

# Global Email Settings

04/14/2026 11:20 am CDT

## Setting up Global Email Settings

Global Email Settings can be accessed by selecting the **Wolters Kluwer logo**, then navigating to **Administrative Tasks > Portal/Workflow > Global Email Settings**. Only users with the role of **Master Admin User** or **Designated Admin** have permission to configure these settings.

On the Global Email Settings screen, the **Email/Server Settings** section provides two configuration options:

1. **Preparer's Email Program**
2. **Specify a Server.**

**NOTE:** These settings must be completed for each module tab.

### Preparer's Email Program

This option allows the system to generate emails using the desktop email application installed on the preparer's computer (such as Outlook, Thunderbird, or HCL Notes [formerly Lotus Notes]). When a portal user is invited, a draft email is automatically created in the default email program—similar to opening a new message manually.

To enable this feature, the default email program must be set in the computer's operating system settings (not within the ftwilliam.com software). This can be done by navigating to **Start Menu > Settings > Apps > Default Apps** and selecting the preferred email program.

**NOTE:** If the correct email program is already selected, selecting and saving it again can help confirm that the setting is properly applied.

**Example:** When inviting a portal user to sign a Form 5500, selecting the **"Click to open email"** link will launch a draft message in the default email application, using the specified email template.

The screenshot shows an email invitation interface titled "Administrator Summary". It contains the following information:

- Email Link:** [Click to open email](#) (indicated by a red arrow)
- To Name:** Marge Simpson
- To Username:** Marge
- To Email:** [Marge@email.com](mailto:Marge@email.com)

Below this information is a note: "Some email programs may limit the number of characters allowed when creating an email through the 'Click to open email' link above. If the link fails to open a new email you can copy the content below and paste it into your preferred email program."

The main body of the email contains the following text:

Your 5500 is Ready to Be Signed

Your 5500 is ready for a signature. You can log on at:

<https://dev4.ftwilliam.com/cgi-bin/sp.cgi?id=9T2IZRQ&Year=2023>

You can log in using the following credentials:

Username: Marge  
Password: Whats This

Thank You

At the bottom of the interface are two buttons: "Return to Previous Page" and "Mark 5500 as 'Invited'"

## Specify a Server

This option is used to send email invitations to the Sponsor Portal from a single, designated email address for all clients. Selecting **Specify a Server** reveals additional configuration fields, where administrators can enter the required server and authentication details necessary for email delivery. Each required field is explained in detail in the sections below.

- **Custom Language:** Allows personalized text to be included in email invitations sent from each module. When this setting is enabled (**Yes**), the custom message entered will automatically replace the `!@!CustomLanguage` placeholder in the default email template.
  - This feature is useful for tailoring messages to individual clients.
  - Custom language is specific to each Portal User and can be used to provide instructions, context, or a personal touch.
  - The setting is available in each module's permissions section.
- **Confirmation Emails:** When this setting is enabled (**Yes**), automatic email notifications are sent to the plan administrator when a client completes specific actions, such as downloading a document, completing a census, or e-filing a Form 5500 or 5330.
  - Confirmation emails are sent to the **Plan Administrator** listed on the *Edit Plan* screen for the selected module.
    - If no Plan Administrator is listed, the email will be sent to the **Master User** on the account.
    - This setting is available in each module's permissions section.

### Module-Specific Behavior

- **5500 Module:**
  - Confirmation recipients can be overridden directly from the **5500 workflow grid**.
  - Once an email address is entered into the workflow grid, it will be used for confirmations instead of the Administrator listed on the **Edit Plan** screen.
    - *Note:* The Plan Administrator will still be listed on the **Edit Plan**, but the system will no longer use that entry for confirmation emails.
- **Documents Module:**
  - Confirmation emails can be sent either to the Admin/Master User or to a **specific email address** defined in the **Global Email Settings**.
  - If the setting **Send confirmation to Plan Admin** is enabled, the **Confirmation Name** and **Confirmation Email** fields in Global Email Settings **must be left blank**. Only one method should be used to avoid conflicts.
  - The module also supports editable confirmation fields. If **Yes** is selected for the **Editable** option under either the **Confirmation Name** or **Confirmation Email** fields, administrators can customize these values when preparing an email invitation.
- **Name Change Emails:** Sends an alert to the plan administrator if a Portal User changes the signature name on their Form 5500/SF/EZ before signing it through the portal.
- **Use Direct Signing Link:** Allows Portal Users to access and sign their Form 5500 directly through a secure link, without logging into the portal.
  - When set to **Yes**, the email invitation includes a direct link to the specific filing.
  - This link provides access only to the assigned document, not the full portal.

- Ideal for users who prefer a quick, simplified signing experience.
- **From Name/Editable:** Defines the display name shown to clients when they receive an email from the system. This is used when the “Specify a Server” email setting is enabled.
  - This name appears in the **From** field of the email.
  - If **Editable** is set to **Yes**, administrators can customize the name for each email invitation.
  - Useful for branding or personalizing communications.
- **From Email/Editable:** Specifies the sender email address that appears in communications sent to Portal Users.
  - This address is paired with the **From Name** and is visible to recipients.
  - If **Editable** is set to **Yes**, administrators can change the email address when preparing an invitation.
  - Ensure the address used is monitored to receive any replies.
- **Reply To/Editable:** Specifies the email address that receives responses when a Portal User replies to a message or invitation from their personal email account. This applies only when the user replies directly from their email provider (such as Gmail or Outlook), rather than responding within the portal. This setting does not impact the confirmation emails.
  - This setting ensures replies sent outside the portal are directed to the correct inbox.
  - It's important to use an actively monitored address to avoid missing user response.
  - If **Yes** is selected for the **Editable** option below the 'Reply To' field, then your administrators will be able to override this name when preparing an email invitation. **Note:** You can add multiple email addresses by separating the addresses with a comma or semi-colon.
- **CC/Editable:** Adds one or more email addresses to be copied (CC'd) on emails sent to Portal Users.
  - CC recipients will be visible to all other recipients.
  - If **Editable** is set to **Yes**, administrators can change or add CC addresses when sending an email.
  - Multiple addresses can be entered using commas (,) or semicolons (;).
  - **Used only when sending emails to Portal Users. Does not apply to confirmation emails.**
- **BCC/Editable:** Adds one or more email addresses to be blind copied (BCC'd) on emails sent to Portal Users.
  - BCC recipients will receive the email without being visible to others.
  - If **Editable** is set to **Yes**, administrators can change or add BCC addresses when sending an email.
  - Multiple addresses can be entered using commas (,) or semicolons (;).
  - **Used only when sending emails to Portal Users. Does not apply to confirmation emails.**
- **SMTP Server/SMTP Port:** Allows emails to be sent through a custom mail server using SMTP (Simple Mail Transfer Protocol).
  - The SMTP Server is the address of the outgoing mail server (e.g., smtp.office365.com).
  - The SMTP Port is the number used to connect to the server (default is 25; Office 365 uses 587).
  - These settings are typically provided by your IT team or email provider.
- **Secure Connection:** Sets the type of encryption used when sending emails through an external mail server.
  - Options include:
    - None – No encryption (not recommended).
    - SSL – Secure Sockets Layer.
    - TLS – Transport Layer Security (recommended for most modern systems).
  - For example, Office 365 typically uses SSL or TLS.
  - If unsure which option to select, contact your IT team or email provider.

- **Username:** Enter the username associated with the **From Email** address.
  - This is usually the full email address (e.g., user@company.com).
  - Required to authenticate with the mail server.
- **Password:** Enter the password for the **From Email** address.
  - Used to authenticate the email account with the mail server.
  - If using an **App Password** (common with services like Office 365 or Gmail), note that it will be different from the regular email login password and is typically 16 characters long.

[Home](#) > Global Email Settings

## Global Email Settings

5500
Distributions
Messaging
Documents
Compliance
Notifi

Email/Server Settings

**Reminders:** Yes ▾

**Every (time since last invite):** 1 Day ▾

**Confirmation Emails:** Yes ▾

**Name Change Emails:** No ▾

**Use direct signing link:** Yes ▾

**Custom Language:** Yes ▾

**Email Sending Method:** Specify a Server ▾

**From Name:** Support@email.com

\*Editable: No ▾

**From Email:** example@email.com

\*Editable: No ▾

**Reply To:**

\*Editable: Yes ▾

**CC:**

\*Editable: Yes ▾

**BCC:**

\*Editable: No ▾

**SMTP Server:** smtp.office365.com

\*\*SMTP Port: 587

**Secure Connection:** TLS ▾

**Username:** abcUser

**Password:** ●●●●●●●●●●●●●●●●

\*Marking a field as 'Editable' will allow preparers to choose their own value for this field. Default settings will not be updated if a preparer chooses their own value.

\*\*Port 25 will be used if left blank. Please contact support if you would like to use a port other than 25, 465, 587, or 2525.

Save Settings

## Setting up Global Email Settings in ftw

Global Email Settings determine how ftwilliam.com sends emails for each module (e.g., 5500, Documents), including invitations, reminders, signature requests, and automated confirmations. Configure these settings **per module tab**.

Access the Global Email Settings screen by selecting:

**Wolters Kluwer logo → Administrative Tasks → Portal/Workflow → Global Email Settings**

**NOTE:** Configure these settings **per module tab**. Only **Master Admin User** and **Designated Admin** roles can change these settings.

## Quick Links

- [Field Descriptions](#)
  - [Custom Language](#)
  - [Confirmation Emails](#)
  - [Name Change Emails \(5500 only\)](#)
  - [Use Direct Signing Link \(5500 only\)](#)
  - [From Name / Editable](#)
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        - [OAuth](#)
- [Common Mistakes and Solutions](#)

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## Field Descriptions [\(Return to top\)](#)

Below are the **common email-related fields** you may see across modules in the Global E-mail Settings (GES). Please note that each module has a slightly different configuration or listing order but the descriptions below apply to all where applicable.

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### Custom Language [\(top\)](#)

Allows personalized text to be included in email invitations sent from each module. When this setting is enabled (**Yes**), the custom message entered will automatically replace the `!@!CustomLanguage` placeholder in the default email template.

**When it applies:** This setting is configured in each module and affects only the invitations generated in that specific module.

**Uses:** This feature is useful for tailoring messages to provide instructions, context, or a personal touch to individual clients.

**Where to View Custom Language:** The custom language is specific to each Portal User. If the portal user does not have custom language entered into the Edit Portal User window for that module, the template will not populate additional text.

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## Confirmation Emails [\(top\)](#)

When this setting is enabled (**Yes**), ftwilliam.com automatically sends an email notification when a client completes certain actions—such as submitting a census, downloading documents, or e-filing a form.

**When it applies:** Confirmation emails are determined on a per-module basis and may follow different rules depending on the module selected.

### How recipients are determined (general rule):

Confirmation emails will typically be sent to one of the following:

- The **Plan Administrator** listed on the **Edit Plan** screen
- The **Master User** on the account, if no Plan Administrator is listed

### For specific routing rules:

Because confirmation logic varies by module (e.g., 5500 workflow grids, Documents confirmation overrides, editable confirmation fields), please use our [Confirmation Email Assistant Tool](#) for exact recipient determination based on your configuration.

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## Name Change Emails (5500 only) [\(top\)](#)

Sends an alert to the plan administrator if a Portal User changes their signature name on a Form 5500/SF/EZ before signing.

**When it applies:** Only for 5500 filings where portal signing is enabled.

**Uses:** Helps detect unintended or unauthorized signer name changes before the form is finalized.

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## Use Direct Signing Link (5500 only) [\(top\)](#)

Allows Portal Users to sign their Form 5500 directly through a secure, individualized link included in the email invitation.

🔍 **When it applies:** When set to **Yes**, the invitation includes a direct link to the specific filing.

🔍 **Uses:** Ideal for administrators or sponsors who prefer not to manage portal credentials.

⚠️ **Limitations:**

- If a Portal user has permissions to view or e-file the 8955-SSA, Direct Link is bypassed and the user will be required to log into the portal to complete the 5500 filing. This is a safety measure put in place as the 5500 filing information is public but the remaining items on the portal may contain sensitive information such as Social Security numbers.
- 

## From Name / Editable (top)

Defines the display name shown in the **From** field of emails sent from the system when using **Specify a Server**.

🔍 **When it applies:** Active and a required field only when the module is set to **Specify a Server** as the **E-mail Sending Method**.

🔍 **Uses:**

- Supports company branding or personalizing communications.
  - If **Editable = Yes**, administrators may replace the default **From** name and/or **From e-mail** address for a specific portal user (updated in the selected module tab on the Edit Portal User screen).
- 

## Reply To / Editable (top)

Specifies the email address that receives replies when Portal Users respond through their own email provider (such as Outlook or Gmail).

This does **not** affect confirmation emails.

🔍 **When it applies:** Only used when recipients reply outside the portal.

🔍 **Uses:**

- Ensures replies go to the appropriate monitored inbox.
  - Supports multiple email addresses separated by commas or semicolons.
  - If **Editable = Yes**, this can be overridden per invitation.
- 

## CC / Editable (top)

Adds visible copy recipients (CC) to emails sent to Portal Users.

🔍 **When it applies:** Used only for emails sent to Portal Users; does not apply to confirmation emails.

🔍 **Uses:**

- Helpful when additional team members need visibility.
  - Supports multiple addresses.
  - If **Editable = Yes**, CC can be changed or added during invitation preparation.
-

## BCC / Editable (top)

Adds hidden copy recipients (BCC) to emails sent to Portal Users.

 **When it applies:** Used only for Portal User invitations, not confirmation emails.

 **Uses:**

- Allows silent internal tracking of communications.
- Supports multiple addresses.
- If **Editable = Yes**, administrators can modify BCC per invitation.

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## E-Mail Sending Method (Return to top)

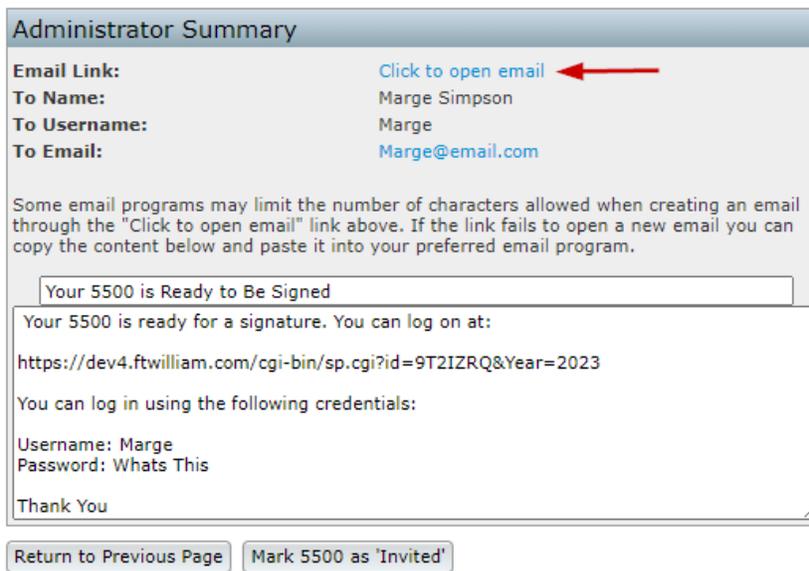
The **E-Mail Sending Method** controls whether emails are sent manually by a user or automatically from a shared company address, and determines whether batch and automated features are available.

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## Preparer's Email Program (top)

**What it is:**

ftwilliam.com creates the email content and **opens a draft** in the preparer's **default desktop email application** (e.g., Outlook, Thunderbird, HCL Notes). The preparer **reviews/edits** the message and **sends it manually**. When, for example, you invite a portal user to sign a Form 5500 and select "**Click to open email**," a draft opens in your default email app using the specified template.



The screenshot shows a web interface titled "Administrator Summary". It contains the following information:

<b>Email Link:</b>	<a href="#">Click to open email</a> 
<b>To Name:</b>	Marge Simpson
<b>To Username:</b>	Marge
<b>To Email:</b>	<a href="mailto:Marge@email.com">Marge@email.com</a>

Some email programs may limit the number of characters allowed when creating an email through the "Click to open email" link above. If the link fails to open a new email you can copy the content below and paste it into your preferred email program.

Your 5500 is Ready to Be Signed

Your 5500 is ready for a signature. You can log on at:

<https://dev4.ftwilliam.com/cgi-bin/sp.cgi?id=9T2IZRQ&Year=2023>

You can log in using the following credentials:

Username: Marge  
Password: Whats This

Thank You

At the bottom, there are two buttons: "Return to Previous Page" and "Mark 5500 as 'Invited'"

**Typically used by:**

- Smaller offices or teams without centralized IT support
- Users who prefer to edit each outgoing message
- Workflows sending invitations **individually**, not in batches
- Firms that do not need server-based automation

#### Configuration (on the user's computer):

- Set the default email program in the **operating system** (not inside ftwilliam.com):  
**Start Menu → Settings → Apps → Default Apps → Email**
- If the correct app already appears, **reselect and save** to ensure the setting applies.

🔗 **Best for:** Low-volume sending, personalized messages, and teams without IT support

#### ⚠️ Limitations:

- **No batch or automation**—delivery relies on the local email app
- Emails send **from the preparer's personal address**
- Requires the user's desktop email application to be available and configured

🔗 **When to use:** Choose this method when you want **manual, one-by-one** sending with per-message editing.

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## Specify a Server [\(Return to top\)](#)

#### What it is:

ftwilliam.com sends emails **automatically** from a **single, shared company email address** via your mail server using **SMTP or OAuth**. Selecting **Specify a Server** reveals the additional **server and authentication fields** needed for delivery (explained later in **SMTP & OAuth Configuration**).

#### Typically used by:

- Firms wanting a **single, standardized sender identity**
- **Automated workflows** and **batch sending**
- Environments that need **consistent branding** or **centralized delivery**
- Modules/features that require server-based sending for workflow automation

#### Configuration (high-level):

- Enter the fields required by your provider: **SMTP Server**, **SMTP Port**, **Secure Connection** type, and (if OAuth) **OAuth Client ID/Tenant ID/Client Secret**.
- See [SMTP & OAuth Configuration](#) additional information.

🔗 **Best for:** Most firms—supports **standardized sender identity**, **batch sending**, **automation**, and **consistent branding** across all messages

#### ⚠️ Limitations:

- Requires **server configuration**; incorrect settings **prevent delivery**
- **Your firm's internal IT involvement** is often needed (especially for OAuth and policy-controlled environments)

🔗 **When to use:** **Recommended for most firms** and **required** for **batch workflows** and other **automated** scenarios.

**NOTE:** Configure the **email sending method per module tab** and use **only one method per module**.

🔗 **Batch features** require **Specify a Server**.

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## SMTP Configuration (Required for Specify a Server) [\(top\)](#)

These selections are only applicable with the Email Sending Method is set to **Specify a Server**. You'll enter your provider's server details and choose a **Secure Connection** type.

**NOTE:** Complete **only** the fields that match the method you choose (SSL/TLS vs OAuth).

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## SMTP Server / SMTP Port (top)

Send email through your organization's outgoing mail server using SMTP.

- **SMTP Server** — The outbound mail server address  
(examples: *smtp.office365.com*, *smtp.gmail.com*)
- **SMTP Port** - The port used to connect to the server
  - **587** - Most commonly used
  - **465** - Used by some providers
  - **25** - Legacy or internal relay (not recommended for internet email)
  - **2525** - Alternative submissions port supported by some providers

**Provided by:** Your internal IT team or your **email provider**.

**Why it matters:** Enables centralized, automated sending from a shared address when **Specify a Server** is selected.

### NOTE:

- SMTP Server values are also widely published; you can often find the SMTP host and recommended ports with a quick web search (e.g., "ProviderName SMTP server and port"). **Always verify what you find online against your organization's requirements or with IT, as providers may have tenant-specific or policy-controlled settings.**
- The port does **not** determine encryption. Choose the encryption/authentication method in the **Secure Connection** setting.
- **Port 25 will be used if left blank.** Please contact support if you would like to use a port other than 25, 465, 587, or 2525.

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## Secure Connection (top)

Choose the encryption/authentication method required by your provider.

- **None** — No encryption (**not recommended**)
- **SSL** — Secure Sockets Layer
- **TLS** — Transport Layer Security (**modern standard**)
- **OAuth** — **Passwordless, token-based** modern authentication (no stored mailbox password)

**NOTE:** If you're unsure which to use, contact your **IT** or your **email provider**.

Many Microsoft 365 tenants now prefer **TLS** or **OAuth**; basic username/password may be restricted.

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## If Secure Connection = None, SSL, or TLS (username + password) (top)

Selecting None, SSL, or TLS as the secure connection will enable the Username and Password fields.

- **Username** — Usually the **full email address** (e.g., user@company.com).
- **Password** — Password for the mailbox **used to authenticate** the SMTP session.
  - If **MFA** is enabled, you may need an **App Password** (often 16 characters and different from your regular login).

<b>SMTP Server:</b>	smtp.gmail.com
<b>**SMTP Port:</b>	467
<b>Secure Connection:</b>	SSL ▾
<b>Username:</b>	Support@gmail.com
<b>Password:</b>	●●●●●●●●●●

**NOTE:** If the secure connection type is altered to OAuth after entering the username and password have been entered, those fields are stored but not utilized until the secure connection type is changed back to None, SSL, or TLS.

<b>Secure Connection:</b>	OAuth ▾
<b>Username:</b>	Support@gmail.com
<b>Password:</b>	●●●●●●●●●●
<b>OAuth Client ID:</b>	
<b>OAuth Tenant ID:</b>	
<b>OAuth Client Secret:</b>	

## If Secure Connection = OAuth (modern authentication) [\(top\)](#)

Selecting **OAuth** disables the **Username** and **Password** fields. With OAuth, email is sent securely without a stored mailbox password. Your IT team registers a small “app” with your email provider, and ftwilliam.com uses that app’s details to request a secure, time-limited token before sending the message.

At this time, OAuth in ftwilliam.com is supported **only for Microsoft 365 environments**. Support for additional email providers may be added in the future.

### What you’ll enter in ftwilliam.com

- **OAuth Client ID** — The ID of the registered application with your email provider. *Providers may call this “Application ID” or “Client ID”.*
- **OAuth Tenant** — The identifier for your organization with the email provider. *Providers may call this “Tenant ID” or “Directory ID”.*
- **OAuth Client Secret** — A private key created for the registered application. *Shown only once when created—store it securely.*

△ **OAuth values must be entered exactly as issued**, including dashes and any special characters. Never modify or “normalize” them.

Secure Connection: OAuth ▾

Username:

Password:

OAuth Client ID: c1d2e3f4-a5b6-789c-d012-3

OAuth Tenant ID: 11112222-3333-4444-5555-

OAuth Client Secret:

**Provided by:** Your IT administrator after registering the application in Microsoft Azure and granting the required mail-send permissions.

Microsoft 365 requires all three fields to be completed.

Other email providers are not currently supported for OAuth connections in ftwilliam.com.

**NOTE:** For Microsoft 365 environments, IT administrators can follow Microsoft’s official guidance for registering an application for [SMTP OAuth authentication](#).

## Common Mistakes and Fixes (top)

- **Emails fail to send** → Verify SMTP port and Secure Connection (e.g., 587/TLS).
- **Authentication errors** → Your provider may require **OAuth**; switch to OAuth and enter the values.
- **Password rejected** → If MFA is enabled, use an **App Password** or migrate to **OAuth**.
- **Batch not available** → Ensure **Specify a Server** is selected (Preparer’s Email Program doesn’t support batch).

## Setting Up Global Email Settings for Divisions

To set up Global Emails Settings by Division, 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, if divisions are enabled, there will be a drop-down list for 'Select Divisions' to select the division to be updated.

**Note:** There will be a check box for the guest divisions to 'Use default division' that will be automatically checked. After the division has been selected, follow the steps in the article '[Setting Up Global Email Settings](#)'.

[Home](#) > Global Email Settings

**Global Email Settings**    Select Division: **DEFAULT**

- Southern Division
- Eastern Division
- Western Division
- Northern Division

Distributions    5500    Messaging    Documents    Compliance

Email/Server Settings    Select

[Home](#) > Global Email Settings

**Global Email Settings**    Select Division: Eastern Division ▾  Use default division

Distributions    5500    Messaging    Documents    Compliance    Notifications

Email/Server Settings    Select an Email to Edit

## How to Test the Global Email Settings for 'Specify a Server'

It is recommended that you test your settings before sending invitations to the portal. To test the 5500 Module settings, navigate to the "Global Email Settings" screen and click on "Edit" to the right of either 'Signer Email' or 'Portal Email'.

Select an Email to Edit		
Email Name	Default Template	Edit
8955-SSA Cover Letter	Default 8955-SSA Cover L ▼	<a href="#">Edit</a>
Portal Email	Default Portal Email ▼	<a href="#">Edit</a>
Signer Email	Default Signer Email ▼	<a href="#">Edit</a>

Enter a valid email address in the "Enter Test Recipient" field and click on "Save and Send Test Email". If a valid SMTP server has been set up properly, you will receive a message stating "Changes have been saved and a test email was sent to [email address]". The valid email address should receive the test email moments after it was sent (it may take a little longer depending on the server).

Email Template Editor

Email Templates

Module: 5500 Clone Delete

Template	Modules	Last Change
Cloned Portal Email	5500	08/08/2022 9:39 AM
Default 8955-SSA Cover Letter	5500	05/06/2022 10:54 AM
Default Portal Email	5500	12/04/2023 8:14 AM
Default Signer Email	5500	03/18/2024 11:57 AM
Direct Link	5500	03/12/2024 3:26 PM
header	5500	12/15/2023 10:37 AM
Signer Email (adv)	5500	10/09/2023 2:27 PM
subject placeholder test	5500	01/22/2024 2:51 PM

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Edit Template: Default Portal Email

Subject: 5500 Portal Account Select Modules  Hidden? Clone Delete

!@!CustomLanguage Please log into your portal user account at:  
 !@!loginlink  
 You can log in using the following credentials:  
 Username: !@!Username  
 Password: !@!Password  
 Thank You

HTML Email? Placeholder List Email: example@email.com Save and Send Test Email Save Template Revert to Default

Close

Email Sent

Test email sent to  
'Test@email.com'

OK

The testing options are available on each module tab.

#### Reasons why the 'Specify a Server' settings may not be set up properly:

1. There are typos within the settings.
2. You have used the IMAP settings instead of the SMTP settings.
3. Your email security is too 'tight' (this may not allow our servers to connect to your servers).
4. The 'from' address for a given portal user was overridden, so the from address no longer matches the username/password in the SMTP settings, so the SMTP server refuses to send the email.

**\*If using Office365 as your server, and are running into issues with sending e-mails we advise the following:**

1. Confirm with your email administrator that SMTP AUTH is enabled for your account.
2. Two-factor authentication has been enabled and an app-password needs to be used.  
[Microsoft Support- Account App Passwords](#)
3. The account is flagged with only access to outlook.office365.com for email. This flag is often imposed on limited access accounts and means that the said account cannot utilize a locally installed version of Outlook or make connections of this sort.

*If the first 3 steps do not correct sending issues it is suggested that a new account be created with Office365 that grants all permissions to see if the account in question is the problem or if the overall Office365 settings are the problem.*

Note: Most email programs will not display the emails sent through the 'Specify a Server' program in your sent email. It is recommended that you set up the BCC field within the email settings with your email address. You could then setup a mail filtering rule to move all incoming mail from your email address into your sent folder (you will need to work with your internal IT staff).

## How to Test the Global Email Settings for 'Preparer's Email Program'

It is recommended that you test your settings before you begin sending invitations to the portal. To test the 5500 Module settings, you would go to the "Global Email Settings" screen and click on "Edit" to the right of either "Invite Signers" or "Standard Portal".

Select an Email to Edit		
Email Name	Default Template	Edit
8955-SSA Cover Letter	Default 8955-SSA Cover L ▼	<a href="#">Edit</a>
Portal Email	Default Portal Email ▼	<a href="#">Edit</a>
Signer Email	Default Signer Email ▼	<a href="#">Edit</a>

Enter a valid email address in the "Enter Test Recipient" field and click on "Save and Send Test Email". If you have a valid Preparer's Email Program, the test email will open/display in your email program.

Email Template Editor

Email Templates

Module: 5500 Clone Delete

Template	Modules	Last Change
Cloned Portal Email	5500	08/08/2022 9:39 AM
Default 8955-SSA Cover Letter	5500	05/06/2022 10:54 AM
Default Portal Email	5500	12/04/2023 8:14 AM
Default Signer Email	5500	03/18/2024 11:57 AM
Direct Link	5500	03/12/2024 3:26 PM
header	5500	12/15/2023 10:37 AM
Signer Email (adv)	5500	10/09/2023 2:27 PM
subject placeholder test	5500	01/22/2024 2:51 PM

Edit Template: Default Portal Email

Subject: 5500 Portal Account Select Modules  Hidden? Clone Delete

!@!CustomLanguage Please log into your portal user account at:  
!@!loginlink  
You can log in using the following credentials:  
Username: !@!Username  
Password: !@!Password  
Thank You

HTML Email? Placeholder List Email: example@email.com Save and Send Test Email Save Template Revert to Default

Close

 Send	To	test@email.com
	Cc	
	Bcc	
Subject		Your 5500 is Ready to Be Signed

Dear John,

This is your custom language. Your 5500 is ready for a signature. This filing is due by 12/31/2000. You can log on at:

<https://www.ftwilliam.com/cgi-bin/WebPortal/WebPortal.cgi?PLID=984d8144fa08bfc>

You can log in using the following credentials:

Username: sampleusername  
Password: abc123

Thank You

!@!PlanAdministrator  
101-202-3030

For the Compliance, Document, Messaging and Notification tabs, there is also a "Select an Email to Edit" box where you can "Edit" and email to "Save and Send Test Email".

Reasons why the 'Preparer's Email Program' settings may not display:

1. You do not have a desktop email program (i.e. Outlook, Thunderbird, Lotus Notes, etc.).
2. Your default email text is too large (should be around 2,000 characters).
3. You copied/pasted text into the default email and the apostrophes/quotations need to be replaced.

**Signer Email**

Subject: Your 5500 is Ready to Be Signed

Preparer's Email Program => Preparer's Email Program

"Save and Send Test Email" => "Save and Send Test Email"

!@!CustomLanguage Your 5500 is ready for a signature. You can log on at:

!@!loginlink "Save and Send Test Email"

You can log in using the following credentials:

Username: !@!Username  
Password: !@!Password

Thank You

4. Your browser's email handling program setting needs to be fixed.

## What SMTP Server Error Messages Mean

When using specify a server, you may see one of the following error messages when attempting to send an email.

#### **Error connecting or logging into the SMTP server.**

This error message indicates that there was likely an error connecting to your SMTP server. Double check your SMTP server address and port, as well as the specified username password that you are using.

#### **Error logging into server.**

This error message indicates that an error occurred while attempting to authenticate with the SMTP server. Double check the username and password in the SMTP settings.

#### **Blank FROM address.**

The address in the From field is blank. Make sure that you fill in the "From" address in the email settings. Emails sent with a blank from address may not be properly delivered.

#### **Invalid FROM/TO/CC/BCC address.**

The SMTP server indicated that the email address specified as the FROM/TO/CC/BCC email address was invalid. Ensure that the address specified in that field is a valid email address.

#### **Error messages mentioning the body or envelope.**

Error messages mentioning the body or envelope may be due to content errors found by the SMTP server. Double check your SMTP settings and email text.

In addition to the above-mentioned error messages, you may also see messages like the following from the SMTP server.

#### **Unable to relay**

If you are using relay on the SMTP server to send emails, ensure that our server's IP address (*Primary - 198.147.32.158* *Secondary - 198.147.34.158*) are in your list of allowed relay clients. If applicable, you may also need to check your server's spam service.

## **How to Edit or Clone Default Email Templates and Reminders**

To access default language for a particular email, click on 'Edit' in the 'Select an Email to Edit' box for the message type you want to view. **Note:** You should select the appropriate tab for the software type you are working on (5500s, Compliance, etc.) as each of the default emails will be different for different portal tasks and functions. Also, you may set up templates based on Division, if applicable, by selecting the Division from the drop-down list (the default division is selected by default). As an example, below is an explanation for the 5500 software standard portal emails:

Home > Global Email Settings

## Global Email Settings

Select Division: **DEFAULT**

- DEFAULT
- Southern Division
- Eastern Division
- Western Division
- Northern Division

Distributions: 5500 | Messaging | Documents | Com...

Email/Server Settings

Reminders: No

Every (time since last invite): 1 Day

Confirmation Emails: Yes

Name Change Emails: No

an Email to Edit

Email Name	Default Template	Edit
8955-SSA Cover Letter	Default 8955-SSA Cover L	<a href="#">Edit</a>
Portal Email	Default Portal Email	<a href="#">Edit</a>
Signer Email	Default Signer Email	<a href="#">Edit</a>

The emails are used as default language for invitations to sign the 5500 filing via the portal (Invite Signers Email); to view 5500/SAR/AFN/8955; edit 5500; and/or upload attachments via the portal (Standard Portal Email).

We have provided default email subjects and sample correspondence that you may customize; clone or hide. It is important that you leave the web-portal link and the 'Username' and 'Password' information in your email (if applicable); however, you may change the placement of these items if you wish (see placeholders below).

1. Update Default template language to customize any way you like\*
2. Hide a Default template (you may not delete the defaults).
3. Clone a Default template to create your own template.

Email Template Editor

Email Templates

Module: 5500

[Clone](#) [Delete](#)

Template	Modules	Last Change
Cloned Portal Email	5500	08/08/2022 9:39 AM
Default 8955-SSA Cover Letter	5500	05/06/2022 10:54 AM
Default Portal Email	5500	12/04/2023 8:14 AM
Default Signer Email	5500	03/18/2024 11:57 AM
Direct Link	5500	03/12/2024 3:26 PM
header	5500	12/15/2023 10:37 AM
Signer Email (adv)	5500	10/09/2023 2:27 PM
subject placeholder tes	5500	01/22/2024 2:51 PM

1

Edit Template: Default Portal Email

2 3

Subject: 5500 Portal Account [Select Modules](#)  Hidden? [Clone](#) [Delete](#)

!@!CustomLanguage Please log into your portal user account at:

!@!loginlink

You can log in using the following credentials:

Username: !@!Username  
Password: !@!Password

Thank You

HTML Email? [Placeholder List](#) Email:  [Save and Send Test Email](#) [Save Template](#) [Revert to Default](#)

[Close](#)

**\*PLEASE NOTE:** There are limits on the number of characters that can be used when emails are set to **Preparer's Email Program**. There are also special characters that can interfere with sending emails. 'Curly' quotation marks or

apostrophes should be replaced with straight quotes (" or ').

**There are a few features of the standard emails described in more detail below:**

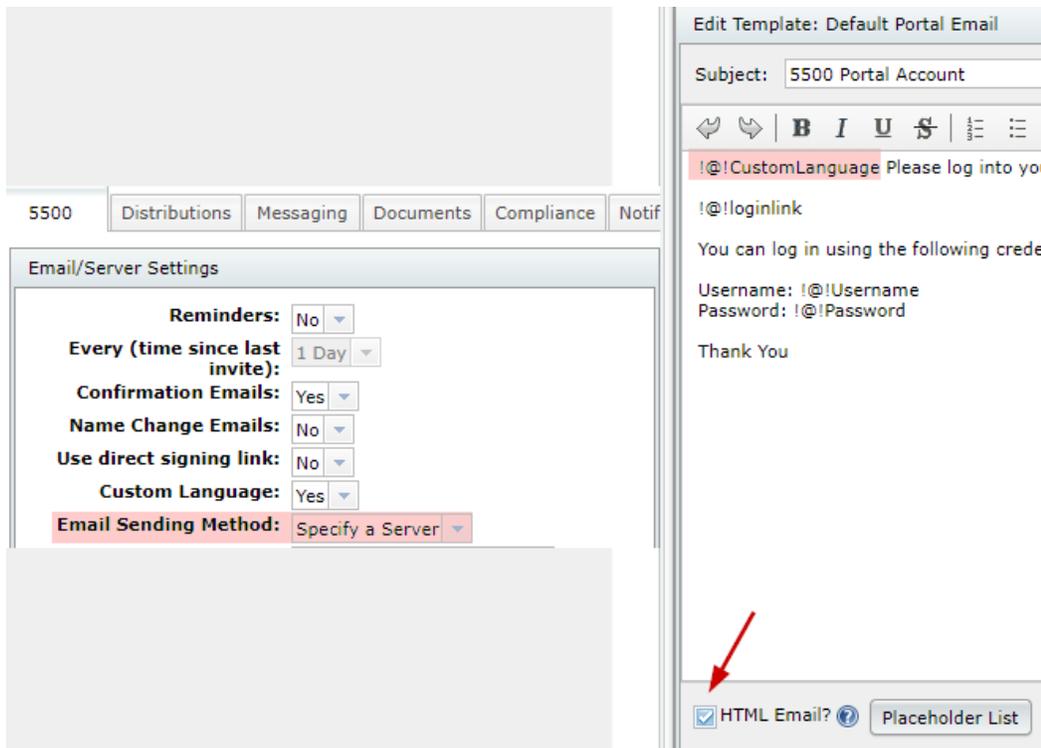
**Custom Language:** Custom language will be completed by language you enter that is specific to a user and filing. For each user you add under the **Work with Signers/Portal Users** option, there will be a box to add custom language for that user. If you are not sure whether you will use custom language, we would recommend leaving in the "!!@!CustomLanguage" text. (If no custom language is entered for a particular user, the placeholder will be omitted.) The placement of the custom language text may also be altered. We have placed this at the beginning of the email since it will allow users to personalize the email.

For Example: Custom language in a template may be used to display the following

"Dear Ms. Smith:

Thank you for the opportunity to assist you with your 5500 filing requirements this year."

**HTML option:** This option is only available if you use "Specify a Server" under the Email/Server Settings described above. Once you have the box checked for 'HTML Email?', then an html editor bar will appear below the Subject line for you to edit the email. You do not need to know html to use this feature.



**Testing.** We have provided the ability to test your email settings (and html if applicable) for each of the standard emails. Please note that the "!!@!CustomLanguage", "!!@!Username" and "!!@!Password" text will be customized for the user and either left out of the email if blank or filled in with the appropriate information (if there is no custom language the "!!@!CustomLanguage" text will not appear).

5500 Portal Account

Select Modules  Hidden? Clone Delete

!@!CustomLanguage Please log into your portal user account at:  
!@!loginlink

You can log in using the following credentials:  
Username: !@!Username  
Password: !@!Password

Thank You

HTML Email? Placeholder List Email: Enter test email address **Save and Send Test Email** Save Template Revert to Default

Reminder signer emails. This option will only become available when "Specify a Server" under the Email/Server Settings described above within the 5500 Tab is set up. To program reminder emails, click "Yes" next to 'Reminders'. You can then select the number of days for reminder emails to be sent. For example, if you choose 3 days, a reminder email will be sent every 3 days from the time the signer is invited to the filing until the filing is signed by the user (if a signer was invited 5 days ago and has not yet signed, this signer would get an email soon after this is updated; whereas a signer invited only one day ago will receive a reminder in two days). The reminder email will be the same text as the signing invitation email except the end of the subject line will include '(Reminder)'.

5500 Distributions Messaging Documents Compliance Notif

Email/Server Settings

Reminders: Yes

Every (time since last invite): 1 Day

Confirmation Emails: Yes

Name Change Emails: No

Use direct signing link: No

Custom Language: Yes

Email Sending Method: Specify a Server

Optional Email Substitutions.

There are several placeholders that you can insert into an email. To see the full list of possible placeholders for a given email template, click the 'Placeholder List' button on the Edit Template form.