

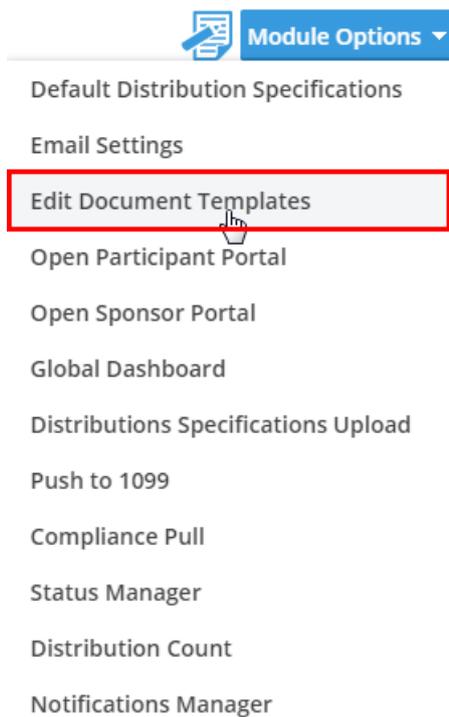
Document Template

12/04/2024 4:11 pm CST

Document Template Editor Video

The Document Template Editor is used to create custom documents for your distributions. These templates can then be used to complete a distribution package for printing, a custodial directive, cover letter, etc.

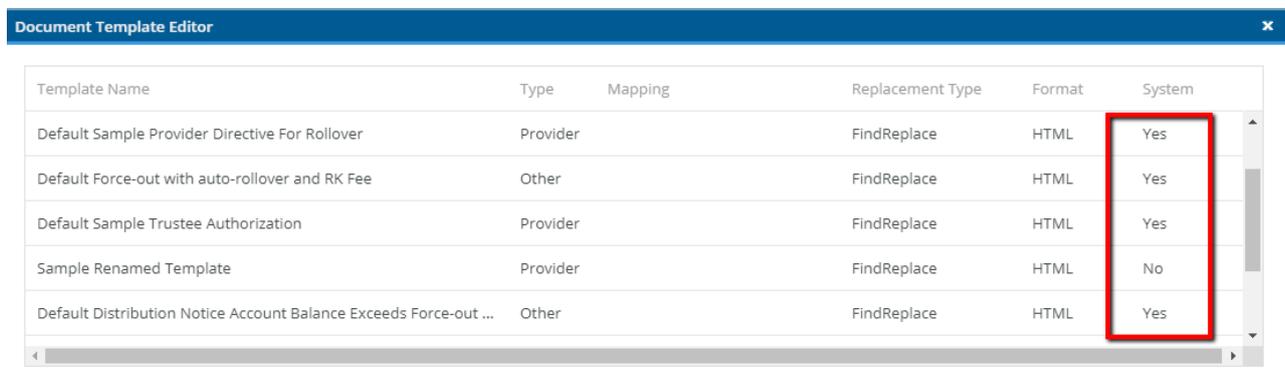
To access the 'Document Template Editor' click the 'Module Options' button in the upper right hand corner of the plan level dashboards.



Module Options ▾

- Default Distribution Specifications
- Email Settings
- Edit Document Templates**
- Open Participant Portal
- Open Sponsor Portal
- Global Dashboard
- Distributions Specifications Upload
- Push to 1099
- Compliance Pull
- Status Manager
- Distribution Count
- Notifications Manager

Once the editor is open, select the template you would like to edit or clone. Please keep in mind that if the template is a "System" template, that is indicated by 'Yes' in the "System" column. These templates may be cloned, but not edited or deleted.



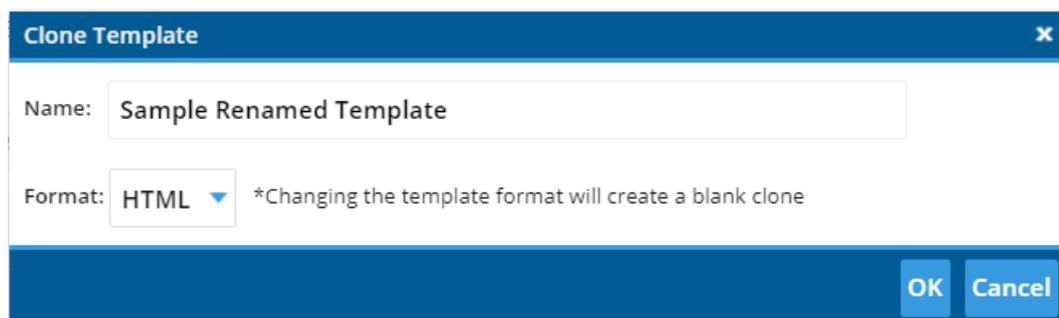
Template Name	Type	Mapping	Replacement Type	Format	System
Default Sample Provider Directive For Rollover	Provider		FindReplace	HTML	Yes
Default Force-out with auto-rollover and RK Fee	Other		FindReplace	HTML	Yes
Default Sample Trustee Authorization	Provider		FindReplace	HTML	Yes
Sample Renamed Template	Provider		FindReplace	HTML	No
Default Distribution Notice Account Balance Exceeds Force-out ...	Other		FindReplace	HTML	Yes

If you choose to clone your template, click the 'Clone Template' button in the bottom right of the pop up window.



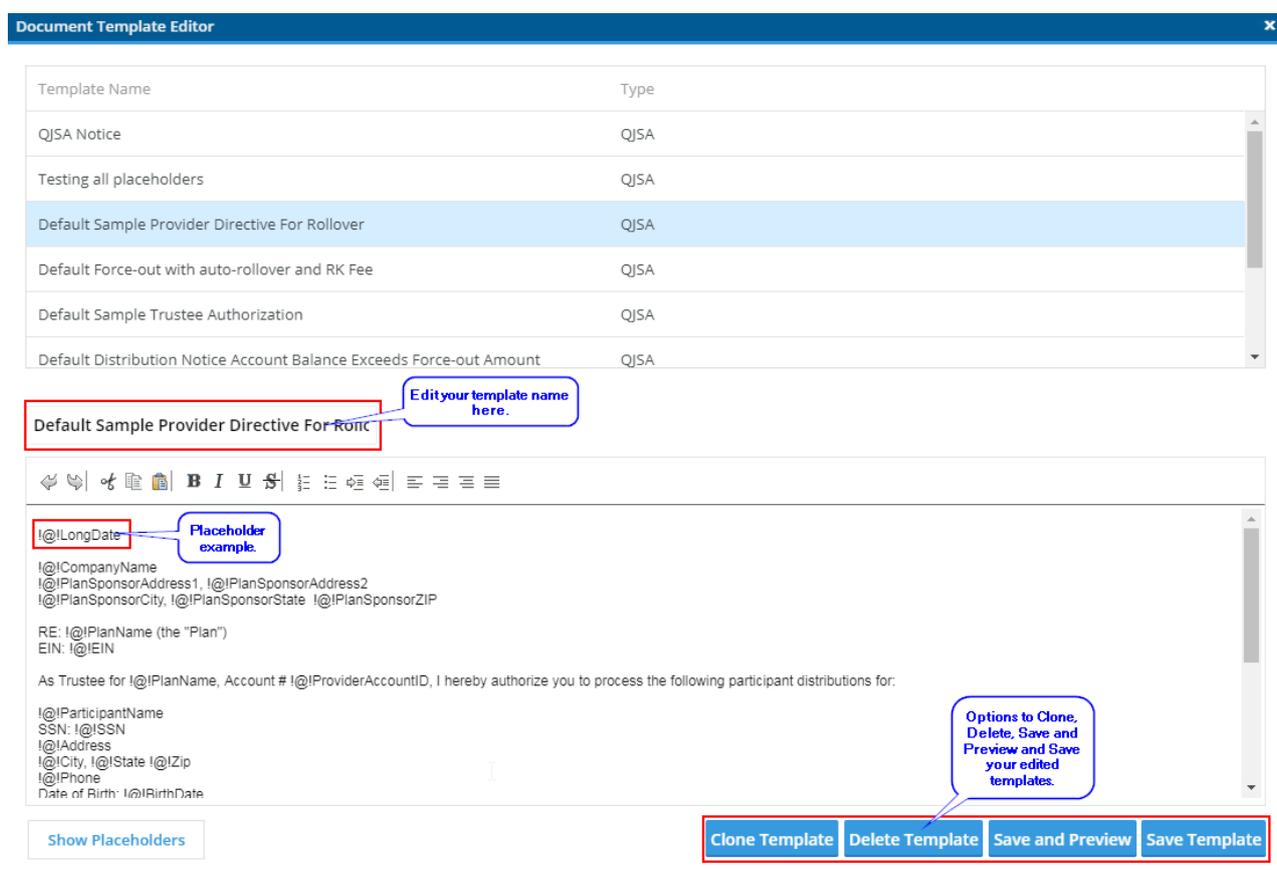
Show Placeholders Mapping Manager **Clone Template** Delete Template Save and Preview Save Template

Once cloned, you can rename the template at the time of cloning or in the box above your template formatting tools. (You are able to rename this template at any time.)



The 'Clone Template' dialog box has a title bar with a close button. It contains a 'Name' field with the text 'Sample Renamed Template'. Below it is a 'Format' dropdown menu set to 'HTML', with a note: '*Changing the template format will create a blank clone'. At the bottom right are 'OK' and 'Cancel' buttons.

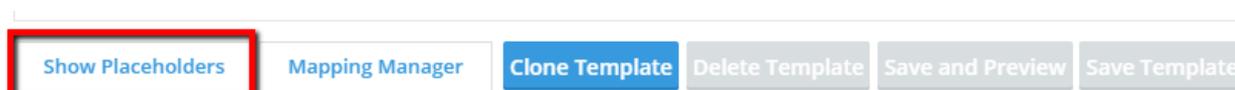
If you select to utilize the HTML Template option, you are able to edit the template from within the tool:



The 'Document Template Editor' window shows a list of templates. The 'Default Sample Provider Directive For Rollover' template is selected. Below the list is a rich text editor with a toolbar. The text in the editor contains several placeholders like '@LongDate', '@CompanyName', etc. Callouts point to the template name, a placeholder, and the bottom buttons. The bottom buttons are 'Clone Template', 'Delete Template', 'Save and Preview', and 'Save Template'.

While editing, the software gives you the option to insert placeholders. Placeholders are used to populate specific data in the template when generated for a distribution. For example, if you use the placeholder for SSN in your text, the appropriate SSN would populate in that template when attached to a specific distribution. Always make sure to save your template when you are finished editing.

To show a list of placeholders select 'Show Placeholders' at the bottom left of the screen. This list can also be exported in Excel for easier access:



A horizontal bar containing five buttons: 'Show Placeholders' (highlighted with a red box), 'Mapping Manager', 'Clone Template', 'Delete Template', and 'Save and Preview'.

Template PlaceHolders [X]

Placeholder Options
 Placeholders are case sensitive! Be sure to copy them exactly as below when using them.

!@!CompanyName	The company name in the portal user's record
!@!EIN	Company EIN
!@!Date	The current date
!@!LongDate	The current date in long form
!@!Module	The module name
!@!PlanID	The plan ID
!@!PlanName	The plan name

Name Placeholders:

!@!Contact	Checklist item 21 on the 'Edit Company' page for the company
!@!Sponsor	Checklist item 1 on the 'Edit Company' page for the company
!@!Salutation	Checklist item 23 on the 'Edit Company' page for the company

Contact Information Placeholders:

!@!PlanSponsorAddress1	Checklist item 2a on the 'Edit Company' page for the company
!@!PlanSponsorAddress2	Checklist item 2b on the 'Edit Company' page for the company
!@!PlanSponsorCity	Checklist item 3 on the 'Edit Company' page for the company
!@!PlanSponsorState	Checklist item 4 on the 'Edit Company' page for the company

[Close]

Once a template is attached to a distribution record, the software will populate that participants data inside of the template.

If you choose the “Document” format template type, you will be able to upload templates that you have on your computer into the system:

Document Template Editor [X]

Template Name	Type	Mapping	Replacement Type	Format	System
Default Distribution Election Form - QJ5A	Other		FindReplace	Document	Yes
Default Distribution Election Form - non-QJ5A	Other		FindReplace	Document	Yes
Default Sample Provider Directive For Rollover	Provider		FindReplace	HTML	Yes
Default Force-out with auto-rollover and RK Fee	Other		FindReplace	HTML	Yes

For example, if you have a merge document and you have inserted logic with your own placeholders, there is no need to recreate the file for use in the software, you will simply need to update the placeholders to match ours, and upload your existing file into the system.

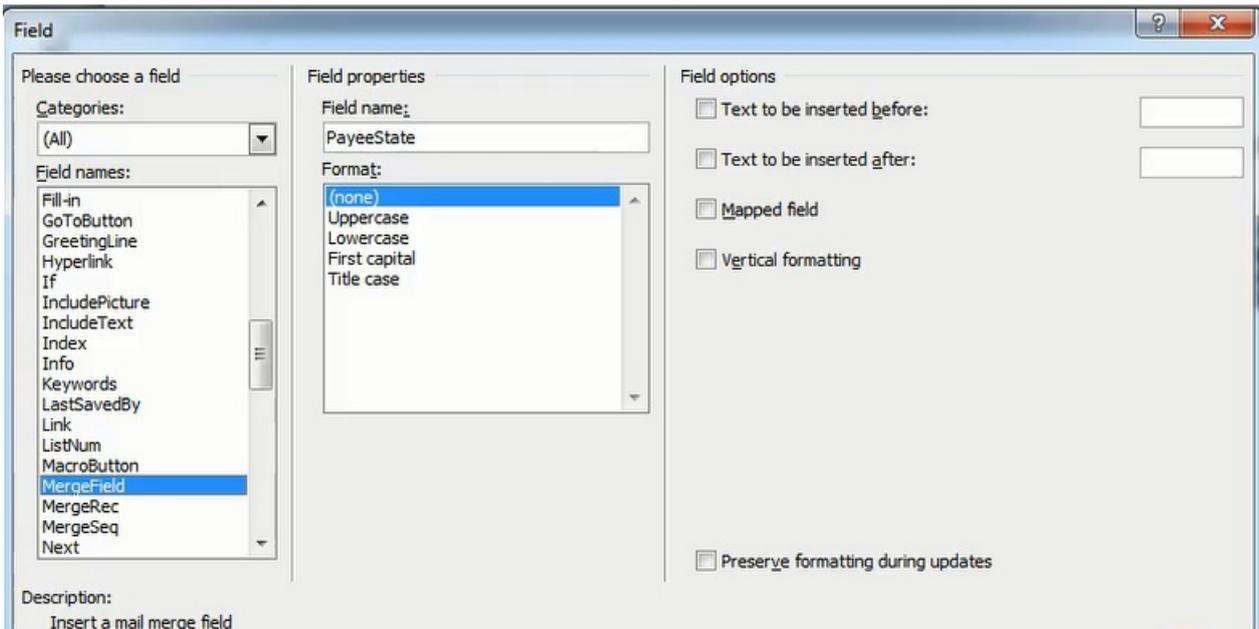
To accomplish this, select your merge file with existing logic, you will need to alter your data to match with our placeholders. Find the merge field you want to edit and right click on it to open up the editor.

```

" "" }
{ IF { MERGEFIELD FlagAmountCode } = 4 "INSTRUCTIONS TO PARTICIPANT
DISTRIBUTION ELECTION FORM – (VESTED ACCOUNT BALANCE EXCEEDS $5,000)
Plan: { MERGEFIELD "PlanName" }
Participant: { MERGEFIELD "PayeeLName" }, { MERGEFIELD "PayeeFName" }
{ IF { MERGEFIELD PayeeEmail } <> "" "Emailed to: { MERGEFIELD "PayeeEmail" }
" "" }Address: { MERGEFIELD "PayeeStreet1" } { IF { MERGEFIELD PayeeStreet2 } <> "" "; " "" } { MERGEFIELD
"PayeeStreet2" }
{ MERGEFIELD "PayeeCity" }, { MERGEFIELD "PayeeState" } { MERGEFIELD "PayeeZIP" }

```

Insert the ftwilliam.com placeholder here so that the software will know where to populate data from the software into your template.



When you are finished, you will want to select an existing "Document" format template and click the "Clone" button. Next you will need to give your new template a name.

Document Template Editor

Template Name	Type	Mapping	Replacement Type	Format	System
Default Distribution Election Form - QJSA	Other		FindReplace	Document	Yes
Default Distribution Election Form - non-QJSA	Other		FindReplace	Document	Yes
unified 3	Other		FindReplace	Document	No
unified 2	Other		MailMerge	Document	No
Sample	Other		FindReplace	Document	No
Unified				Document	No

Clone Template

Name:

Format: *Changing the template format will create a blank clone

Default Distribution Election Form

Uploaded File: [Distribution Election Form](#)

From there you will need to upload your file into the software and choose the “Mail Merge” option from the menu. When you click the “Upload and Save” button, the software will load your new template into your template library for use.

Document Template Editor

Template Name	Type	Mapping	Replacement Type	Format	System
Default - QJSA/Spousal Consent with Notary	Spousal		FindReplace	HTML	Yes
PBMARES TEMPLATE	Other		FindReplace	Document	No
Amertias Example	Other		FindReplace	Document	No
Nationwide Distribution Form	Other		MailMerge	Document	No
Custom Distribution Election Template	Other		MailMerge	Document	No
New Template Name	Other		FindReplace	Document	No

Upload Document Template

Document: DistributionElectionForm NonQJSA.docx

Replacement Type: Find/Replace Mail Merge

Mapping Rule Set:

New Template Name

Uploaded File: [Distribution Election Form](#)

You are also able to use a Word file and fill in the forms with our placeholders. This is the “Find/Replace” option. You will need to follow the same instructions, but choose “Find/Replace” instead of “Mail Merge” when you upload your new template. Below is an example of a “Find/Replace” template set-up with ftwilliam.com placeholders.

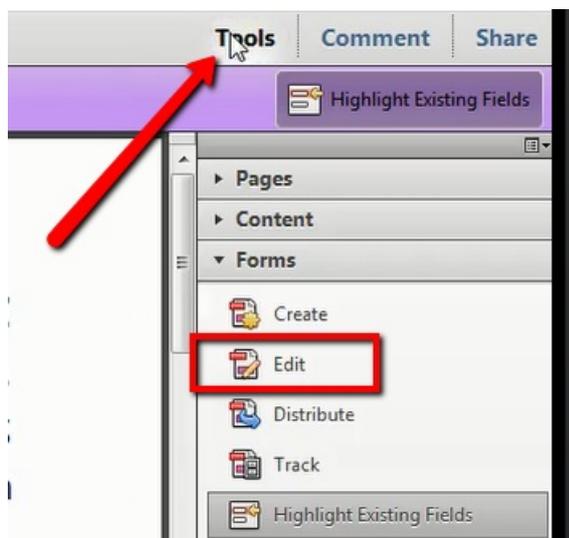
DISTRIBUTION ELECTION FORM
!@!PlanName

Section 1: PARTICIPANT INFORMATION

!@!LastName Last Name	!@!FirstName First Name	MI	Employee ID Number
!@!Address Address - Number and Street		!@!City City	!@!State State
Date of Birth: !@!BirthDate		Date of Hire: !@!EarliestHireDate	
		Current Marital Status: !@!MaritalStatus	
Work Phone		!@!Phone Home Phone	

*The difference between a merge data and “Find and Replace” is with a merge file, you have logic and will need to replace your internal variable with our placeholders in order for the system to properly display the data. With Find and Replace you are just inserting our place holders into a file.

The last option is to use a record keeper form. You will need to open the form in Adobe in order to make changes. You will need to Select Tools>Forms>Edit



Then right click on the existing variables inside of the PDF and replace the fields with our placeholders. Please note that you do not need to add “!@!” when working with a PDF. Once in the system, the software will use these fields to input the proper data after the template has been attached to a distribution record.

Case Number: <input type="text" value="Case Number"/>	Case Name: <input type="text" value="Case Name"/>
Does this case include multiple fixed contracts?	<input type="checkbox"/> Yes <input type="checkbox"/> No (If Yes, answer the next question)
Does the de minimis policy apply to this withdrawal?	<input type="checkbox"/> Yes <input type="checkbox"/> No (If No, complete Attachment B)
3. Participant Information (all fields required)	
Name: <input type="text" value="ParticipantName"/>	SSN: <input type="text" value="SSN"/>
Street Address: <input type="text" value="Address"/>	

Once your file is ready to be added to your template library, you will need to clone an existing template with the

Format category "Document". Next, click the clone button and give your template a name so it is easily recognizable in the library.

Template Name	Type	Replacement Type	Format	System Template
Default Distribution Election Form - QJSA	Other	FindReplace	Document	Yes
Default Distribution Election Form - non-QJSA	Other	FindReplace	Document	Yes
Default Sample Provider Directive For Rollover	Provider	FindReplace	HTML	Yes
Default Force-out with auto-rollover and RK Fee	Other	FindReplace	HTML	Yes
Default Sample Trustee Authorization	Provider	FindReplace	HTML	Yes
Default Distribution Notice Account Balance Exceeds Force-out Amount	Other	FindReplace	HTML	Yes

Default Distribution Election Form - QJSA Download Sample Upload Template

Uploaded File: [Distribution Election Form - QJSA.docx](#)

Show Placeholders Clone Template Delete Template Save and Preview Save Template

If you are uploading a record keeper form, please note, you will not need to select find and replace or mailmerge.

Document: Select File(s) Distribution Election Template_Test.doc

Replacement Type: Find/Replace Mail Merge

Upload and Save

Once 'Upload and Save' is selected, the file will be made available inside of the template editor library for use.

In order to use the forms, select the participants you wish to attach them to from your dashboard:

Home > Edit Company > Edit Plan > Distribution Manager

Example Company 401(k) Plan test
Company ID: | Plan ID: | PYE: 12-31 | EIN: 11-2233456 | Plan Number: 101

Module Options

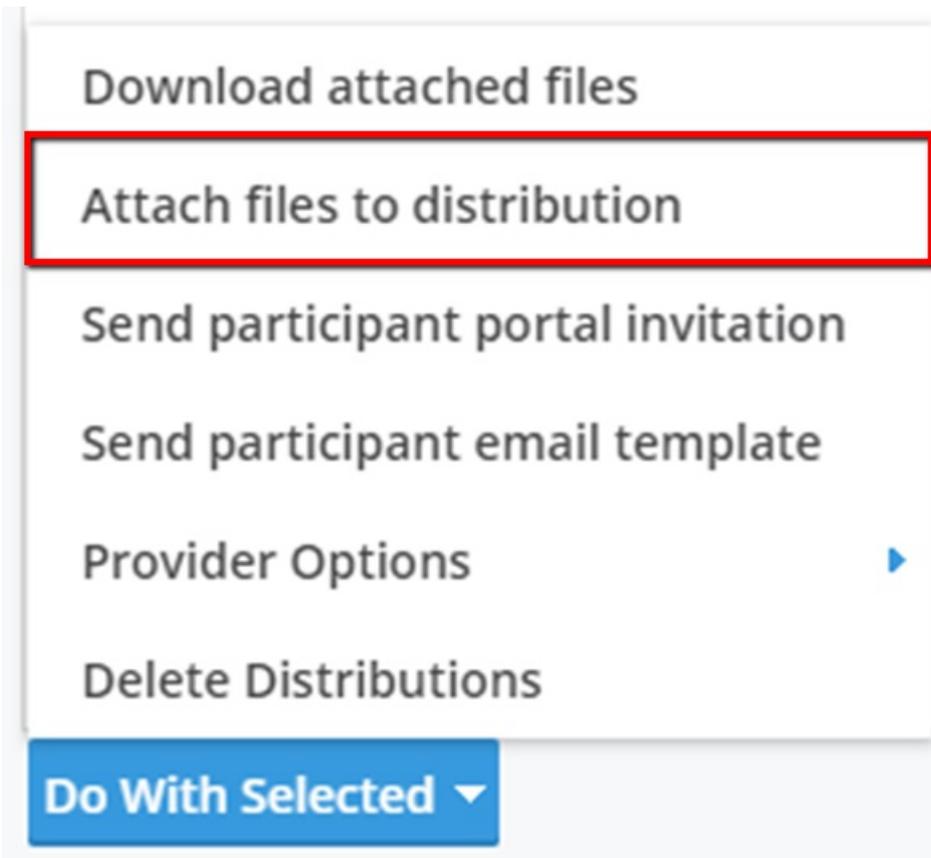
DISTRIBUTIONS

Distributions Participants Specifications 17 Status(es) Selected From To Find by Name or Distribution Type Start Distribution

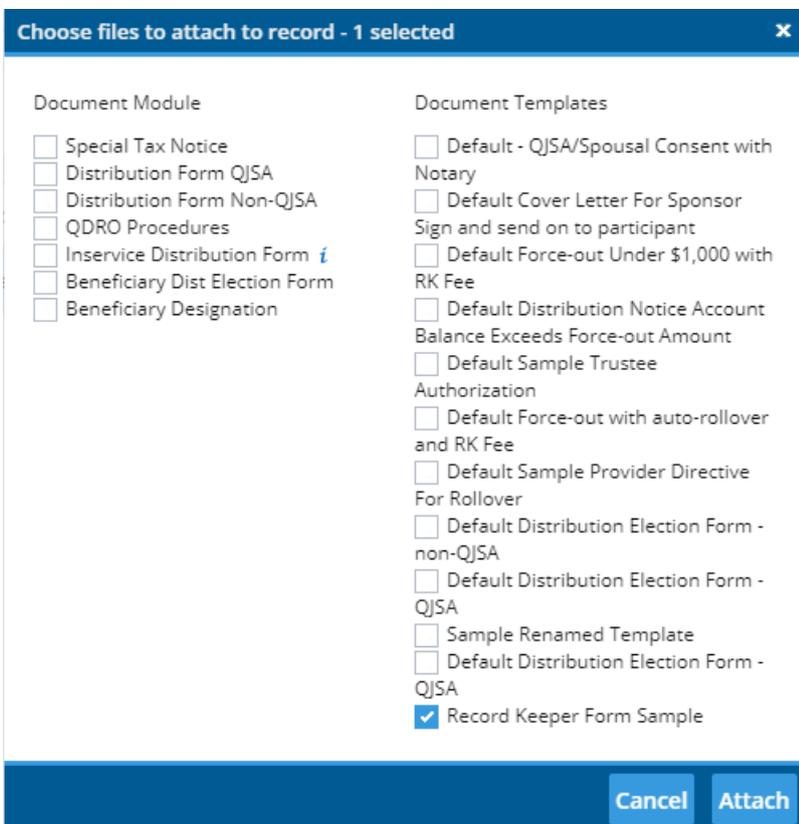
First Name	Last Name	SSN	Reason	Involuntary	Distribution Type	Status	Alert	Last Update	Started	Owner	1099
<input checked="" type="checkbox"/>	Sample	Name	6788	In-Service Withdra...	Unspecified	Needs Participant Input		02/19/2019	02/19/2019		1099

Open

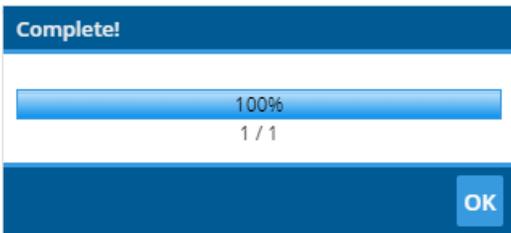
From the bottom left hand corner, select the 'Do with Selected' button and select 'Attach Files to Distribution'



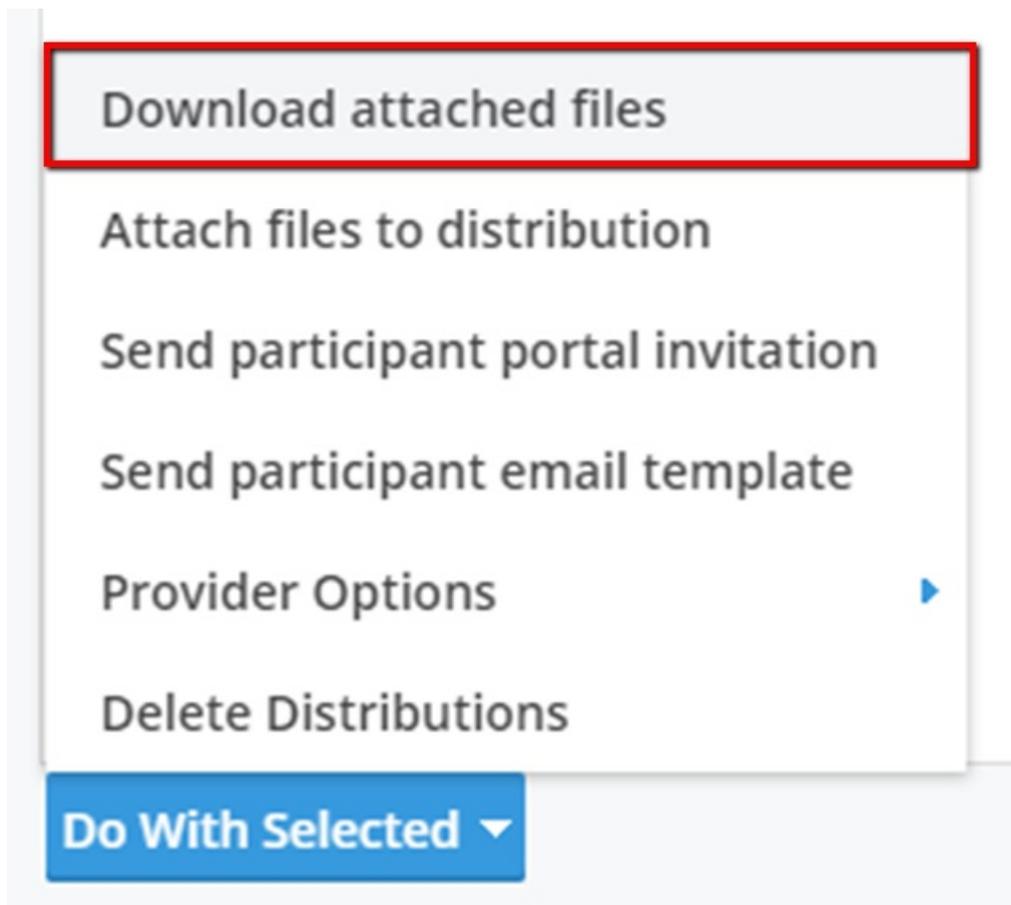
You will then be able to select the forms you wish to add to the participants from a checklist. Select the templates and click the 'Attach' button.



From here, the software is taking the data from your distributions and populating it into the appropriate fields that match the placeholders on the forms.



Once this process is completed, you may access a zip file with individual folders for each selected participant via the 'Do with Selected' and 'Download Attached Files' option.



Name	Type	Compressed size	Password ...	Size
Name, Sample - Unspecified	Compressed (zipped) Fol...	15 KB	No	

Name	Type	Compressed size	Password ...	Size
Record Keeper Form Sample	Adobe Acrobat Document	15 KB	No	

All distributions forms and data are also stored inside of the distribution record. You may download your files for an individual distribution by clicking the 'Open' button for the desired distribution record and clicking the download icon next to the upload files link.

Example Company 401(k) Plan test

Company ID: | Plan ID: | P/E: 12-31 | EIN: 11-2233456 | Plan Number: 101

Module Options

DISTRIBUTIONS

Distributions | Participants | Specifications

17 Statuses Selected

From

To

Find by Name or Distribution Type

Q

+ Start Distribution

First Name	Last Name	SSN	Reason	Involuntary	Distribution Type	Status	Alert	Last Update	Started	Owner	1099	
Sample	Name	6788	In-Service Withdra...		Unspecified	<input type="radio"/> Not Started		02/19/2019	02/19/2019			Open

Distribution

Distribution Summary

Needs Participant Input

Change Status

Please Review the information below before submitting.

TAX NOTICE

Open

Tax Notice Review

Not Reviewed Reviewed By Participant Sent via Email

MISSING

BASIC INFORMATION

Participant Middle Name

Participant Title

CONTACT INFORMATION

Participant Phone

DISTRIBUTION DETAILS

Pay Date

EMPLOYMENT INFORMATION

Last Day Worked

...

[Show All \(7\)](#)

UPLOADED FILES

No files currently uploaded.

You may also attach files individually to distribution records via the 'Miscellaneous files for download' section on Step 2 of the distribution data collection process. Click the 'Attach Document Templates' link and you will be able to access your template library from there. Once you select your templates and attach them, they will be attached to your distribution record and will be available for download via the download icon.

Miscellaneous Files For Download

No files currently uploaded.

Uploaded Files

No files currently uploaded.

[Choose File\(s\)](#) [No file selected]

[Attach Document Templates](#)