

How to Test the Global Email Settings for 'Preparer's Email Program'

07/29/2024 3:05 pm CDT

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 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 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
	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:

	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.