

# Global Email Settings

05/05/2026 12:41 pm CDT

## 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.

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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.

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## 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).

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## 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.

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## 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.

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## 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)

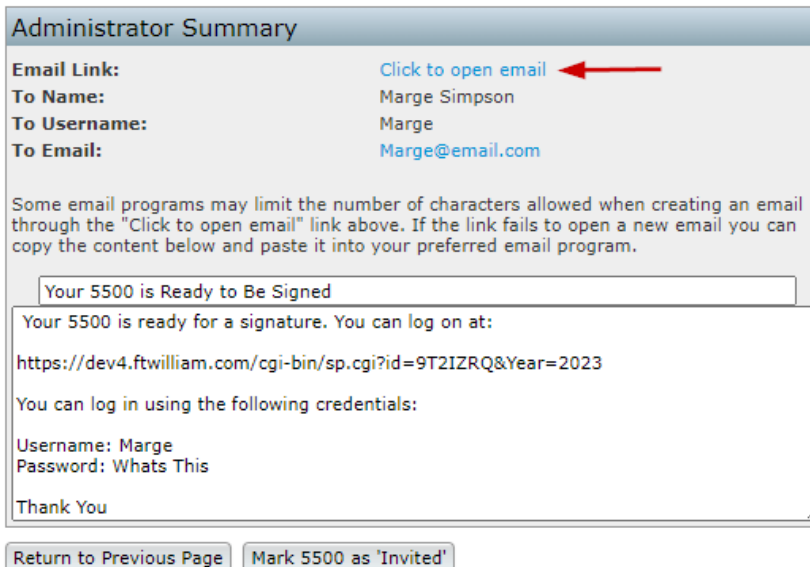
The **E-Mail Sending Method** controls whether emails are sent manually by a user or automatically from a shared company address, and determines whether batch and automated features are available.

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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:

- 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 content of the email is: "Your 5500 is Ready to Be Signed".

Below the main content, 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

The page ends with "Thank You" and two buttons: "Return to Previous Page" and "Mark 5500 as 'Invited'" (disabled).

**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.

## 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 and will often fail due to modern security protocols**)
- **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.exampleprovider.com
<b>**SMTP Port:</b>	465
<b>Secure Connection:</b>	SSL
<b>Username:</b>	no-reply@examplecompany.c
<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>	

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## If Secure Connection = OAuth (modern authentication) (top)

Selecting **OAuth** disables the Username and Password fields. With OAuth, email is sent using a secure access token rather than a stored mailbox password.

In this model, an application is registered with Microsoft 365, and the application credentials are used to authenticate when email is sent.

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 **Application (client) ID** assigned to the registered application in Microsoft Entra ID. This value uniquely identifies the application that Microsoft 365 recognizes when token requests are made. It is associated with the app registration and does not change unless the application itself is deleted and recreated.
- **OAuth Tenant**  
The **Directory (tenant) ID** for your Microsoft 365 organization. This value identifies the Microsoft 365 tenant where the application is registered and where authentication is performed. It ensures the OAuth request is directed to the correct organization.



[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,(and you have not updated your settings to OAuth) common issues to check are as follows:**

**1. SMTP AUTH**

Confirm with your email administrator that SMTP AUTH is enabled for your account.

**2. Two-Factor Authentication**

If enabled, you'll need to use an **app password**.

Learn more about app passwords and two-step verification here: [Microsoft Support- Account App Passwords](#)

**3. SMTP Limitations**

Ensure connections are allowed from our IP addresses:

- o Primary: 4.149.123.203
- o Secondary: 157.55.183.204
- o Tertiary: 157.55.183.205

**4. Restricted Account Access**

Some accounts are flagged for access only through `outlook.office365.com` , which prevents local Outlook installations or SMTP connections.

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 x

Email Templates

Module:


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:    Hidden?

!@!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?  Email:

 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 configuring email settings using the **Specify a Server** selection, you may occasionally encounter error messages when attempting to send an email. These messages typically indicate a configuration, connection, or security-related issue and can often be resolved by reviewing a few common settings.

This article explains frequently encountered **SMTP** server error messages, what they mean and recommended next steps.

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## General Troubleshooting Tips

Before reviewing specific error messages, confirm the following basic settings. These steps apply whether you are using standard SMTP authentication or OAuth.

- Ensure the **SMTP server address** is entered correctly (example: `smtp.exampleprovider.com` )
- Verify the **SMTP port** matches the requirements of your email provider (commonly `465` or `587` )
- Confirm the **Secure Connection** option (None, SSL, or TLS) aligns with the selected port
  - Some email providers enforce modern security requirements and may not accept unencrypted connections. If the Secure Connection is set to **None**, the provider may reject the connection. In these situations, configuring the Secure Connection to **SSL** or **TLS** is commonly required, depending on the provider's security policies.
- If using standard SMTP authentication (Not OAuth), verify the **username and password** entered are correct
- If using **OAuth with Microsoft email accounts**, confirm the following fields are populated (*rather than username and password*):
  - **OAuth Client ID**
  - **OAuth Tenant ID**
  - **OAuth Client Secret**
- Confirm the **From email address** is populated and valid

If you are unsure which values should be used, or whether changes are appropriate, contact your internal IT team for guidance.

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## Common Error Messages and What They Mean

### Error connecting or logging into the SMTP server

**What this means:** The system was unable to connect to your SMTP server or log in successfully.

<b>SMTP Server:</b>	<input type="text" value="smtp.exampleprovider.com"/>
<b>**SMTP Port:</b>	<input type="text" value="465"/>
<b>Secure Connection:</b>	<input type="text" value="SSL"/>
<b>Username:</b>	<input type="text" value="no-reply@examplecompany.c"/>
<b>Password:</b>	<input type="password" value="••••••••"/>

### Common causes:

- Incorrect SMTP server address
- Wrong SMTP port or secure connection setting
- Incorrect credentials or expired OAuth configuration
- Firewall or network restrictions blocking the connection

**What to do:**

- Double-check the SMTP server name, port, and secure connection settings
- If using OAuth, have your IT team confirm OAuth credentials and permissions
- Verify firewall and network access

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**Error logging into server**

**What this means:** A connection to the SMTP server was made, but authentication failed.

<b>SMTP Server:</b>	smtp.exampleprovider.com	<b>SMTP Server:</b>	smtp.exampleprovider.com
<b>**SMTP Port:</b>	465	<b>**SMTP Port:</b>	465
<b>Secure Connection:</b>	SSL	<b>Secure Connection:</b>	OAuth
<b>Username:</b>	no-reply@examplecompany.c	<b>Username:</b>	no-reply@examplecompany.c
<b>Password:</b>	●●●●●●●●	<b>Password:</b>	●●●●●●●●
<b>OAuth Client ID:</b>		<b>OAuth Client ID:</b>	a1b2cd3-e4f5-678g-0000-00
<b>OAuth Tenant ID:</b>		<b>OAuth Tenant ID:</b>	11111111-1111-1111-1111-
<b>OAuth Client Secret:</b>		<b>OAuth Client Secret:</b>	●●●●●●●●●●●●●●●●●●●●

**Common causes:**

- Incorrect username or password (non-OAuth)
- Expired or invalid OAuth Client Secret
- Authentication required but not enabled

**What to do:**

- Re-enter credentials if using standard SMTP authentication
- For OAuth, have your IT team review Microsoft Azure OAuth configuration

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**Blank FROM address**

**What this means:** The email does not have a sender (From) address.

<b>Email Sending Method:</b>	Specify a Server
<b>From Name:</b>	Sally Smith
<b>*Editable:</b>	No
<b>From Email:</b>	

**Why this matters:** Emails without a From address are frequently rejected or flagged as spam.

**What to do:**

- Enter a valid email address in the **From** field
- Ensure the From address is permitted by your SMTP server or Microsoft tenant

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

**What this means:** One or more email addresses used in the message are not valid.

**Common causes:**

- Typos or missing characters

- Extra spaces, or formatting issues

**What to do:**

- Review and correct all email addresses located on either:
  - The Global E-mail Settings

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

**From Name:** Sally Smith

\*Editable: No ▾

**From Email:** [Redacted]

\*Editable: No ▾

**Reply To:** [Redacted]

\*Editable: Yes ▾

**CC:** [Redacted]

\*Editable: Yes ▾

**BCC:** [Redacted]

\*Editable: No ▾

- Edit Portal User screen under:
  - **User Info** section (the user's e-mail address)

Edit Portal User
✕

Select User: Example User (Example USER) View Add Add Existing Delete

> User Info

User Info

> Messaging

**\*\*Note:** When the Reset Password button displays, the portal user has logged into the portal to set up security questions and a password. You do not need to click the button unless your client needs assistance resetting their password.

A. Demo 401(k) Plan

Contact Information

Add
Delete

Email: example@email.com [E-mail](#)

- Individual module overrides (if enabled on Global E-mail Settings)

Edit Portal User
✕

Select User: Example User (Example USER) View Add Add Existing Delete

> User Info

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> Messaging

Tabs for Plan:

A. Demo 401(k) Plan

Add
Delete

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> Document

5500

---

> Compliance

---

> PDS

Edit Contact Types

5500 -

Selected Year: 2025 Add Portal User Delete Portal User

Portal Users: Example User (Example USER)

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Email Settings

From Name:

Default Value: Sally Smithers

From Email: Moirar@email.com

Default Value: Donotreply@email.com

Reply To: Moirar@email.com

Default Value: accountmgt@email.com

CC: DavidR@email.com

Default Value: Admin@email.com

BCC: AlexisR@email.com

Default Value: reporting@email.com

### Error messages mentioning the body or envelope

**What this means:** The SMTP server reviewed the message and rejected it because of how the email was structured or what it contained

**Common causes:**

- Invalid or broken formatting, such as malformed HTML or missing message details
- Extra line breaks, special characters, or content pasted from another program
- Message formatting the receiving email system (SMTP server) can't process

**What to do:**

- Review the email content for formatting issues
- Confirm SMTP security and content filtering settings

### Unable to relay

**What this means:** Your SMTP server does not allow this system to send emails on its behalf.

**What to do:**

- If you are using relay on the SMTP server, ensure the following IP addresses are included in your list of allowed relay client:
  - **Primary:** 198.147.32.158
  - **Secondary:** 198.147.34.158
- If applicable, also review your server's spam or security filtering service to confirm it is not blocking relay traffic.

**EHLO command failed: 220 We do not authorize the use of this system to transport unsolicited, or bulk email**

**What this means:** The SMTP server accepted the connection but rejected the email request because the connection settings do not meet security requirements.

This does **not** mean you are sending spam. It commonly indicates a mismatch between the SMTP port and secure connection type, or insufficient trust for the connecting system.

**What to do:**

- Review the **SMTP Port** and **Secure Connection** settings
- Confirm required encryption, relay permissions, or OAuth configuration with your IT team

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### When to Contact Your IT Team

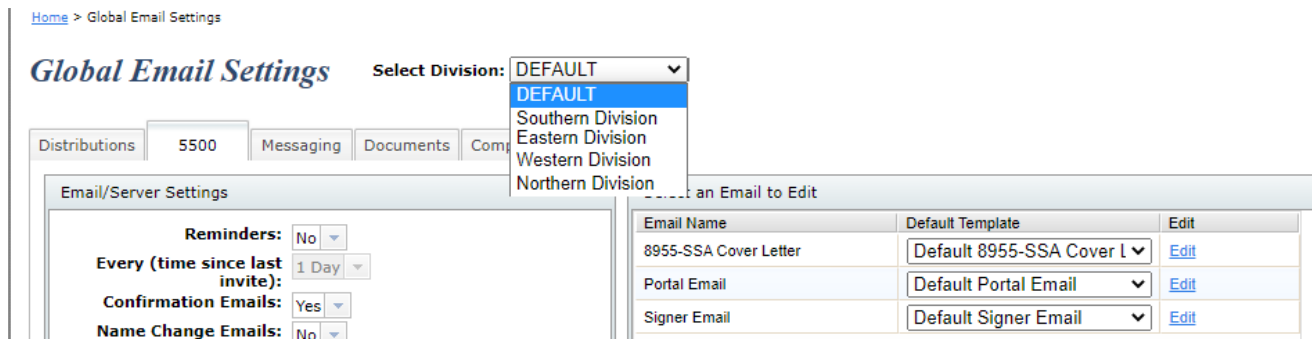
If errors continue after reviewing these settings, contact your internal IT team to:

- Confirm SMTP or Microsoft OAuth configuration
- Validate security, relay, and firewall rules
- Review Microsoft Azure OAuth permissions and credential expiration

Providing the **exact error message** will help speed up troubleshooting.

## 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 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
<b>Default Portal Email</b>	<b>5500</b>	<b>12/04/2023 8:14 AM</b>
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** 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:

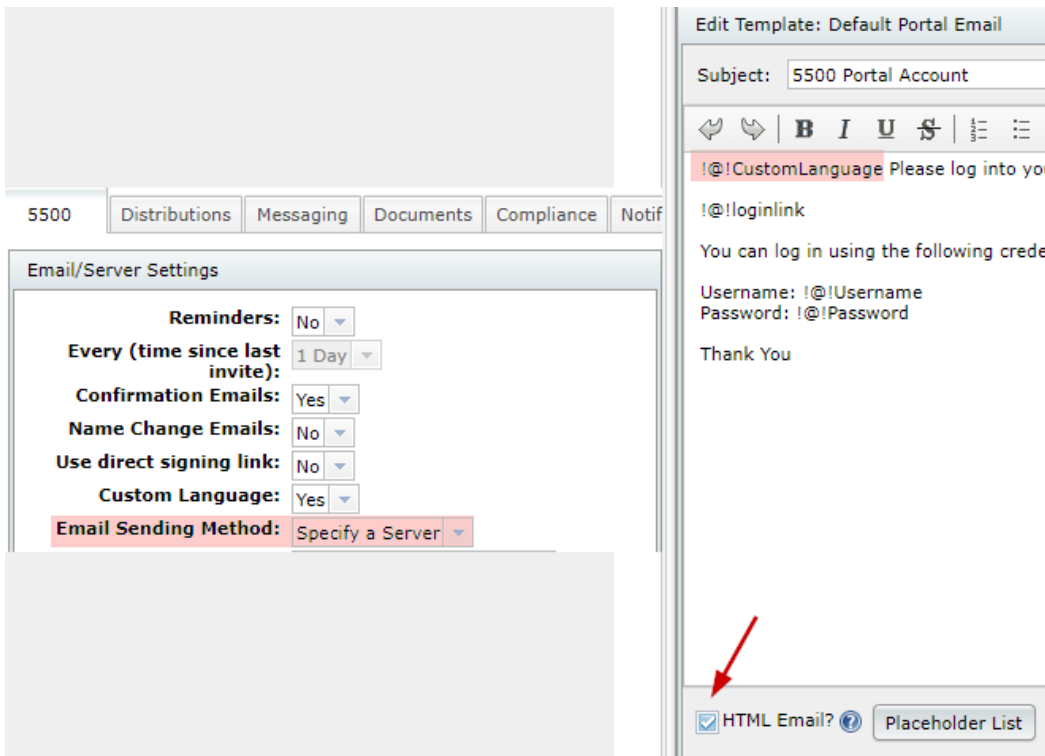
**Custom Language:** Custom language will be completed by language you enter that is specific to a user and filing. For each user you add under the **Work with Signers/Portal Users** option, there will be a box to add custom language for that user. If you are not sure whether you will use custom language,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

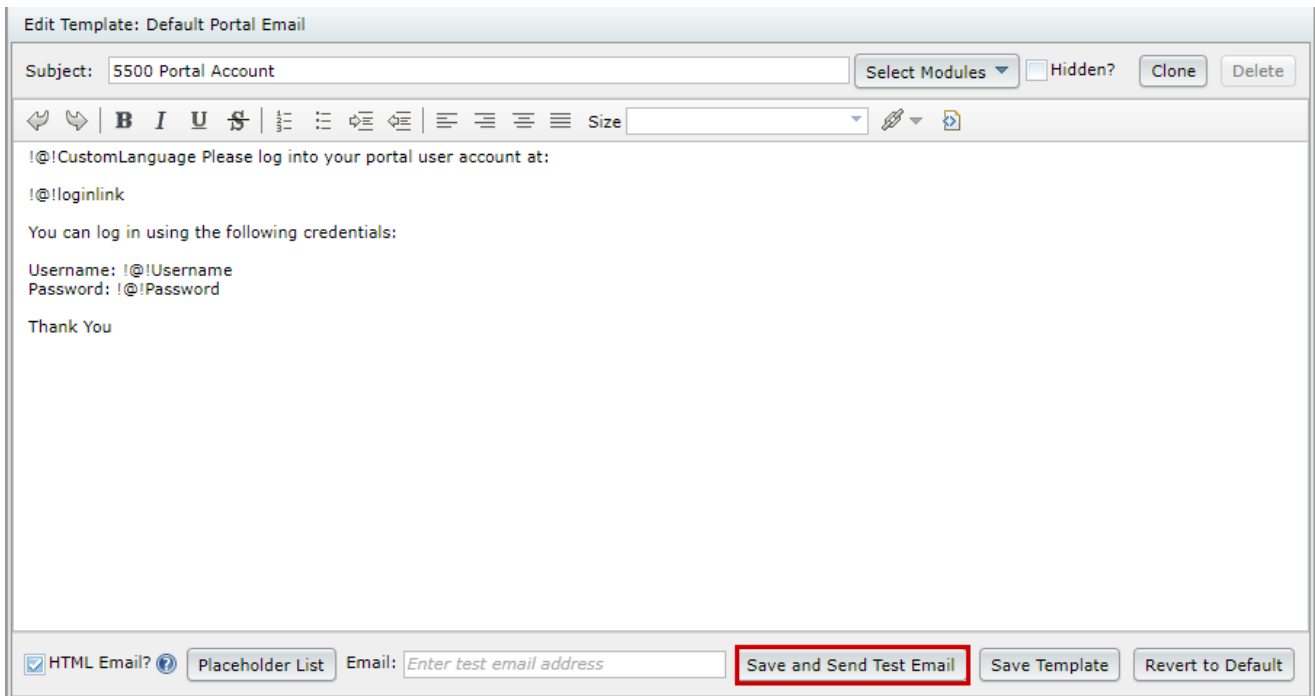
"Dear Ms. Smith:

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).



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.

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