

Email/Server Settings

1.

09/11/2024 4:31 pm CDT

- **Email/Server Settings.** [Top](#) There are two options:

- Users that choose this option, the email invitation will come from the email program (i.e. Outlook, Thunderbird Lotus Notes, etc.) that is loaded onto the computer being used by the preparer that invites a portal user to the portal. When you invite your client to sign, an email will pop up on your computer for you to send to your client (similar to clicking "compose" in your email account). Note that the email is being sent by your computer. You need to click "Send" to send the email, just as the user would any other email sent from the user's computer. ftwilliam.com assumes that the majority of users will select this option.

Users that are using a web-based email program (gmail or yahoo) that does not use software loaded onto the user's computer, this selection will not automatically open a default email. Some web-based emails that do not use accompanying installed software may be able to use the Specify a Server option below as an alternative (this will take some investigating to determine the appropriate settings). Alternatively, users can copy and paste the text provided into an email message when inviting.

2. **Specify a Server and Reminders for Signers** - If users choose this option, the user's email invitation to the web-portal will come from one specified email address for all of the user's clients. Selecting the "Specify a Server" option will allow users to enter information in the fields below. The only required field for the ftwilliam.com software is the SMTP Server (however the email server may require other fields to be completed in order to work, such as the SMTP Port, Username, Password and From Email. The ftwilliam.com system will default to SMTP Port 25).

5500

Email/Server Settings

Reminders: Yes

Every (time since last invite): 1 Day

Confirmation Emails: No

Name Change Emails: No

Use direct signing link: Yes

Custom Language: No

Email Sending Method: Preparer's Email Program

From Name: Preparer's Email Program

*Editable: Specify a Server

From Email: sample@email.com

*Editable: No

Some fields will allow users to select whether the field is editable. Marking a field as "Editable" will allow preparers to choose their own value for this field for a particular portal user.

When users select to invite a portal user to the portal, a screen will appear to allow users to review the email before sending (it will not pop-up in the user's email program as it would if users select the Preparer's Email Program above). This option allows for less ad-hoc editing of emails since users cannot modify the email in the user's own email program.

Reminder Signer Emails. This option is only available if users select "Specify a Server" under the "Email/Server Settings". Once the "Specify A Server" option is selected, click "Yes" next to "Reminders"

(see screen shot above). Users may then select the number of days for reminder emails to be sent. For example, if users choose 3 days, a reminder email will be sent every 3 days until the filing is signed by the portal user. The reminder email will be the **same** text as the original signing invitation email except the end of the subject line will include "(Reminder)."

If your filing is "Not Accepted," there is a "Details" link next to the status on the "5500 - Year" screen as shown below:

Home > Edit Company > Edit Plan > 5500 > 2022 Help

Company:	Example Company	ID:	CustID
Plan:	Example Company	ID:	PlanID
Checklist:	Misc (1099, 5500 or Compliance)		
Details:	EIN: 86-7530932 • PN: 001 • PYE: 12-31		

Edit Status:	Locked
Signed Status:	Signed Invite Example User to Portal
Acceptance Status:	Not Accepted Details Amend Filing History

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Portal Menu

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Click on the "Details" link to view the reason(s) for the filing not being accepted by the DOL.