

Setting up Global Email Settings in ftw

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Global Email Settings determine how ftwilliam.com sends emails for each module (e.g., 5500, Documents), including invitations, reminders, signature requests, and automated confirmations. Configure these settings **per module tab**.

Access the Global Email Settings screen by selecting:

Wolters Kluwer logo → Administrative Tasks → Portal/Workflow → Global Email Settings

NOTE: Configure these settings **per module tab**. Only **Master Admin User** and **Designated Admin** roles can change these settings.

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Field Descriptions [\(Return to top\)](#)

Below are the **common email-related fields** you may see across modules in the Global E-mail Settings (GES). Please note that each module has a slightly different configuration or listing order but the descriptions below apply to all where applicable.

Custom Language [\(top\)](#)

Allows personalized text to be included in email invitations sent from each module. When this setting is enabled (**Yes**), the custom message entered will automatically replace the `!@!CustomLanguage` placeholder in the default email template.

When it applies: This setting is configured in each module and affects only the invitations generated in that specific module.

Uses: This feature is useful for tailoring messages to provide instructions, context, or a personal touch to individual clients.

Where to View Custom Language: The custom language is specific to each Portal User. If the portal user does not have custom language entered into the Edit Portal User window for that module, the template will not populate additional text.

Confirmation Emails [\(top\)](#)

When this setting is enabled (**Yes**), ftwilliam.com automatically sends an email notification when a client completes certain actions—such as submitting a census, downloading documents, or e-filing a form.

When it applies: Confirmation emails are determined on a per-module basis and may follow different rules depending on the module selected.

How recipients are determined (general rule):

Confirmation emails will typically be sent to one of the following:

- The **Plan Administrator** listed on the **Edit Plan** screen
- The **Master User** on the account, if no Plan Administrator is listed

For specific routing rules:

Because confirmation logic varies by module (e.g., 5500 workflow grids, Documents confirmation overrides, editable confirmation fields), please use our [Confirmation Email Assistant Tool](#) for exact recipient determination based on your configuration.

Name Change Emails (5500 only) [\(top\)](#)

Sends an alert to the plan administrator if a Portal User changes their signature name on a Form 5500/SF/EZ before signing.

When it applies: Only for 5500 filings where portal signing is enabled.

Uses: Helps detect unintended or unauthorized signer name changes before the form is finalized.

Use Direct Signing Link (5500 only) [\(top\)](#)

Allows Portal Users to sign their Form 5500 directly through a secure, individualized link included in the email invitation.

🔍 **When it applies:** When set to **Yes**, the invitation includes a direct link to the specific filing.

🔍 **Uses:** Ideal for administrators or sponsors who prefer not to manage portal credentials.

⚠️ **Limitations:**

- If a Portal user has permissions to view or e-file the 8955-SSA, Direct Link is bypassed and the user will be required to log into the portal to complete the 5500 filing. This is a safety measure put in place as the 5500 filing information is public but the remaining items on the portal may contain sensitive information such as Social Security numbers.

From Name / Editable (top)

Defines the display name shown in the **From** field of emails sent from the system when using **Specify a Server**.

🔍 **When it applies:** Active and a required field only when the module is set to **Specify a Server** as the **E-mail Sending Method**.

🔍 **Uses:**

- Supports company branding or personalizing communications.
- If **Editable = Yes**, administrators may replace the default **From** name and/or **From e-mail** address for a specific portal user (updated in the selected module tab on the Edit Portal User screen).

Reply To / Editable (top)

Specifies the email address that receives replies when Portal Users respond through their own email provider (such as Outlook or Gmail).

This does **not** affect confirmation emails.

🔍 **When it applies:** Only used when recipients reply outside the portal.

🔍 **Uses:**

- Ensures replies go to the appropriate monitored inbox.
- Supports multiple email addresses separated by commas or semicolons.
- If **Editable = Yes**, this can be overridden per invitation.

CC / Editable (top)

Adds visible copy recipients (CC) to emails sent to Portal Users.

🔍 **When it applies:** Used only for emails sent to Portal Users; does not apply to confirmation emails.

🔍 **Uses:**

- Helpful when additional team members need visibility.
 - Supports multiple addresses.
 - If **Editable = Yes**, CC can be changed or added during invitation preparation.
-

BCC / Editable (top)

Adds hidden copy recipients (BCC) to emails sent to Portal Users.

? **When it applies:** Used only for Portal User invitations, not confirmation emails.

? **Uses:**

- Allows silent internal tracking of communications.
- Supports multiple addresses.
- If **Editable = Yes**, administrators can modify BCC per invitation.

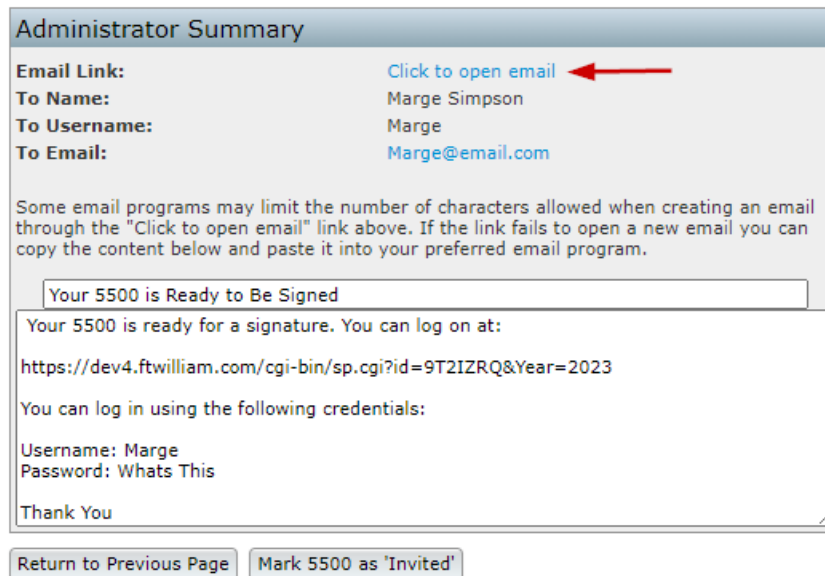
E-Mail Sending Method (Return to top)

The **E-Mail Sending Method** controls whether emails are sent manually by a user or automatically from a shared company address, and determines whether batch and automated features are available.

Preparer's Email Program (top)

What it is:

ftwilliam.com creates the email content and **opens a draft** in the preparer's **default desktop email application** (e.g., Outlook, Thunderbird, HCL Notes). The preparer **reviews/edits** the message and **sends it manually**. When, for example, you invite a portal user to sign a Form 5500 and select "**Click to open email**," a draft opens in your default email app using the specified template.



The screenshot shows a web interface titled "Administrator Summary". It contains the following information:

- Email Link:** [Click to open email](#) (indicated by a red arrow)
- To Name:** Marge Simpson
- To Username:** Marge
- To Email:** Marge@email.com

Below this is a text box containing the message content:

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.

Your 5500 is Ready to Be Signed

Your 5500 is ready for a signature. You can log on at:

<https://dev4.ftwilliam.com/cgi-bin/sp.cgi?id=9T2IZRQ&Year=2023>

You can log in using the following credentials:

Username: Marge
Password: Whats This

Thank You

At the bottom, there are two buttons: "Return to Previous Page" and "Mark 5500 as 'Invited'"

Typically used by:

- Smaller offices or teams without centralized IT support
- Users who prefer to edit each outgoing message
- Workflows sending invitations **individually**, not in batches
- Firms that do not need server-based automation

Configuration (on the user's computer):

- Set the default email program in the **operating system** (not inside ftwilliam.com):
Start Menu → Settings → Apps → Default Apps → Email
- If the correct app already appears, **reselect and save** to ensure the setting applies.

🔗 **Best for:** Low-volume sending, personalized messages, and teams without IT support

⚠️ Limitations:

- **No batch or automation**—delivery relies on the local email app
- Emails send **from the preparer's personal address**
- Requires the user's desktop email application to be available and configured

🔗 **When to use:** Choose this method when you want **manual, one-by-one** sending with per-message editing.

Specify a Server [\(Return to top\)](#)

What it is:

ftwilliam.com sends emails **automatically** from a **single, shared company email address** via your mail server using **SMTP or OAuth**. Selecting **Specify a Server** reveals the additional **server and authentication fields** needed for delivery (explained later in **SMTP & OAuth Configuration**).

Typically used by:

- Firms wanting a **single, standardized sender identity**
- **Automated workflows** and **batch sending**
- Environments that need **consistent branding** or **centralized delivery**
- Modules/features that require server-based sending for workflow automation

Configuration (high-level):

- Enter the fields required by your provider: **SMTP Server, SMTP Port, Secure Connection type**, and (if OAuth) **OAuth Client ID/Tenant ID/Client Secret**.
- See **SMTP & OAuth Configuration** additional information.

🔗 **Best for:** Most firms—supports **standardized sender identity, batch sending, automation, and consistent branding** across all messages

⚠️ Limitations:

- Requires **server configuration**; incorrect settings **prevent delivery**
- **Your firm's internal IT involvement** is often needed (especially for OAuth and policy-controlled environments)

🔗 **When to use:** Recommended for most firms and required for **batch workflows** and other **automated** scenarios.

NOTE: Configure the email sending method per module tab and use only one method per module.

🔗 **Batch features** require **Specify a Server**.

SMTP Configuration (Required for Specify a Server) [\(top\)](#)

These selections are only applicable with the Email Sending Method is set to **Specify a Server**. You'll enter your provider's server details and choose a **Secure Connection** type.

NOTE: Complete **only** the fields that match the method you choose (SSL/TLS vs OAuth).

SMTP Server / SMTP Port (top)

Send email through your organization's outgoing mail server using SMTP.

- **SMTP Server** – The outbound mail server address
(examples: *smtp.office365.com*, *smtp.gmail.com*)
- **SMTP Port** - The port used to connect to the server
 - **587** - Most commonly used
 - **465** - Used by some providers
 - **25** - Legacy or internal relay (not recommended for internet email)
 - **2525** - Alternative submissions port supported by some providers

Provided by: Your internal IT team or your **email provider**.

Why it matters: Enables centralized, automated sending from a shared address when **Specify a Server** is selected.

NOTE:

- SMTP Server values are also widely published; you can often find the SMTP host and recommended ports with a quick web search (e.g., "ProviderName SMTP server and port"). **Always verify what you find online against your organization's requirements or with IT, as providers may have tenant-specific or policy-controlled settings.**
- The port does **not** determine encryption. Choose the encryption/authentication method in the **Secure Connection** setting.
- **Port 25 will be used if left blank.** Please contact support if you would like to use a port other than 25, 465, 587, or 2525.

Secure Connection (top)

Choose the encryption/authentication method required by your provider.

- **None** – No encryption (**not recommended and will often fail due to modern security protocols**)
- **SSL** – Secure Sockets Layer
- **TLS** – Transport Layer Security (**modern standard**)
- **OAuth** – **Passwordless, token-based** modern authentication (no stored mailbox password)

NOTE: If you're unsure which to use, contact your **IT** or your **email provider**.

Many Microsoft 365 tenants now prefer **TLS** or **OAuth**; basic username/password may be restricted.

If Secure Connection = None, SSL, or TLS (username + password) (top)

Selecting None, SSL, or TLS as the secure connection will enable the Username and Password fields.

- **Username** – Usually the **full email address** (e.g., user@company.com).
- **Password** – Password for the mailbox **used to authenticate** the SMTP session.
 - If **MFA** is enabled, you may need an **App Password** (often 16 characters and different from your regular login).

SMTP Server:	smtp.exampleprovider.com
**SMTP Port:	465
Secure Connection:	SSL
Username:	no-reply@examplecompany.c
Password:	●●●●●●●●

NOTE: If the secure connection type is altered to OAuth after entering the username and password have been entered, those fields are stored but not utilized until the secure connection type is changed back to None, SSL, or TLS.

Secure Connection:	OAuth
Username:	Support@gmail.com
Password:	●●●●●●●●
OAuth Client ID:	
OAuth Tenant ID:	
OAuth Client Secret:	

If Secure Connection = OAuth (modern authentication) (top)

Selecting **OAuth** disables the Username and Password fields. With OAuth, email is sent using a secure access token rather than a stored mailbox password.

In this model, an application is registered with Microsoft 365, and the application credentials are used to authenticate when email is sent.

At this time, OAuth in ftwilliam.com is supported only for **Microsoft 365** environments. Support for additional email providers may be added in the future.

What you'll enter in ftwilliam.com

- **OAuth Client ID**
The **Application (client) ID** assigned to the registered application in Microsoft Entra ID. This value uniquely identifies the application that Microsoft 365 recognizes when token requests are made. It is associated with the app registration and does not change unless the application itself is deleted and recreated.
- **OAuth Tenant**
The **Directory (tenant) ID** for your Microsoft 365 organization. This value identifies the Microsoft 365 tenant where the application is registered and where authentication is performed. It ensures the OAuth request is directed to the correct organization.
- **OAuth Client Secret**

