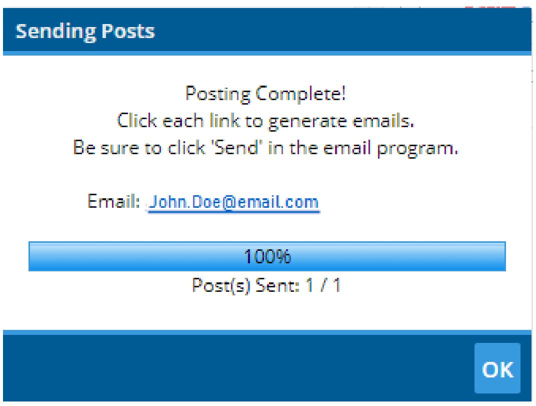




Dependent upon your e-mail settings, and which option you choose, you will receive a pop-up progress bar window. In the following instance documents were published to portal and an e-mail communication was sent using the Specify a Server settings:



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:



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

To	John.Doe@email.com
Cc	
Bcc	
Subject	Your Plan Document is Ready to Be Signed

Send

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