

Portal Email Default Templates

09/11/2024 4:32 pm CDT

- [Portal Email Default Templates](#). [Top](#)

[Home](#) > Global Email Settings

Global Email Settings

5500

Email/Server Settings

Reminders: Yes

Every (time since last invite): 1 Day

Confirmation Emails: No

Name Change Emails: No

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

Once you've clicked on "Edit" for the Default Portal Email*, for example, you be able to update the Default Template; hide the Default Template; or Clone the template. If you choose to hide a template, it will not display for admins when sending portal invites. **Note:** You may not delete Default Templates (the button is grayed out for Default Templates).

Email Template Editor

Email Templates

Module: 5500 Clone Delete

Template	Modules	Last Change
Default 8955-SSA Cover Letter	5500	05/06/2022 10:54 AM
Default Portal Email	5500	08/08/2022 9:39 AM
Default Signer Email	5500	08/31/2023 9:19 AM

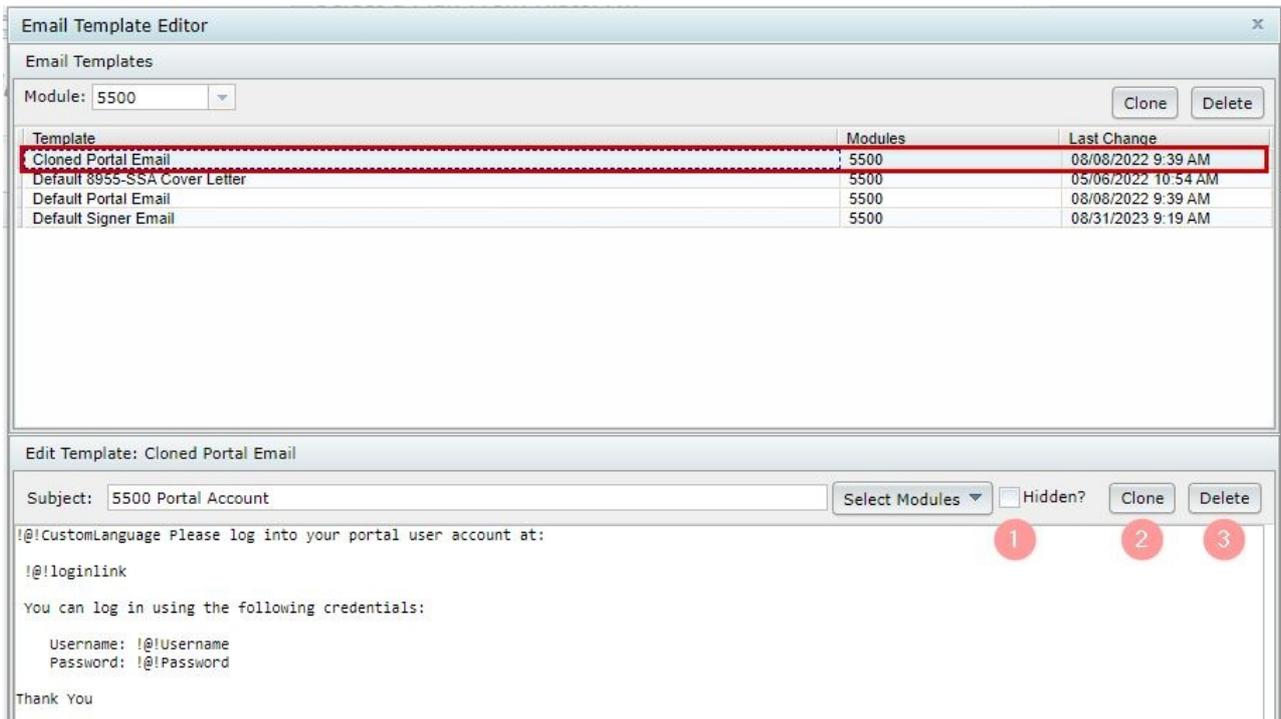
Edit Template: Default Portal Email

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: Save and Send Test Email Save Template Revert to Default Close

If you clone the Default Portal email, a pop-up box will appear for you to name the template. After you have named the template, you will have the option to update the text; hide the template; clone the template; or delete the template. Once you are done, click on the "Close" button.



Within the "Select an Email to Edit" box, you will now be able to select the template you would like to default to when sending the Invite to Portal email. You will need to click on "Save Settings" towards the bottom of the screen. Note: the Default Portal Email was hidden so it does not appear in the drop-down list.

Select an Email to Edit		
Email Name	Default Template	Edit
8955-SSA Cover Letter	Default 8955-SSA Cover L	Edit
Portal Email	Cloned Portal Email	Edit
Signer Email	Cloned Portal Email	Edit

Now that the default template has been selected, when you go to the 5500 Module and click on the "Invite X to Portal" link, the selected default from the Global Email Settings will appear in the drop-down list. However, you are able to select another template type for the standard Default Portal Email, any cloned Portal Email Templates, Default 8955-SSA Email or any cloned 8955-SSA Email Templates.

Invite Portal Users

Email Template: Cloned Portal Email [Edit](#)

Portal User Summary

Email Link: [Click to open email](#)
To Name: Example User
To Username: ExampleUser1234
To Email: Example.User@email.com

Some email programs may limit the number of characters allowed when creating an email through the "Click to open email" link above. If the link fails to open a new email you can copy the content below and paste it into your preferred email program.

5500 Portal Account

Please log into your portal user account at:
<https://www.ftwilliam.com/cgi-bin/sp.cgi?id=9MMF5MV>

You can log in using the following credentials:

Username: ExampleUser1234
 Password: Lost password? Use the 'Forgot Password' link on the login screen to reset your password.

Invite Portal Users

Email Template: Cloned Portal Email [Edit](#)

- Cloned Portal Email
- Cloned Portal Email
- Default 8955-SSA Cover Letter

Portal User Summary

Email Link: [Click to open email](#)
To Name: Example User
To Username: ExampleUser1234
To Email: Example.User@email.com

Some email programs may limit the number of characters allowed when creating an email through the "Click to open email" link above. If the link fails to open a new email you can copy the content below and paste it into your preferred email program.

5500 Portal Account

Please log into your portal user account at:
<https://www.ftwilliam.com/cgi-bin/sp.cgi?id=9MMF5MV>

You can log in using the following credentials:

Username: ExampleUser1234
 Password: Lost password? Use the 'Forgot Password' link on the login screen to reset your password.

***Note:** We have provided default email subjects and sample correspondence, but you may customize this language any way that you like. 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. If after you have edited the text and wish to return to the default language, click on "Revert Email" and the body of the Invitation Email will revert back to its original text.

There are a few features of the standard emails described in more detail below:

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 you enter no custom language for a particular user and signer, there will be no information added to the email and it will cause no harm.) You may also change the placement of the custom language text. We have placed this at the beginning of the email since it will allow you to personalize the email. For example, you could enter custom language like 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 in order to use this feature.
- **Testing.** We have provided the ability to test your email settings (and html coding 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).
- **Placeholders.** You will want to ensure you insert the placeholders you wish to use into the "Signer Email" or "Portal Email." You will only need to insert the placeholder itself (i.e. !!@!Password) and not the placeholder and placeholder description.

There are a number of 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.

