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# ftwilliam.com Plan Design Summary

The **ftwilliam.com** portfolio is fully 100% cloud-based software that streamlines time-consuming tasks for the employee benefits professional. The applications are easy to use and integrated to ensure that data flows effortlessly between the different modules.

The **Plan Design Summary (PDS)** module allows you to track and streamline your plan installation process, and securely communicate plan recommendations and suggestions to plan sponsors during installation via ftwPortal Pro - saving hours of time during plan installation.

## Software Highlights

- **Unlimited PDS Templates** provides the ability to create unlimited plan design templates based on service model and available plan designs.
- **Automatic Notification and Alerts** can be programmed to inform all internal users as well as plan sponsors when tasks are due. Red flag alerts inform internal users when a PDS must be reviewed.
- **Activity Summary** tracks every click within your account as well as any activity by the plan sponsor via ftwPortal Pro. Date/time stamp, change details, and user information are tracked for review and auditing purposes.
- **Full Integration with Document and ftwPortal Pro** lets you automatically update the PDS with one click for streamlined plan document preparation and reduction in data entry errors. Plus, fully integrated with ftwPortal pro for secure communication and electronic signatures.
- **Document Change Tracking** allows you to track discretionary or required amendment changes and automatically update the parameters once the changes are effective.
- **Global Dashboard** displays all the relevant data points at a glance for easy tracking, reporting, and analytics.