

Setting up Global Email Settings

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Global Email Settings can be accessed by selecting the **Wolters Kluwer logo**, then navigating to **Administrative Tasks > Portal/Workflow > Global Email Settings**. Only users with the role of **Master Admin User** or **Designated Admin** have permission to configure these settings.

On the Global Email Settings screen, the **Email/Server Settings** section provides two configuration options:

1. **Preparer's Email Program**
2. **Specify a Server.**

NOTE: These settings must be completed for each module tab.

Preparer's Email Program

This option allows the system to generate emails using the desktop email application installed on the preparer's computer (such as Outlook, Thunderbird, or HCL Notes [formerly Lotus Notes]). When a portal user is invited, a draft email is automatically created in the default email program—similar to opening a new message manually.

To enable this feature, the default email program must be set in the computer's operating system settings (not within the ftwilliam.com software). This can be done by navigating to **Start Menu > Settings > Apps > Default Apps** and selecting the preferred email program.

NOTE: If the correct email program is already selected, selecting and saving it again can help confirm that the setting is properly applied.

Example: When inviting a portal user to sign a Form 5500, selecting the **"Click to open email"** link will launch a draft message in the default email application, using the specified email template.

Administrator Summary

Email Link: [Click to open email](#) ←

To Name: Marge Simpson

To Username: Marge

To Email: Marge@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.

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=9T21ZRQ&Year=2023>

You can log in using the following credentials:

Username: Marge
Password: Whats This

Thank You

[Return to Previous Page](#) [Mark 5500 as 'Invited'](#)

Specify a Server

This option is used to send email invitations to the Sponsor Portal from a single, designated email address for all clients. Selecting **Specify a Server** reveals additional configuration fields, where administrators can enter the required server and authentication details necessary for email delivery. Each required field is explained in detail in the sections below.

- **Custom Language:** 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.
 - This feature is useful for tailoring messages to individual clients.
 - Custom language is specific to each Portal User and can be used to provide instructions, context, or a personal touch.
 - The setting is available in each module's permissions section.
- **Confirmation Emails:** When this setting is enabled (**Yes**), automatic email notifications are sent to the plan administrator when a client completes specific actions, such as downloading a document, completing a census, or e-filing a Form 5500 or 5330.
 - Confirmation emails are sent to the **Plan Administrator** listed on the *Edit Plan* screen for the selected module.
 - If no Plan Administrator is listed, the email will be sent to the **Master User** on the account.
 - This setting is available in each module's permissions section.

Module-Specific Behavior

- **5500 Module:**
 - Confirmation recipients can be overridden directly from the **5500 workflow grid**.
 - Once an email address is entered into the workflow grid, it will be used for confirmations instead of the Administrator listed on the **Edit Plan** screen.
 - *Note:* The Plan Administrator will still be listed on the **Edit Plan**, but the system will no longer use that entry for confirmation emails.
- **Documents Module:**
 - Confirmation emails can be sent either to the Admin/Master User or to **a specific email address** defined in the **Global Email Settings**.
 - If the setting **Send confirmation to Plan Admin** is enabled, the **Confirmation Name** and **Confirmation Email** fields in Global Email Settings **must be left blank**. Only one method should be used to avoid conflicts.
 - The module also supports editable confirmation fields. If **Yes** is selected for the **Editable** option under either the **Confirmation Name** or **Confirmation Email** fields, administrators can customize these values when preparing an email invitation.
- **Name Change Emails:** Sends an alert to the plan administrator if a Portal User changes the signature name on their Form 5500/SF/EZ before signing it through the portal.
- **Use Direct Signing Link:** Allows Portal Users to access and sign their Form 5500 directly through a secure link, without logging into the portal.
 - When set to **Yes**, the email invitation includes a direct link to the specific filing.
 - This link provides access only to the assigned document, not the full portal.
 - Ideal for users who prefer a quick, simplified signing experience.

- **From Name/Editable:** Defines the display name shown to clients when they receive an email from the system. This is used when the “Specify a Server” email setting is enabled.
 - This name appears in the **From** field of the email.
 - If Editable is set to **Yes**, administrators can customize the name for each email invitation.
 - Useful for branding or personalizing communications.

- **From Email/Editable:** Specifies the sender email address that appears in communications sent to Portal Users.
 - This address is paired with the **From Name** and is visible to recipients.
 - If Editable is set to **Yes**, administrators can change the email address when preparing an invitation.
 - Ensure the address used is monitored to receive any replies.

- **Reply To/Editable:** Specifies the email address that receives responses when a Portal User replies to a message or invitation from their personal email account. This applies only when the user replies directly from their email provider (such as Gmail or Outlook), rather than responding within the portal. This setting does not impact the confirmation emails.
 - This setting ensures replies sent outside the portal are directed to the correct inbox.
 - It’s important to use an actively monitored address to avoid missing user response.
 - If **Yes** is selected for the **Editable** option below the 'Reply To' field, then your administrators will be able to override this name when preparing an email invitation. **Note:** You can add multiple email addresses by separating the addresses with a comma or semi-colon.

- **CC/Editable:** Adds one or more email addresses to be copied (CC'd) on emails sent to Portal Users.
 - CC recipients will be visible to all other recipients.
 - If Editable is set to Yes, administrators can change or add CC addresses when sending an email.
 - Multiple addresses can be entered using commas (,) or semicolons (;).
 - **Used only when sending emails to Portal Users. Does not apply to confirmation emails.**

- **BCC/Editable:** Adds one or more email addresses to be blind copied (BCC'd) on emails sent to Portal Users.
 - BCC recipients will receive the email without being visible to others.
 - If Editable is set to Yes, administrators can change or add BCC addresses when sending an email.
 - Multiple addresses can be entered using commas (,) or semicolons (;).
 - **Used only when sending emails to Portal Users. Does not apply to confirmation emails.**

- **SMTP Server/SMTP Port:** Allows emails to be sent through a custom mail server using SMTP (Simple Mail Transfer Protocol).
 - The SMTP Server is the address of the outgoing mail server (e.g., smtp.office365.com).
 - The SMTP Port is the number used to connect to the server (default is 25; Office 365 uses 587).
 - These settings are typically provided by your IT team or email provider.

- **Secure Connection:** Sets the type of encryption used when sending emails through an external mail server.
 - Options include:
 - None – No encryption (not recommended).
 - SSL – Secure Sockets Layer.
 - TLS – Transport Layer Security (recommended for most modern systems).
 - For example, Office 365 typically uses SSL or TLS.
 - If unsure which option to select, contact your IT team or email provider.

- **Username:** Enter the username associated with the **From Email** address.
 - This is usually the full email address (e.g., user@company.com).
 - Required to authenticate with the mail server.
- **Password:** Enter the password for the **From Email** address.
 - Used to authenticate the email account with the mail server.
 - If using an **App Password** (common with services like Office 365 or Gmail), note that it will be different from the regular email login password and is typically 16 characters long.

Global Email Settings

5500 Distributions Messaging Documents Compliance Notifi

Email/Server Settings

Reminders: Yes ▾

Every (time since last invite): 1 Day ▾

Confirmation Emails: Yes ▾

Name Change Emails: No ▾

Use direct signing link: Yes ▾

Custom Language: Yes ▾

Email Sending Method: Specify a Server ▾

From Name: Support@email.com

*Editable: No ▾

From Email: example@email.com

*Editable: No ▾

Reply To:

*Editable: Yes ▾

CC:

*Editable: Yes ▾

BCC:

*Editable: No ▾

SMTP Server: smtp.office365.com

**SMTP Port: 587

Secure Connection: TLS ▾

Username: abcUser

Password:

*Marking a field as 'Editable' will allow preparers to choose their own value for this field. Default settings will not be updated if a preparer chooses their own value.

**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.

Save Settings