

Global Email Settings

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By going to the "WK Logo" drop-down menu at the top of most screens, Administrative Tasks > Portal/Workflow > Global Email Settings, users will have the option to work with Email Settings and Email Templates. Along the left-hand side of the screen are options to set up the email address that will be used to send invitations to the web portal and set up reminder emails for signers (discussed under [Email/Server Settings](#)). Along the right-hand side of the screen, users may customize standard email correspondence that will be used as a default for all filings on the system (discussed under [Portal Email Default Templates](#)).

Home > Global Email Settings

Global Email Settings

5500

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

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: ABC Company
***Editable:** No
From Email:
***Editable:** No
Reply To:
***Editable:** No
CC:
***Editable:** No
BCC:
***Editable:** No
SMTP Server:
****SMTP Port:**
Secure Connection:
Username:
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

Edit Templates **Save Settings**

Be sure the 5500 tab is selected at the top of the screen to access 5500 software email settings if you have other

ftwilliam.com portal software.
