

Setting up Global Email Settings

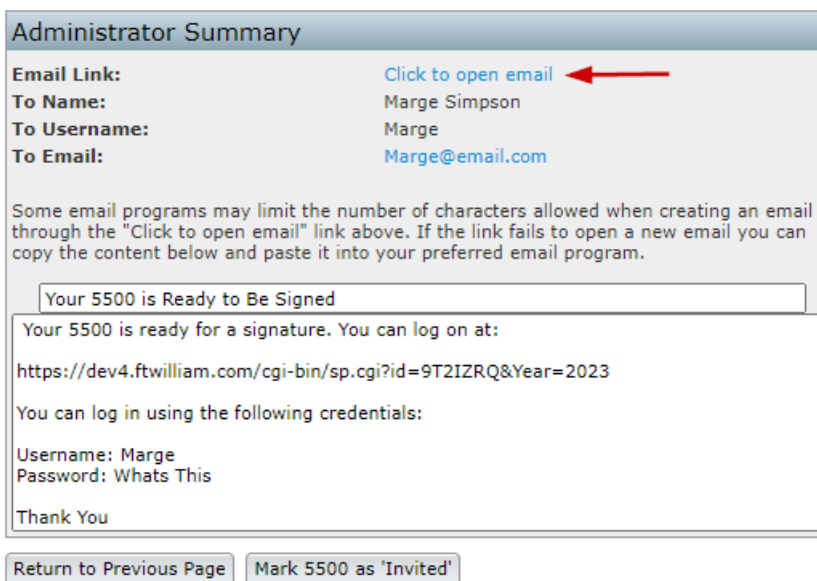
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To set up Global Emails Settings, you have to be the Master Admin User or a Designated Admin. If you have these designations, the Global Email Settings may be accessed by selecting the Wolters Kluwer Logo, selecting Administrative Tasks> Portal/Workflow> 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.



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

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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.