smartview

Overview & Instructional Guide

smart**view** | smart**mail**

Fidelity National Title®

Trusted everywhere,
every day.

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About This Guide

At Fidelity National Title, your security is of utmost importance to us. Because of the rising threat and instances of wire fraud and email fraud, we have deployed a new system to protect your private information and provide the secure options for ongoing digital communication.

What is smartmail?
The email delivery system we call "smartmail" is a "behind the scene" secure email delivery system. Email sent from smartview, selecting the smartmail distribution option, will automatically be encrypted and sent.

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NEW USER REGISTRATION

smartview
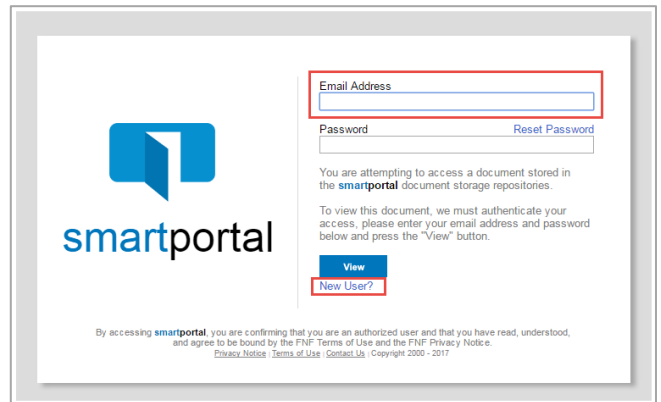
smartmail - New User Registration

Overview: This Job Aid reviews the process of registering for the smartportal encrypted delivery system.

smartmail is an encrypted and secure email delivery system, available through the smartportal website. All smartmail messages sent to your Email Address are stored and available at any time in the smartportal system. You are also able to send encrypted Replies to any message, and/or Upload documents securely back to our document management system.
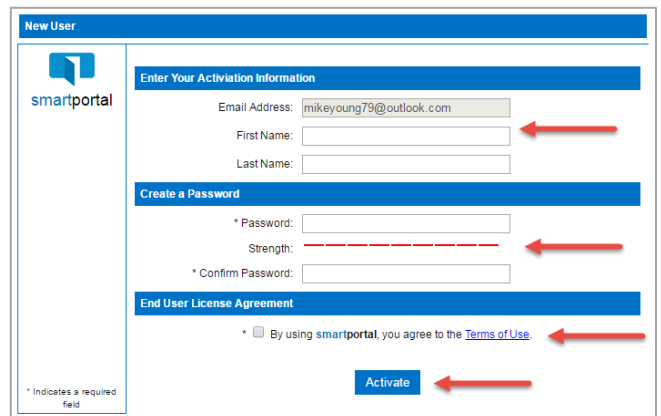
1. If it is the first time accessing a **smartmail**, enter your email address (<u>must be the same address where the email was sent</u>), and click the "**New User?**" link.

   ==**Please Note: The email address entered, MUST be the same email address that the smartmail message was delivered to.**==

   If a different email address is entered, the registration will not be able to be completed successfully.
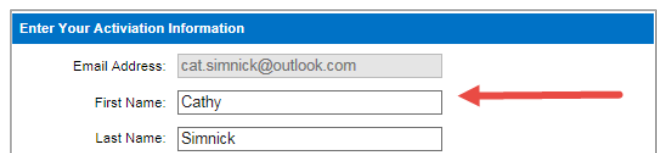

2. The smartportal **New User** Registration screen must be completed as described in Steps 3 - 5.

3. In the first section, the email address that the smartmail was sent to and entered in Step 1 will already be listed.

   Enter your **First Name** and **Last Name** in the corresponding fields.

4. In the second section, enter a **Password**.

   Your Password must meet the following criteria, and rate **Strong** or higher on the Strength Meter:
   - The Password must contain characters from at least 3 of the 4 following categories:
     - Upper Case Letter (A-Z)
     - Lower Case Letter (a-z)
     - Numbers (0-9)
     - Symbols (ex.: !, #, $, %, etc.)
   - **The Password cannot be the same as the Username and <mark>cannot contain 5 or more</mark> characters from the Username.**
   - The Password must have a minimum of 8 characters.

   Once you've entered a Password that rates Strong and meets all criteria above, re-enter it in the **Confirm Password** field.

5. In the third section, click the checkbox to agree to the **Terms of Use**. Clicking on the link will allow you to view the terms and conditions.

   Then click the **Activate** button to complete the account activation.

6. Once the smartportal Registration page is completed successfully, you will receive an Account Activation email in your email Inbox.

   Return to your email Inbox, and locate the **smartportal Account Activation** email, sent by smartportal Customer Support. (**Please Note:** If this email does not arrive in your Inbox, please check your Junk Email/Spam folder.)

   Click the words **this link** within the Body of the Account Activation email.

   <mark>**The Account Activation emails automatically expire 24 hours from being sent. Contact your Title and Escrow contact to receive a new activation email if more than 24 hours has passed.**</mark>

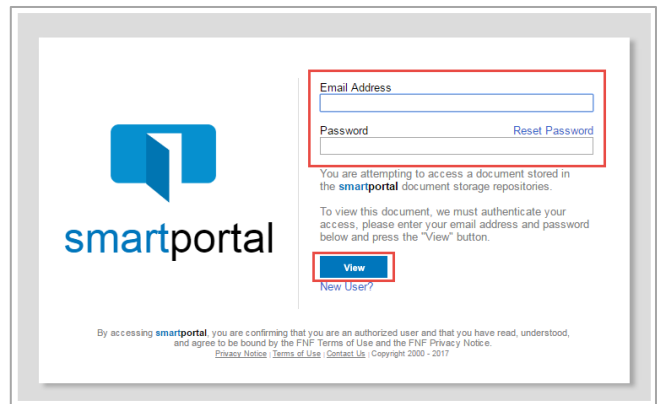smartmail & smartportal: New User Registration
Updated: 8/16/2017

7. Once you have clicked on the link in the Account Activation email, you will be taken to the smartportal login page.

   Enter the Email Address and Password just used in the Activation process.

   Click the **View** button.

   Please Note: For more details on functionality available through the smartmail feature, please refer to the **Recipient Access** Job Aid.

8. Once you have successfully logged into smartportal, you will receive an Activation Successful email confirmation.
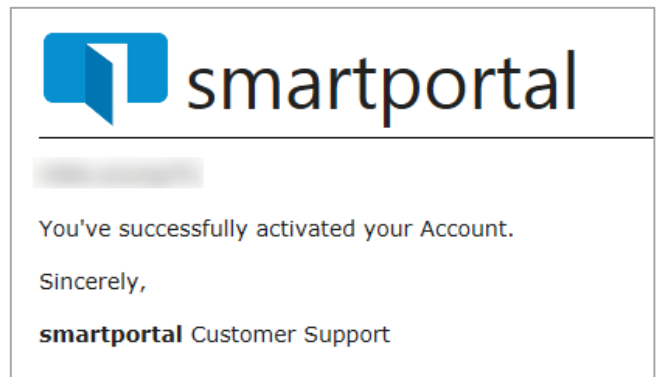
Additional information about smartmail:

- Both the "**View smartmail**" link and **smartmail** document links are expiring links, and will expire at the expiration value set in the initial **smartmail** distribution.
- **smartmails** forwarded to another email address that is not listed in the initial distribution will **NOT** be able to authenticate, and will receive "smartVIEW: Access denied" message.
- If you are still experiencing issues accessing the **smartmail,** please contact your escrow & title contact.

smartmail

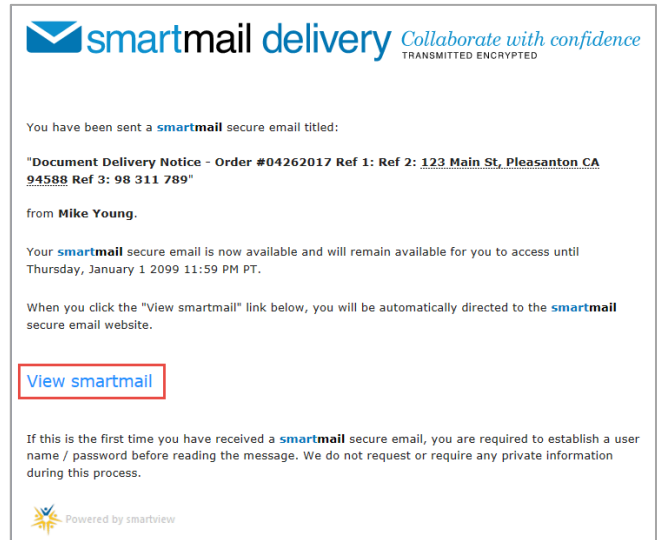## RECIPIENT ACCESS

smartview

smartmail - External Customer Access

Overview: This Job Aid reviews the process of accessing email content sent via encrypted smartmail delivery.

1. Email recipients will receive a **smartmail** delivery notification defining the email content, showing the Subject Line of the sent message, as well as the message Sender.

   To access the secured message, click the "**View smartmail**" link.

2. Recipients accessing the email will be challenged for authentication. You will be asked for your email address and password when "**View smartmail**" link is clicked. Enter your email address (the same address where the email was sent) and password, then click the "**View**" button.

   Please Note: If this is the first smartmail message you are receiving, please see the **Registration & PW Reset** Job Aid for instructions on completing the one-time smartmail account registration.
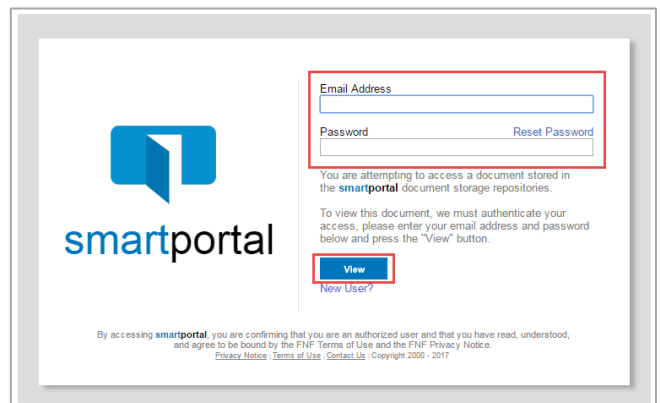

3. Once you have successfully logged in, you will be presented with **smartmail** HTML email. From this web page you can view the Subject and Body of the **smartmail,** as well as open any of the document links.
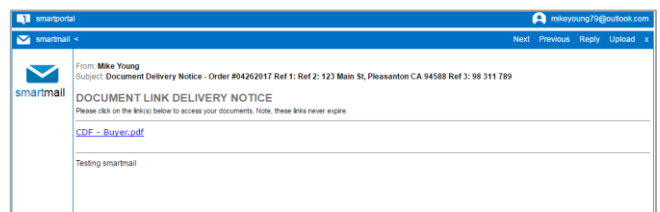
4. All smartmail messages sent to your same email address, will all be available on the smartmail tab of our smartportal website.

   While viewing any smartmail message, click the **smartmail** icon along the left side of the page to access additional smartmail messages.
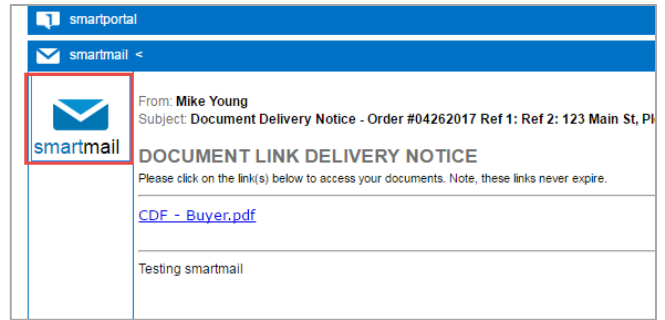
5. All smartmail messages sent to your same email address will be shown in the smartmail Inbox, with the most recent received email listed along the top.

   Single-click on any email message listed to access the message.
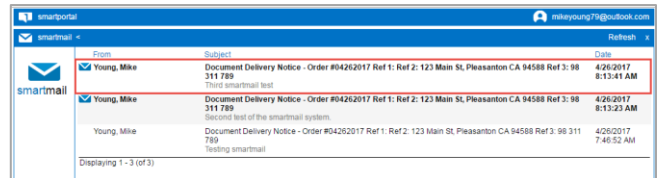
6. While viewing any smartmail message, there are options in the top right corner:
   Next = Navigate to the next smartmail message sent to your address (if applicable).
   Previous = Navigates to the previous smartmail message sent to your address (if applicable).
   Reply = Allows you to send an encrypted reply to the Sender of the original email message.
   Upload = Allows you to upload and return documents securely back to our system.
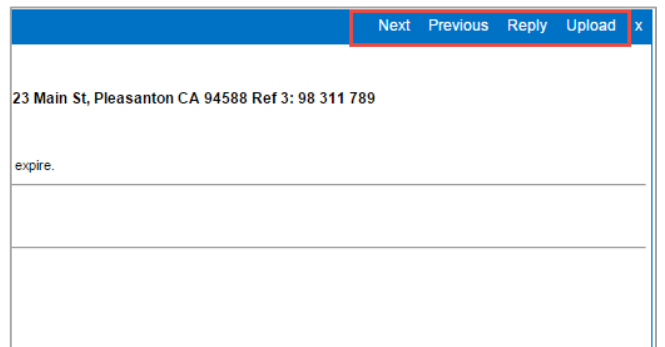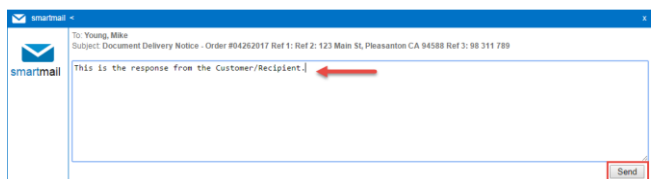
7. To **Reply** to any message, while viewing the message itself, click the **Reply** link in the top right corner of the page.
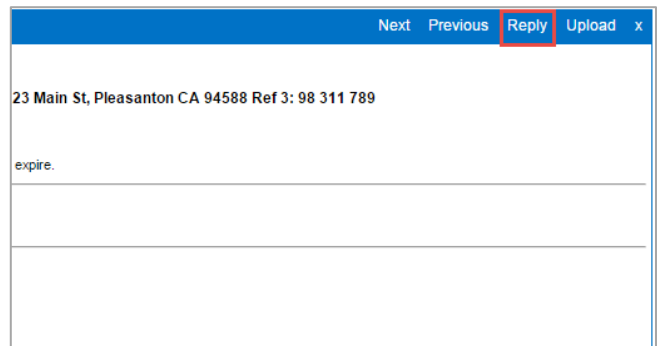
8. Enter your text response in the window provided, adding as much information as you like.

   Click the **Send** button to deliver your response as an encrypted email Reply.

smartmail**:** External Customer Access
Updated: 7/17/2017

9. To **Upload** documents in response to any message, while viewing the message requesting the document, click the **Upload** link in the top right corner of the page.
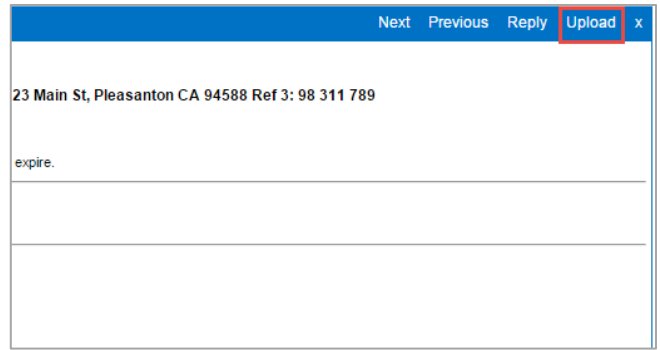

10. Enter any **Comments** in regards to the documents being returned in the field along the top of the page.

   To Upload documents, click the **Browse** button to locate a document saved anywhere on your Computer.
   OR
   Drag-and-Drop documents to the grey upload area.
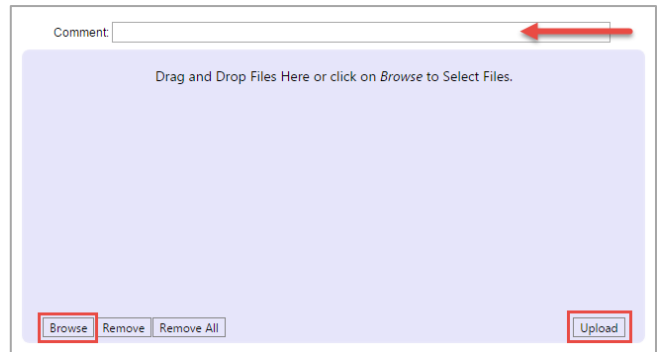
   Once all documents you wish to return are listed in the window, click the **Upload** button to return those documents.

11. Click **OK** to the Upload confirmation.
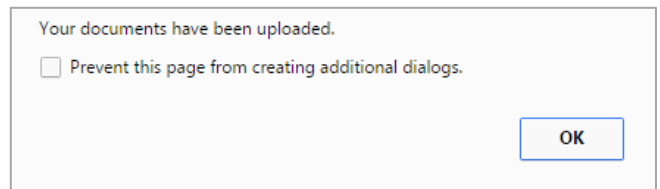
Additional information about smartmail:

- Both "**View smartmail**" link and **smartmail** document link is an expiring link and they will expire at the expiration value set in the initial **smartmail** distribution.
- **smartmails** forwarded to another email address that is not listed in the initial distribution will not be able to authenticate, and will receive "smartVIEW: Access denied" message.
- If you are still experiencing issues accessing the **smartmail**, please contact your escrow & title contact.

smartmail

RESETTING YOUR PASSWORD

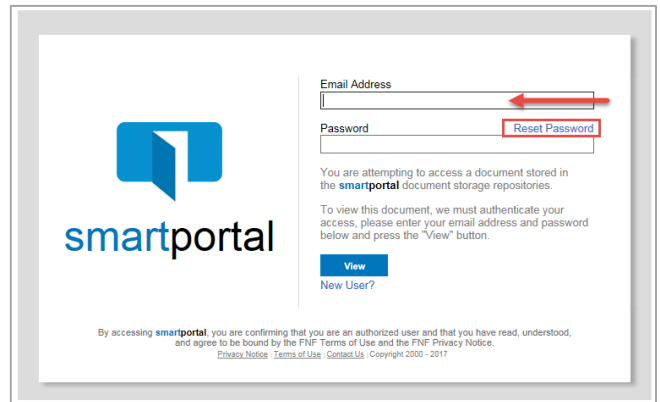smartview

smartmail & smartportal - Password Reset

Overview: This Job Aid reviews the process of resetting your smartmail & smartportal Password.

smartmail is an encrypted and secure email delivery system, available through the smartportal website. All smartmail messages sent to your Email Address are stored and available at any time in the smartportal system. You are also able to send encrypted Replies to any message, and/or Upload documents securely back to our document management system.
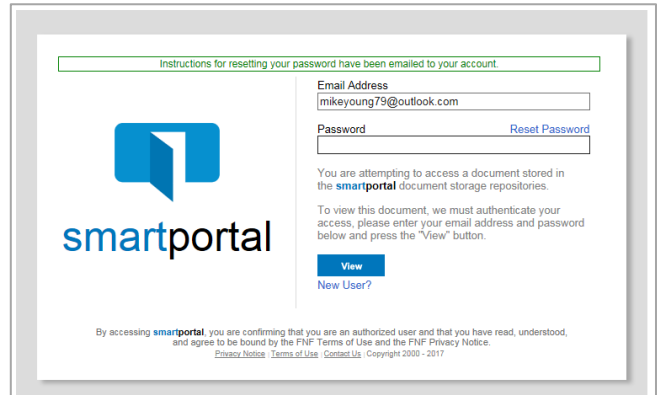
Password Reset:

1. If you forgot your password, you can reset it.

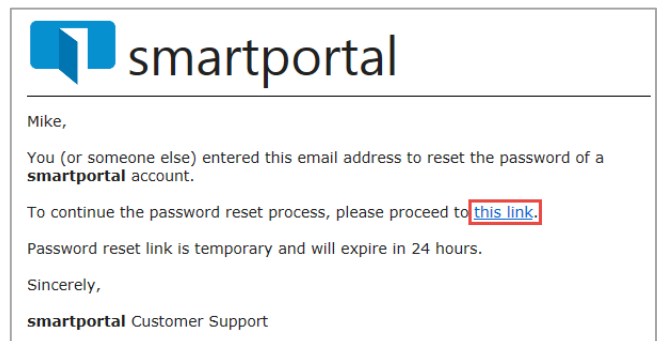   Enter your email address, and then click the **Reset Password** link.

2. If the email address matches, then an instructional message will be posted as shown outlined in green: **Instructions for resetting your password have been emailed to your account.**
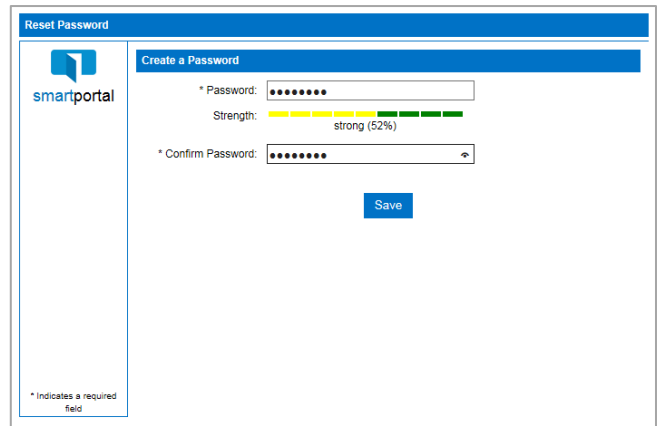

3. Password Reset email is sent immediately to the email address entered in the dialog box.

   Click on the words **this link** with in the body of the email.

4. Enter and confirm a new password, ensuring that the strength meter shows an entry of **strong**.

   Then click the **Save** button.

5. Once the password reset is accepted, the Password reset page will close. You will immediately receive an email confirmation that your Password has been reset.

   Return to any smartmail message and click the **View smartmail** link in the body of the email to Login and view the message.
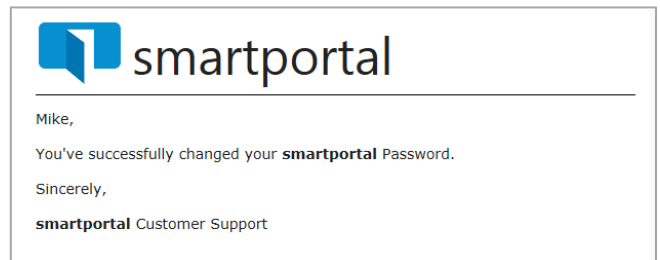
Additional information about smartmail:

- Both the "View smartmail" link and **smartmail** document links are expiring links, and will expire at the expiration value set in the initial **smartmail** distribution.
- **smartmails** forwarded to another email address that is not listed in the initial distribution will **NOT** be able to authenticate, and will receive "smartVIEW: Access denied" message.
- If you are still experiencing issues accessing the **smartmail**, please contact your escrow & title contact.

smartmail & smartportal: Password Reset
Updated: 8/16/2017

smart**mail**

## TROUBLESHOOTING

smart**view**

# smartmail & smartportal - Android Troubleshooting

Overview: This Job Aid offers suggestions to resolve common issues while working in smartportal from an Android device.

Once Logged in to smartportal from my Android device, clicking the document links don't respond.
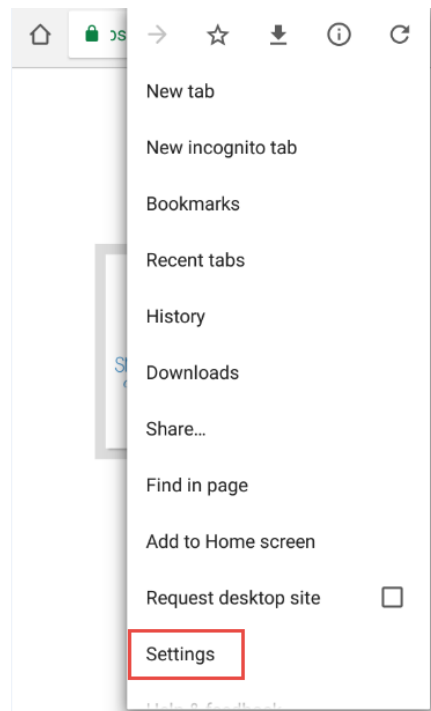
1. If you are attempting to click a document link within a smartmail message from your Android device, and the link is not responding, check the **Block Pop-Ups** setting on your device.
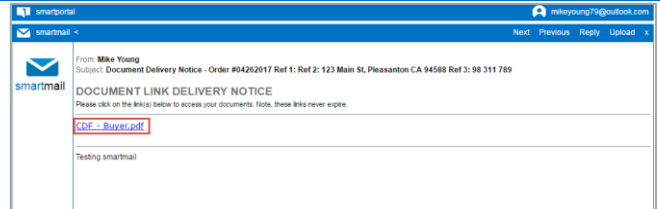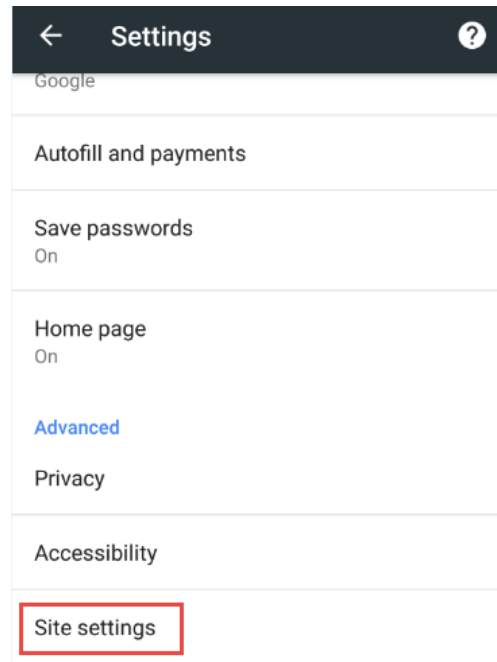
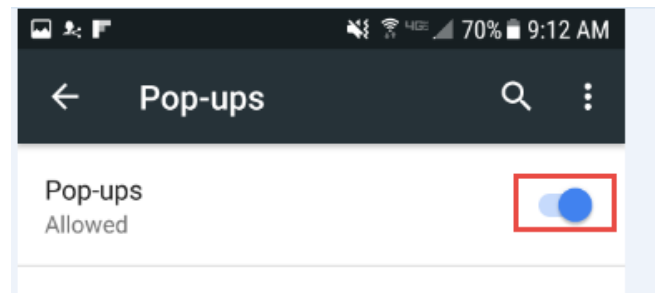2. Choose the **Settings** icon on your Device.

3. Go to settings.

smartmail & smartportal: Android Troubleshooting
Updated: 8/16/2017
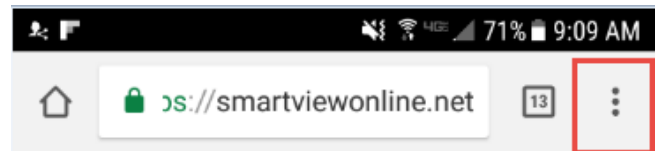
4. Go to site settings.

5. Turn the setting to "allow"


Additional information about smartmail:

- Both "**View smartmail**" link and **smartmail** document link is an expiring link and they will expire at the expiration value set in the initial **smartmail** distribution.
- **smartmails** forwarded to another email address that is not listed in the initial distribution will not be able to authenticate, and will receive "smartVIEW: Access denied" message.
- If you are still experiencing issues accessing the **smartmail**, please contact your escrow & title contact.

smartmail & smartportal - Chrome Troubleshooting

Overview: This Job Aid offers suggestions to resolve common issues while working in smartportal using Chrome as your internet browser.

Once Logged in to smartportal using Chrome, clicking the document links don't respond.

1. If you are attempting to click a document link within a smartmail using Internet Explorer as your browser, and the link is not responding, add the smartportal document storage site to your Pop-up blocker exception list.
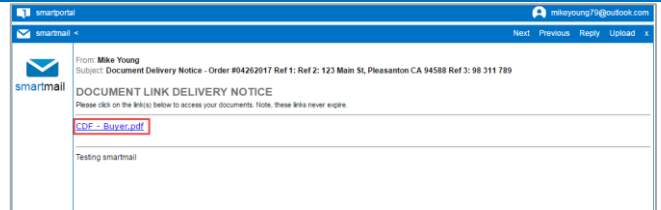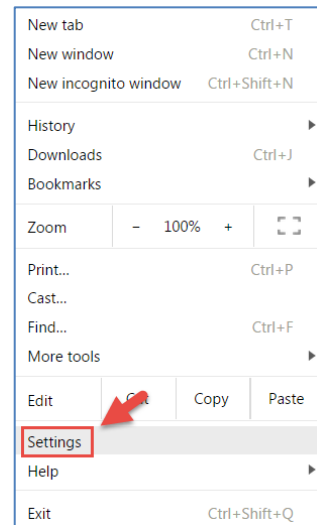
   Please Note: It is recommended you access smartportal using Internet Explorer 11, without Compatibility Mode enabled.
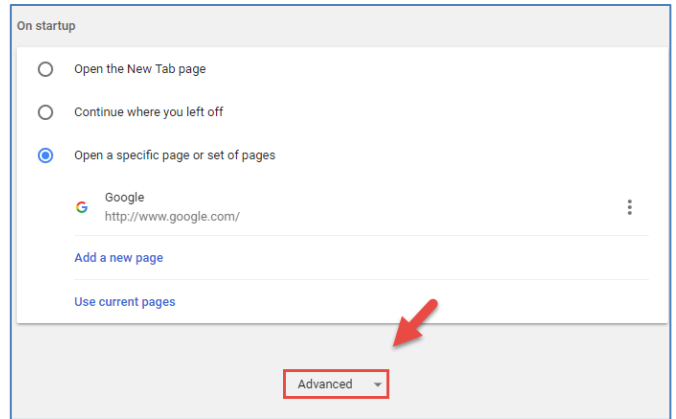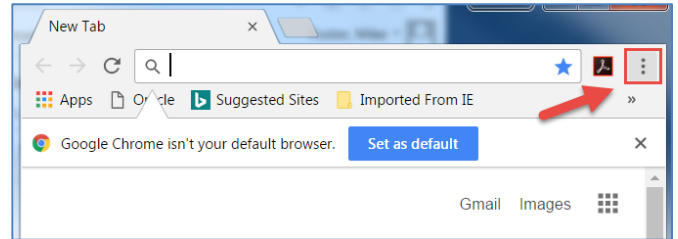

2. Open Google Chrome and click the ⋮ symbol.
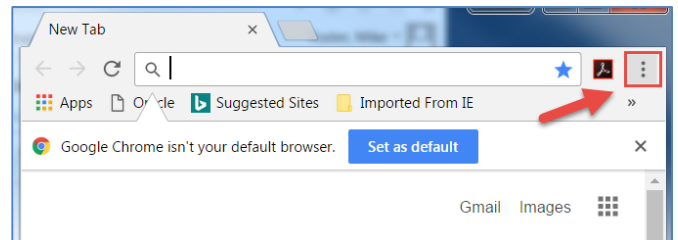
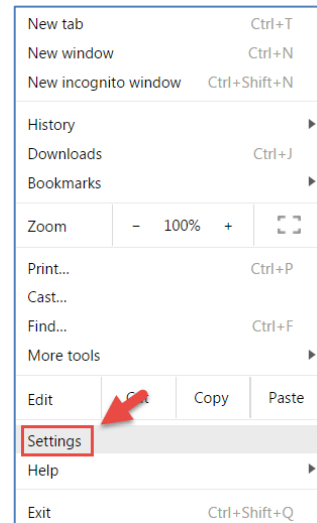3. Choose **Settings** from the menu.

4. Scroll to the bottom and click **Show advanced settings…**.

5. Open Google Chrome and click the ⋮ symbol.

6. Choose **Settings** from the menu.
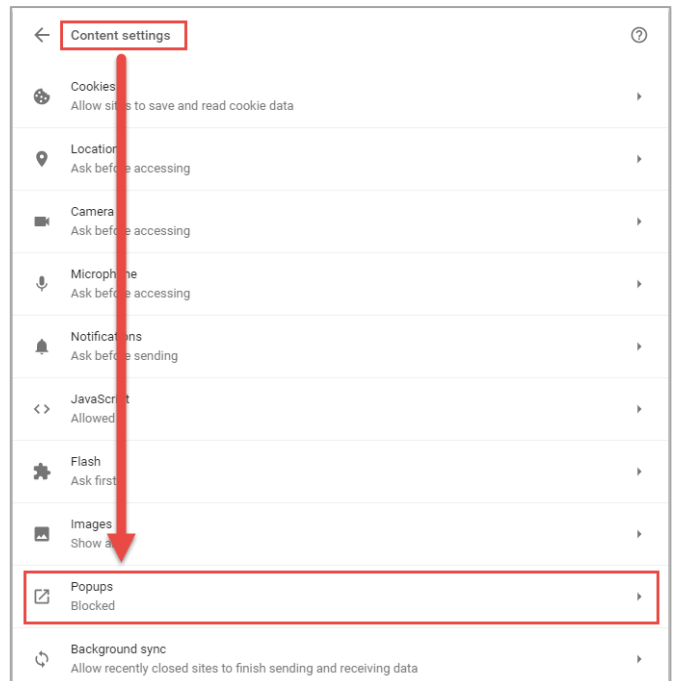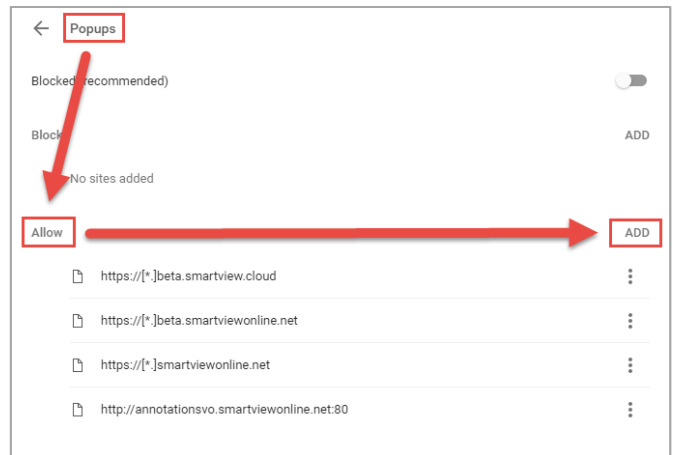
smartmail & smartportal: Chrome Troubleshooting
Updated: 8/16/2017

7. Under Privacy and Security, click **Content settings**.
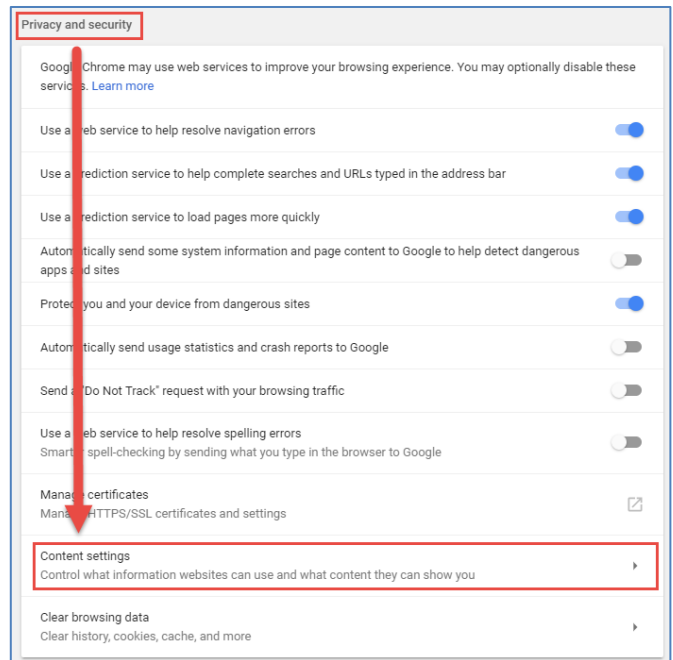
8. In Content settings, click Popups.

smartmail & smartportal: Chrome Troubleshooting
Updated: 8/16/2017

9. Next to Allow, click ADD.

10. Enter https://[*.]smartviewonline.net in the "Add a site" window, and click the **ADD** button.

11. **Close and reopen** Google Chrome for the changes to take effect.

    Then log back in to smartportal, and click the document links to access the documents.

Additional information about smartmail:

- Both the "**View smartmail**" link and **smartmail** document links are expiring links, and will expire at the expiration value set in the initial **smartmail** distribution.
- **smartmails** forwarded to another email address that is not listed in the initial distribution will **NOT** be able to authenticate, and will receive "smartVIEW: Access denied" message.
- If you are still experiencing issues accessing the **smartmail**, please contact your escrow & title contact.

smartmail & smartportal - Internet Explorer Troubleshooting

Overview: This Job Aid offers suggestions to resolve common issues while working in smartportal using Internet Explorer as your internet browser.

## Once Logged in to smartportal using Internet Explorer, clicking the document links don't respond.

1. If you are attempting to click a document link within a smartmail using Internet Explorer as your browser, and the link is not responding, add the smartportal document storage site to your Pop-up blocker exception list.
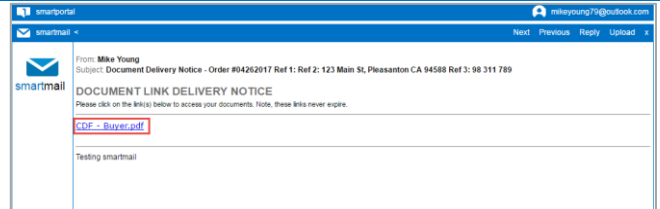
   **Please Note:** It is recommended you access smartportal using Internet Explorer 11, without Compatibility Mode enabled.

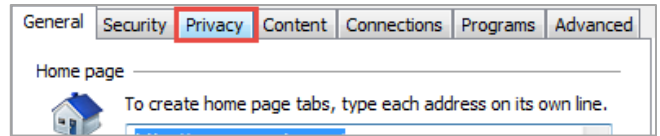2. First, close all open Internet Explorer windows.

   For Windows 7 Users, click the **Windows** icon, and choose the **Control Panel** option.
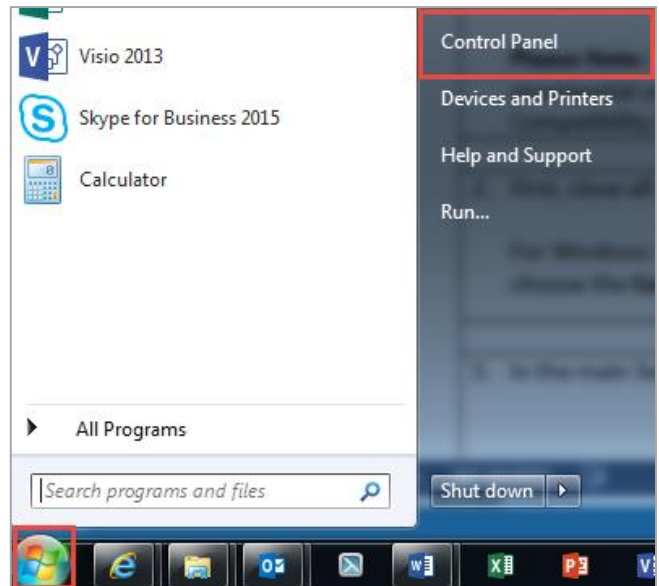
3. In the Control Panel, choose the **Internet Options** icon.

smartmail & smartportal: Internet Explorer Troubleshooting
Updated: 8/16/2017
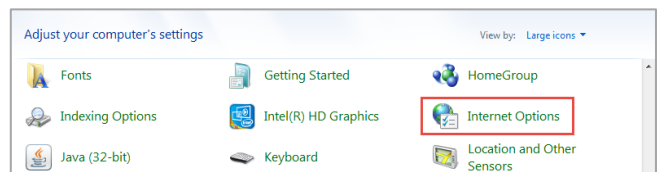
4. Select the **Privacy** tab along the top of the Internet Options window.

5. In the **Pop-up Blocker** section, click the **Settings** button.

6. In the **Address of website to allow:** field, enter the entry of: ***.smartviewonline.net**, then click the **Add** button.
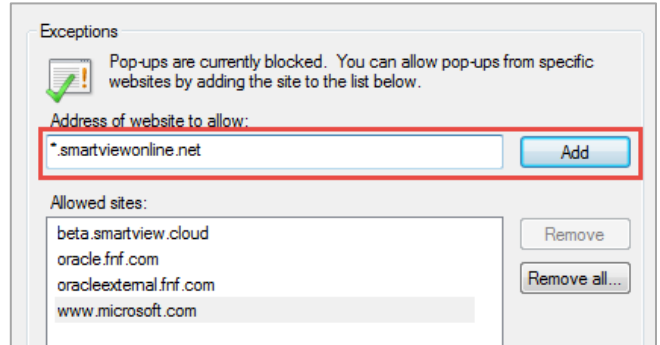
7. Once the ***.smartviewonline.net** entry is listed in the **Allowed Sites:** window, click the **Close** button.

smartmail & smartportal: Internet Explorer Troubleshooting
Updated: 8/16/2017

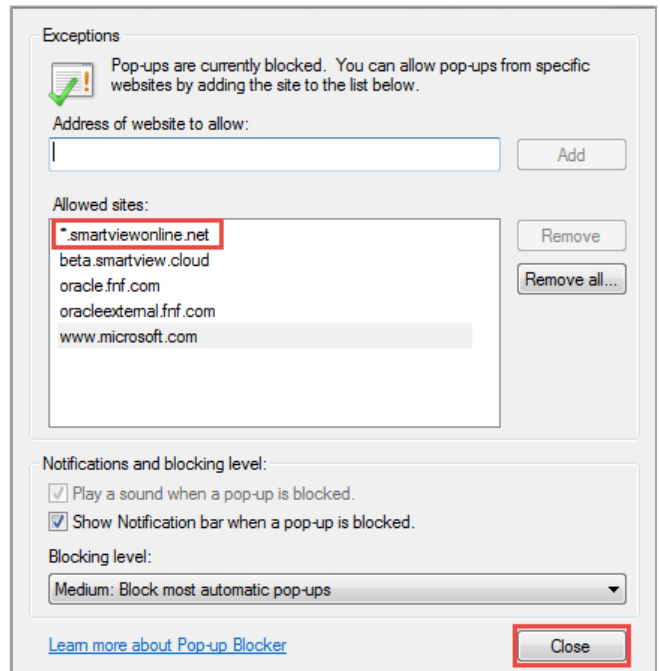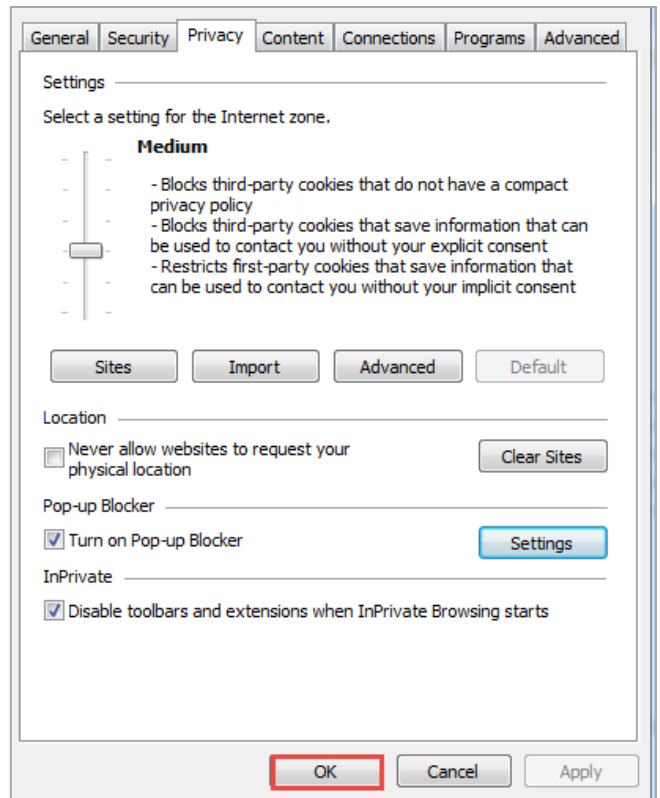8. Click **OK** to the main Internet Options window.

9. **Open a new** Internet Explorer window, then log back in to smartportal, and click the document links to access the documents.

Additional information about smartmail:

- Both the "View smartmail" link and **smartmail** document links are expiring links, and will expire at the expiration value set in the initial **smartmail** distribution.
- **smartmails** forwarded to another email address that is not listed in the initial distribution will **NOT** be able to authenticate, and will receive "smartVIEW: Access denied" message.
- If you are still experiencing issues accessing the **smartmail**, please contact your escrow & title contact.

smartmail & smartportal: Internet Explorer Troubleshooting
Updated: 8/16/2017

# smartmail & smartportal - iPhone/iPad Troubleshooting

Overview: This Job Aid offers suggestions to resolve common issues while working in smartportal from an iPhone or iPad device.

Once Logged in to smartportal from my iPhone/iPad, clicking the document links don't respond.
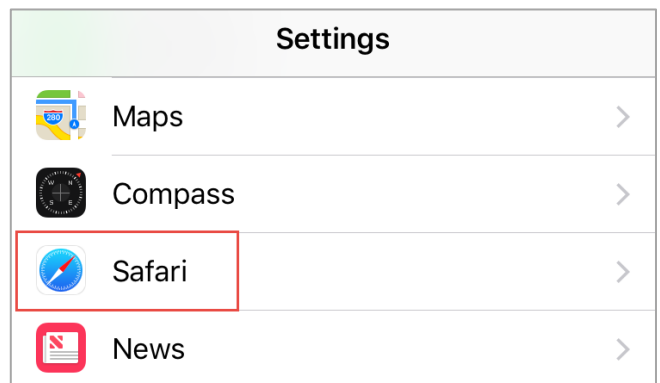
1. If you are attempting to click a document link within a smartmail message from your iPhone/iPad, and the link is not responding, check the **Block Pop-Ups** setting on your device.
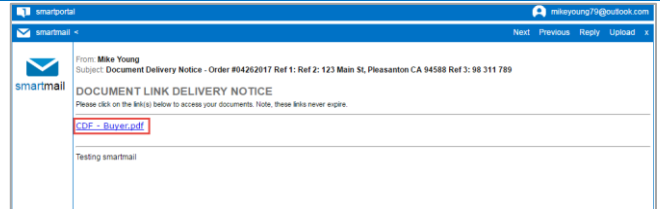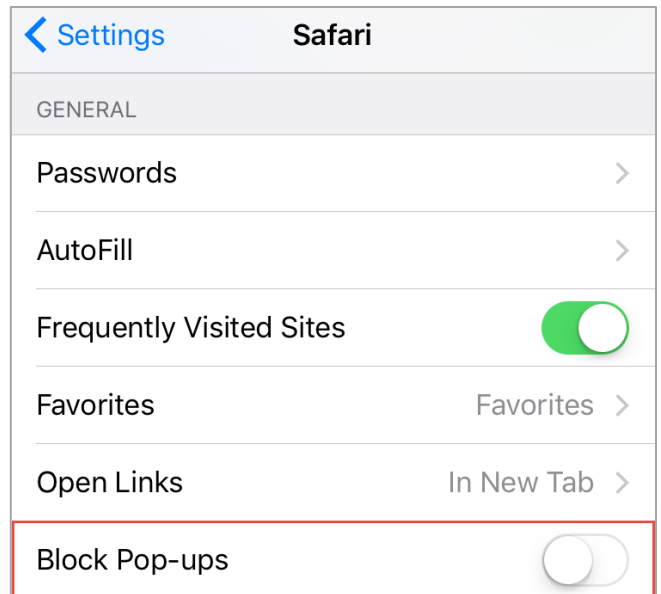

2. Choose the **Settings** icon on your Device.
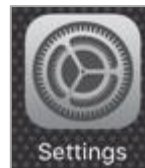
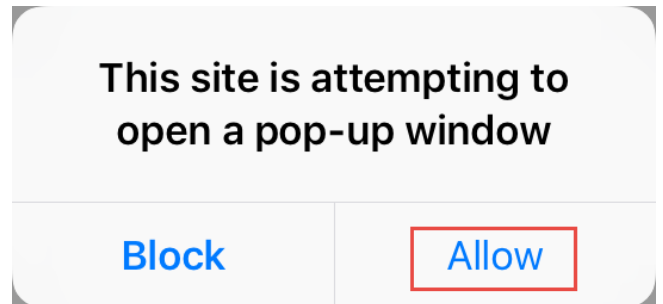3. In the main Settings screen, select the **Safari** option.

4. Turn the **Block Pop-ups** option off, so that the selection bubble shows white.

‹ Settings	**Safari**
GENERAL	
Passwords	›
AutoFill	›
Frequently Visited Sites	🟢
Favorites	Favorites ›
Open Links	In New Tab ›
Block Pop-ups	⚪

5. When you return to the smartmail message and click the document link, you should receive the Safari pop-up warning. Select the **Allow** option to view the selected document.

   Please Note: With the change of the Block pop-ups Setting, you will receive this prompt for any site attempting to open a pop-up.

This site is attempting to open a pop-up window

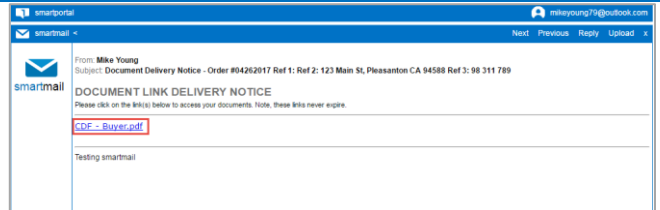| Block | Allow |

Additional information about smartmail:

- Both the "**View smartmail**" link and **smartmail** document links are expiring links, and will expire at the expiration value set in the initial **smartmail** distribution.
- **smartmails** forwarded to another email address that is not listed in the initial distribution will **NOT** be able to authenticate, and will receive "smartVIEW: Access denied" message.
- If you are still experiencing issues accessing the **smartmail**, please contact your escrow & title contact.

smartmail & smartportal - Safari Troubleshooting

Overview: This Job Aid offers suggestions to resolve common issues while working in smartportal using Safari as your internet browser.

Once Logged in to smartportal using Safari, clicking the document links don't respond.

1. If you are attempting to click a document link within a smartmail message from your Android device, and the link is not responding, check the **Block Pop-Ups** setting on your device.

2. Click **Safari** in the browser menu, located at the top of the screen, then choose the **Preferences** option.
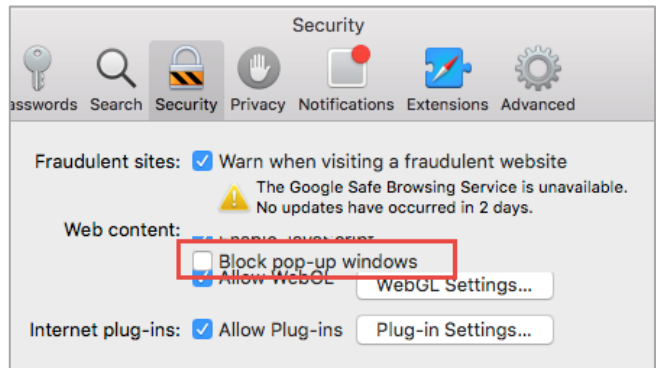
   Please Note: You can also use the **Command+Comma (,)** shortcut keys, in lieu of clicking through the menu.
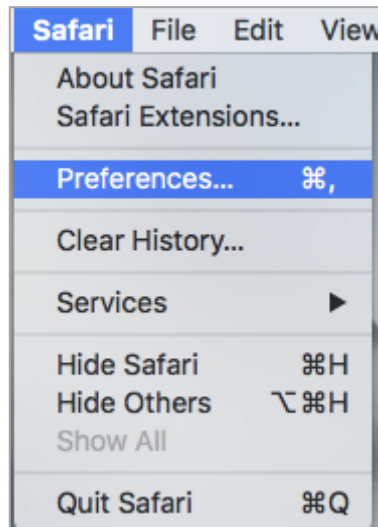
3. Click on the **Security** tab to open the *Security Preferences* window.

4. In the *Web Content* section, uncheck the box next to the option called **Block pop-up windows**.

Additional information about smartmail:

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smartmail & smartportal: Safari Troubleshooting
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