How to Add or Edit Contact Types with ftwPortal Pro

08/25/2025 11:06 am CDT

To Edit/Add Contact Types, you do have to be the Master Admin User or a Designated Admin. The "Edit Contact Type" window may be accessed two different ways.

1. Select the Wolters Kluwer Logo>Administrative Tasks>Portal/Workflow>Edit Contact types:

😌 Wolters Kluwer 👻			Select a Plan				
			Select a Plan From History				
	Home						
8	Edit Profile		lan Search				
	Company / Plan	►	Name of ID				
	Batches	►	Company: Name or 1D				
	Distribution Tracking	•	Plan:				
	ftwPortal Pro	•	Advanced Options				
	Reports	•	EIN:	EIN:			
Downloads			Plan Number:				
4	Administrative Tasks	►	Portal / Workflow	Global Email Settings			
0	Support	►	Create Custom Checklist Edit Checks	Edit Module Admins			
	TAG (Technical Answer Group)		Global Document Print Settings	Portal Branding			
	Log Out	_	SAR/AFN Print Settings	Portal Correspondence			
			Defaults 🕨 🕨	Edit Contact Types			
	data - 01/31/2022		Account Profile	Edit Document Classifications			
	ftwilliam Phone System	:	Logged In Users	Edit Folder List			
	Upgrade - 01/27/2022		Divisions	View Portal Data Usage			
	2022 PBGC Comprehensive		Archival Counts				
	01/26/2022		Users				
	FTW 1094/1095 ACA		View Online Usage Agreement]			

2. Select the link from within the 'Edit Portal User' Screen:

Edit Portal Use	r						x
Select User:	ser: Aerith Gainsborough (AerithG)		Vie	w Ado	d Add Exis	sting Delete	
> User Info		User Info					
> Messaging		User Information					_
Tabs for Plan:		Portal Username:	Aerith	G			
ABC Bank		Name:	Aerith Gainsborough		<u>Split name</u>		
Add	Delete		Prefix:				
> Document			First:	Aerith			
> 5500			Middle:				
> Compliance			Last:	Gainsbo	rough		
Edit Conta	act Types		Suffix:				
		Title/Pecition					

The "Edit Contact Types" link will open to the '*default*' contact type. On the left-hand side of the screen, are the modules the account subscribes to. *For example, if the account does not have the Compliance software, the 'Compliance' tab will not populate.* The '*default*' permissions are those that each portal user is added with if a contact type is not specified.

Edit Contact Types				x
Select Contact Type:	*default*	Add	Delete	
Messaging	Document			
	Document Classification Access Permissions			
> Document	Set all document classification permissions:			L
> 5500	5500 Document:	No		
> Compliance	5500 bocument.	NO		н.
	Annual Questionnaire:	No		
	Audit Report:	No		
	Census Report:	No		
	Fee Schedule:	No		
		••		-
	Apply to por	tal users	Save Ta	b
				_
Help			Clo	se

Additional contact types will appear if the drop down is selected. The existing contact types may be edited or a custom contact type may be created.

Edit Contact Types			×	
Select Contact Type:	*default*	Add	Delete	
Messaging	*default*			
Deserved	Actuary			
5500	Attorney			
Compliance	СРА			
	Financial Advisor			
	New User			
	Personal Account			
	Plan Sponsor			
	Record Keeper			
	Trustee	rtal users	Save Tab	
Help			Close	

Updated permissions to existing contact types may be applied to existing portal users that currently have that contact type listed on the Edit Portal User Screen.

To apply the changes to current portal users in the system, check the "Apply to portal users" box before clicking on "Save Tab". A window will pop up to select all portal users of that specified type, or select specific users to update.

Edit Contact Types				x
Select Contact Type:	*default*	Add	Delete	
Messaging	Document			
	Document Classification Access Permissions			
> Document	Set all document classification permissions:			L
> 5500	5500 Document:	No	~	L
Compliance	Annual Questionnaire:	No		1
	Audit Report:	No		
	Census Report:	No		
	Fee Schedule:	No		
		•••		-
	Apply to por	rtal users	Save Tal	b
Help			Clo	se

Contact Types may also be added or deleted by selecting the applicable button to the right of the drop-down list. If deleting a contact type, be sure to select the specific contact type from the drop down prior to selecting the 'Delete' button.