Global Email Settings

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By going to the "WK Logo" drop-down menu at the top of most screens, Administrative Tasks > Portal/Workflow > Global Email Settings, users will have the option to work with Email Settings and Email Templates. Along the left-hand side of the screen are options to set up the email address that will be used to send invitations to the web portal and set up reminder emails for signers (discussed under Email/Server Settings below). Along the right-hand side of the screen, users may customize standard email correspondence that will be used as a default for all filings on the system (discussed under Portal Email Default Templates below).

Be sure the 5500 tab is selected at the top of the screen to access 5500 software email settings if you have other ftwilliam.com portal software.