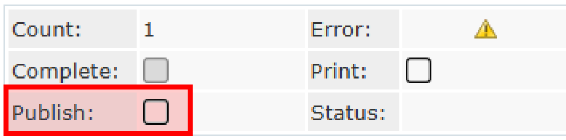
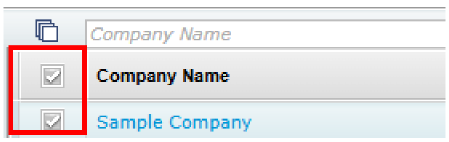
Publishing Documents to the Portal

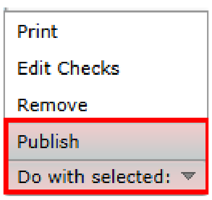
12/17/2025 8:50 am CST

Customers that also subscribe to ftwPortal Pro can choose to deliver documents/forms using the "Publish" option at the top of the Batch Menu.



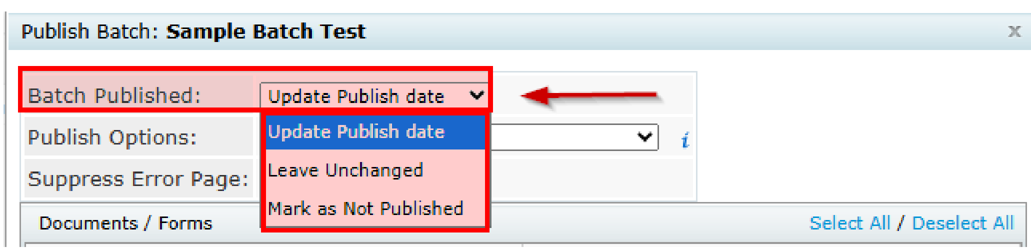
You can also select plans from your list to that you want to publish. Select your plans, then click on the "Do with selected".



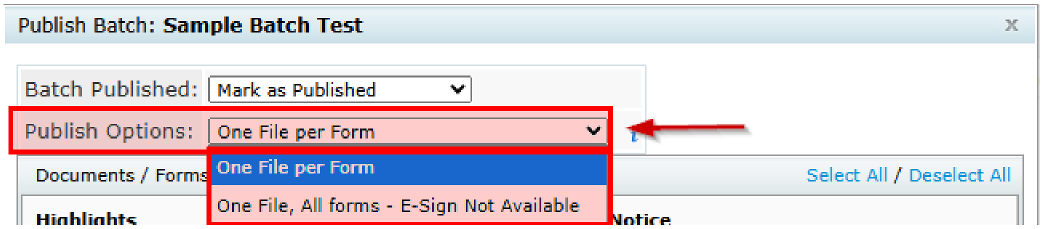


On the "Publish Batch" page, there are three options available.

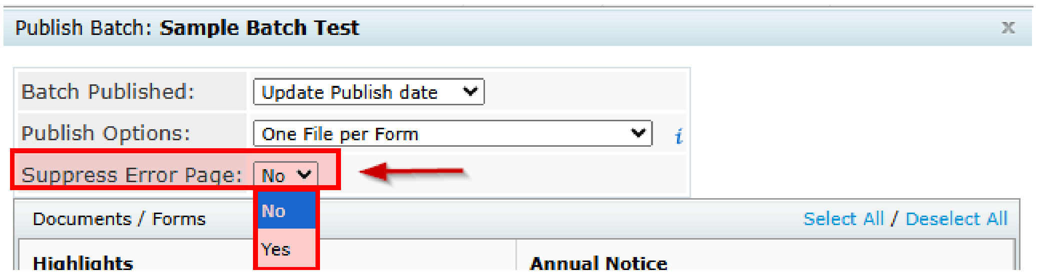
1. "Batch Published" - Updates the "Publish" date on the Batch Menu. You can choose to update the publish date, leave the publish date unchanged, or choose to mark as not published.



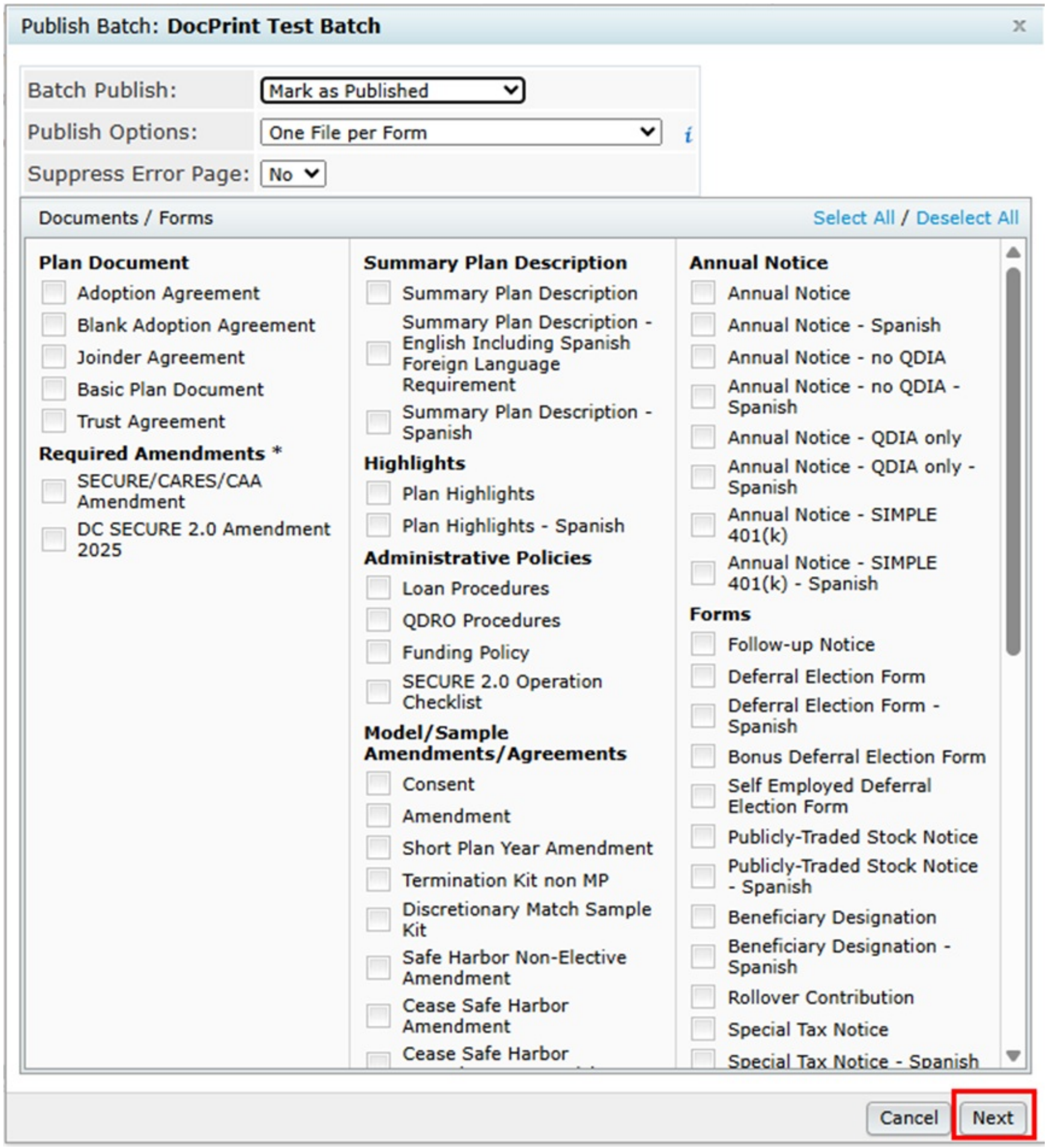
2. "Publish Options" - provides options to choose from on how selected documents/forms are published to the Portal.
   - "One File per Form" - sends all selected documents/forms in individual files. This option is recommended for E-Sign.
   - "One File, All forms" - sends all selected documents/forms in one file. This may be a large file. You may experience additional processing time.



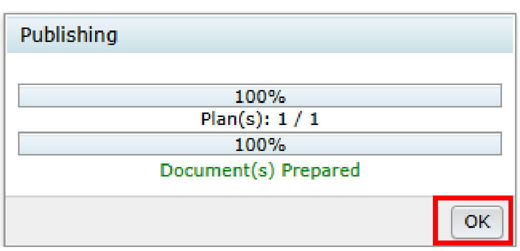
3. "Suppress Error Page" - gives the option of suppressing the error page. The error page generates as the first page of all documents when the checklist has not passed all edit checks.



After making your publish selections, choose which documents/forms you would like to include, and click on the "Next" button at the bottom of the menu.



A progress bar window will appear to indicate you are ready to proceed. Click on the "Ok" button.



The software will direct you to the Communication Manager in the Portal, where there are several options to choose from.

1. Classifications: If you are publishing more than one document with different types of "Classifications", the classification type of "Plan Forms" will default. You can choose a different classification from the drop-down menu.

2. Subject: Each communication requires a subject to be sent.

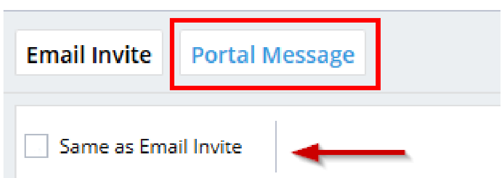
3. Send Email Invite: This toggle option indicates whether communication will be sent to the Portal User that the items are available, or you can choose to publish the files to the Portal without an invitation. When the toggle is gray (off mode), an invitation will not be sent.

4. Confirmation Email Recipient: This field indicates who will receive confirmation that the Portal User has downloaded, or E-Signed the documents in the communication. This will either be the Admin associated with the plan or the Master User on your account.

5. Expires Field: This field allows you to set an expiration date. Once the date has passed these documents will no longer be on the Portal User's Portal. ***NOTE: this is an uncommon field, as most prefer their Portal Users to have access to these documents on an ongoing basis.***

6. Email Invite: This field indicates what template to use when sending the invitation to your Portal User to inform them of items to review or sign. You can select from system generated or custom templates from the dropdown icon in this section. You can also create or edit templates by selecting the gear icon to the right of the template dropdown.

7. Portal Message: This is the message that is displayed within the portal view for your Portal Users. This can be left blank, you can enter a custom message, or you can choose to have the email invitation copied to the Portal message by checking the box next to "Same as Email Invite".



8. Folder Name: This allows you to specify a folder for the documents you are publishing to the Portal. This is often used to help organize documents by specific years or item type.

9. Add ToDo with Portal Access: This allows you to add items that do not require action to the Portal User's "ToDo" list. Adding items to the ToDo list will also trigger reminders if reminders are set in the Global Email Settings. To add viewing the document to the Portal User's ToDo list after E-Signing, be sure to check the box.

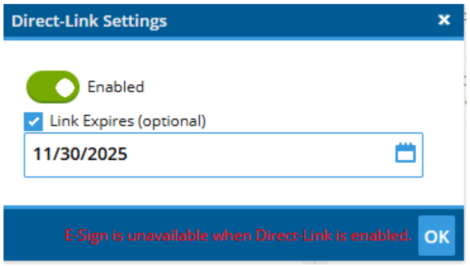
10. Do with Selected: This field will allow you to add E-Sign options, remove E-Sign options, or remove selected plans/files from the batch.

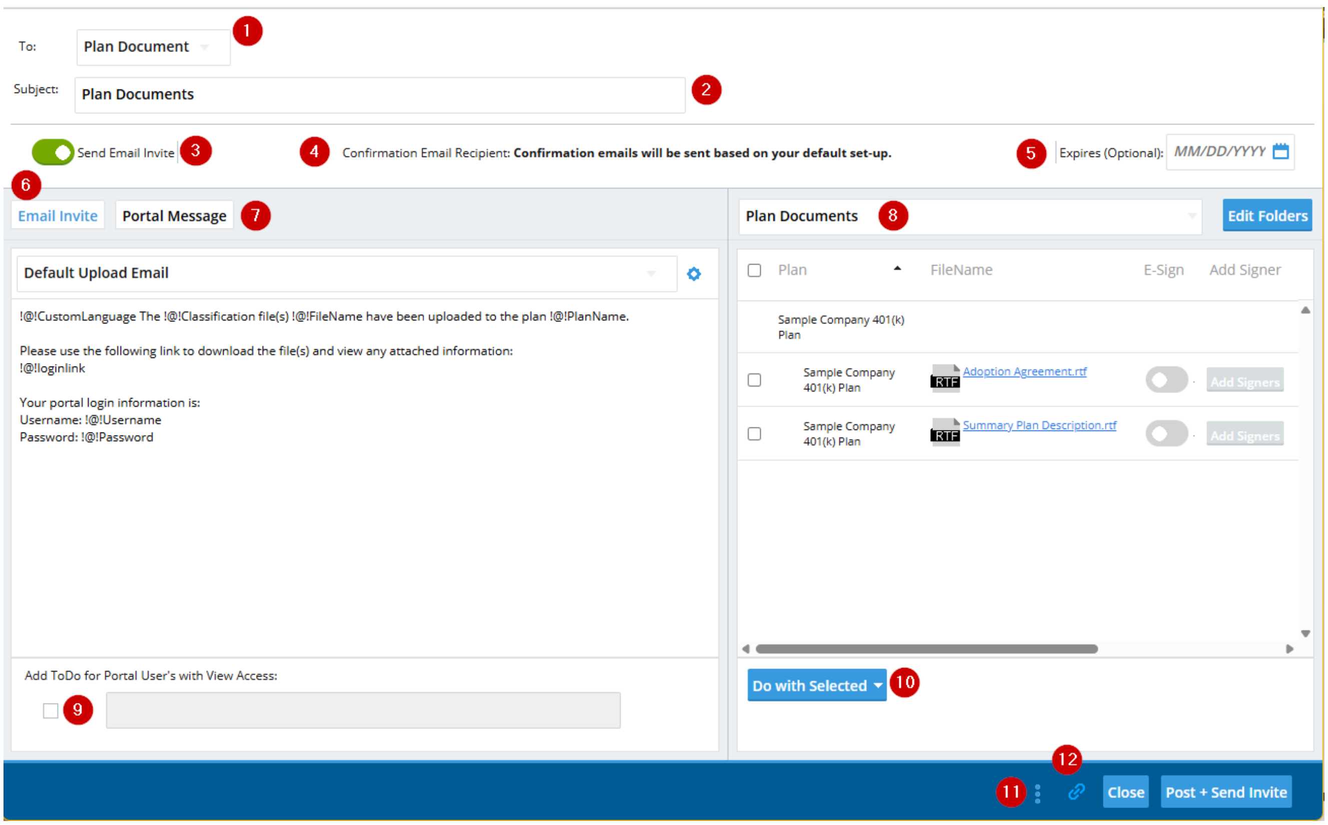
11. Preview Portal Invite: The tri-colon at the bottom of the page allows you to preview your communication.

12. Direct-Link: The chain icon at the bottom of the page allows you to send your documents/files in email. This offers the Portal User the ability to access the documents within the communication (Direct Message) without having to log into the Portal.

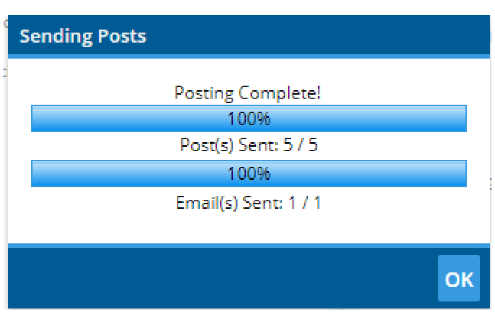
Please Note: Direct-Link cannot be used for items set for E-Sign. When Direct-Link is enabled, the link will turn green. To use this feature requires "Specify a Server" to be set up in your Global Email Settings. For detailed instructions on Specify a Server, please click here. For detailed instructions on how to verify your Global Email Settings, please click here.

When using Direct-Link, you can also set an expiration for how long the link is visible.





Once you are ready to send your communication to the Portal, click on the "Post+Send Invite" or "Post" (depending on your selections) button at the bottom of the page. A window with a progress bar will generate. Click the "Ok" button.



You can now view the communications on the Global or Plan Level Dashboards. The red flag on your dashboard indicates there are unread messages for that Portal User. The Batch column indicates the name of the batch file the plan is in.