

Global Email Settings

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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 a web application window titled "Administrator Summary". It contains the following information:

- Email Link:** [Click to open email](#) (highlighted with a red arrow)
- To Name:** Marge Simpson
- To Username:** Marge
- To Email:** 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."

A text box contains the message: "Your 5500 is Ready to Be Signed".

Below the text box, it says: "Your 5500 is ready for a signature. You can log on at:" followed by the URL: <https://dev4.ftwilliam.com/cgi-bin/sp.cgi?id=9T2IZRQ&Year=2023>

It then says: "You can log in using the following credentials:"

Username: Marge
Password: Whats This

At the bottom, it says "Thank You" and has two buttons: "Return to Previous Page" and "Mark 5500 as 'Invited'" (which is highlighted).

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 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 ▼ | Edit |
| Portal Email | Default Portal Email ▼ | Edit |
| Signer Email | Default Signer Email ▼ | Edit |

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 |

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 ▼ | Edit |
| Portal Email | Default Portal Email ▼ | Edit |
| Signer Email | Default Signer Email ▼ | Edit |

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 | |
| Enter Test Recipient | Save and Send Test Email |

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** ▼

[Distributions](#)
[5500](#)
[Messaging](#)
[Documents](#)
[Compliance](#)

Email/Server Settings

Reminders: No ▼

Every (time since last invite): 1 Day ▼

Confirmation Emails: Yes ▼

Name Change Emails: No ▼

Select an Email to Edit

| Email Name | Default Template | Edit |
|-----------------------|----------------------------|----------------------|
| 8955-SSA Cover Letter | Default 8955-SSA Cover L ▼ | Edit |
| Portal Email | Default Portal Email ▼ | Edit |
| Signer Email | Default Signer Email ▼ | Edit |

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.

The screenshot displays the 'Edit Template: Default Portal Email' interface. On the left, the 'Email/Server Settings' panel is visible, showing various configuration options. The 'Email Sending Method' is set to 'Specify a Server'. The main content area shows the email template being edited. The subject line is '5500 Portal Account'. The body of the email includes placeholders for custom language, login link, username, and password. A red arrow points to the 'HTML Email?' checkbox at the bottom, which is checked.

5500 | Distributions | Messaging | Documents | Compliance | Notif

Email/Server Settings

Reminders: No
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

Edit Template: Default Portal Email

Subject: 5500 Portal Account

!@!CustomLanguage Please log into you

!@!loginlink

You can log in using the following crede

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

Thank You

☒ HTML Email? Placeholder List

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).

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: 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.