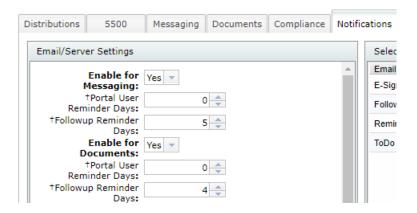
Defining Who Receive Reminder Emails

07/29/2024 3:59 pm CDT

If you have Notification emails enabled for the 5500, Documents, Messaging and/or Compliance modules, then Portal User Reminder emails are sent to the specific portal user(s) every X number of days for each enabled module regarding the overdue items in the portal user's ToDo list.

Note: If portal user reminders are set to 0, the portal user reminder emails will not be sent and the follow-up reminder emails will be sent every X number of days instead.

For example, in the screen shot below, the portal user would not receive a reminder email, but the TPA would receive the follow-up every 5 days for the Messaging module and every 4 days for the Document module.



Note: Email settings, such as the DEFAULT ftwilliam.com Emails, Specify a Server, and User Messaging Settings, only affect portal user reminder emails. Follow-up emails are always sent from donotreply@ftwilliam.com.

