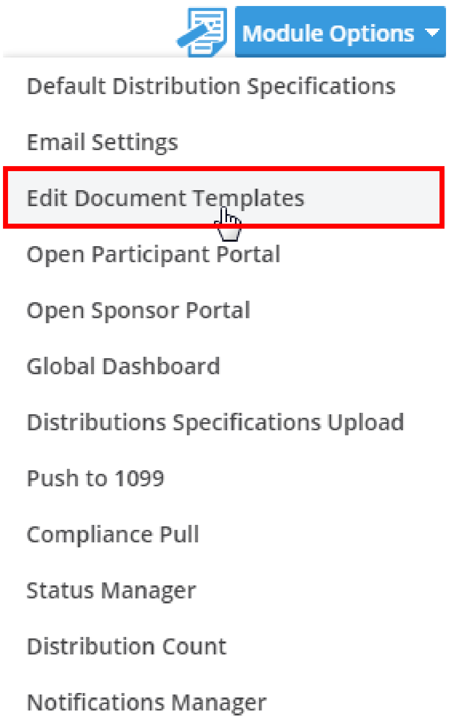
Document Template

12/04/2024 4:11 pm CST

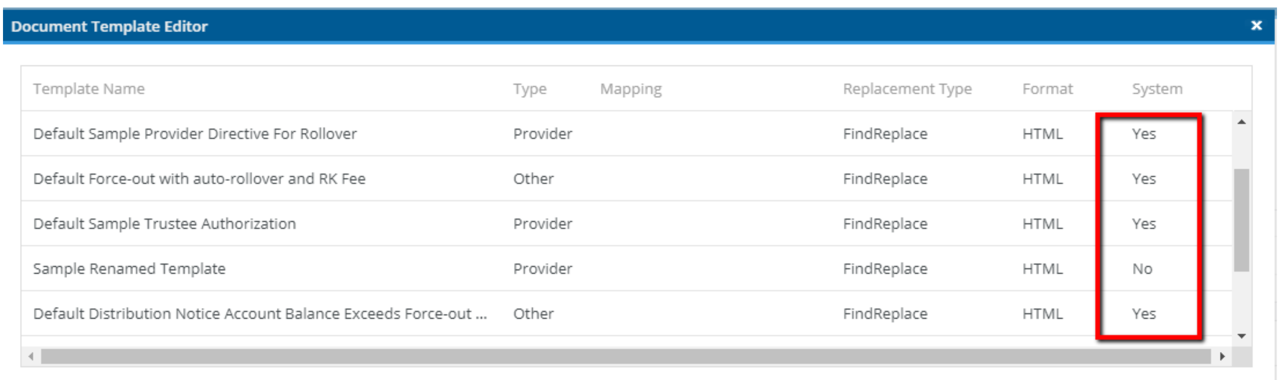
Document Template Editor Video

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.

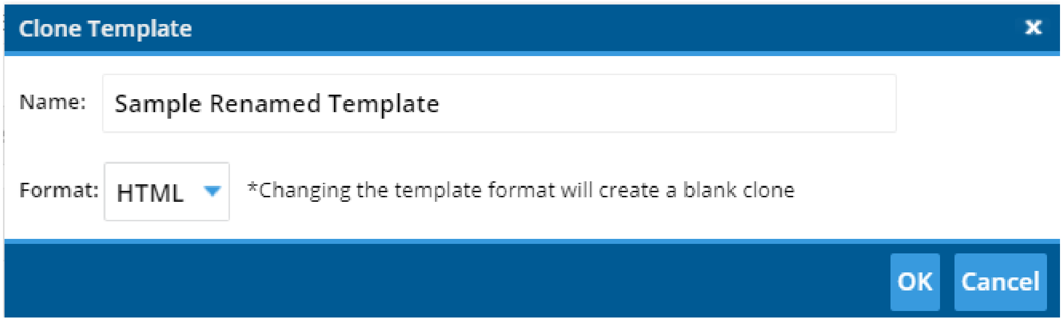


Once the editor is open, select the template you would like to edit or clone. Please keep in mind that if the template is a "System" template, that is indicated by 'Yes' in the "System" column. These templates may be cloned, but not edited or deleted.

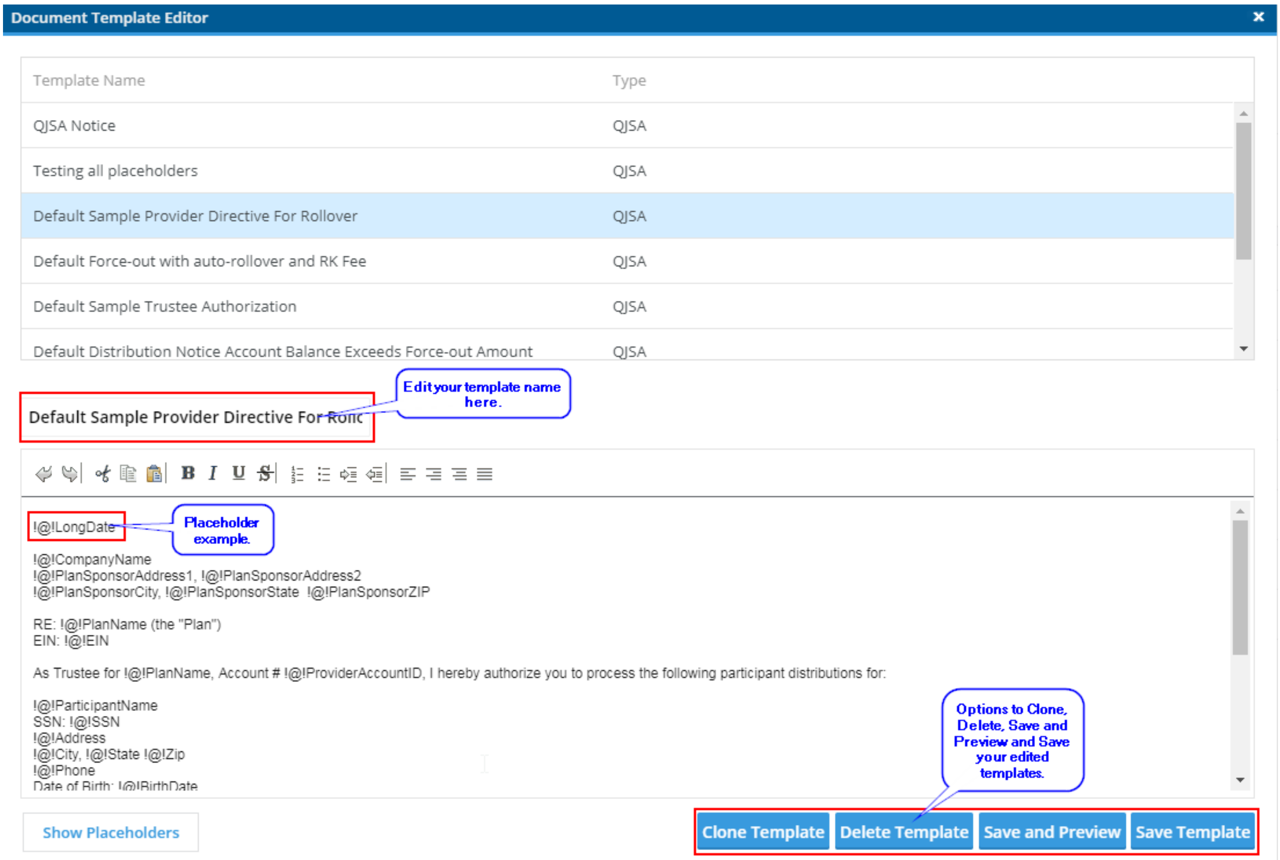


If you choose to clone your template, click the 'Clone Template' button in the bottom right of the pop up window.

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.)

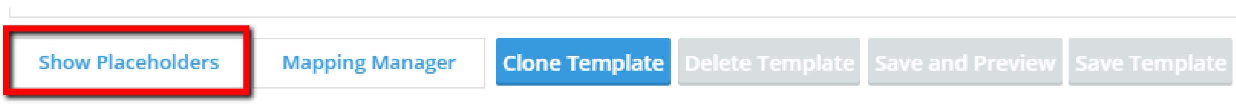


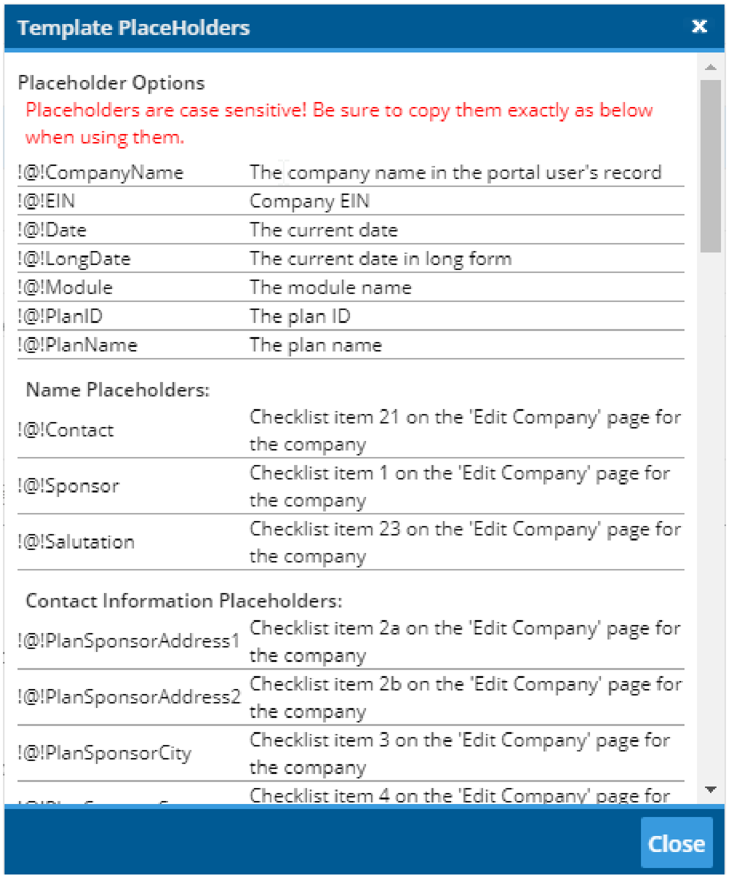
If you select to utilize the HTML Template option, you are able to edit the template from within the tool:



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:





Template PlaceHolders

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

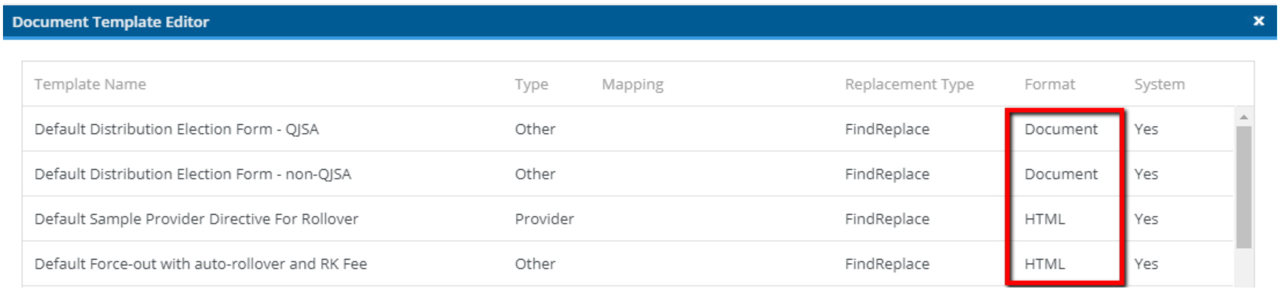
Contact Information Placeholders:

!@!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
	Checklist item 4 on the 'Edit Company' page for

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

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
Default Sample Provider Directive For Rollover	Provider		FindReplace	HTML	Yes
Default Force-out with auto-rollover and RK Fee	Other		FindReplace	HTML	Yes

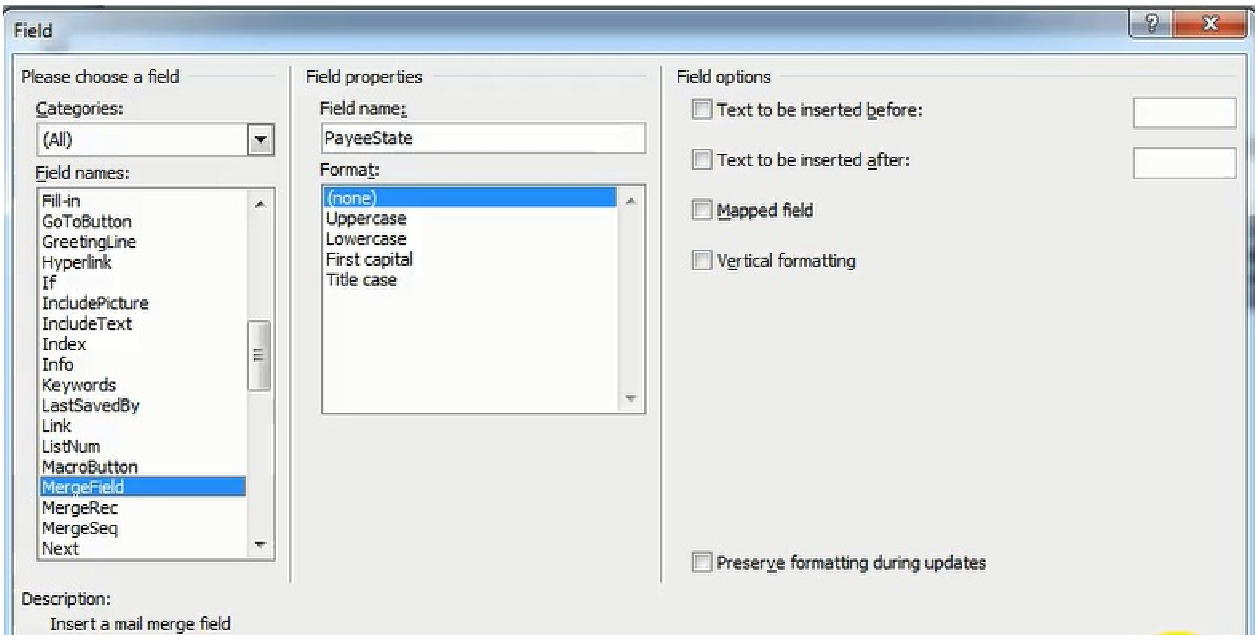
For example, if you have a merge document and you have inserted logic with your own placeholders, there is no need to recreate the file for use in the software, you will simply need to update the placeholders to match ours, and upload your existing file into the system.

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.

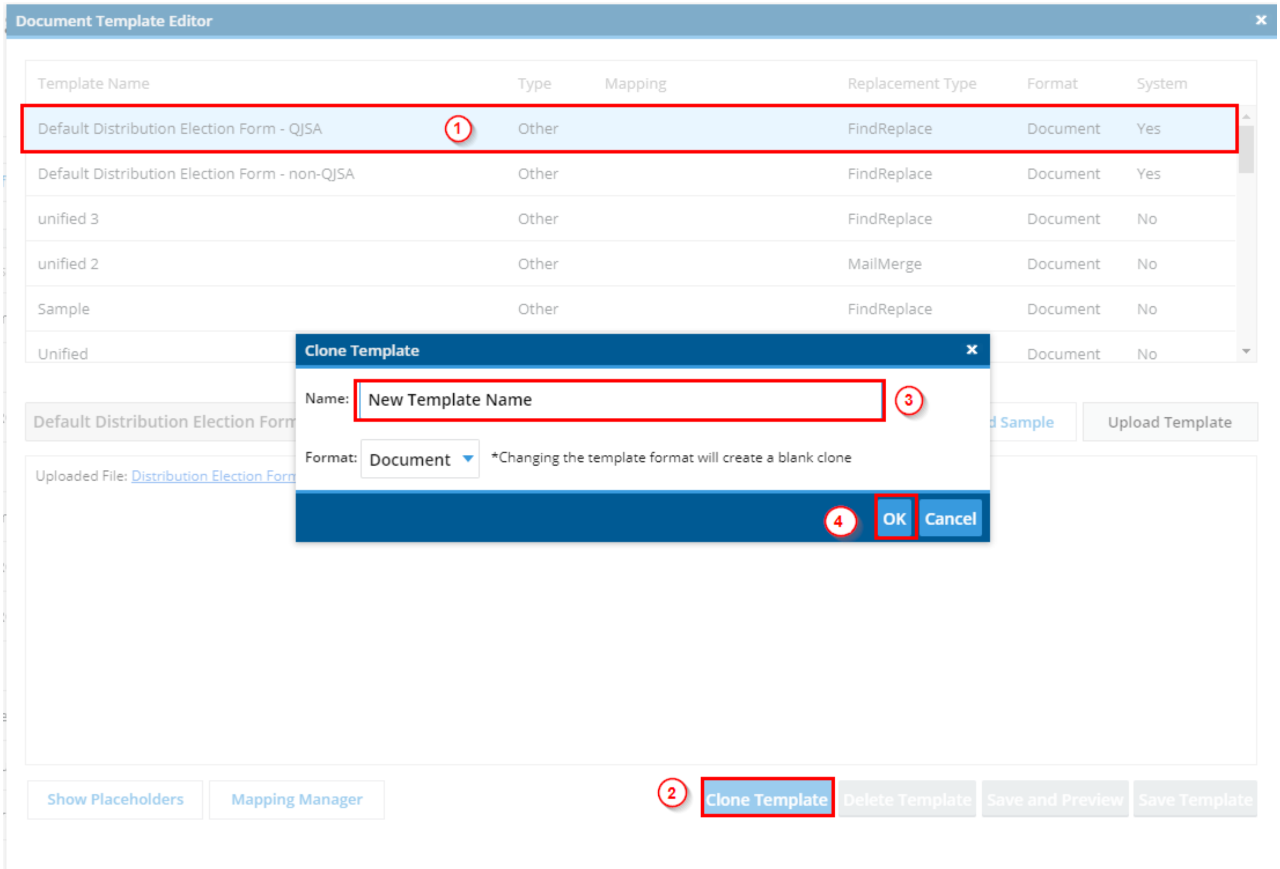
" "" }
{ IF { MERGEFIELD FlagAmountCode } = 4 "**INSTRUCTIONS TO PARTICIPANT**
DISTRIBUTION ELECTION FORM – (VESTED ACCOUNT BALANCE EXCEEDS $5,000)

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" }

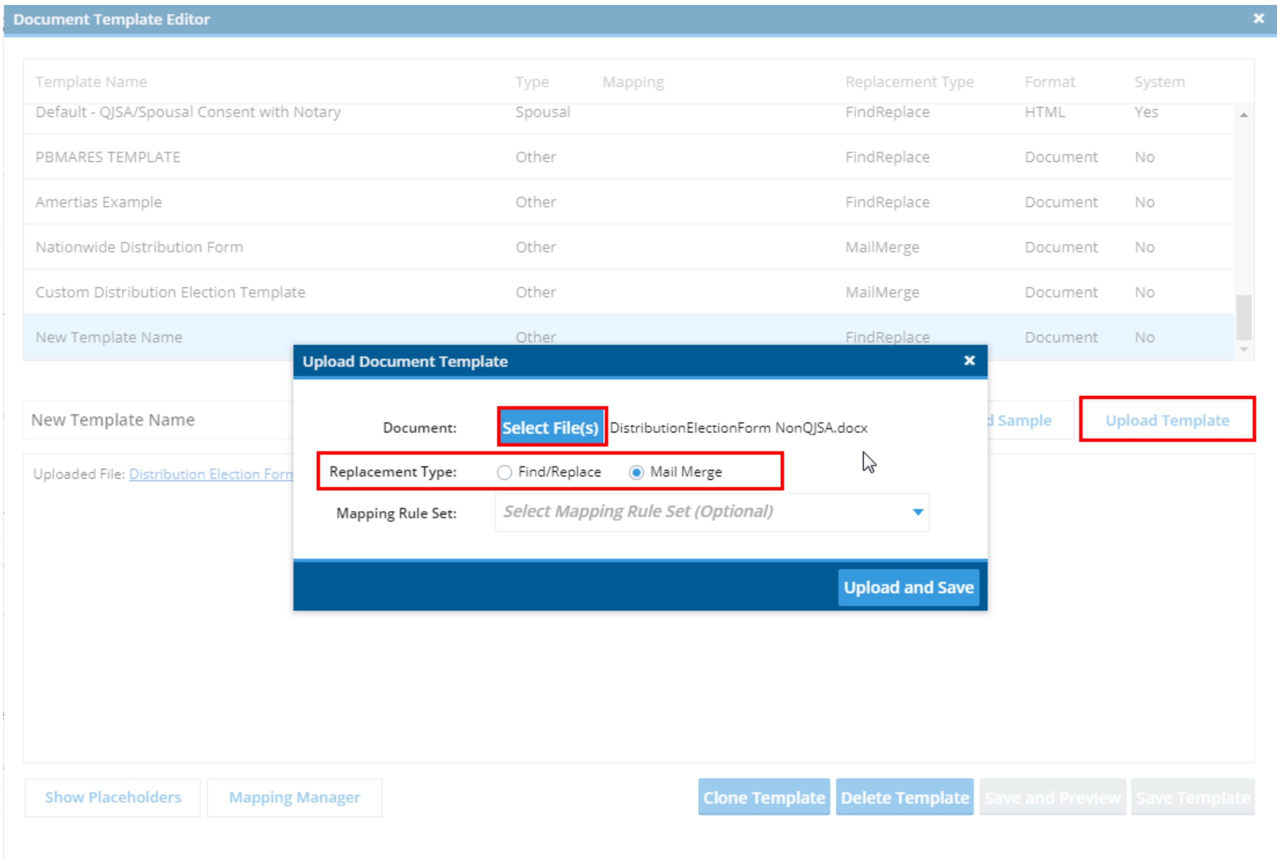
Insert the ftwilliam.com placeholder here so that the software will know where to populate data from the software into your template.



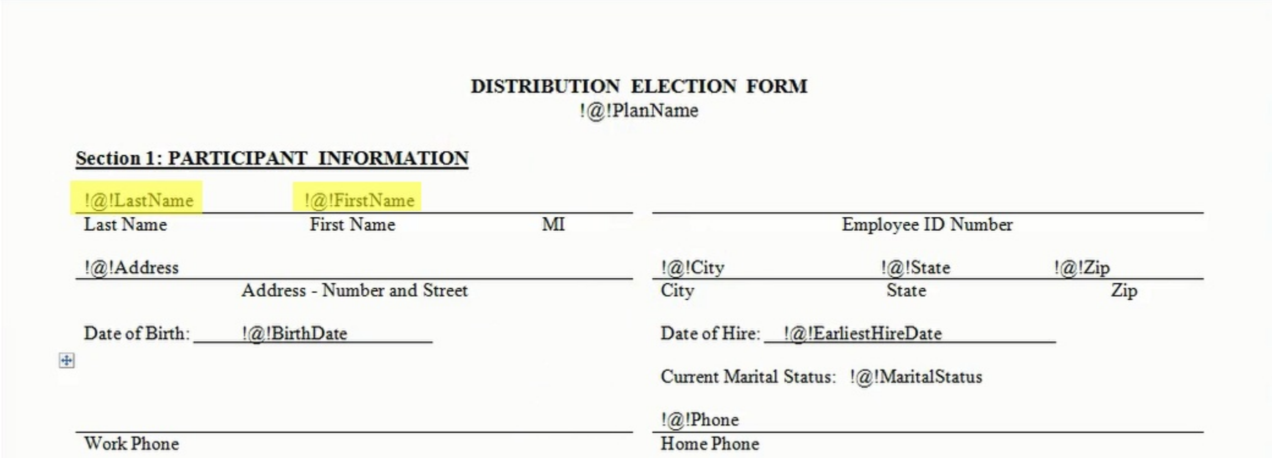
When you are finished, you will want to select an existing "Document" format template and click the "Clone" button. Next you will need to give your new template a name.



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.



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 the 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 !@!FirstName

Last Name First Name MI Employee ID Number

!@!Address !@!City !@!State !@!Zip

Address - Number and Street City State Zip

Date of Birth: !@!BirthDate Date of Hire: !@!EarliestHireDate

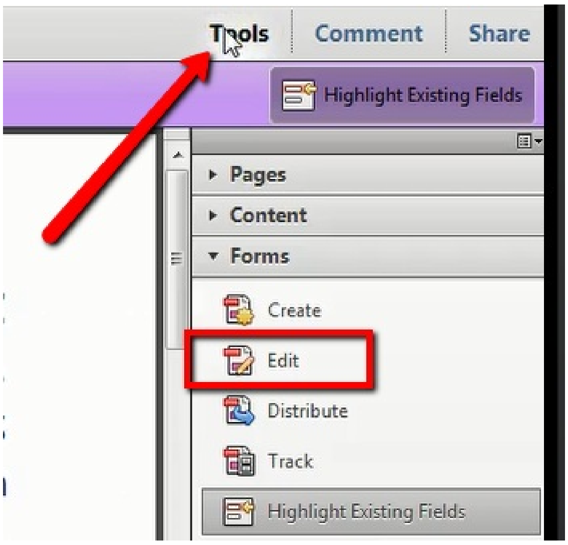
Current Marital Status: !@!MaritalStatus

!@!Phone

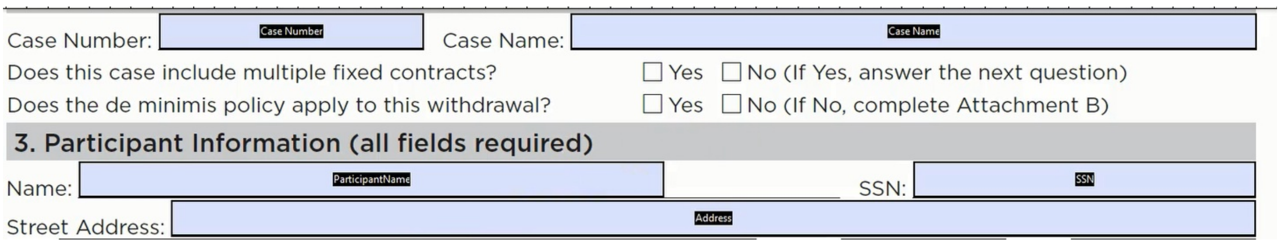
Work Phone Home Phone

*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: Case Number Case Name: Case Name

Does this case include multiple fixed contracts? ☐ Yes ☐ No (If Yes, answer the next question)

Does the de minimis policy apply to this withdrawal? ☐ Yes ☐ No (If No, complete Attachment B)

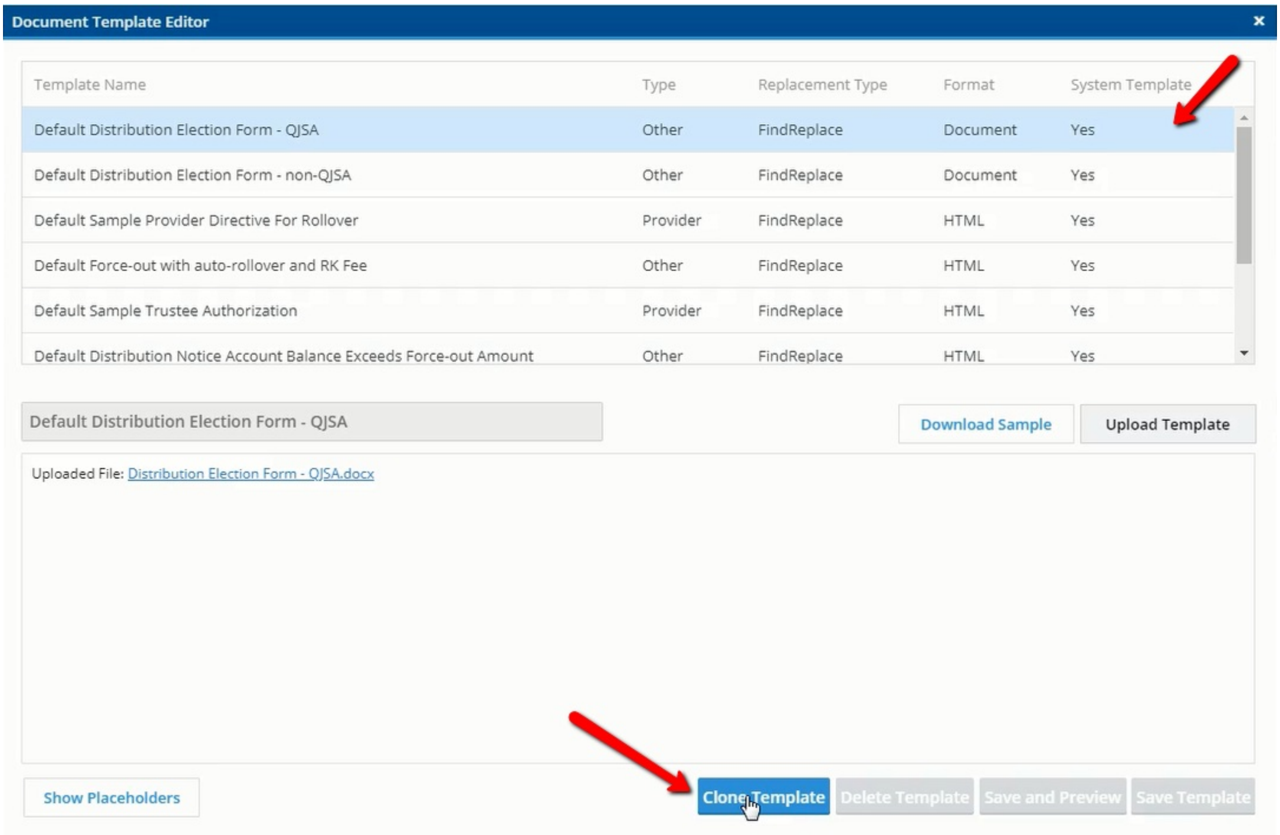
3. Participant Information (all fields required)

Name: ParticipantName SSN: SSN

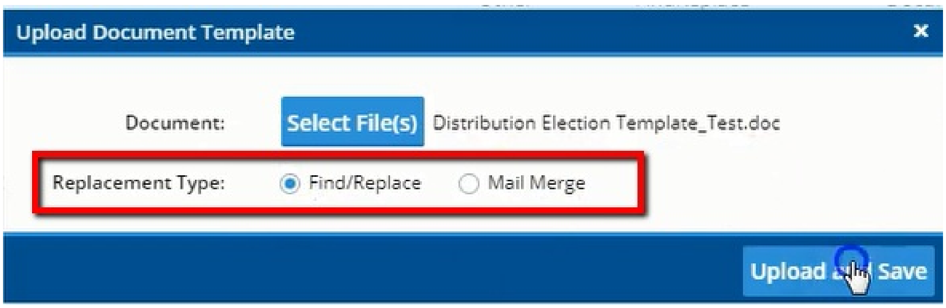
Street Address: Address

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.

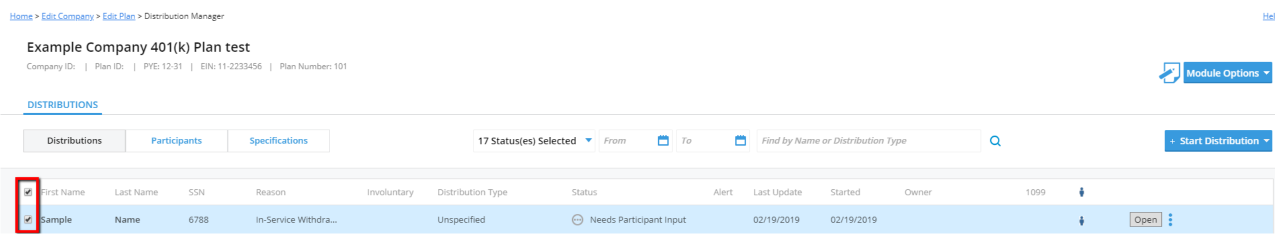


If you are uploading a record keeper form, please note, you will not need to select find and replace or mailmerge.

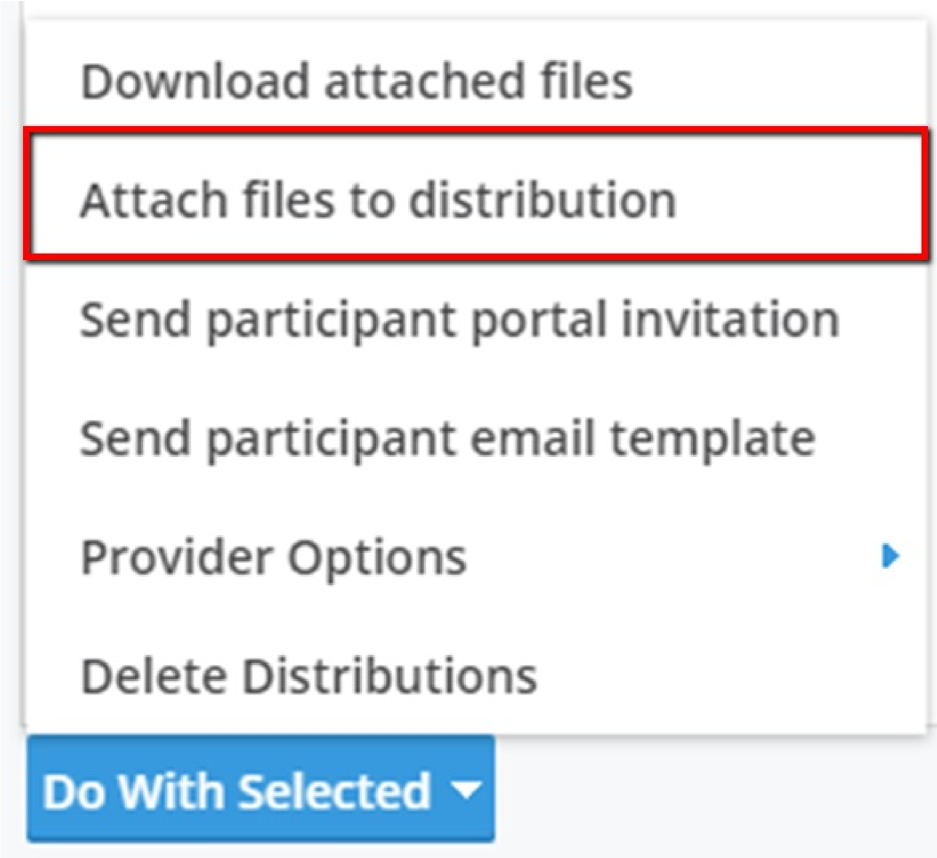


Once ‘Upload and Save’ is selected, the file will be made available inside of the template editor library for use.

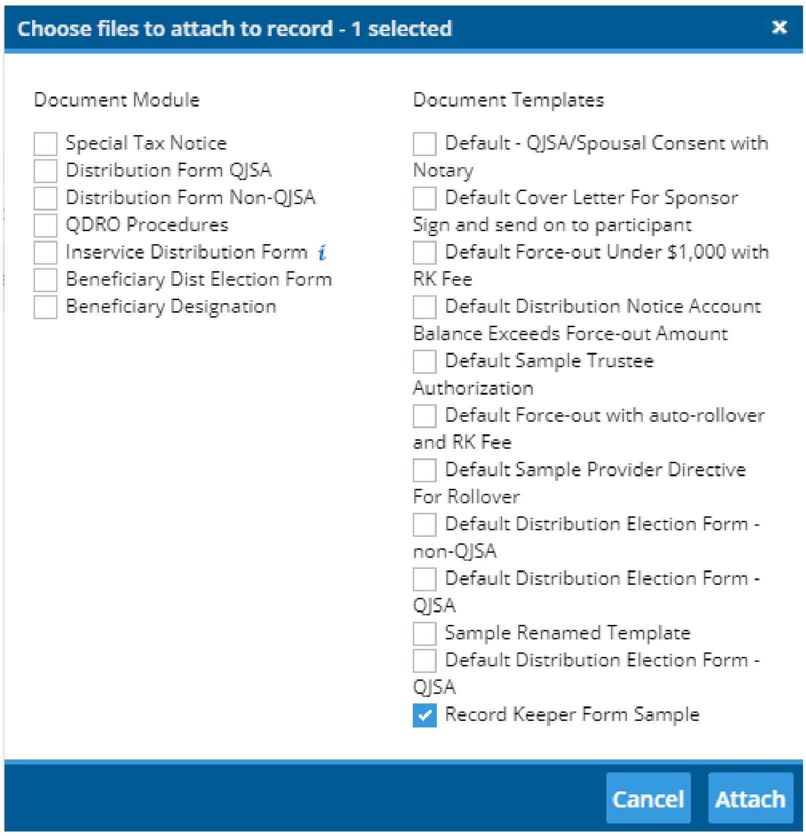
In order to use the forms, select the participants you wish to attach them to from your dashboard:



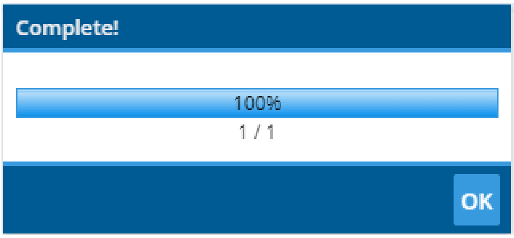
From the bottom left hand corner, select the ‘Do with Selected’ button and select ‘Attach Files to Distribution’



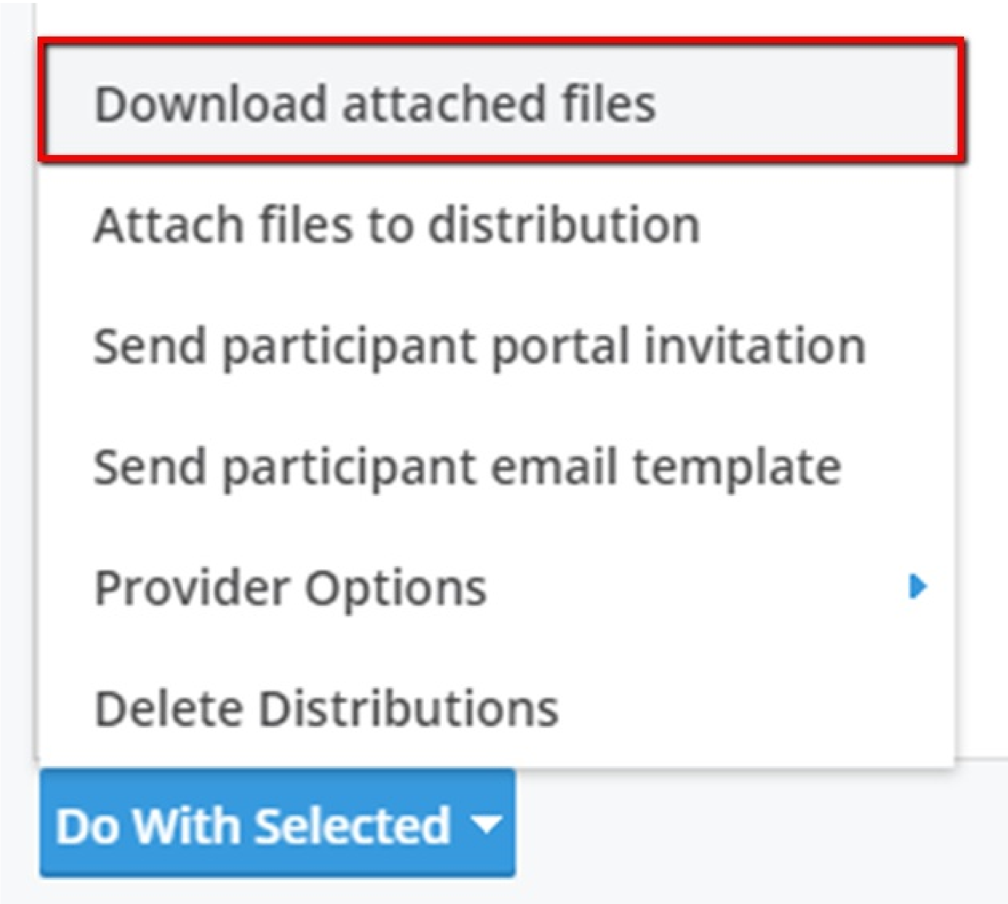
You will then be able to select the forms you wish to add to the participants from a checklist. Select the templates and click the 'Attach' button.

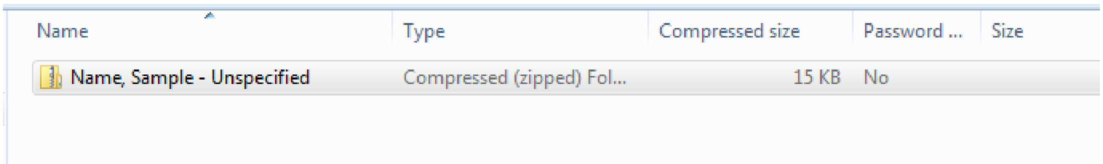


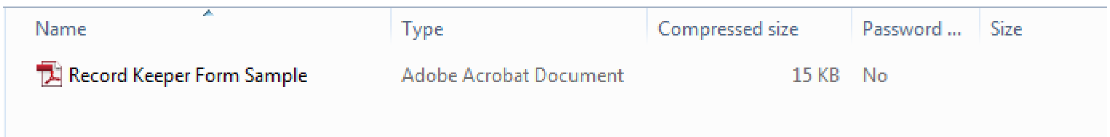
From here, the software is taking the data from your distributions and populating it into the appropriate fields that match the placeholders on the forms.



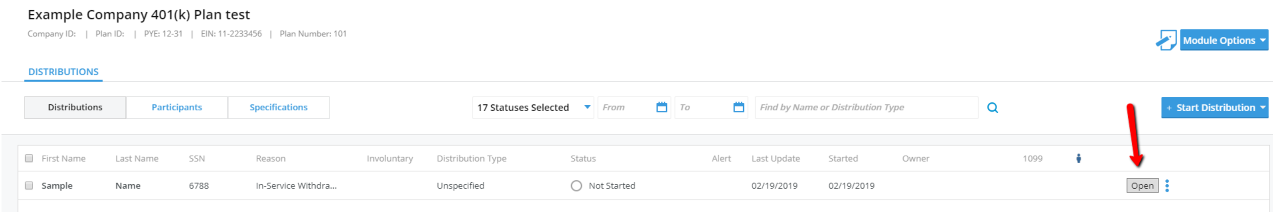
Once this process is completed, you may access a zip file with individual folders for each selected participant via the ‘Do with Selected’ and ‘Download Attached Files’ option.

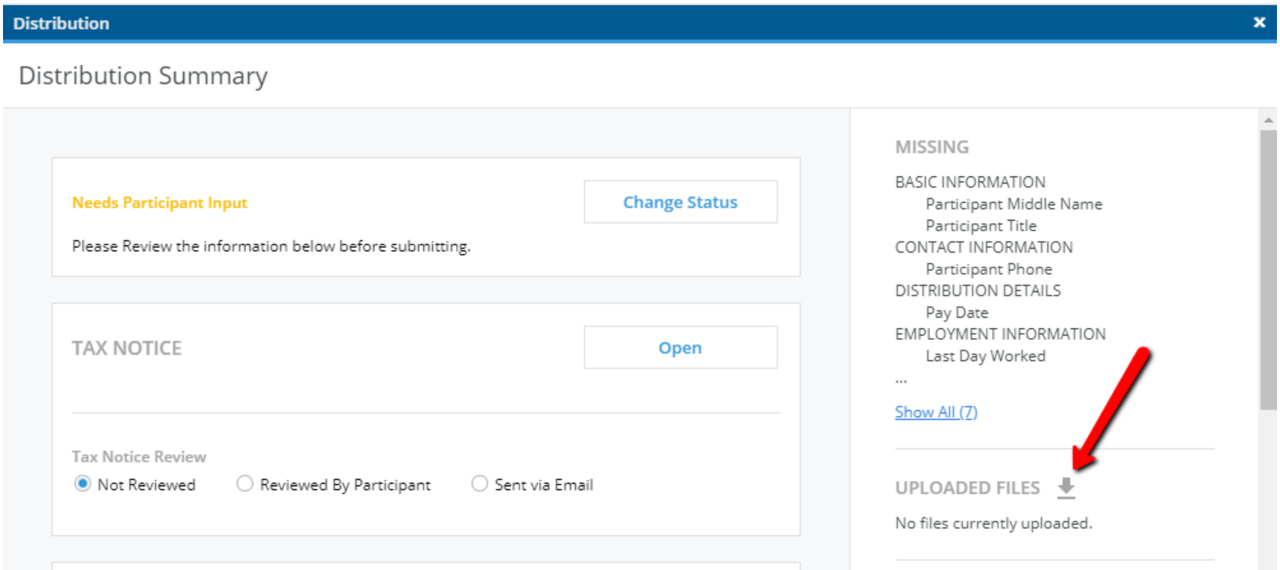






All distributions forms and data are also stored inside of the distribution record. You may download your files for an individual distribution by clicking the ‘Open’ button for the desired distribution record and clicking the download icon next to the upload files link.





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.