

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

07/30/2024 1:03 pm CDT

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 header	5500	03/12/2024 3:26 PM
Signer Email (adv)	5500	12/15/2023 10:37 AM
subject placeholder test	5500	10/09/2023 2:27 PM
		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).
