Global Email Settings

09/15/2026 3:34 pm CDT

Setting up Global Email Settings in ftw

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.

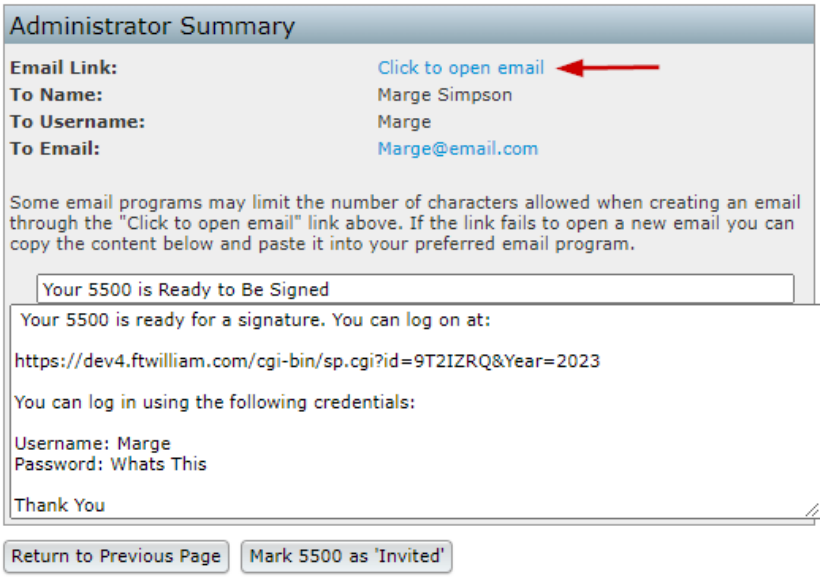
Uses:
- Allows silent internal tracking of communications.
- Supports multiple addresses.
- If **Editable = Yes**, administrators can modify BCC per invitation.

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.



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.

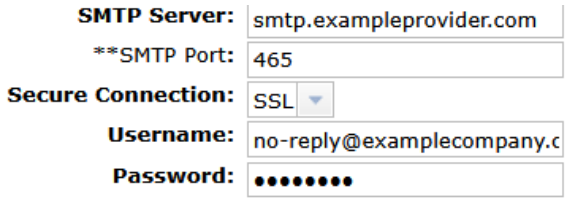
- **None** — No encryption (**not recommended and will often fail due to modern security protocols**)
- **SSL** — Secure Sockets Layer
- **TLS** — Transport Layer Security (**modern standard**)
- **OAuth** — **Passwordless, token-based** modern authentication (no stored mailbox password)

> **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.

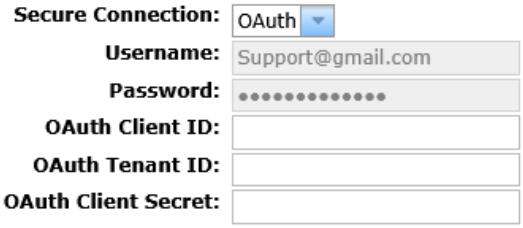
If Secure Connection = None, SSL, or TLS (username + password) (top)

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).



> **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.



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**
  The **client secret value** generated for the application in Microsoft Entra ID. This value functions as a confidential credential used by the application during authentication. Microsoft displays the secret value only at the time it is created, and it cannot be retrieved later; if lost or expired, a new client secret must be generated and updated wherever it is used.



⚠**OAuth values must be entered exactly as issued**, including dashes and any special characters. Never modify or "normalize" them.

For Microsoft 365 environments, OAuth-based SMTP email relies on an application registered under **Office 365 Exchange Online** with appropriate mail-sending permissions (**SMTP.SendAsApp**).

All application registration, Exchange Online configuration, and related security settings are managed entirely within Microsoft 365. ftwilliam support is unable to assist with the application registration process or any setup that occurs outside of the ftwilliam.com software.

For additional details, refer to Microsoft's documentation: Authenticate an IMAP, POP, or SMTP connection using OAuth.

Common Mistakes and Fixes (top)

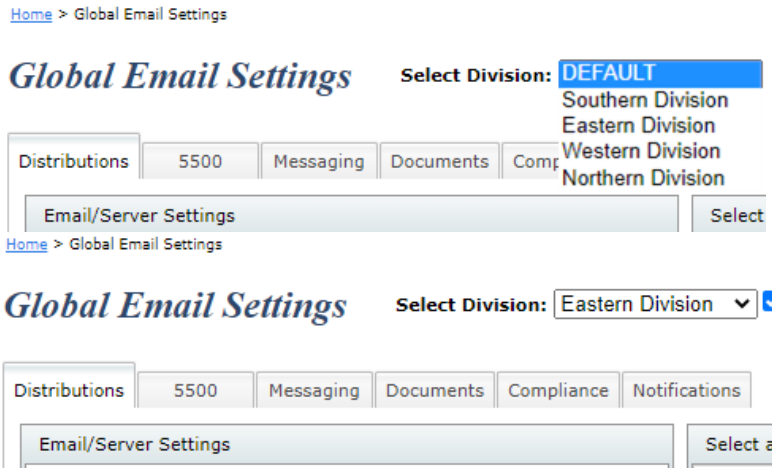
- **Emails fail to send** → Verify **SMTP port** and **Secure Connection** (e.g., **587/TLS**).
- **Authentication errors** → Your provider may require **OAuth**; switch to OAuth and enter the values.
- **Password rejected** → If **MFA** is enabled, use an **App Password** or migrate to **OAuth**.
- **Batch not available** → Ensure **Specify a Server** is selected (Preparer's Email Program doesn't support batch).

Setting Up Global Email Settings for Divisions

To set up Global Emails Settings by Division, you have to be the Master Admin User or a Designated Admin. If you have these designations, the Global Email Settings may be accessed by selecting the Wolters Kluwer Logo, selecting Administrative Tasks> Portal/Workflow> Global Email Settings.

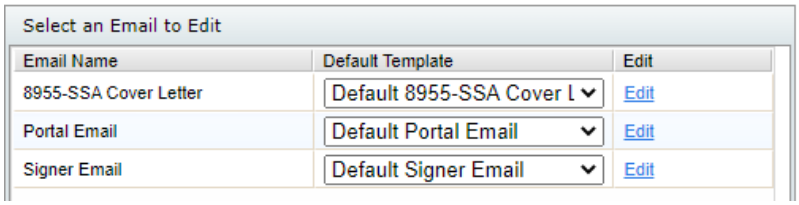
Once on the "Global Email Settings" screen, if divisions are enabled. there will be a drop-down list for 'Select Divisions' to select the division to be updated.

Note: There will be a check box for the guest divisions to 'Use default division' that will be automatically checked. After the division has been selected, follow the steps in the article 'Setting Up Global Email Settings'.

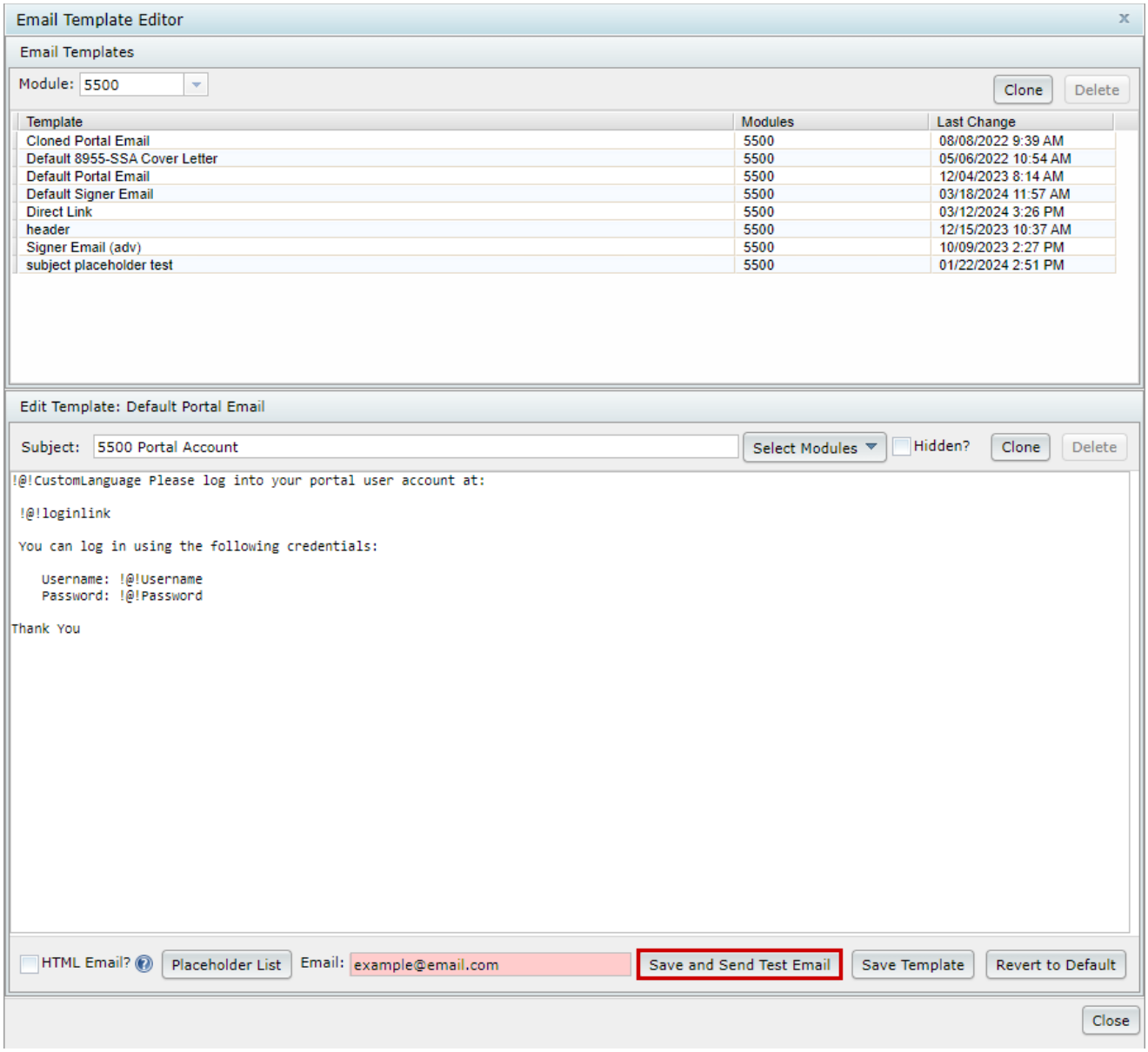


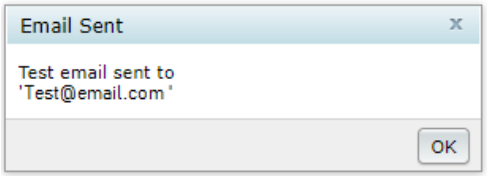
How to Test the Global Email Settings for 'Specify a Server'

It is recommended that you test your settings before sending invitations to the portal. To test the 5500 Module settings, navigate to the “Global Email Settings” screen and click on “Edit” to the right of either 'Signer Email' or 'Portal Email'.



Enter a valid email address in the “Enter Test Recipient” field and click on “Save and Send Test Email”. If a valid SMTP server has been set up properly, you will receive a message stating “Changes have been saved and a test email was sent to [email address]. The valid email address should receive the test email moments after it was sent (it may take a little longer depending on the server).





The testing options are available on each module tab.

Reasons why the 'Specify a Server' settings may not be set up properly:

1. There are typos within the settings.
2. You have used the IMAP settings instead of the SMTP settings.
3. Your email security is too 'tight' (this may not allow our servers to connect to your servers).
4. The 'from' address for a given portal user was overridden, so the from address no longer matches the username/password in the SMTP settings, so the SMTP server refuses to send the email.

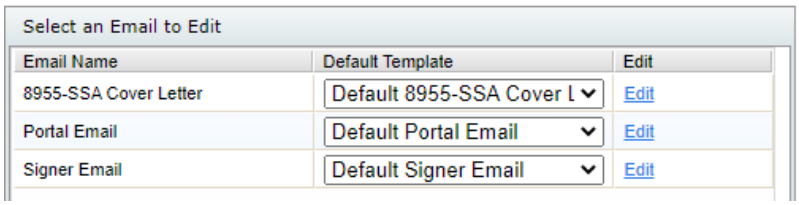
***If using Office365 as your server, and are running into issues with sending e-mails,*(and you have not updated your settings to OAuth)* common issues to check are as follows:**

1. **SMTP AUTH**
   Confirm with your email administrator that SMTP AUTH is enabled for your account.
2. **Two-Factor Authentication**
   If enabled, you'll need to use an **app password**.
   Learn more about app passwords and two-step verification here: Microsoft Support- Account App Passwords
3. **SMTP Limitations**
   Ensure connections are allowed from our IP addresses:
   - Primary: 4.149.123.203
   - Secondary: 157.55.183.204
   - Tertiary: 157.55.183.205
4. **Restricted Account Access**
   Some accounts are flagged for access only through `outlook.office365.com`, which prevents local Outlook installations or SMTP connections.

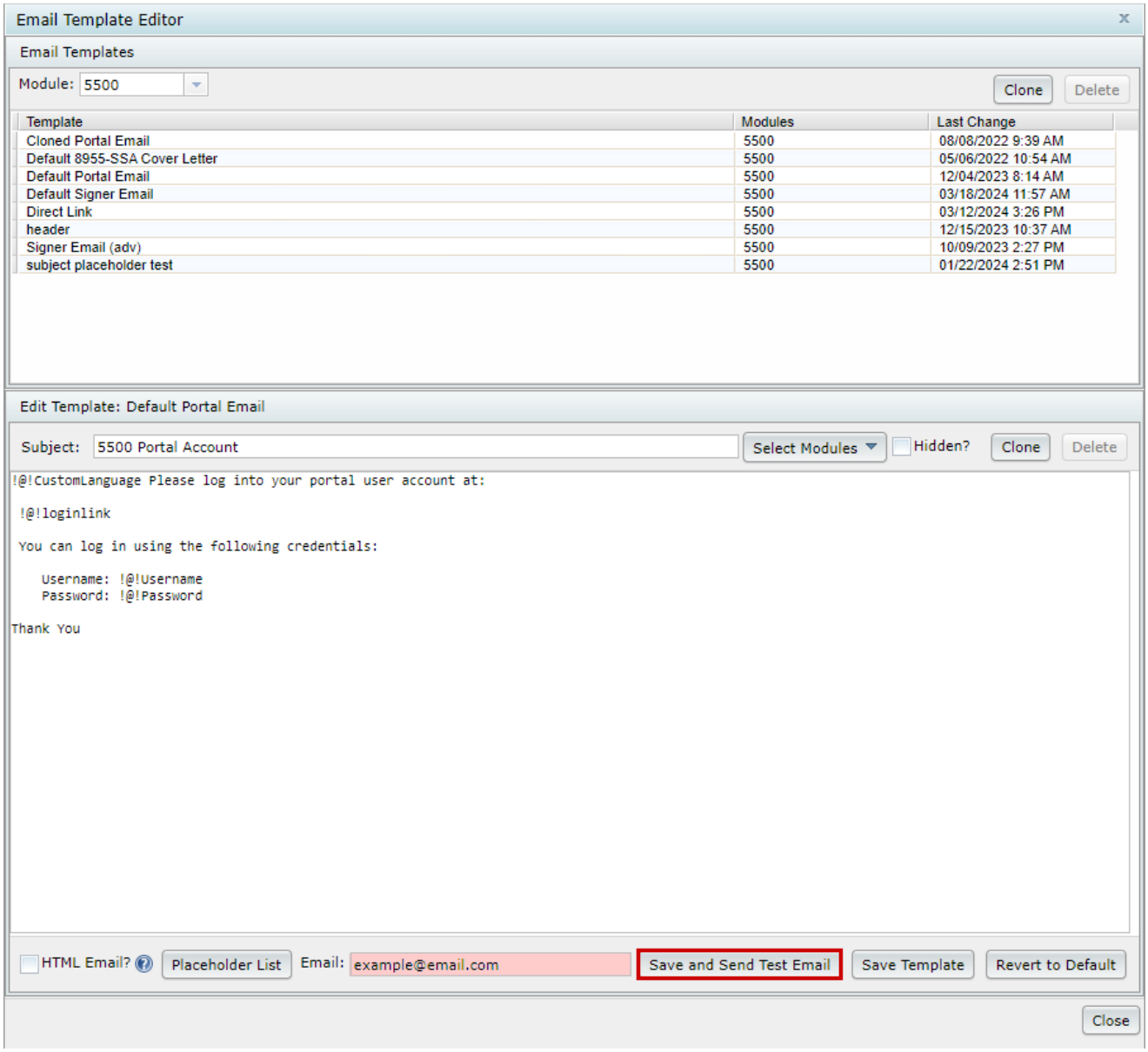
Note: Most email programs will not display the emails sent through the 'Specify a Server' program in your sent email. It is recommended that you set up the BCC field within the email settings with your email address. You could then setup a mail filtering rule to move all incoming mail from your email address into your sent folder (you will need to work with your internal IT staff).

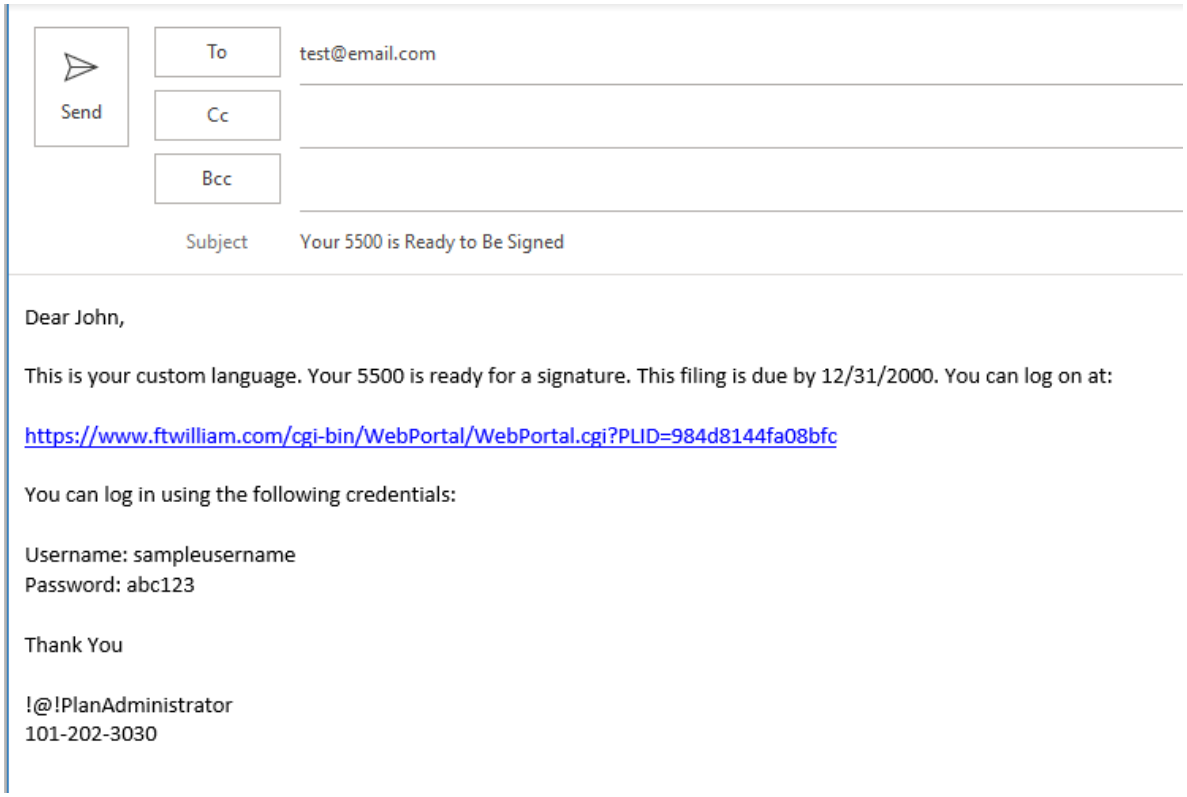
How to Test the Global Email Settings for 'Preparer's Email Program'

It is recommended that you test your settings before you begin sending invitations to the portal. To test the 5500 Module settings, you would go to the "Global Email Settings" screen and click on "Edit" to the right of either "Invite Signers" or "Standard Portal".



Enter a valid email address in the "Enter Test Recipient" field and click on "Save and Send Test Email". If you have a valid Preparer's Email Program, the test email will open/display in your email program.

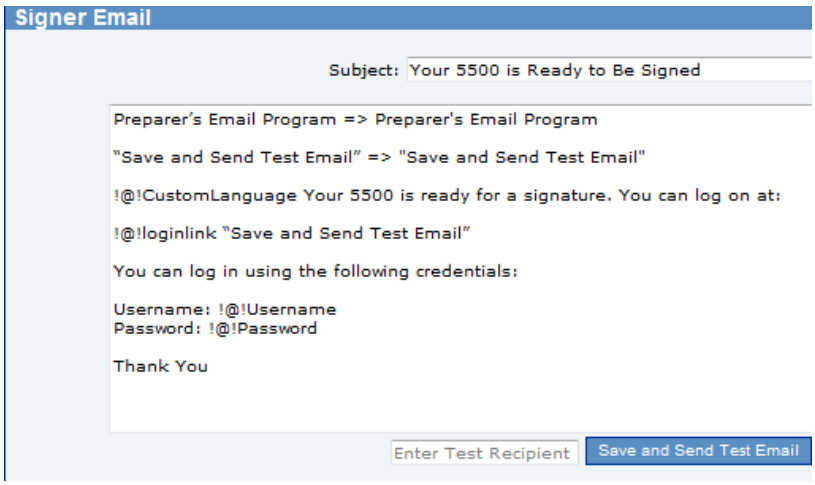

Email Template Editor
Email Templates
Module: 5500
Clone
Delete
Template
Modules
Last Change
Cloned Portal Email 5500 08/08/2022 9:39 AM
Default 8955-SSA Cover Letter 5500 05/06/2022 10:54 AM
Default Portal Email 5500 12/04/2023 8:14 AM
Default Signer Email 5500 03/18/2024 11:57 AM
Direct Link 5500 03/12/2024 3:26 PM
header 5500 12/15/2023 10:37 AM
Signer Email (adv) 5500 10/09/2023 2:27 PM
subject placeholder test 5500 01/22/2024 2:51 PM
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: example@email.com
Save and Send Test Email
Save Template
Revert to Default
Close



For the Compliance, Document, Messaging and Notification tabs, there is also a "Select an Email to Edit" box where you can "Edit" and email to "Save and Send Test Email".

Reasons why the 'Preparer's Email Program' settings may not display:

1. You do not have a desktop email program (i.e. Outlook, Thunderbird, Lotus Notes, etc.).
2. Your default email text is too large (should be around 2,000 characters).
3. You copied/pasted text into the default email and the apostrophes/quotations need to be replaced.



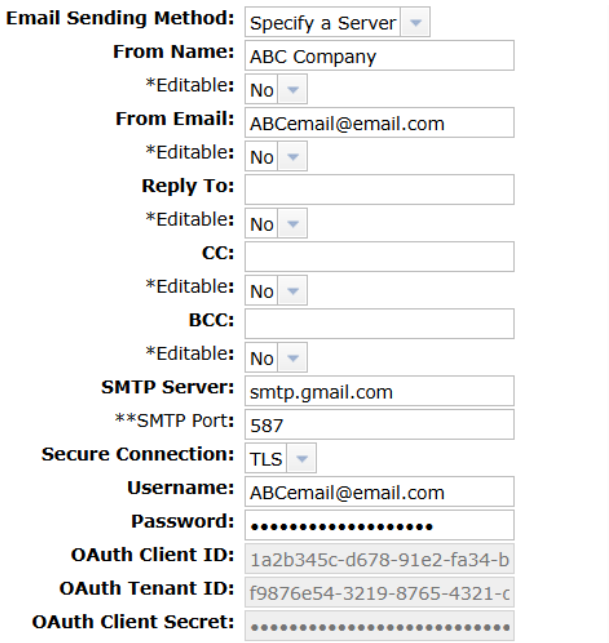
4. Your browser's email handling program setting needs to be fixed.

What SMTP Server Error Messages Mean

When configuring email settings using the **Specify a Server** selection, you may occasionally encounter error messages when attempting to send an email. These messages typically indicate a configuration, connection, or security-related issue and can often be resolved by reviewing specific settings on the module from which the error message was sent.

This article explains frequently encountered **SMTP** server error messages, what they mean and recommended next steps.

> **NOTE**: When troubleshooting SMTP error messages, review the settings listed below the **Email Sending Method: Specify a Server**.
> For more information on configuring each individual setting, refer to Setting up Global Email Settings in ftw.



General Troubleshooting Tips

If you receive an error when testing or sending email, review the following settings and confirm they match the requirements provided by your email service provider.

SMTP Server Address

- Verify the SMTP server address is entered correctly.
- This value is provided by your email service provider.
  - **Example**: `smtp.exampleprovider.com`

SMTP Port

- Confirm the SMTP port matches the requirements provided by your email service provider.
- Common SMTP ports include `465` and `587`.
  - Refer to your email provider's documentation to determine the correct **port** for your account.

Secure Connection

- Confirm the selected **Secure Connection** option (**None**, **SSL**, **TLS**, or **OAuth**) matches your email provider's requirements.
- Many email providers require encrypted connections and may reject connections configured with **None**. In these cases, **SSL** or **TLS** is typically required.
- If you are using a Microsoft email account that does not support Basic Authentication, select **OAuth**. (Refer to Microsoft documentation for further information.)
    - Refer to your email provider's documentation to determine the correct **security and authentication settings** for your account.

Authentication Credentials

- Confirm all authentication information is current and entered correctly.
- If using **None**, **SSL**, or **TLS**, verify the:
    - Username
    - Password
- If using **OAuth** with a Microsoft email account, verify the:
    - Client ID
    - Tenant ID
    - Client Secret

From Email Address

- Ensure the **From Email Address** contains a valid email address.
- Depending on your email provider's settings, you may be restricted to sending from specific email addresses or domains.
- If the configured address is not authorized by your provider, email messages may be rejected.

If the Issue Persists

If all settings have been verified and errors continue to occur, contact your email or SMTP service provider. They can confirm the correct SMTP settings, authentication requirements, and any security restrictions that may be preventing the connection.

Common Error Messages and What They Mean

The following tables list SMTP error messages paired with recommended troubleshooting steps. The error message may be followed by additional text provided by your email service provider, which will vary by provider and context.

> You can use **Ctrl+F** to search this document using the beginning of the error message. If you need assistance, please **include the full error message text**, not just the first line, as the additional details often help identify the cause of the problem more quickly.

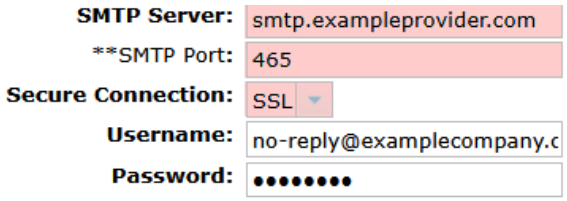
Connection Errors:

Error Message	Troubleshooting
Connect failed	Verify the **SMTP Server Address, SMTP Port,** and **Secure Connection** settings.

Error Message	Troubleshooting
Could not connect to SMTP server	Verify the **SMTP Server Address, SMTP Port,** and **Secure Connection** settings. Contact your email provider if the issue persists.
EHLO command failed	Verify the **Secure Connection setting** and **SMTP server compatibility.**
Connection Error - Timeout	Retry after a few minutes. If the issue persists, verify the **SMTP Server Address, SMTP Port,** and **Secure Connection** settings.
An error occurred disconnecting from the mail server	Retry after a few minutes. If the issue persists, verify the **SMTP Server Address, SMTP Port,** and **Secure Connection** settings.
Error while closing SMTP connection	Retry after a few minutes. If the issue persists, verify the **SMTP Server Address, SMTP Port,** and **Secure Connection** settings.

What this means: The system was unable to connect to your SMTP server or log in successfully.

Occasionally, this is not caused by incorrect module settings but is instead due to a slow connection to the server. In these cases, wait ten minutes, then retry. If the issue persists AND you have verified your server/port/connection settings, contact your IT support.



Common causes:

- Incorrect SMTP server address
- Wrong SMTP port or secure connection setting
- Incorrect credentials or expired OAuth configuration
- Firewall or network restrictions blocking the connection

What to do:

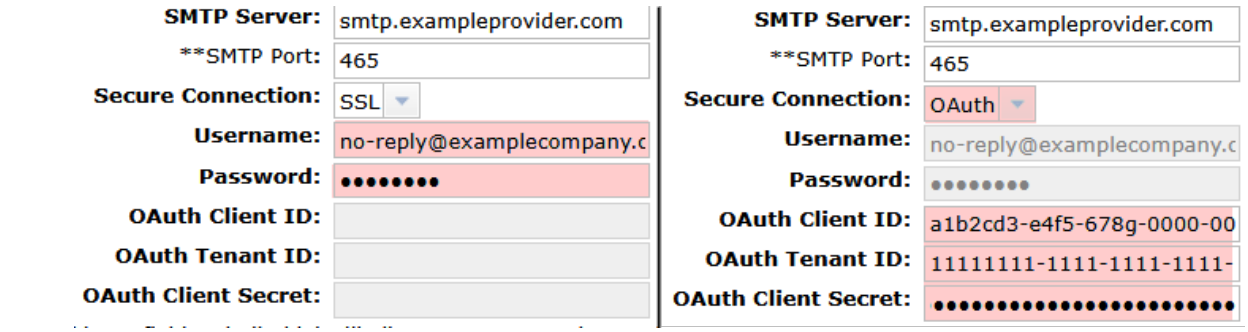
- Double-check the SMTP server name, port, and secure connection settings
- If using OAuth, have your IT team confirm OAuth credentials and permissions
- Verify firewall and network access

Authentication Errors:

Error Message	Troubleshooting
Error logging into server.	Verify **Username**, **Password**, and **Authentication Method** settings.
Server did not return AUTH in capabilities	Use **TLS** or **SSL** instead of **None**. Verify the **SMTP Port** is appropriate for the selected **Secure Connection**.

Error Message	Troubleshooting
Unsupported Authentication mechanism	Switch server settings or enable **LOGIN**, **PLAIN**, **CRAM-MD5**, or **XOAUTH2** as appropriate.
Cannot authenticate via LOGIN:	Verify the server authentication policy and **Secure Connection** settings.
Cannot authenticate via CRAM-MD5:	Use a different authentication method or server configuration.
Auth failed:	Verify the **SMTP Server Address**, **SMTP Port**, **Secure Connection**, and authorization credentials.
No username or password provided for SMTP authentication.	Enter both a valid **SMTP Username** and **SMTP Password**.
Error connecting or logging into the SMTP server.	Verify the **SMTP Server Address**, **SMTP Port**, **Secure Connection**, and authorization credentials.
Failed to get access token: <code> - <description>	Verify the **Client ID**, **Tenant ID**, and **Client Secret** values are current and valid.

What this means: A connection to the SMTP server was made, but authentication failed.



Common causes:

- Incorrect username or password (non-OAuth)
- Expired or invalid OAuth Client Secret
- Authentication required but not enabled

What to do:

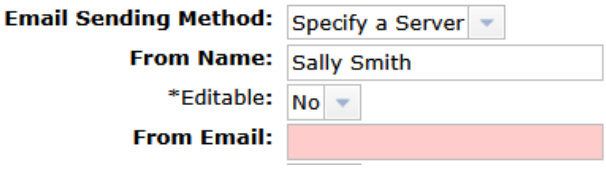
- Re-enter credentials if using standard SMTP authentication
- For OAuth, have your IT team review Microsoft Azure OAuth configuration

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FROM Errors:

Error Message	Troubleshooting
Blank FROM address	Enter a valid email address in the **From Email** field.
Invalid FROM address: '<from>'	Use a valid authorized sender/domain in the **From Email** field.
Couldn't set FROM:	Use a valid authorized sender/domain in the **From Email** field.

What this means: The module's From Email field is blank, or else uses an email that is not authorized for use with your SMTP server.



Why this matters: Emails without a From address are frequently rejected or flagged as spam.

What to do:

- Enter a valid email address in the **From Email** field
- Ensure the From address is permitted by your SMTP server or Microsoft tenant

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Invalid TO / CC / BCC address

Error Message	Troubleshooting
No valid TO addresses found	Enter at least one non-empty **TO** address.
Error with TO address: '<to>'.	Verify the **TO** address is valid and your email provider permits sending to the recipient.
Couldn't send TO <address>:	Verify recipient exists and the email provider permits sending to the recipient; Review **all** **TO, CC,** and **BCC** addresses on both the module and the portal user override screens.
Error with CC address: '<cc>'.	Verify the **CC** address is valid and your email provider permits sending to the recipient.
Invalid BCC address: '<bcc>'.	Verify the **BCC** address is valid and your email provider permits sending to the recipient.

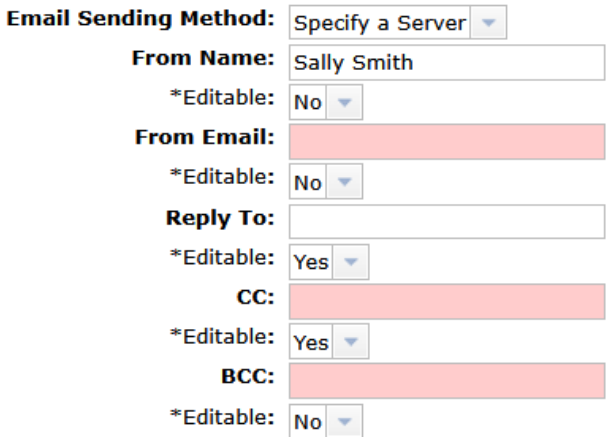
What this means: One or more email addresses used in the message are not valid.

Common causes:

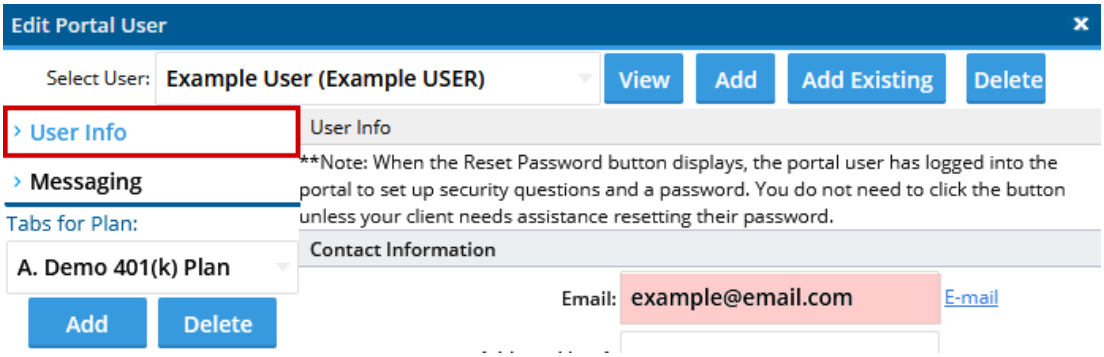
- Typos or missing characters
- Extra spaces, or formatting issues

What to do:

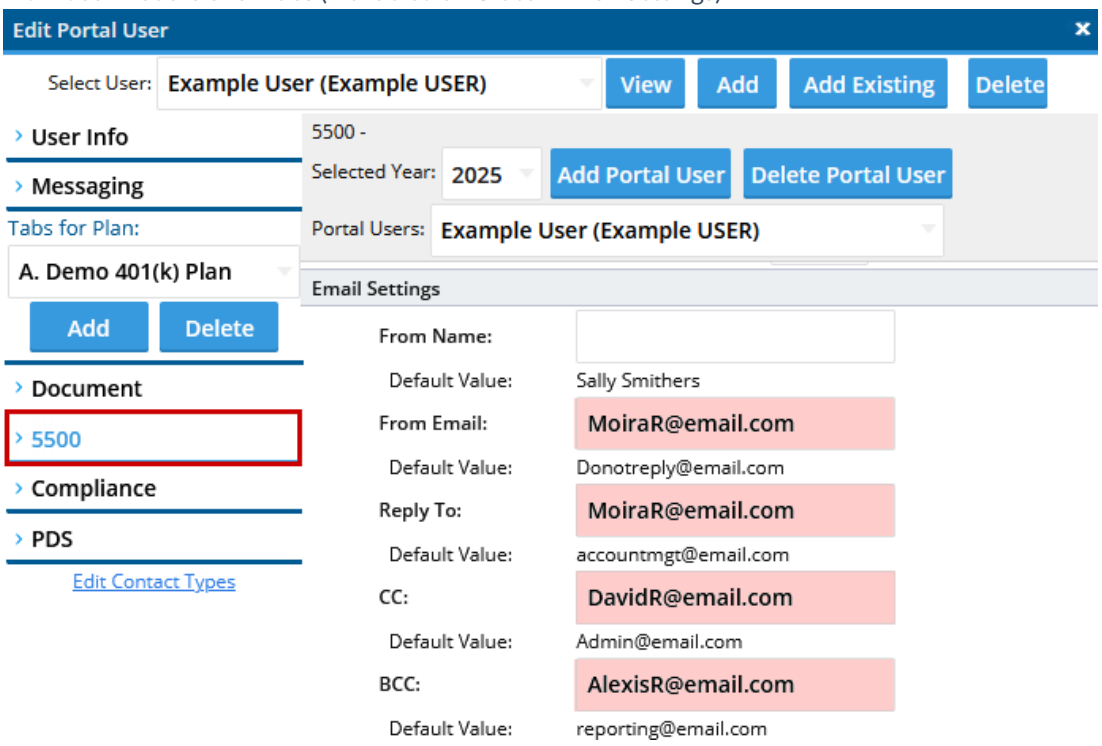
- Review and correct **all** email addresses located on either:
  - **The Global E-mail Settings**



- **Edit Portal User screen under:**
  - **User Info** section (the user's e-mail address)



  - Individual **module overrides** (if enabled on Global E-mail Settings)



Error Messages Mentioning the Body or Envelope

Error Message	Troubleshooting
Error while opening envelope.	Retry. Verify your email provider's content and sending policies.
Data failed:	Verify the **sender** and **recipient addresses** are valid and accepted by your email provider.
Invalid text in email body.	Review the email content for unsupported or invalid characters or message length and retry.
Error closing email envelope.	Verify the email content complies with your providers size and policy restrictions
Couldn't send mail:	Retry. Verify the email content complies with you email providers sending policies.

What this means: The SMTP server reviewed the message and rejected it because of how the email was structured or what it contained

Common causes:

- Invalid or broken formatting, such as malformed HTML or missing message details
- Extra line breaks, special characters, or content pasted from another program
- Message formatting the receiving email system (SMTP server) can't process

What to do:

- Review the email content for formatting issues
- Confirm SMTP security and content filtering settings

Unable to relay

What this means: Your SMTP server does not allow this system to send emails on its behalf.

What to do:

- If you are using relay on the SMTP server, ensure the following IP addresses are included in your list of allowed relay client:
  - **Primary:** 198.147.32.158
  - **Secondary:** 198.147.34.158
- If applicable, also review your server's spam or security filtering service to confirm it is not blocking relay traffic.

When to Contact Your IT Team

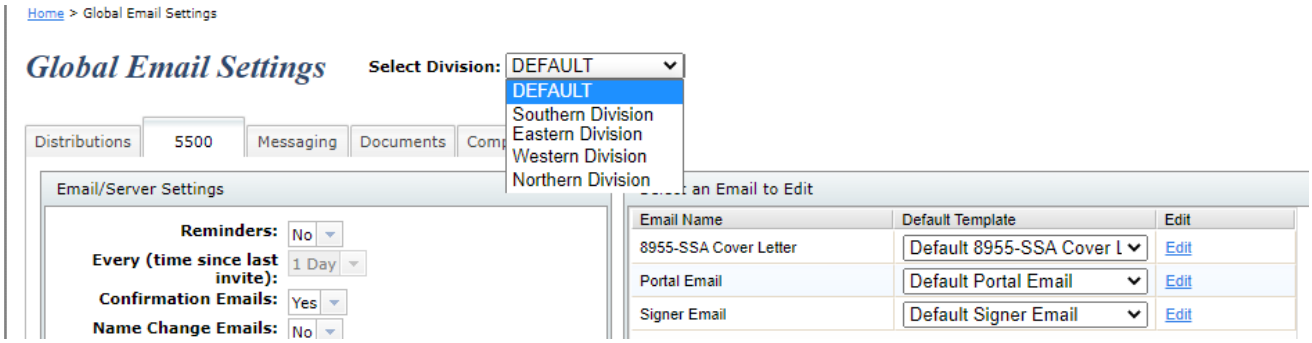
If errors continue after reviewing these settings, contact your internal IT team to:

- Confirm SMTP or Microsoft OAuth configuration
- Validate security, relay, and firewall rules
- Review Microsoft Azure OAuth permissions and credential expiration

Providing the **exact error message** will help speed up troubleshooting.

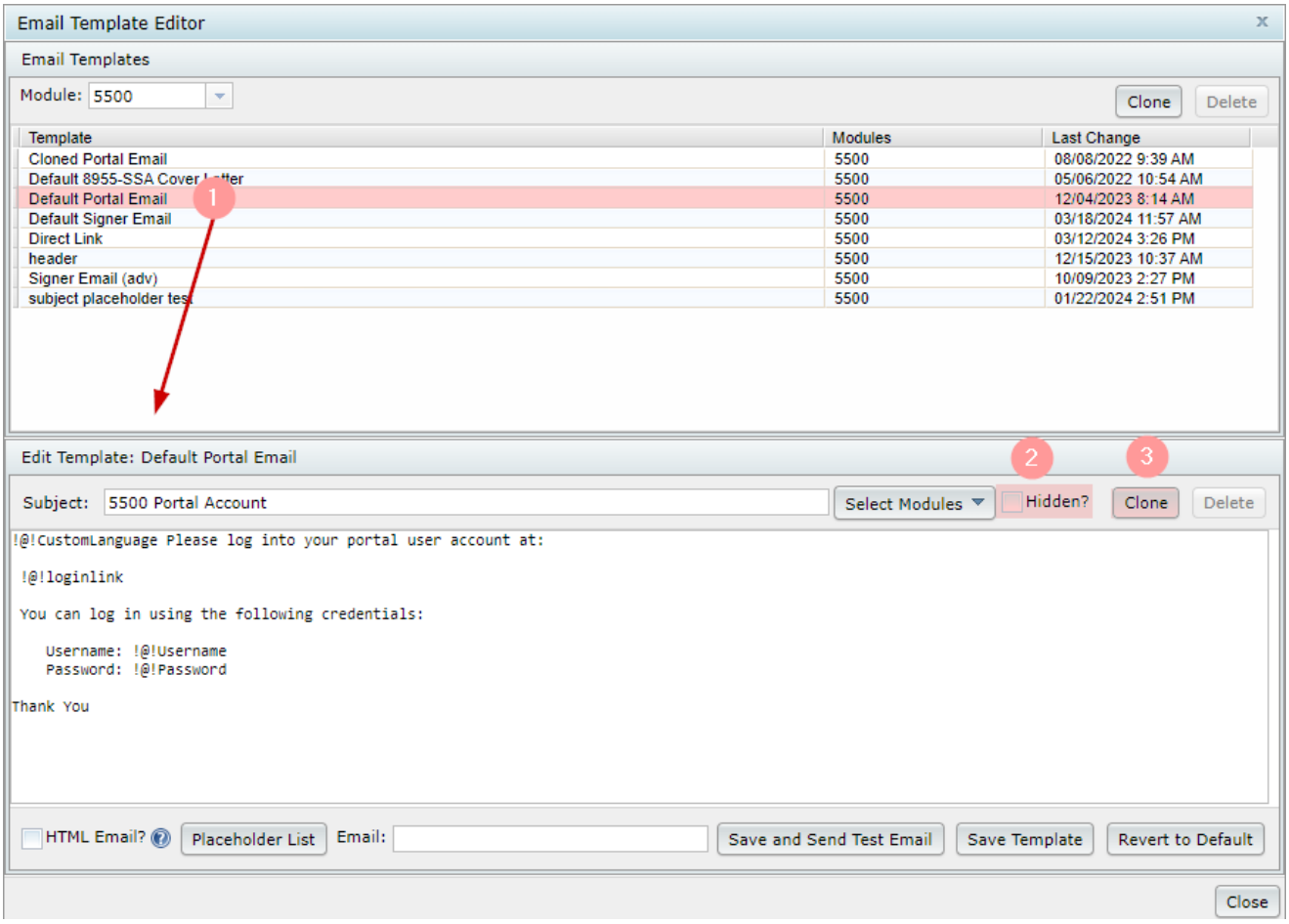
How to Edit or Clone Default Email Templates and Reminders

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:

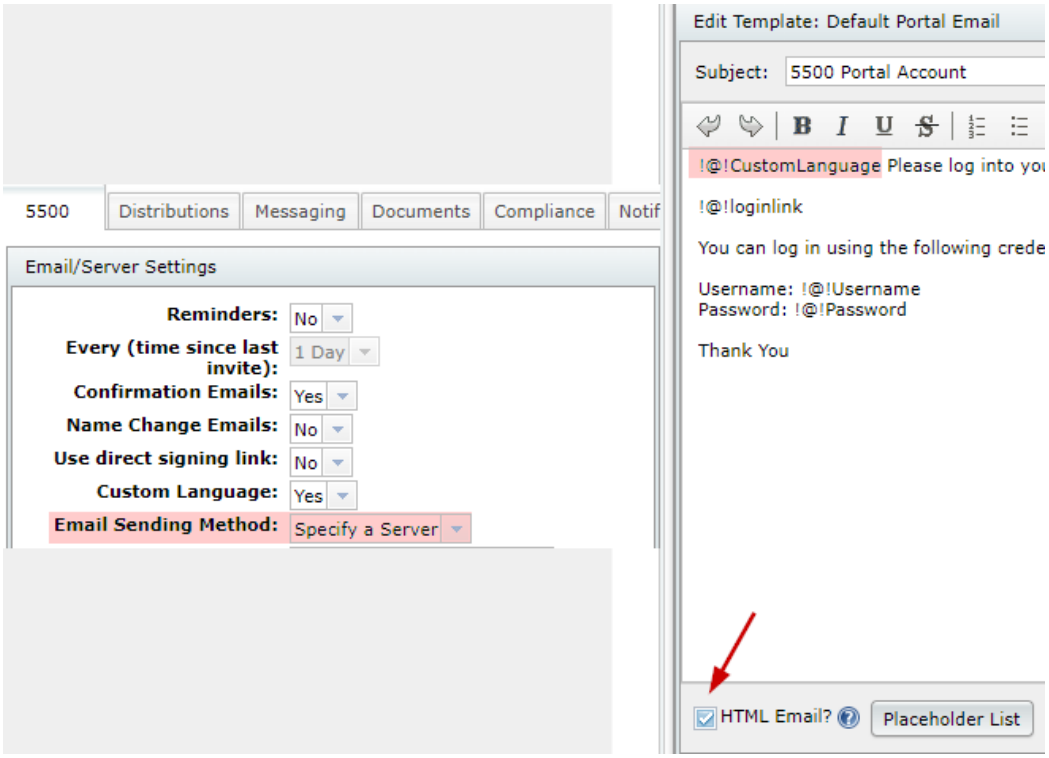
Custom Language: Custom language will be completed by language you enter that is specific to a user and filing. For each user you add under the **Work with Signers/Portal Users** option, there will be a box to add custom language for that user. If you are not sure whether you will use custom language, 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

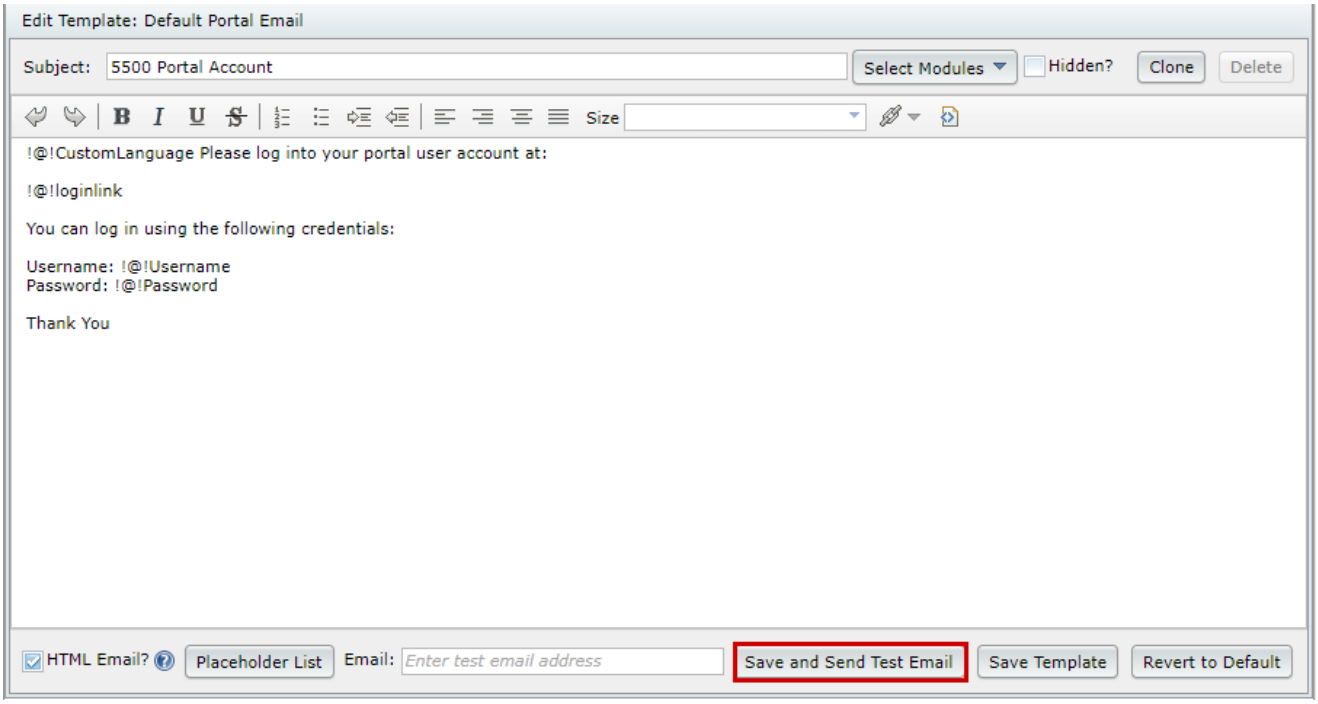
"Dear Ms. Smith:

Thank you for the opportunity to assist you with your 5500 filing requirements this year."

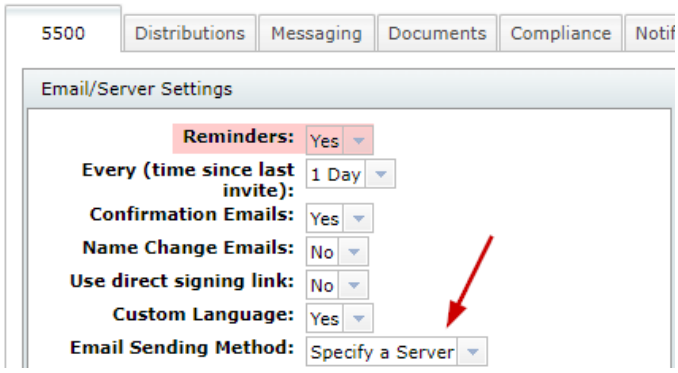
HTML option: This option is only available if you use "Specify a Server" under the Email/Server Settings described above. Once you have the box checked for 'HTML Email?', then an html editor bar will appear below the Subject line for you to edit the email. You do not need to know html to use this feature.



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.