# How to Upload Portal Users in Bulk

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The Portal User Upload feature allows you to create new or update existing Portal users as well as assign users to plans for Documents, 5500, or Compliance module access. This article provides a simplified approach to the upload process while highlighting the fields required/ or suggested.

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## Review Contact Types (Recommended First Step)(return to top)

Before creating your upload file, review your Contact Types.

Contact Types determine the permissions available to Portal Users and can significantly reduce the number of fields that need to be completed within the upload file.

For additional information, refer to:

- **Help Article:** Managing Contact Types
- **Video Tutorial:** Default Contact Types and Classifications

### Why Contact Types Matter

A properly configured Contact Type automatically applies Portal permissions to users. This greatly simplifies the upload process and reduces the number of permission-related fields that must be maintained.  See notation

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## Access the Upload Template Files (return to top)

Navigate to:  **Wolters Kluwer Logo > ftwPortal Pro > Global Dashboard**

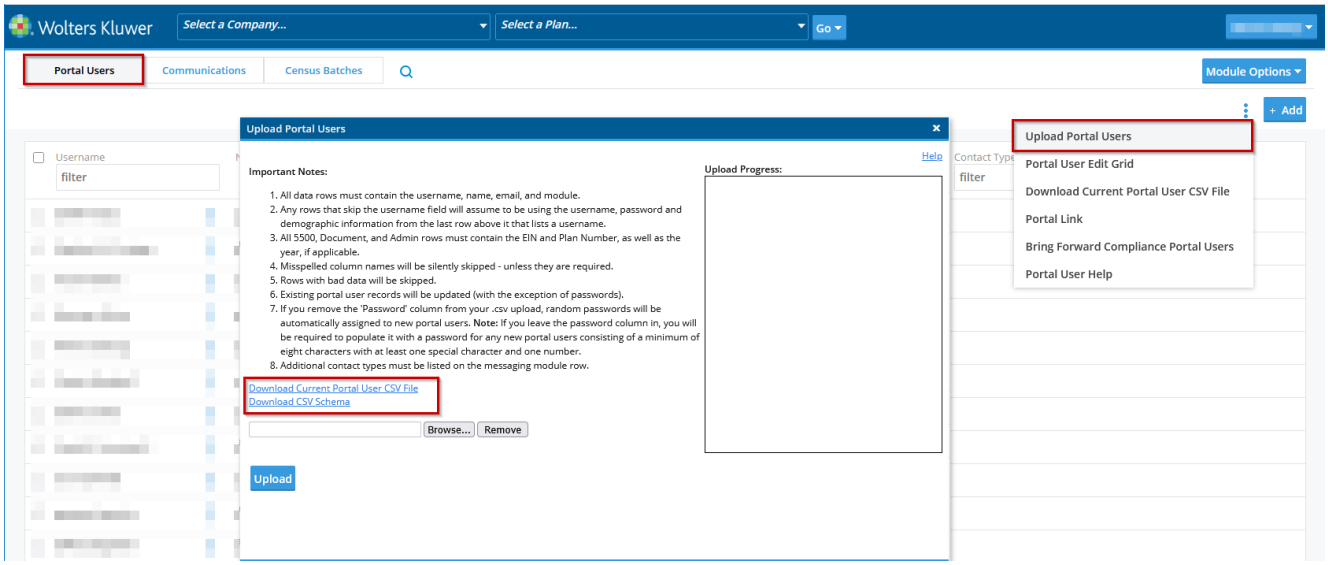
From the Portal Users tab:

- Select the tricolon menu above the grid.
- Select **Upload Portal Users**.
    - A pop-up window will display where 2 files are available.
        - Download Current Portal User CSV File  – This is the file that will be updated and uploaded.
            - **NOTE:** When using **Contact Types**, permissions are controlled by the Contact Type entered in

**Column S**. As a result, all columns after **AJ (Custom Language)** can be removed. Columns **AC–AJ** are optional and may be left blank.
**Use the Portal User Upload-simplified spreadsheet.csv  template for the recommended format.**

- Download CSV Schema  – This file explains how the data should be entered in the upload file.

> **NOTE**: The schema file in this article includes the system default contact types and classification options and is for reference only, as they may vary based on your firms settings.




## Understanding the Upload Structure

Every Portal User upload follows the same basic process:

**1. Access Template**
Portal User CSV
Portal User Schema

→

**2. Identify the Portal User**
Module = Messaging

→

**3. Assign User to Plan(s) (by Module)**
Document,

5500,
Compliance

→

**4. Upload Template**
Review upload results

**Important:** Every Portal User listing begins with a row containing identifying characteristics and the Module is set to **Messaging**.

- If the Portal User **does not already exist**, the Messaging row creates the user.
- If the Portal User **already exists**, the Messaging row identifies the user associated with the plan assignment rows that follow.
- All plan assignment rows for that user should be listed directly below the applicable **Messaging** row.

The Messaging row serves as the starting point for each Portal User and establishes the relationship between that user and any plan assignment rows included below it. All rows listed directly below that Messaging row belong to that user until another Messaging row is encountered.

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## Module Requirements (return to top)

The table below summarizes the fields required for each module type.

When completing the module details, it is recommended that you first download the ftwilliam PlanIDs Report **(WoltersKluwer Logo> Reports> Download ftwilliam PlanIDs Report).** This report ensures that the details entered on the Portal User upload match the existing plans exactly. It is also helpful when completing the optional fields provided below.

| Module Purpose | Module Value | Required Fields | Recommended Fields | Additional Requirements / Formatting |
|---|---|---|---|---|
| Create /Identify Portal User | Messaging | Username<br>Password<br>Name<br>First Name<br>Last Name<br>Email<br>Contact Type | N/A | Required for all users.<br>Creates new users and identifies existing users.<br><br>**Username** must be at least 4 characters, and cannot contain leading or trailing spaces, [%] [#] [+] [;] [&] [/] [?] ['] or [\].<br><br>**Passwords** must be at least 8 characters, with at least one number, one letter, and one special character. Passwords are case sensitive. |

| Module Purpose | Module Value | Required Fields | Recommended Fields | Additional Requirements / Formatting |
|---|---|---|---|---|
| Documents Access | Document | EIN<br>Plan Number | Plan ID*<br>Company ID*<br>Plan Name*<br>Signing As (optional) | Optional **Signing As** values:<br>• NONE (or blank)<br>• TRUST<br>• ADMIN<br>• ADMIN:TRUST |
| Form 5500 Access | 5500 | EIN<br>Plan Number<br>Year | Plan ID*<br>Company ID*<br>Plan Name*<br>Signing As (optional) | **Year** must be entered as a four-digit filing year only<br>(Example: 2025).<br><br>Optional **Signing As** values:<br>• NONE<br>• ADMIN:SPONS<br>• ADMIN<br>• SPONS<br>• DFE |
| Compliance Access | Admin | EIN<br>Plan Number<br>Year | Plan ID*<br>Company ID*<br>Plan Name | Year must be entered using Month, Day, Year details with one of the following formats:<br>• MM/DD/YYYY<br>• MM-DD-YYYY<br>• YYYY/MM/DD<br>• YYYY-MM-DD |

**Recommendation notes:** Include Plan ID and Company ID whenever possible. These values help ensure the upload is associated with the correct plan, particularly when multiple plans share the same EIN and Plan Number.

- **Plan ID** correlates to the ftwilliam PlanIDs Report column B, **FTWPlanID**.
- **Company ID** correlates to the ftwilliam PlanIDs Report column A, **FTWCustomerID**.
- **Plan Name:** This field is ignored for upload purposes and exists mainly for ease of use when reviewing the portal user list.
- Users may choose to upload additional details in the provided columns, the grid above (and sample below) simply define the required fields.

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## Example Upload File (return to top)

In the example below two new users are being added to the account. Each user is added with identifying information on the **Messaging** Module Line (highlighted blue).

**Jane Smith** is associated with **two** different plans with the following access:

- **Documents** module for both plans (highlighted green).
  - She is added as the Sponsor for signing permissions on one plan, and only viewing permissions on the other plan.
- **5500** module for one plan with signing access to two different filing **years** (highlighted purple).

- **Compliance** module for one plan with access to two different filing years (highlighted orange).

**John Doe** is added and associated with a **single** plan with the following access:

- **Documents** module (highlighted green) .
  - He is added as the Trustee for signing purposes.
- **5500** Module for one year with viewing permissions only. (highlighted purple).

| | A | B | C | E | G | R | S | U | V | W | X | Y | Z | AA | AB |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Username | Password | Name | First | Last | Email | Contact Type | EIN | Plan Number | Plan Name | Plan ID | Company ID | Signing As | Module | Year |
| 2 | JaneSmith26 | Password1! | Jane Smith | Jane | Smith | J.smith@email.com | Actuary | | | | | | | Messaging | |
| 3 | | | | | | | | 86-7530911 | 1 | 1 Example Company | 2552779824 | 1751503688 | SPONS | Document | |
| 4 | | | | | | | | 12-3456789 | 1 | AVALANCHE 401(k) Plan | 2025933395 | 1678892773 | NONE | Document | |
| 5 | | | | | | | | 12-3456789 | 1 | AVALANCHE 401(k) Plan | 2025933395 | 1678892773 | ADMIN:SPONS | 5500 | 2024 |
| 6 | | | | | | | | 12-3456789 | 1 | AVALANCHE 401(k) Plan | 2025933395 | 1678892773 | ADMIN:SPONS | 5500 | 2025 |
| 7 | | | | | | | | 12-3456789 | 1 | AVALANCHE 401(k) Plan | 2025933395 | 1678892773 | | Admin | 12/31/2024 |
| 8 | | | | | | | | 12-3456789 | 1 | AVALANCHE 401(k) Plan | 2025933395 | 1678892773 | | Admin | 12/31/2025 |
| 9 | John.Doe | Password1! | John Doe | John | Doe | J.Doe@email.com | CPA | | | | | | | Messaging | |
| 10 | | | | | | | | 25-1533392 | 51 | ACNH Residential Services LLC | 2297468854 | 1893990766 | TRUST | Document | |
| 11 | | | | | | | | 25-1533392 | 51 | ACNH Residential Services LLC | 2297468854 | 1893990766 | NONE | 5500 | 2025 |

## Additional Notes

- **Document Signer Restrictions:** Only one user may be designated as ADMIN or ADMIN:TRUST for a plan at any given time. If those permissions are already assigned to another user, the upload will generate an error.
- **Form 5500 Filing Years:** Form 5500 access and signer permissions are maintained by filing year. Separate rows are required for each filing year.
- **Compliance Plan Years:** Compliance access is maintained by plan year. Separate rows are required for each Compliance year.
- **Contact Types** Although multiple Contact Types may be assigned to a Portal User, Portal permissions are determined by the user's **Main Contact Type** only.

## Upload the File and Review Results (return to top)

When the upload template has been completed, return to the Upload Portal Users screen.

- Select the completed CSV file.
- Select Upload.
- Review any messages or errors returned by the system.

**Common upload issues include:**

- Invalid Contact Types
- Incorrect EIN or Plan Numbers
- Invalid Plan ID or Company ID values
- Existing signer assignments
- Invalid year formats

**The below is an example of what displays if there are errors present:**

Upload Progress:

Portal User Upload Example.csv
**Processing Portal User Upload Example.csv**
unable to mark user as Signing As 'ADMIN:SPONS' for user Ferb on row 2. 'hk5w' is already marked as Signing As ADMIN:SPONS.
**Processing Complete.**

**The below is an example of what displays when everything imports without issue:**

