How to Edit or Clone Default Email Templates and Reminders

07/29/2024 3:23 pm CDT

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.

*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.
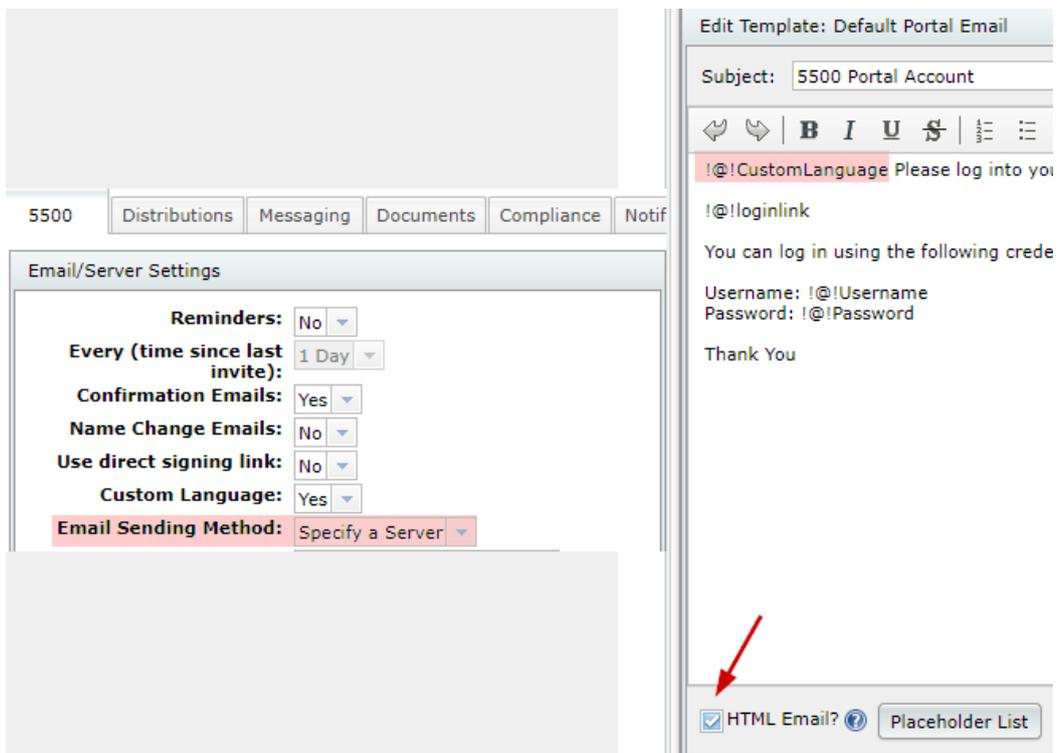
Testing. We have provided the ability to test your email settings (and html if applicable) for each of the standard emails. Please note that the "!@!CustomLanguage", "!@!Username" and "!@!Password" text will be customized for the user and either left out of the email if blank or filled in with the appropriate information (if there is no custom language the "!@!CustomLanguage" text will not appear).
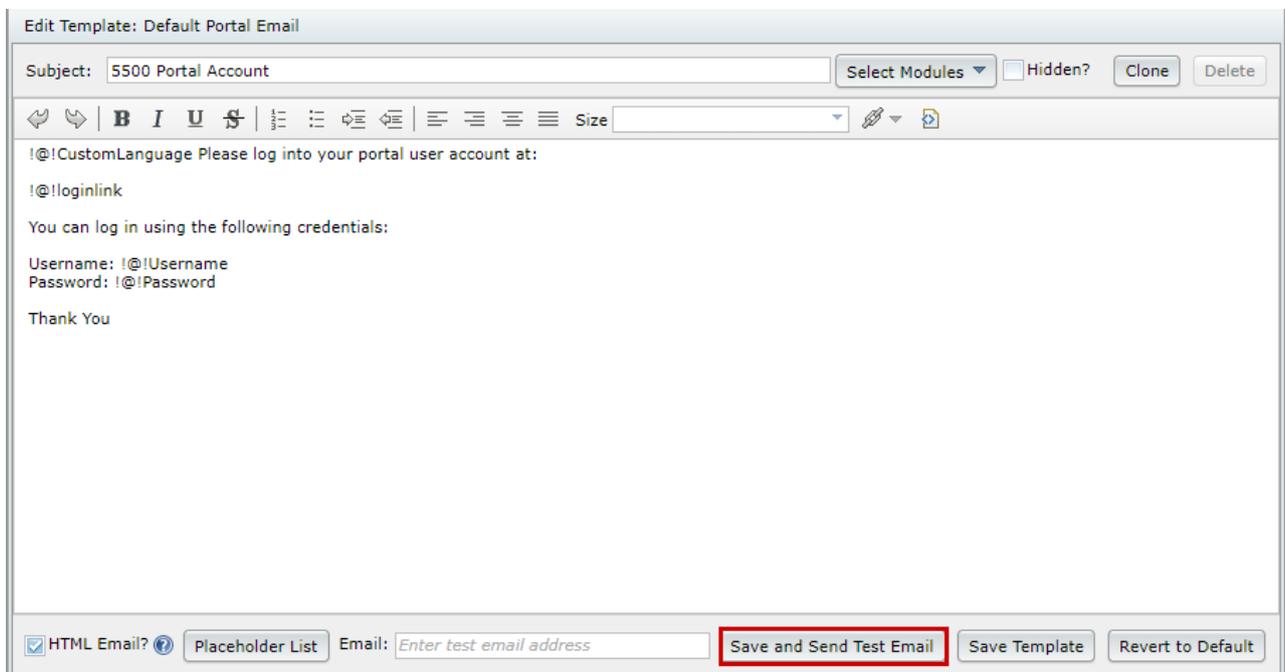
Reminder signer emails. This option will only become available when "Specify a Server" under the Email/Server Settings described above within the 5500 Tab is set up. To program reminder emails, click "Yes" next to 'Reminders'. You can then select the number of days for reminder emails to be sent. For 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)'.
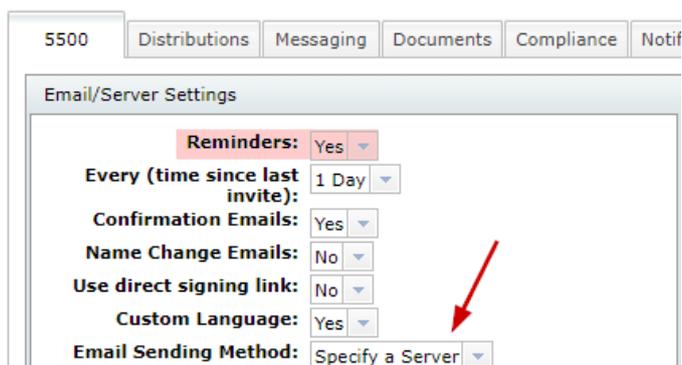
Optional Email Substitutions.

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.