Portal Branding

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On the Portal Branding page, you may customize the look of the portal with your company's logo and corporate colors, so your clients feel like they are accessing your website and not ftwilliam.com's.

Portal Page Icon and Title: The favicon is the small image that is associated with the web page. If you currently have a favicon, you should be able to type http://yoursite.com/favicon.ico and the image will display. If not, you should speak with your web designer to help you set one up. The custom page title is the text that will appear as the title of the web page once your client logs into the portal.

Portal 5500 Document Feature: Customers who only subscribe to the 5500 Software package will be able to select this option to remove the "Documents" tab from the main portal screen. When your client logs into the portal, he/she will see each document (e.g. 5500, SAR, 8955-SSA, 5558) listed on the left-hand side of the screen. Your client will need to click on each option to view/print the selected form.
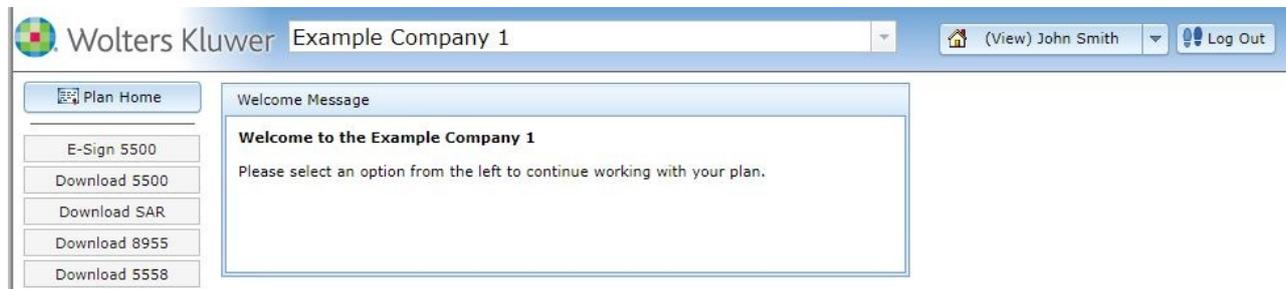
Portal Logo: The logo you upload will be used in the upper-left hand corner of the portal. To see what the settings look like, you can click on the "Portal Link" at the upper-right hand corner of the "Portal Branding" screen (shown above).

Portal 5500 Download Status Report: If you select this option, you may upload a logo that will appear on the 5500 Report your client downloads in the portal after clicking "Check 5500 Status" and selecting "View as a PDF." Please be sure and follow the recommended file sizes and types, as if you attempt to upload a file that is not PNG, JPG or GIF, or the file is too large, your client may be unable to view the 5500 Report in the portal.

Portal Theme: You may select a font style, font size or color to further customize the portal.

Portal Custom Welcome Message: You may enter a customized message that your clients will see upon logging into the portal.

Footer Text: You may enter custom footer text here. If no footer text is provided, the default text, "© 2007-2023 CCH Incorporated or its affiliates" will be used.

Portal Password Reminder Text: You may enter text here that will replace the default text of "Lost Password? Use the 'Forgot Password' link on the login screen to reset your password" that is displayed in the Invitation Email. The "Lost Password?" text appears in the Invitation Email after a portal user logs into the portal and updates his/her password. Oftentimes, portal users believe their password is lost based on seeing the default language that displays, so it may be helpful if you enter customized text such as the following: "Your password will no longer be displayed within this email. Please use the password you created after answering your three challenge questions. If you no longer remember your password, please contact your filing's preparer for further assistance or click on 'Forgot Password' to reset your password."

Portal Mask Portal User Help: If you select this option, the "Help" button will be masked for your client on the portal log in screen, as well as when he/she is logged into the portal.

Note that we also offer a portal customization service for an additional fee. If you would like to take advantage of this service or would like more information, please call 800.596.0714 or email support@ftwilliam.com for more details.

Portal 5500 Always Require Challenge Questions: Customers who only subscribe to the 5500 Software package will be able to select this option to continue to require your portal users to set-up and complete 3 security questions/responses, as well as require your portal user to create a new password. **Note:** If you do not check the box, your portal user will not have to set-up and complete 3 security questions/responses or create a new password unless your portal user has View/Print 8955-SSA permissions.