

Global Email Settings

07/30/2024 1:03 pm CDT

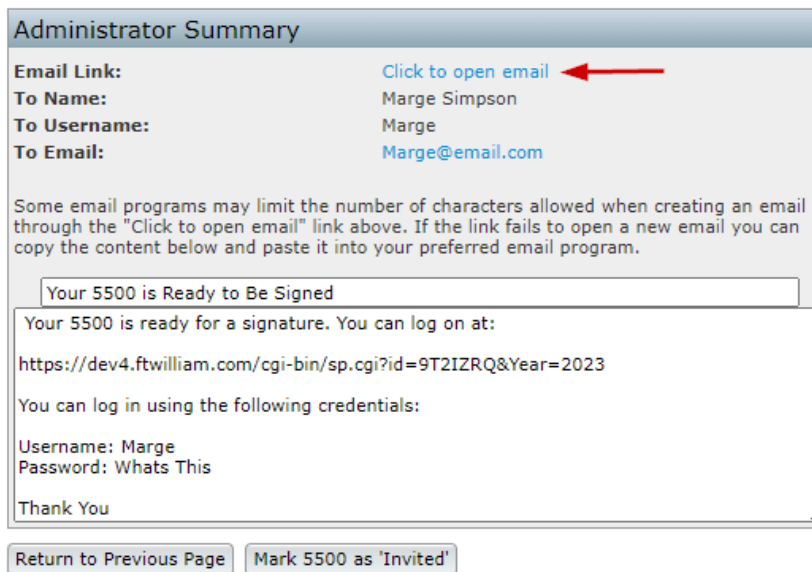
Setting up Global Email Settings

To set up 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, there is an "Email/Server Settings" box. Within this section there is the option to use the "Preparer's Email Program" or to "Specify a Server". *The 'Email/Server Settings' box will need to be updated on each tab for the different Modules the account subscribes to.*

1. Preparer's Email Program – Designed to send an email from the desktop email program (i.e. Outlook, Thunderbird, Lotus Notes, etc.) that is loaded on the computer being used by the preparer that invites a portal user to the portal. When you invite your client to the portal, an email will pop up on your computer for you to send to your client (similar to clicking 'compose' in your email account).

Example: When inviting a portal user to sign a 5500, selecting the 'Click to open email' link will generate the email shown below within Outlook, Thunderbird, Lotus Notes, etc.



Administrator Summary

Email Link: [Click to open email](#) ←

To Name: Marge Simpson

To Username: Marge

To Email: Marge@email.com

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

[Return to Previous Page](#) [Mark 5500 as 'Invited'](#)

2. Specify a Server – Designed to send an email invitation to the web-portal from one specified email address for all of your clients. Selecting the "Specify a Server" option will allow users to enter additional information in the fields below.

- **Custom Language:** In each of the module permissions, there is an option to enter "custom language" in any of the email invitations that your clients receive. "yes" to this box, the custom language you enter will appear in your email invitation where the !@!CustomLanguage placeholder is displayed in the default email. Custom language is specific to each portal user.
- **Confirmation Emails:** If you would like the plan administrator to receive an email confirmation informing them that a client has downloaded a file (via messaging), downloaded a document, the census, the annual

questionnaire, or signed a 5500, then select “yes” to the drop-down menu for the specific module.

- **Name Change Emails:** If the Portal User changes the signature name on their Form 5500/SF/EZ prior to signing via the web-portal, the plan administrator on the account, will be notified via email.
- **Use Direct Signing Link:** selecting 'Yes' allows users to bypass signing into the portal to e-file the 5500. The link provided in the invitation will allow the Portal User to only view the specific filing rather than the full access view of the Portal.
- **From Name/Editable:** This is the name that will appear when your client receives an email from the address you've chosen when utilizing the “Specify a Server” email setting. If 'Yes' is selected for the 'Editable' option below the 'From Name', field then your administrators will be able to override this name when preparing an email invitation.
- **From Email/Editable:** This is the email address associated with the “From Name” mentioned above. If 'Yes' is selected for the 'Editable' option below the 'From Email' field, then your administrators will be able to override this email address when preparing an email invitation.
- **Reply To/Editable:** This is the email address that will be used when Portal Users 'reply' to an email they have received from you. 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:** This email address will be CC'd when you send an email to your portal user(s). If 'Yes' is selected for the 'Editable' option below the 'CC' 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.
- **BCC/Editable:** This email address will be BCC'd when you send an email to your portal user(s). If 'Yes' is selected for the 'Editable' option below the 'BCC' 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.
- **SMTP Server/SMTP Port:** Simple Mail Transfer Protocol (SMTP) allows you to send emails through outgoing mail servers. Server information for popular web-based email smtp settings can be easily found through an internet search. The standard port number is 25, which is our default. However, some email programs use a different port number. If we use Office 365 as an example, we would find that the smtp server should be entered as 'smtp.office365.com' and the port number is '587'.
- **Secure Connection:** There are three options to choose from: None, SSL and TLS. For the example above, if we use Office365, then the Secure Connection would be 'SSL' or 'TLL'. If you do not know how to answer, we recommend you contact your internet provider or a member of your IT staff.
- **Username:** This is the username for the “From Email” being utilized.
- **Password:** This is the password associated with the “From Email” address being utilized.

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 | Comp |

[Home](#) > Global Email Settings

Global Email Settings

Select Division: Eastern Division Use default division

Distributions | 5500 | Messaging | Documents | Compliance | Notifications |

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 <input type="button" value="v"/> | Edit |
| Portal Email | Default Portal Email <input type="button" value="v"/> | Edit |
| Signer Email | Default Signer Email <input type="button" value="v"/> | 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

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:

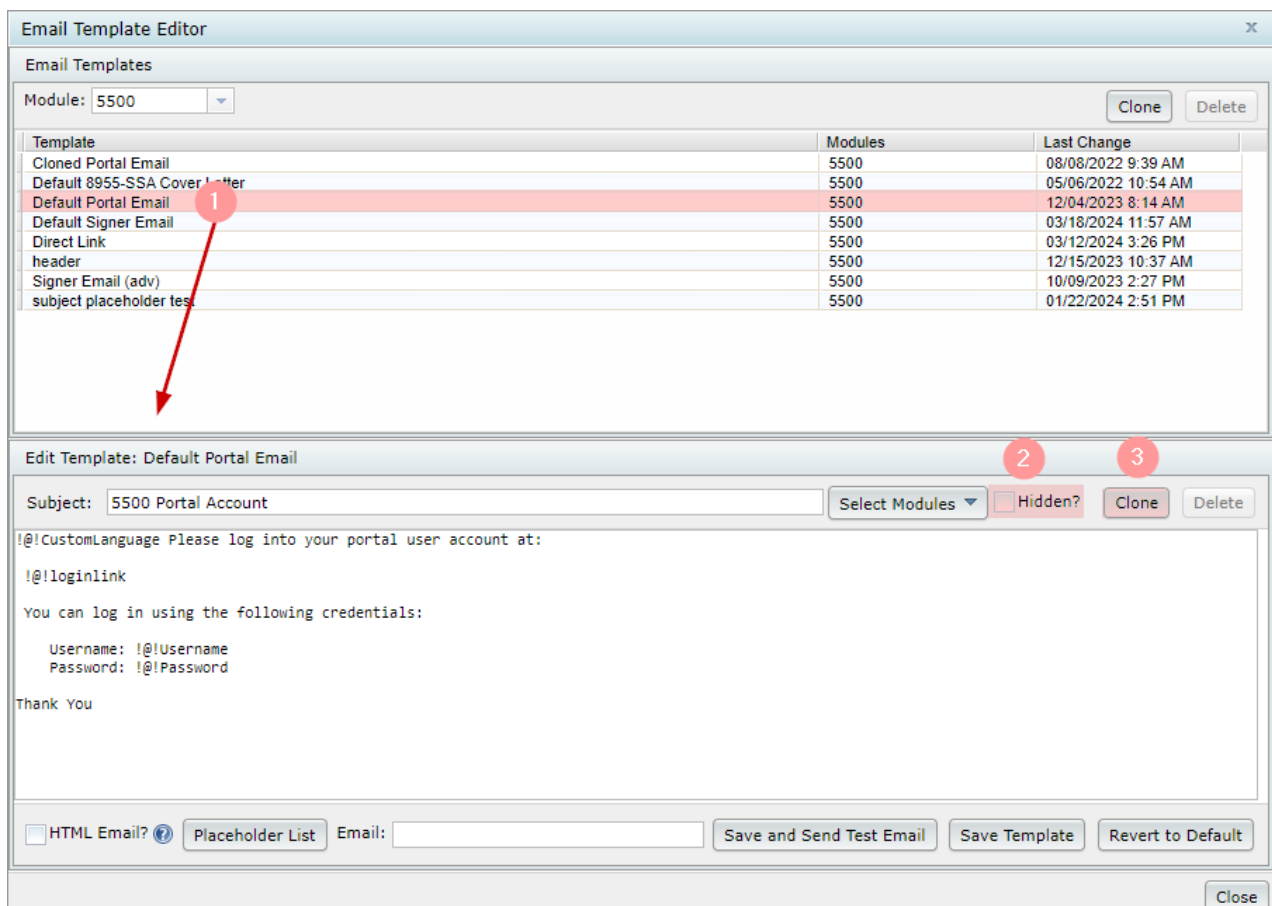
The screenshot shows the 'Global Email Settings' page. At the top, there is a breadcrumb 'Home > Global Email Settings' and a 'Select Division:' dropdown menu with 'DEFAULT' selected. Below this are tabs for 'Distributions', '5500', 'Messaging', 'Documents', and 'Compliance'. The '5500' tab is active. On the left, there are settings for 'Reminders: No', 'Every (time since last invite): 1 Day', 'Confirmation Emails: Yes', and 'Name Change Emails: No'. On the right, there is a table titled 'Select an Email to Edit' with columns for 'Email Name', 'Default Template', and '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.



***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:

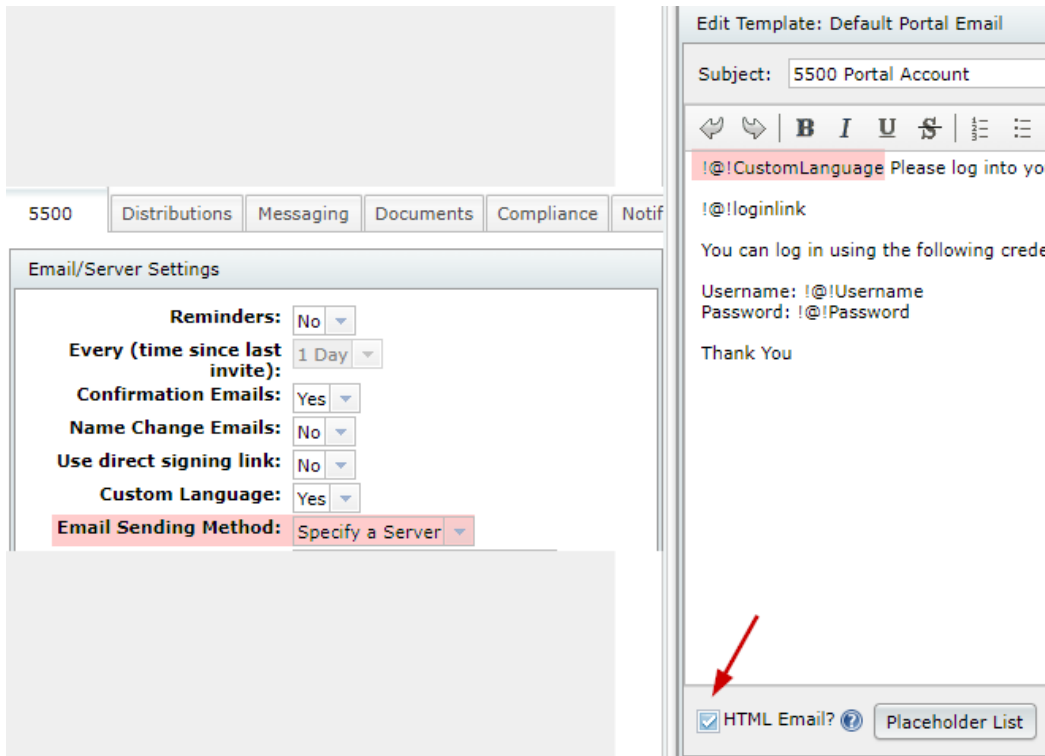
Custom Language: Custom language will be completed by language you enter that is specific to a user and filing. For each user you add under the **Work with Signers/Portal Users** option, there will be a box to add custom language for that user. If you are not sure whether you will use custom language, 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

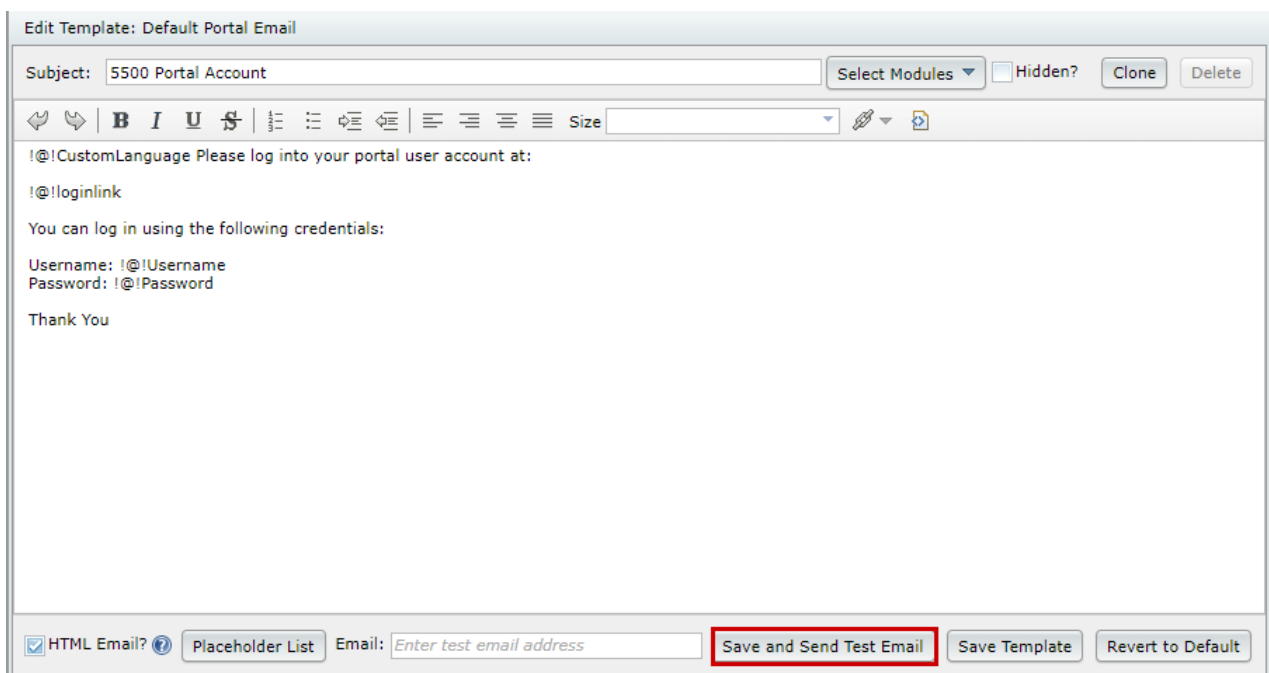
"Dear Ms. Smith:

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

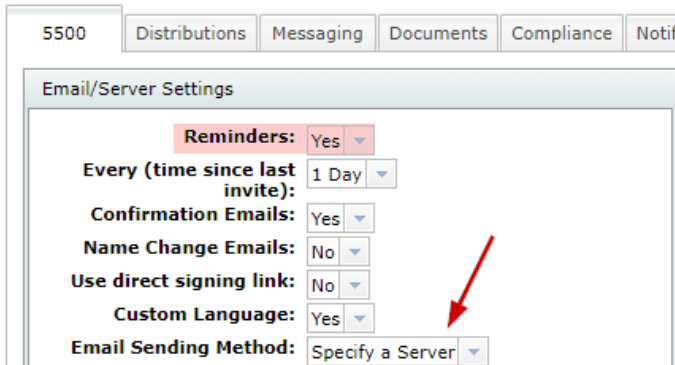
HTML option: This option is only available if you "Specify a Server" under the Email/Server Settings described above. Once you have the box checked for 'HTML Email?', then an html editor bar will appear below the Subject line for you to edit the email. You do not need to know html to use this feature.



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).



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.
