

Add, Edit, or Remove Portal Users

05/13/2026 11:22 am CDT

How to Alter a Portal User's Username

A **User** with permission to **Edit** the Portal module can update a portal username from the **Edit Portal User** screen.

- **Navigate to the Portal Users Tab** in the Portal module.
- Click the **menu icon** (three dots) next to the user whose username needs updating.

The screenshot shows the 'ABC Bank' portal interface. At the top, there's a navigation bar with 'Wolters Kluwer' logo, 'ABC Bank' dropdown, and a 'Go' button. Below this, the 'ABC Bank' header includes 'Portal Doc Admin:' with an 'Update' button and a 'Module Options' dropdown. The main content area is titled 'PORTAL DISTRIBUTIONS' and has tabs for 'Portal Users' and 'Communications'. A search bar is present. Below the tabs, there's a table of portal users. The first row is selected and highlighted in blue. It contains the following information: Username: AerithG, Name: Aerith Gainsborough, Email: [redacted], Contact Type: Record Keeper, Phone: [redacted]. A red arrow points to the three-dot menu icon next to the user name. A dropdown menu is open, showing the following options: 'Edit Portal User' (highlighted with a red box), 'View User Portal', 'View Direct Messages', 'View All User Comms', and 'Delete Portal User'.

- Select **Edit Portal User**.
- In the **User Info** tab, enter the new username.
- Click the **Save** button to confirm the changes.

✕
Edit Portal User

Select User: **Aerith Gainsborough (AerithG)**
View
Add
Add Existing
Delete

- > User Info
- > Messaging

Tabs for Plan:

ABC Bank

Add
Delete

- > Document
- > 5500

[Edit Contact Types](#)

User Info

User Information

Portal Username: **AerithG**

Name: **Aerith Gainsborough** [Split name](#)

Prefix:

First: **Aerith**

Middle:

Last: **Gainsborough**

Suffix:

Title/Position:

Company Name: **Flower Merchant Avalanche**

Password:** Reset Password

Main Contact Type: **Record Keeper** [Edit](#)

Addl Contact Types: None

Select Contact Types

**Note: When the Reset Password button displays, the portal user has logged into the portal to set up security questions and a password. You do not need to click the button unless your client needs assistance resetting their password.

Contact Information

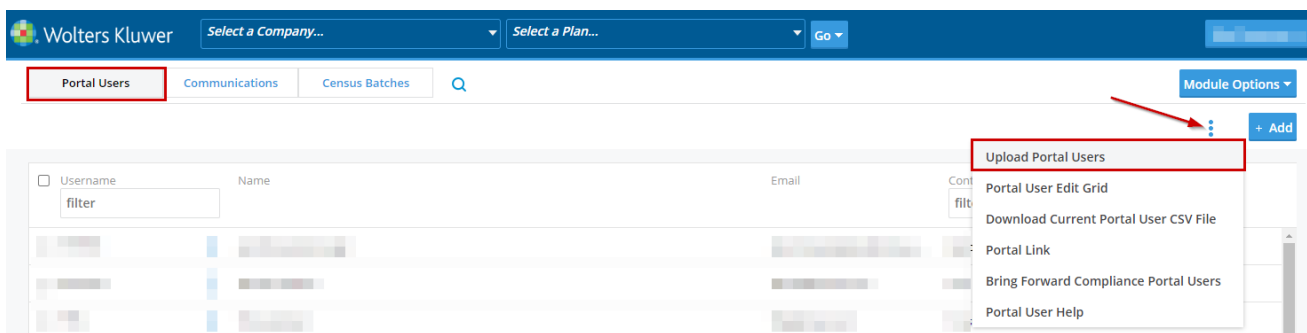
Help
Save Tab
Close

NOTE: The Portal user will need to log in with the new username. Any references to that user will update to the new username as well.

How to Upload Portal Users in Bulk

Portal Users may be added or updated in bulk through the 'Upload Portal Users' interface.

The Upload Portal User interface is accessible from the Global or Plan level Dashboards through the tricolon menu option on the Portal Users Tab.



This interface may also be accessed by selecting the Wolters Kluwer Logo>ftwPortalPro>Upload Portal Users.

Within this window are 2 files:

1. Download Current Portal User CSV File- This will be the file that needs to be uploaded.
2. Download CSV Schema- This file explains how the data should be entered within the 'Download Current Portal User CSV File'.

It is recommended the "Important Notes" be reviewed prior to entering data into the spreadsheet. The notes read as follows:

Important Notes:

- All data rows must contain the username and plan information (with the exception of rows for the Messaging module).* If you would like the Name column to be automatically parsed into first, middle, and last names you must remove the columns with those names from the header (the first row, of the uploaded file).
- Misspelled column names will be silently skipped - unless they are required.
- Rows with bad data will be skipped.**
- Existing portal user records will be updated.
- If you do not specify passwords for new portal users in a "Password" column, they will automatically be assigned random passwords.***

Example. You want to add a portal user, Jane Doe, who will be given Messaging, 5500 and Document permissions. On the spreadsheet, you would list Jane Doe once for Messaging, once for Documents and twice for 5500s (for the 2020 and 2021 plan year). In all, Jane Doe will be listed four times on the spreadsheet.

Note: Plans need to already be established in the software to assign Document, 5500, and/or Admin permissions to those plans. If there is not a 5500 set up for a specified plan year that you are assigning a portal user, that plan year will be skipped.

	A	B	C	D	F	G	Q	R	T	U	V	Y	Z	AA
1	Username	Name	Prefix	First	Last	Suffix	Email	Contact Type	EIN	Plan Number	Plan Name	Signing As	Module	Year
2	Jdoe22	Jane Doe	Mrs.	Jane	Doe		Jdoe@123co.com	CPA					Messaging	
3	Jdoe22	Jane Doe	Mrs.	Jane	Doe		Jdoe@123co.com	CPA	86-7530932	1	123 Demo 401(k) Plan	ADMIN:SPONS	5500	2020
4	Jdoe22	Jane Doe	Mrs.	Jane	Doe		Jdoe@123co.com	CPA	86-7530932	1	123 Demo 401(k) Plan	ADMIN:SPONS	5500	2021
5	Jdoe22	Jane Doe	Mrs.	Jane	Doe		Jdoe@123co.com	CPA	86-7530932	1	123 Demo 401(k) Plan		Document	

** Note: The portal Username must be at least 4 characters, and cannot contain leading or trailing spaces, [%] [#] [+] [;] [&] [/] [?] ['] or [N].

*** Note: If you create passwords, they must be at least 8 characters, with at least one number, one letter, and one

special character. Passwords are case sensitive.

After the spreadsheet is completed return to the “Upload Portal User” screen. Select “Browse” select the file and click “Upload”. Please be patient if the upload contains a lot of portal users; it may take a few moments.

Upload Portal Users x

[Help](#)

Important Notes:

1. All data rows must contain the username, name, email, and module.
2. Any rows that skip the username field will assume to be using the username, password and demographic information from the last row above it that lists a username.
3. All 5500, Document, and Admin rows must contain the EIN and Plan Number, as well as the year, if applicable.
4. Misspelled column names will be silently skipped - unless they are required.
5. Rows with bad data will be skipped.
6. Existing portal user records will be updated (with the exception of passwords).
7. If you remove the 'Password' column from your .csv upload, random passwords will be automatically assigned to new portal users. **Note:** If you leave the password column in, you will be required to populate it with a password for any new portal users consisting of a minimum of eight characters with at least one special character and one number.
8. Additional contact types must be listed on the messaging module row.

[Download Current Portal User CSV File](#)
[Download CSV Schema](#)

Upload Progress:

When the file has completed the upload process, a status result will populate in the window to the right. Make note of any users that need alterations from the status box.

For example, if a user has been assigned signing permissions that are assigned to another user on the plan, the following error will populate.

Upload Progress:

Portal User Upload Example.csv
Processing Portal User Upload Example.csv
unable to mark user as Signing As 'ADMIN:SPONS'
for user Ferb on row 2. 'hk5w' is already marked as
Signing As ADMIN:SPONS.
Processing Complete.

If the ‘Upload Progress’ window populates as shown in the screen shot below, the upload process has been successfully completed and the window may be closed.

Upload Portal Users

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3. All 5500, Document, and Admin rows must contain the EIN and Plan Number, as well as the year, if applicable.
4. Misspelled column names will be silently skipped - unless they are required.
5. Rows with bad data will be skipped.
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7. If you remove the 'Password' column from your .csv upload, random passwords will be automatically assigned to new portal users. **Note:** If you leave the password column in, you will be required to populate it with a password for any new portal users consisting of a minimum of eight characters with at least one special character and one number.
8. Additional contact types must be listed on the messaging module row.

[Download Current Portal User CSV File](#)
[Download CSV Schema](#)

Upload More Portal Users

Upload Progress: [Help](#)

Portal User Upload Example using contact types.csv
Processing Portal User Upload Example using contact types.csv...
Processing Complete.

Close

Assigning Portal Users to a Plan

Users can be assigned to a plan in three ways:

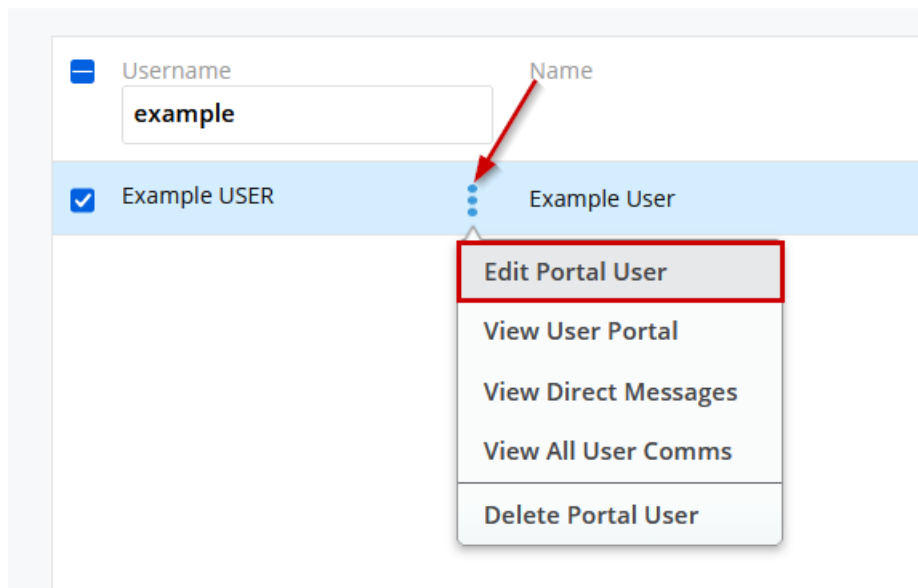
- From the Global Dashboard
- From the Plan-Level Dashboard
- During the Portal User Upload Process

Global Dashboard

Wolters Kluwer Logo > ftwPortalPro > Global Dashboard

Steps:

1. Locate the Portal User in the list (must already be added or uploaded).
2. Select the menu icon (;) next to the Portal User's name.
3. Choose **Edit Portal User**.



Username

Name

<input type="checkbox"/>	Username	Name
<input checked="" type="checkbox"/>	Example USER	Example User

- Edit Portal User
- View User Portal
- View Direct Messages
- View All User Comms
- Delete Portal User

4. In the Edit screen, select the **Add** button on the left.
5. Filter by Company Name, Plan Name, or scroll through the list of available plans.
6. Check the box next to the desired plan.
7. Select **Add Plans** to complete the assignment.

The screenshot shows the 'Edit Portal User' window. At the top, there is a 'Select User:' dropdown menu with 'Example User (Example USER)' selected. To the right are buttons for 'View', 'Add', 'Add Existing', and 'Delete'. Below this is a sidebar with 'User Info' and 'Messaging' sections. The 'Add Plans' dialog is open, showing a search filter for 'Company Name' and 'Plan Name contains...'. A list of plans is displayed with checkboxes: 'Plan Name', 'ACNH Residential Services LLC', 'Air Nomad Profit Sharing Plan', 'DCG Example Company', 'Earth Kingdom 401(k) Plan', 'Example Company 401(k) Plan', 'Fire Nation 401(k) Plan', 'Moe's Tavern 401(k)', 'New Plan', 'Portal Test', and 'Prior Year Test'. At the bottom of the dialog, it says '32 Results' and has 'Add Plans' and 'Close' buttons. The 'Add Plans' button is highlighted with a red box. In the main interface, the 'Add' button is also highlighted with a red box, and a red arrow points from it to the dialog.

Plan-Level Dashboard

Steps:

1. Select the desired plan.
2. Navigate to the Portal via the **GO** menu or the **Portal** button on the **Edit Plan** screen.

Wolters Kluwer Example Company

Select a Plan From History...

Home > Edit Company > Edit Plan

Company: Example Company ID:

Plan: Example Company ID:

Checklist: **Non-Standardized 401(k) (Adoption Agreement Format) - POST**

Details: EIN: 867530936 • PN: 002 • PYE: 12-31

Plan Menu

- Conv
- Clon
- Del
- Sho
- Docu
- MEP
- Post

Plan Modules

Module	Plan Documents	IRS Forms	5500 Forms	1099-R	Compliance	Portal	Prop	Portal
Resp	Yes	Yes	2024	2024	Yes	Yes		Yes
Admin								

3. In the **Portal Users** screen, select the **Add** button above the user grid.

Wolters Kluwer Example Company Example Company Go David Rose

Example Company Portal Doc Admin: Update Module Options

Company ID: | Plan ID: | PYE: 12-31 | EIN: 86-7530936 | Plan Number: 002 | Checklist: Non-Standardized 401(k) (Adoption Agreement Format) - POST

PORTAL COMPLIANCE

Portal Users Communications

+ Add

Username	Name	Email	Contact Type	Phone
filter			filter	

No results found.

4. In the **Edit Portal User** screen, choose one of the following options:

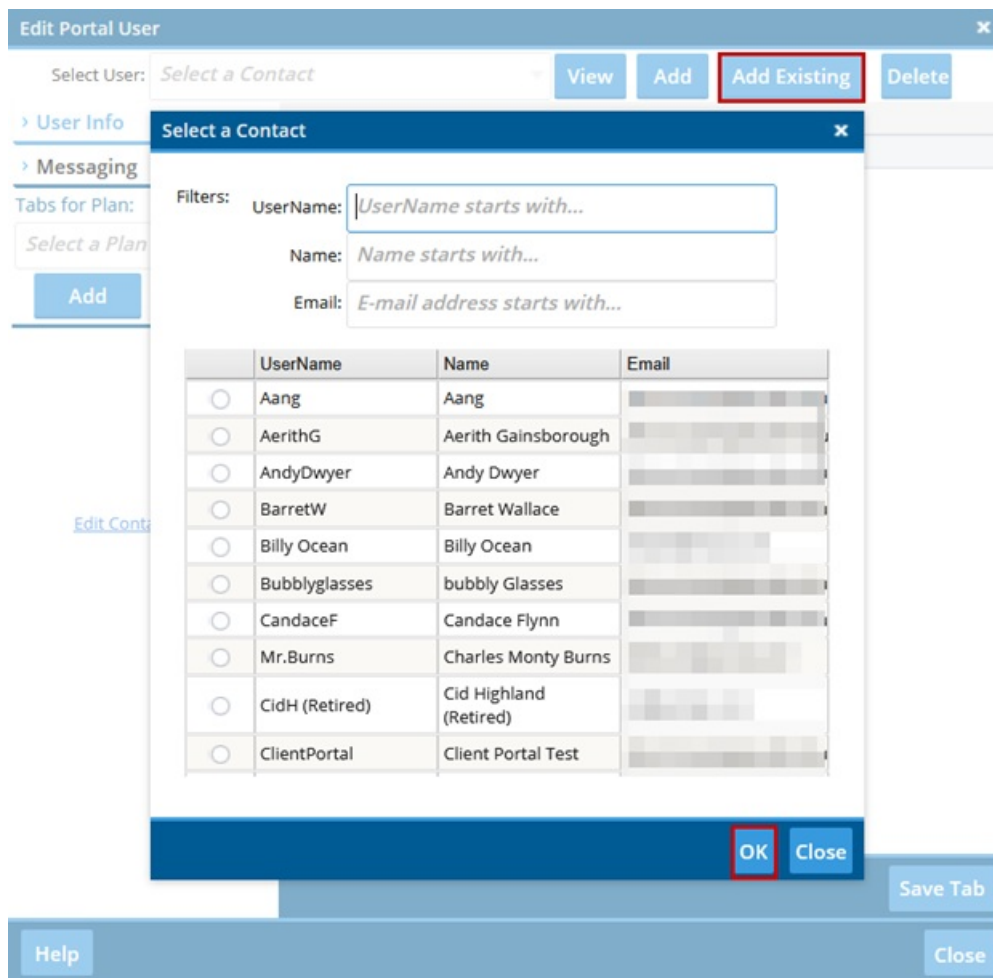
- **Add**

- Use to create a new Portal User.
- Enter a username and password (minimum 8 characters, including at least one letter, one number, and one special character).
- Provide the first and last name, email address, and optionally, the associated company.

The screenshot displays the 'Edit Portal User' interface. At the top, there is a 'Select User:' dropdown menu with the text 'Select a Contact' and buttons for 'View', 'Add', 'Add Existing', and 'Delete'. Below this, there are sections for 'User Info' and 'User Information'. The 'User Information' section contains the text 'Please select a portal user to edit.' and a modal dialog box titled 'Add New Contact'. The dialog box has two radio buttons: 'No portal access' and 'Grant portal access', with 'Grant portal access' selected. It includes input fields for 'Username', 'Password', 'Confirm', 'Full Name', 'Prefix', 'First', 'Middle', 'Last', 'Suffix', 'Company Name', and 'Email'. At the bottom of the dialog box are 'Create New Contact' and 'Cancel' buttons. The main interface also features a 'Tabs for Plan:' dropdown menu with 'Select a Plan' and 'Add'/'Delete' buttons, and a 'Save Tab' button at the bottom right. A 'Help' button is located at the bottom left of the interface.

- **Add Existing**

- Use when the Portal User has already been added to another plan or exists in the Global Dashboard.
- Filter by username, name, or email.
- Select the user and confirm with **OK**.



Upload Portal Users

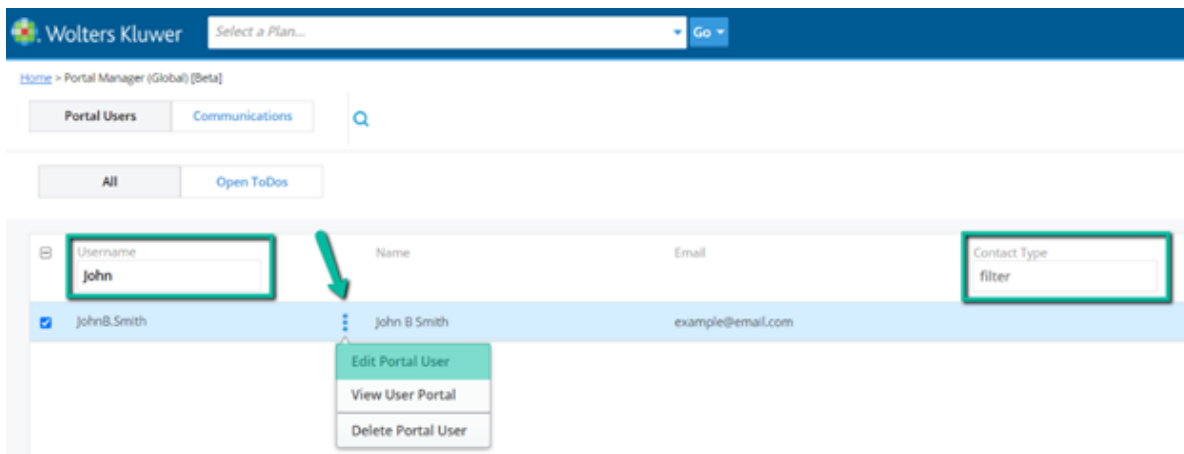
Portal Users can also be assigned to plans during the upload process. Refer to the article: [How to Upload Portal Users in Bulk](#) for detailed instructions.

Delete Portal User

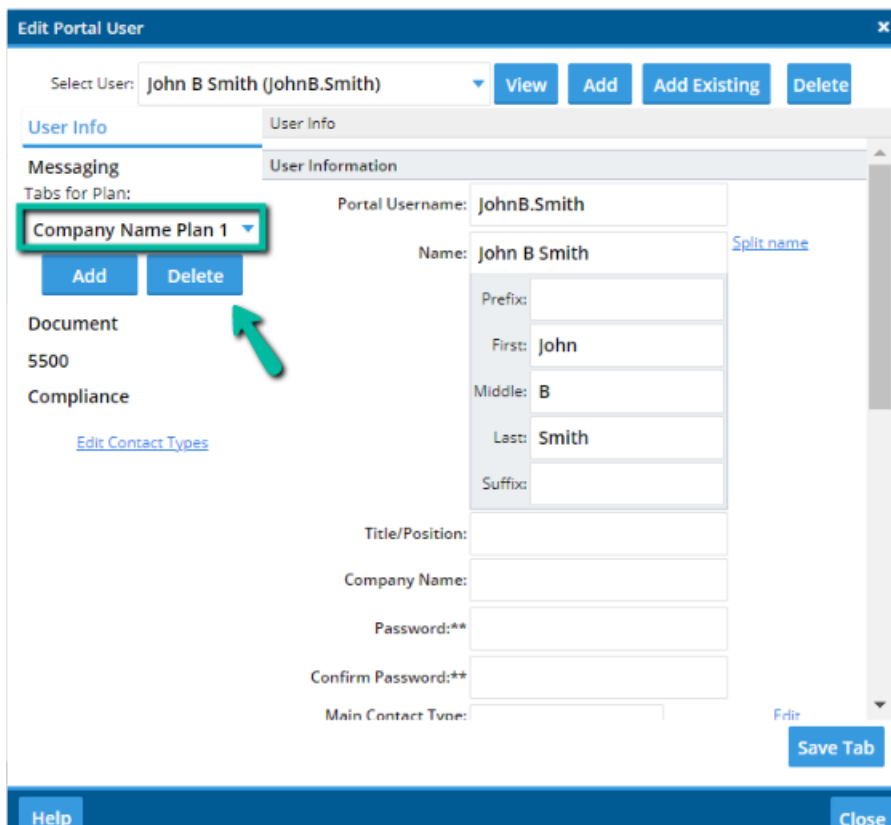
To remove a Portal User from the system, you must first remove them from the plan(s) in which they are associated.

The user may be edited from either a particular plan via the Global Dashboard. Select the tricolon next to their name and click on Edit Portal User will bring up the 'Delete Portal User' option.

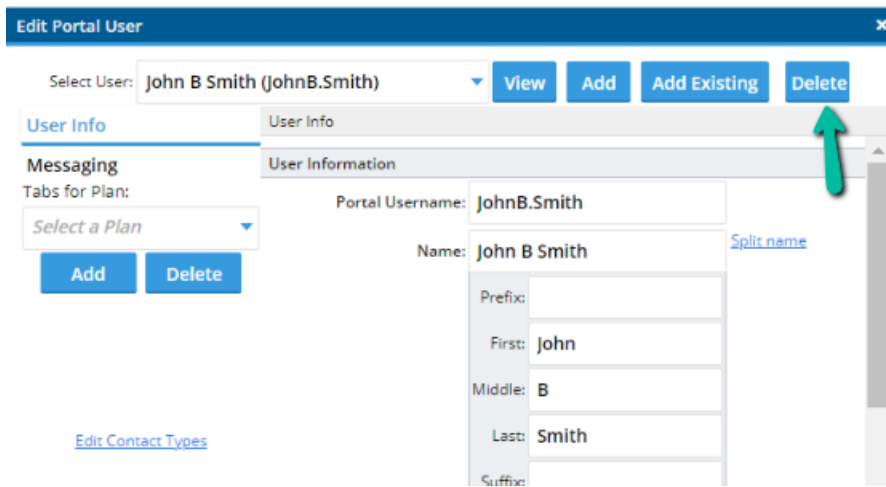
You can scroll and find the user or filter by Username or Contact Type:



Once in the 'Edit Portal User' screen, you will need to select each plan you wish to remove them from on the left-hand side under tabs for plans. If you wish to remove them from a single plan you can select that plan and delete. If you wish to remove them from the software completely, you will need to select each plan in the drop-down menu shown below and select 'Delete':



Once removed from all associated plans the software will allow you to select the 'Delete' option in the upper right-hand corner:



A window will populate confirming you wish to remove them from the system:

www.ftwilliam.com says

Do you wish to completely delete this portal user from the system?



****If the user is not currently associated with a plan, you are able to select the user from the Global Dashboard, select the tricolon to the right of their name, and 'Delete Portal User':**

