## 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:

<u>Home &gt; Edit Company &gt; Edit Plan</u> > Portal Manager	
123 Demo 401(k) Plan	Portal Doc Admin:  Update Module Options
Company ID:   Plan ID:   PYE: 12-31   EIN: 86-7530932   Plan Number: 001	
PORTAL COMPLIANCE DISTRIBUTIONS	
Portal Users Communications All - Q	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.

😢 Communication Manager - ftwilliam.com - Google Chrome			- 🗆 X
ftwilliam.com/cgi-bin/MasterIndex.cgi?windowed=1#go=/Porta	I/Communication&CommonField=14640839	3924&ChildField=1798070826	
To: Plan Forms (1) V John Doe, Subject:	Ed	Edit Portal Users	
Send Email Invite Confirm	ation Email Recipient: Kitty Foreman (K.Foreman@er	Bemail.com)	Expires (Optional): MM/DD/YYYY
Email Invite Portal Message		Folder Name	▼ Edit Folders
Default Upload Email	× 0	FileName	E-Sign Add Signer
I@!CustomLanguage The I@!Classification file(s) I@!FileName have been t Please use the following link to download the file(s) and view any attache I@!lognink Your portal login information is: Username: I@!Username Password: I@!Password	iploaded to the plan !@!PlanName. d information:		
Add ToDo for Portal User's with View Access:		Do with Selected 👻	Upload Files
			Close Post + Send Invite

**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:

Fold	er Name		▼ Edit Folders
	FileName	E-Sign	Add Signer
	PDF Review.pdf	•/	Add Signers
	PDF	<b>C</b>	1 Signers

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):

Signe	er Status				×
P	<b>DF</b> Important document to s	sign.pdf			
=	Portal Users	Signing As	Notify E-Signing Complete		
	Jane Doe	None		•	
	John Doe	Plan Admin/Trustee 🔹			
				-	
			c	ancel	ок

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.

Fold	er Name			Edit Folders
	FileName		E-Sign	Add Signer
	PDF Review.pdf	ument to		Add Signers
	PDF	nt to sign.pdf		Add Signers
Ad	dd E-Sign			
Re	emove E-Sign			
D	elete Files			Ψ
Do	with Selected 🔻			<b>Upload Files</b>

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 Portal messages by marking the indicated box below.

Email Invite	Portal Message
Same as Ema	il Invite

**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:



To: A Plan Forms (1) V John Doe,	Edit Portal	Users	в			
Subject: Documents to Review and Sign	C					
Send Email Invite	E Confirmation Email Recipient: <u>Kitty Foreman (K.For</u>	reman@(	email.com)	1	F Expires (Option	al): MM/DD/YYYY 📛
Email Invite Portal Message G			Folder	r Name		▼ H Edit Folders
Default Document Signer Email	•	۰		FileName	E-Sign	Add Signer
I@!CustomLanguage Your plan document is ready for a signature. You can k	ig on at:		0	Important Plan Document to Review.pdf		1 Signers
I@!Message You can log in using the following credentials:			0	Important document to sign.pdf		Add Signers
Username Password: I@IPassword						
Thank You						
Add ToDo for Portal User's with View Access:			Do v	vith Selected 🔻		Upload Files
	1					
					J 🖉 Close	Post + Send Invite

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:

Sending Posts		
	Posting Complete!	
	100%	
	Post(s) Sent: 1 / 1	
	100%	
	Email(s) Sent: 1 / 1	
		ОК

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:

Sending Posts	
Posting Complete! Click each link to generate emails. Be sure to click 'Send' in the email program. Email: <u>John.Doe@email.com</u>	
100% Post(s) Sent: 1 / 1	
	ОК

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

$\triangleright$	То	John.Doe@email.com
Send	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