

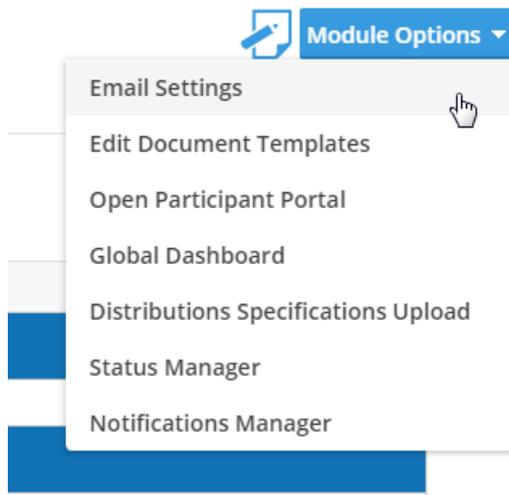
# Download Attached Files

12/05/2024 7:57 am CST

When the software is finished attaching your files, you can then proceed to batch printing. Click the same “Do with Selected” menu button and instead, click “Download Attached Files”. By doing this, the software will automatically create a zip file for you to download with an individual folder for each of your selected participants. Your files will be located inside of these folders for you to print.

Send participant portal invitation and send participant email template

You may also use the “Do with Selected” menu for sending attached templates and invitations to the participants in batch. This will send each of your selected participants an email notification inviting them to log into the participant portal for data collection or to download files. This can be used in conjunction with the batch Distribution Upload if you choose to not send the invitation at the same time the Distribution records are created. This option is only available if you use the “Specify Server Settings” in the “Email Settings” menu. You can access the “Email Settings” via the “Module Options” button.



Email/Server Settings

**Custom Language:** No

**Email Sending Method:** Specify a Server

**From Name:** Test Tester  
\*Editable: Yes

**From Email:** test@ftwilliam.com  
\*Editable: No

**Reply To:**  
\*Editable: No

**CC:**  
\*Editable: No

**BCC:**  
\*Editable: No

**SMTP Server:** mail.tushaus.com

**\*\*SMTP Port:** 25

**Secure Connection:** None

**Username:** support@ftwilliam.com

**Password:** .....

\*Marking a field as 'Editable' will allow preparers to choose their own value for this field. Default settings will not be updated if a preparer chooses their own value.

\*\*Port 25 will be used if left blank. Please contact support if you would like to use a port other than 25, 465, 587, or 2525.

Save Settings

Select an Email to Edit

Email Name	Default Template	Edit
Data-Based	Default Data-Based	<a href="#">Edit</a>
Force Out	Default Force Out	<a href="#">Edit</a>
Participant Invitation	Default Participant Invitatic	<a href="#">Edit</a>
Participant Portal Invitation	Default Participant Portal I	<a href="#">Edit</a>
Plan Sponsor Invitation	Default Plan Sponsor Invit:	<a href="#">Edit</a>
Plan Sponsor Portal Invitation	Default Plan Sponsor Port:	<a href="#">Edit</a>
Spousal Consent	Default Spousal Consent	<a href="#">Edit</a>
Time-Based	Default Time-Based	<a href="#">Edit</a>

Edit Templates

Save Settings