

Edit Company

12/19/2024 2:10 pm CST

From the "Home" screen, select a Company or Plan to access the "Edit Company" screen, purchased modules, or the "Edit Plan" screen. First-time users will need to add a Company and Plan before proceeding. The available plan types depend on the subscriptions with ftwilliam.com.

1. Listings that only show the "Edit Company" button do not have any associated plans, as seen in the 'Sample Company' example in the screenshot below.
2. Clicking on a plan name will expand its details, displaying quick-access buttons for the available modules.

The screenshot displays the Wolters Kluwer software interface. At the top, there is a navigation bar with the Wolters Kluwer logo and search options. Below the navigation bar, there is a sidebar with several buttons: "Add Company", "Add Plan", "Batches / Workflow", "ftwPortal Pro", and "Upload Company/Plan Data". The main content area is divided into two sections. The top section is titled "Plan Search" and contains two input fields for "Company" and "Plan", both with placeholder text "Name or ID ...". There are also "Clear All Filters" and "Advanced" buttons. The bottom section is titled "Search Results" and contains a table with the following data:

Plan	
Sample Company	Edit Company
1 Example Company (ID: PlanID123)	Edit Plan

Below the table, there are several buttons: "Company", "IRS", "5500", "1099", "ACA", "Portal", "Distributions", and "PDS".

Users can update Company/Sponsor information (including company/sponsor name, address, etc.) on the Edit Company page. On this page, there is also a box at the top of the page that will also update any future and *unlocked* 5500s and 8955-SSAs or 1099s with updated company/sponsor data for a particular filing year. Be sure to click on "Update" after checking the box to ensure the changes are reflected correctly.

Company: Example Company ID: CustID123
Plan: Select a plan...
Details: EIN: 86-7530932

- Company Menu
- Delete Company
 - Add Plan
 - Show History
 - Default Company

Company Modules

Module: ACA-C
2024
Resp: No
Admin:

- Update future and unlocked 2024 5500s, 8955-SSAs, and PBGCs with any company info changes. ??
- Update future and unlocked 2024 1099s with any company info changes. ??

Update

Company Data - Expand All Applicable / Expand All / Collapse All

Company Edit Check Status:

Company Information:	
1. Name of adopting employer (Plan Sponsor):	Example Company
2a. Plan Sponsor address line 1:	123 Anywhere Street
2b. Plan Sponsor address line 2:	
3. Plan Sponsor city:	Sample City
4. Plan Sponsor state:	CA
5. Plan Sponsor zip:	90210
6. Plan Sponsor phone AC/Number:	555 - 867-5309
7. Plan Sponsor fax AC/Number:	555 - 867-5309