

Setting Up Notifications in the Global Email Settings

01/14/2025 3:23 pm CST

The purpose for the Reminder/Follow-Up email Notifications is to help you and your clients keep track of what tasks remain on the portal user's ToDo List.

To set up Notifications in the Global Emails Settings, you have to be the Master Admin User or a Designated Admin. If you have these designations, the Global Email Settings may be accessed by selecting the Wolters Kluwer Logo, selecting Administrative Tasks > Portal/Workflow > Global Email Settings.

Once on the "Global Email Settings" screen, select the 'Notifications' tab.

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Email/Server Settings

Enable for Messaging: Yes

†Portal User Reminder Days: 3

†Followup Reminder Days: 20

†††Maximum Reminder Days: 0

Enable for Documents: Yes

†Portal User Reminder Days: 3

†Followup Reminder Days: 20

†††Maximum Reminder Days: 0

Enable for 5500: Yes

†Portal User Reminder Days: 3

†Followup Reminder Days: 20

†††Maximum Reminder Days: 0

Enable for Compliance: Yes

†Portal User Reminder Days: 3

†Followup Reminder Days: 20

Email Sending Method: DEFAULT ftwilliam.com Email

From Name: DEFAULT ftwilliam.com Email

From Email: Specify a Server

Reply To: Use Messaging Settings

You will have the option to enable Portal User Reminder Emails and TPA Follow-Up Emails per module, based on the portal user's ToDo List. If you do not wish to send the portal user reminders, but you do want to have TPA follow-up reminders turned on, you can set the 'Portal User Reminder Days' to 0 and the 'Follow up Reminder Days' set to a positive number. Note: If the two numbers added together are less than or equal to zero, the follow-up reminders will not be sent. If you would like the TPA Follow-Up Emails to be sent before the Portal User Reminder Emails, you could enter a negative number, such as -2 for the 'Follow up Reminder Days' and a positive number for the 'Portal User Reminder Days' so that 2 days before the portal user reminder emails are scheduled to be sent, the TPA will receive the follow-up email. In this case every 5 days the TPA would receive the reminder and every 7 days the portal user would receive the reminder.

1. DEFAULT ftwilliam.com Email – Designed to send Portal User Reminders to the portal users from donotreply@ftwilliam.com for all your clients with overdue items in the ToDo List.

2. Specify a Server – Designed to send Portal User Reminders to the portal users from one specified email address for all of your clients with overdue items in the ToDo List. Selecting the "Specify a Server" option will allow you to enter additional information in the fields below.

- **From Name:** This is the name that will appear when your client receives an email from the address you've chosen when utilizing the "specifying a server" email setting.
- **From Email:** This is the email address associated with the "From Name" mentioned above.
- **Reply To:** This is the email address that will be used when your client hits "reply" to an email they have received from you. **Note:** You can add multiple email addresses by separating the addresses with a comma or semi-colon.
- **CC:** This email address will be CC'd when you send an email to your portal user(s). **Note:** You can add multiple email addresses by separating the addresses with a comma or semi-colon.
- **BCC:** This email address will be BCC'd when you send an email to your portal user(s). **Note:** You can add multiple email addresses by separating the addresses with a comma or semi-colon.
- **SMTP Server/SMTP Port:** Simple Mail Transfer Protocol (SMTP) allows you to use to send emails through outgoing mail servers. You can easily search the internet to find popular web-based email smtp settings. The standard port number is 25, which is our default. However, some email programs use a different port number. If we use gmail as an example, we will find that the smtp server should be entered as "smtp.gmail.com" and that the port number would be "465".
- **Secure Connection:** You have three options to choose from: None, SSL and TLS. For the example above, if we use gmail, then the Secure Connection would be "SSL". If you do not know how to answer, we recommend you contact your internet provider or a member of your IT staff. We can also help at support@ftwilliam.com.
- **Username:** This is the username for the "From Email" you will be utilizing.
- **Password:** This is the password associated with the "From Email" address you will be utilizing.

3. User Messaging Settings – Designed to send Portal User Reminders only to the portal users from the settings used within the Global Email Settings for "Messaging" regarding the overdue items in the ToDo List.
