



smartportal

Recipient User Guide



CHICAGO TITLE

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General Information

What is **smartmail**?

smartmail is smartview’s proprietary email encryption system used to protect your personal and transaction related information.

What is **smartportal**?

The smartportal website is a secure, centralized access point for each smartmail recipient to access all smartmail messages delivered to them. The smartportal site also offers each Recipient to send an encrypted reply through the system, and/or upload documents securely back to our document management system.

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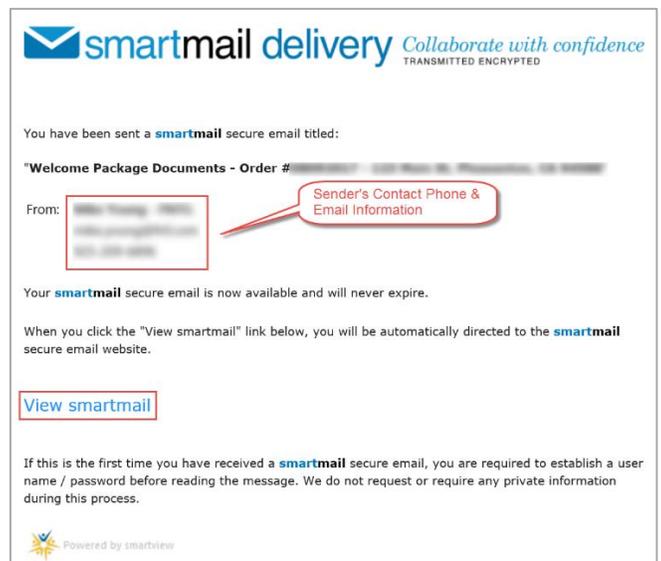
New User Registration

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. Click the **View smartmail** link within the Body of the smartmail message you received in your Inbox.

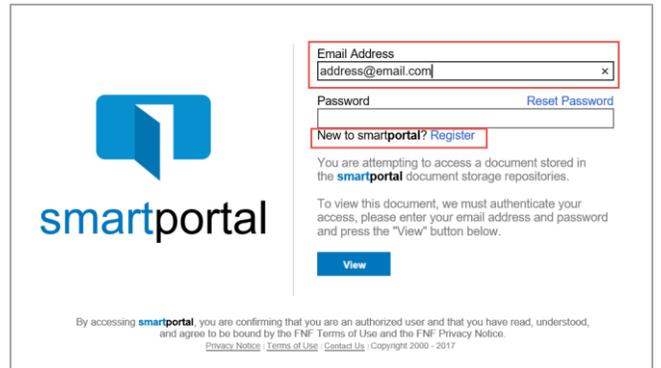
Please Note: The Sender's Name, Email Address, and Contact Phone Number will be listed in the **From:** section of the received smartmail message.



2. If it is the first time accessing a **smartmail**, enter your email address (must be the same address where the email was sent), 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, you will receive an error message stating **“Access Denied”**, and the registration will not be able to be completed successfully.



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

- 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.

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

Please Note: If you click the **Password Requirements** link in the 'Create Password' section, you will be shown the Password criteria, as listed below:

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.
- 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.

6. 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.

7. Once the smartportal New User Registration page is completed successfully, you will receive the following confirmation on screen.

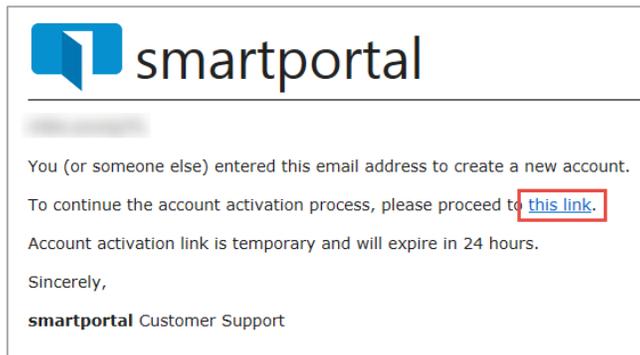
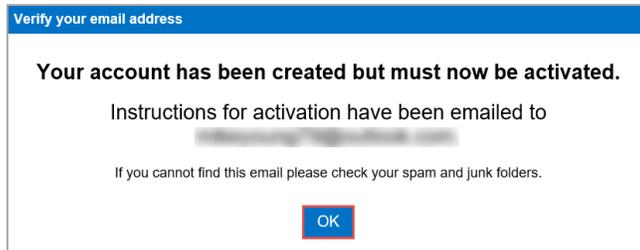
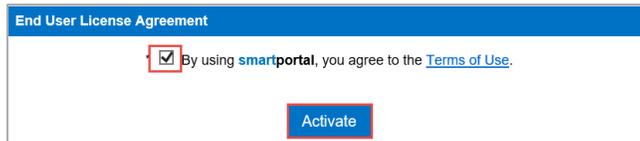
Click the **OK** button to confirm, and the window/tab will close automatically.

To complete the activation, return to your Inbox for the email address you just registered, and locate the Account Activation email.

8. In your email account Inbox, 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.

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.



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

You will see the “**Success! Your account has been activated.**” message along the top of the login page.

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

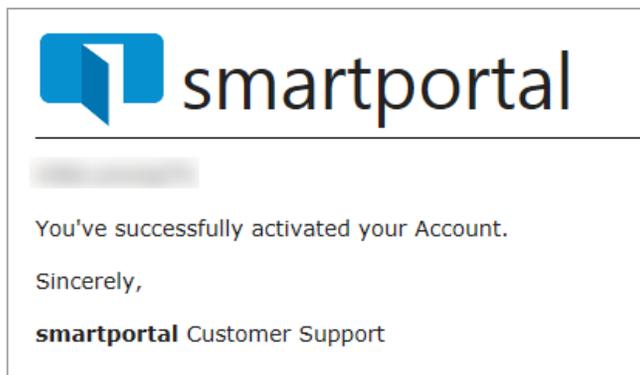
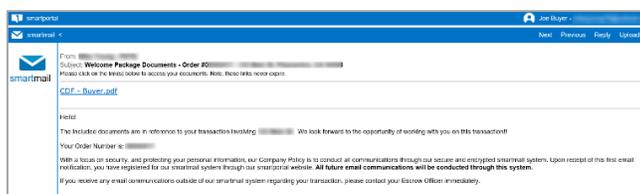
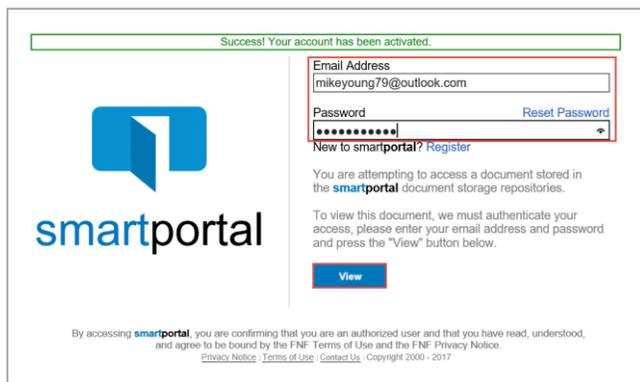
Click the **View** button.

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

10. Once you’ve logged in with your email address and registered Password, you will be taken into the smartportal site to view the smartmail message originally delivered to you.

11. Once you have successfully logged into smartportal, you will receive an Activation Successful email confirmation.

For more information on available smartportal functionality, proceed to Page 7 of this User Guide to review the **Recipient Access** features.



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.

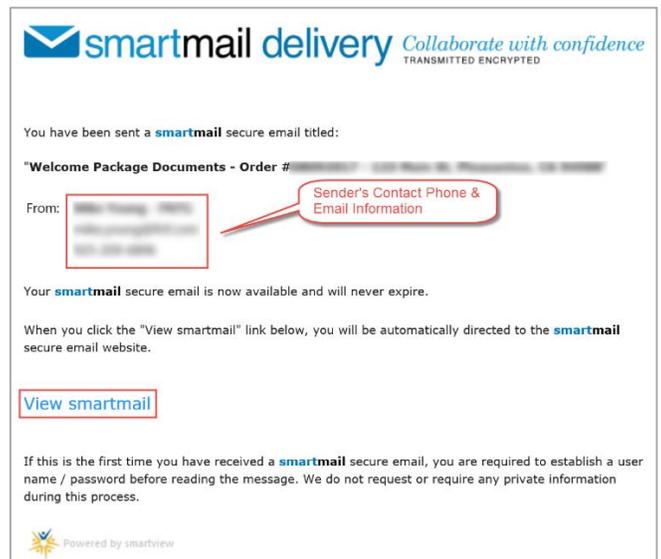
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Recipient Access

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. The Sender's Name, Email Address, and contact Phone Number will be listed.

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

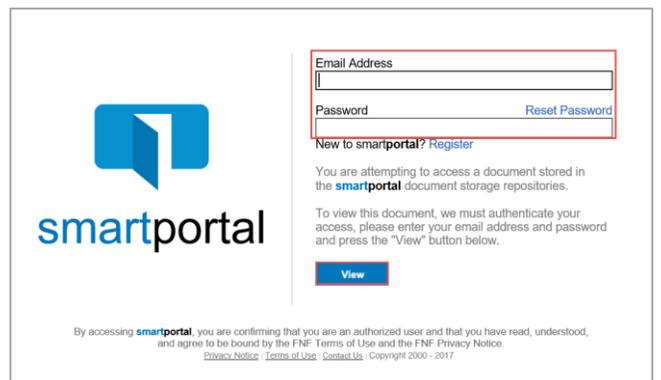


2. Recipients accessing the email will be challenged for authentication.

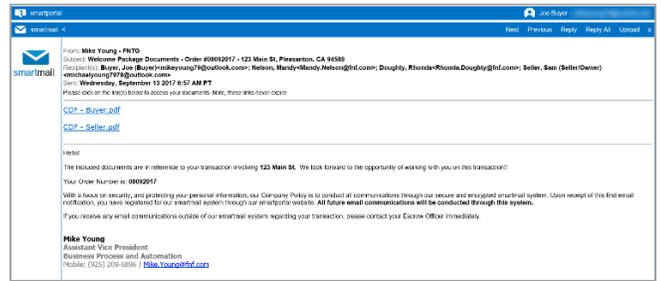
Each recipient will be asked for their email address and registered when logging in to smartportal.

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.

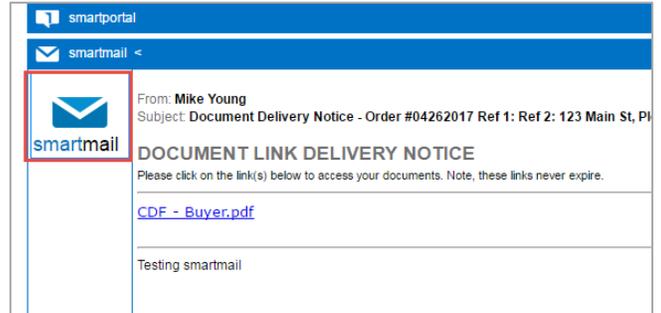


- Once you have successfully logged in, you will be presented with **smartmail** HTML email. From this web page you can view the Subject and Body of the **smartmail**, as well as open any of the document links.



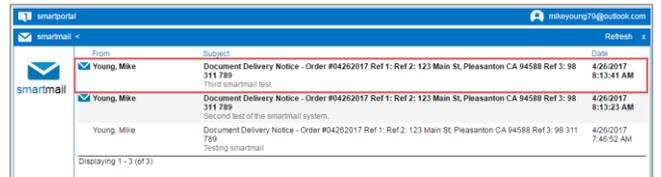
- All smartmail messages sent to your same email address, will all be available on the smartmail tab of our smartportal website.

While viewing any smartmail message, click the **smartmail** icon along the left side of the page to access additional smartmail messages.



- 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 along the top message.

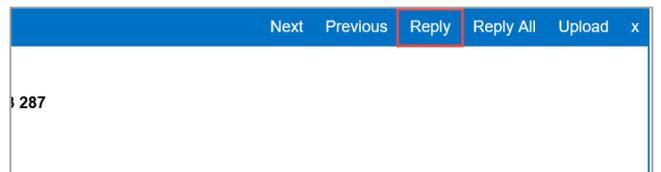


- While viewing any smartmail message, there are options in the top right corner:
 - Next** = Navigate to the next smartmail message sent to your address (if applicable).
 - Previous** = Navigates to the previous smartmail message sent to your address (if applicable).
 - Reply** = Allows you to send an encrypted reply to the Sender of the original smartmail message.
 - Reply All** = Allows you to send an encrypted reply to All Recipients of the original smartmail message.
 - Upload** = Allows you to upload and return documents securely back to our system.



Reply to Sender

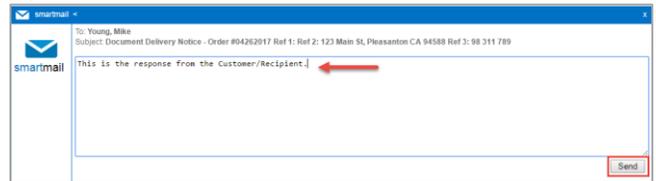
- To **Reply** to the Sender of any message, while viewing the message itself, click the **Reply** link in the top right corner of the page.



8. Enter your text response in the window provided, adding as much information as you like.

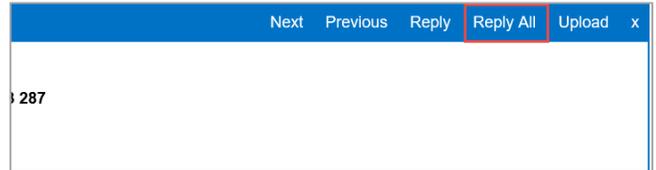
Click the **Send** button to deliver your response as an encrypted email Reply.

Click **OK** to the sent confirmation message.



Reply to All Recipients

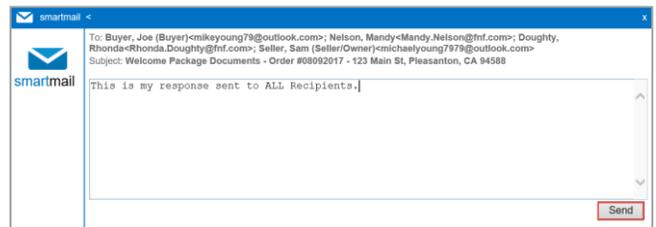
9. To **Reply All** to any message, while viewing the message itself, click the **Reply All** link in the top right corner of the page.



10. 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.

Click **OK** to the sent confirmation message.



Document Upload

11. 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.



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

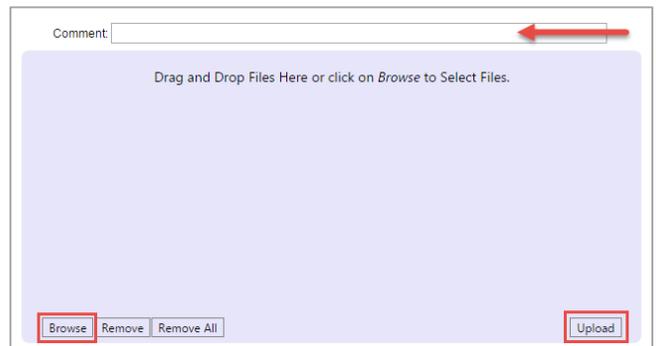
To Upload documents, click the **Browse** button to locate a document saved anywhere on your Computer.

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.

Click **OK** to the upload confirmation window.



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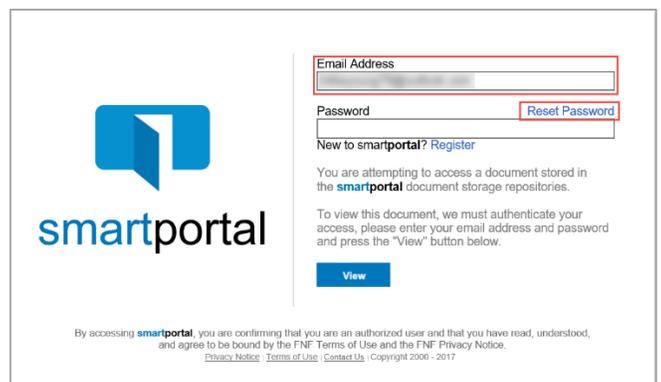
Password Reset

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.

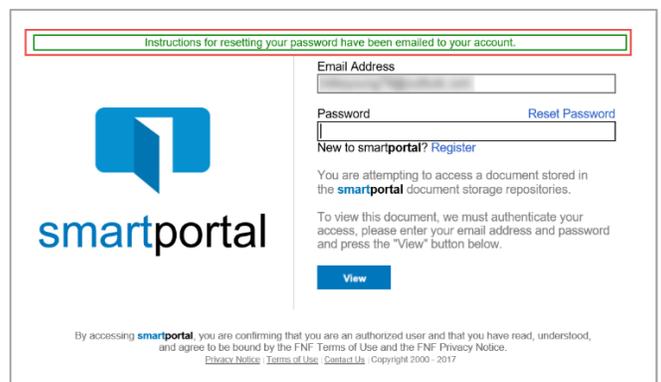
1. If you forgot your password, you can reset it.

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



The screenshot shows the smartportal login interface. On the left is the smartportal logo. On the right, there are two input fields: 'Email Address' and 'Password'. A red box highlights the 'Reset Password' link next to the Password field. Below the fields, there is a 'New to smartportal? Register' link. A paragraph of text explains that access to documents requires authentication. A blue 'View' button is located below the text. At the bottom, there is a footer with legal notices and copyright information.

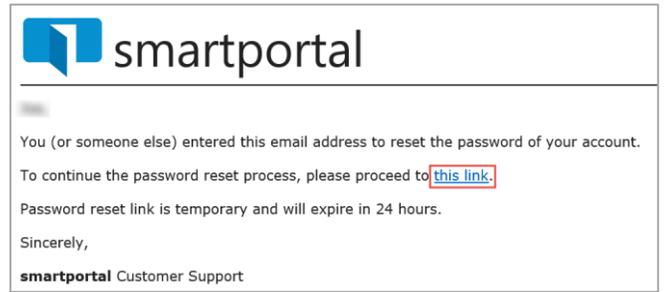
2. If the email address matches, then an instructional message will be posted as shown outlined in green: **Instructions for resetting your password have been emailed to your account.**



This screenshot is identical to the one above, but it features a green message bar at the top of the page that reads: 'Instructions for resetting your password have been emailed to your account.' The 'Reset Password' link is no longer highlighted.

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

Click on the words **this link** within the body of the email.



4. Enter and confirm a new password, ensuring that the strength meter shows an entry of **strong** (or higher), and meets all other Password requirements.

Then click the **Save** button.

Please Note: If you click the **Password Requirements** link in the 'Create Password' section, you will be shown the Password criteria, as listed below:

Your Password must meet the following criteria:

- The Password must 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.
- 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.

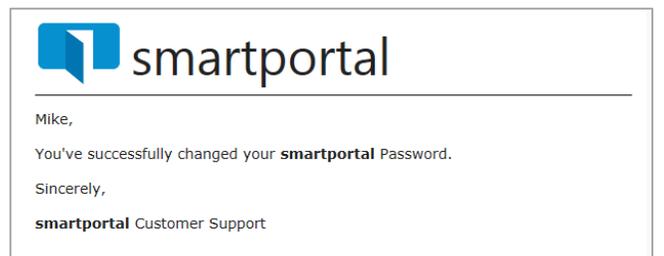
A screenshot of the "Create a Password" form. It has two input fields: "Password" and "Confirm Password". The "Password" field has a strength meter below it showing 50% strength, labeled "strong". A "Password Requirements" link is visible on the right. A "Save" button is at the bottom right.A screenshot of the "Create a Password" form. The "Password" field has a strength meter showing 100% strength, labeled "very strong". A "Password Requirements" link is highlighted with a red box. A red-bordered box contains the following criteria:

- The password must contain characters from at least 3 of the following 4 categories:
 - English uppercase characters (A - Z)
 - English lowercase characters (a - z)
 - Base 10 digits (0 - 9)
 - Non-alphanumeric (for example: !, \$, #, or %)
- The password cannot be the same as the username
- The password must have a minimum of 8 characters

A "Save" button is at the bottom right.

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.



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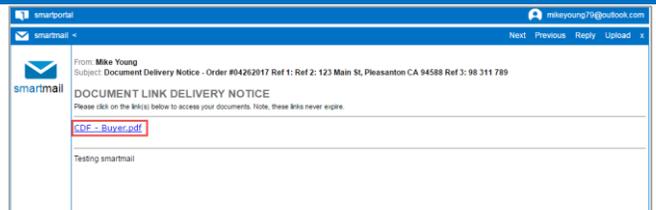


Android Troubleshooting

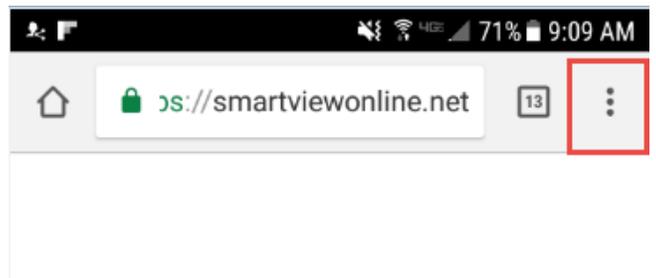
Overview: This Job Aid offers suggestions to resolve common issues while working in smartportal from an Android device.

Once Logged in to smartportal from my Android device, clicking the document links don't respond.

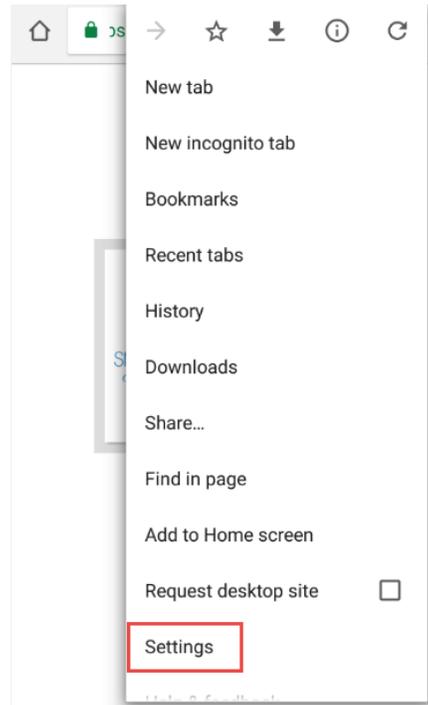
1. If you are attempting to click a document link within a smartmail message from your Android device, and the link is not responding, check the **Block Pop-Ups** setting on your device.



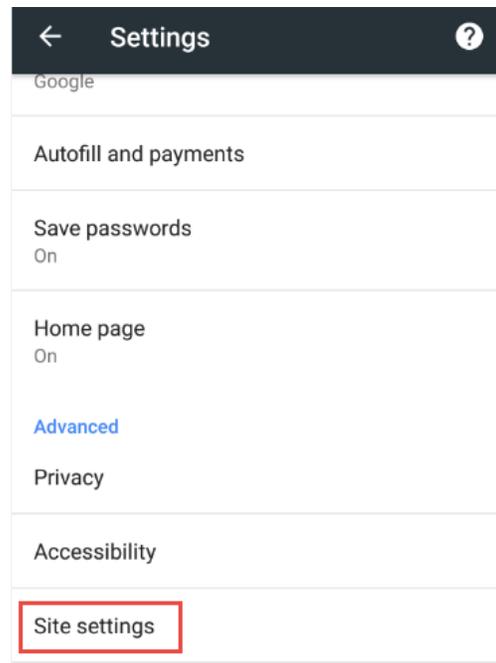
2. Choose the **Settings** icon on your Device.



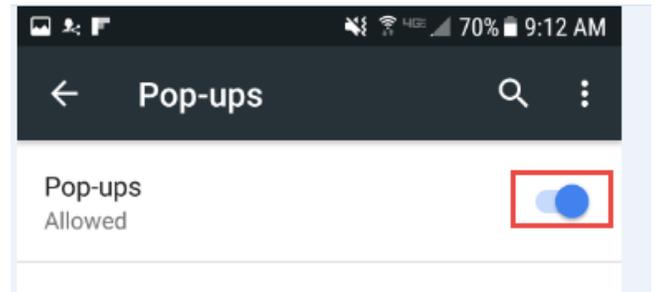
3. Go to settings.



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.

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Chrome Troubleshooting

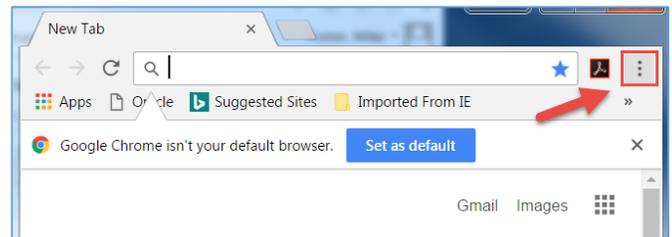
Overview: This Job Aid offers suggestions to resolve common issues while working in smartportal using Chrome as your internet browser.

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

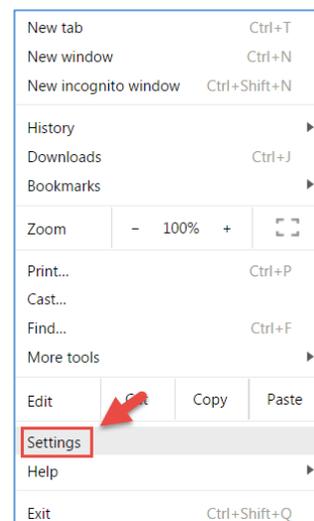
1. If you are attempting to click a document link within a smartmail using Google Chrome as your browser, and the link is not responding, add the smartportal document storage site to your Pop-up blocker exception list.



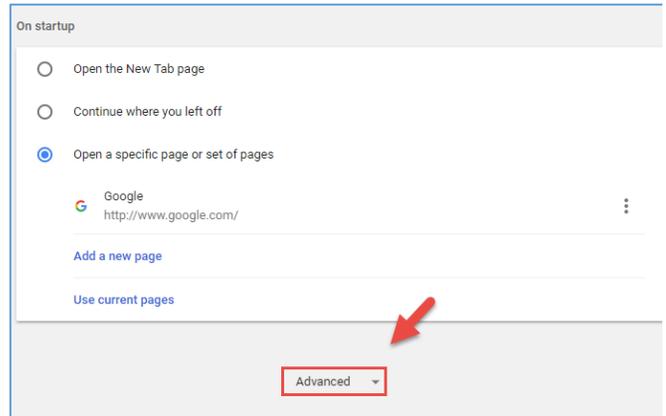
2. Open Google Chrome and click the  symbol.



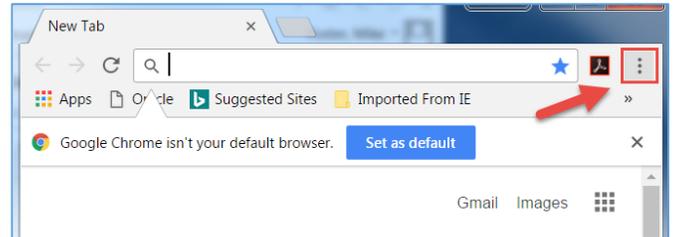
3. Choose **Settings** from the menu.



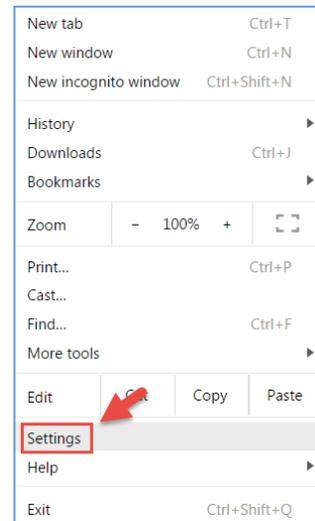
4. Scroll to the bottom and click **Show advanced settings...**



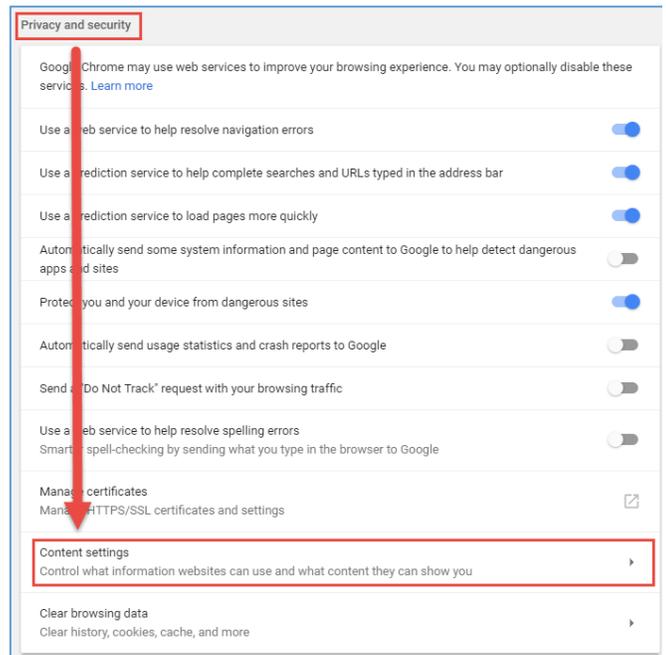
5. Open Google Chrome and click the  symbol.



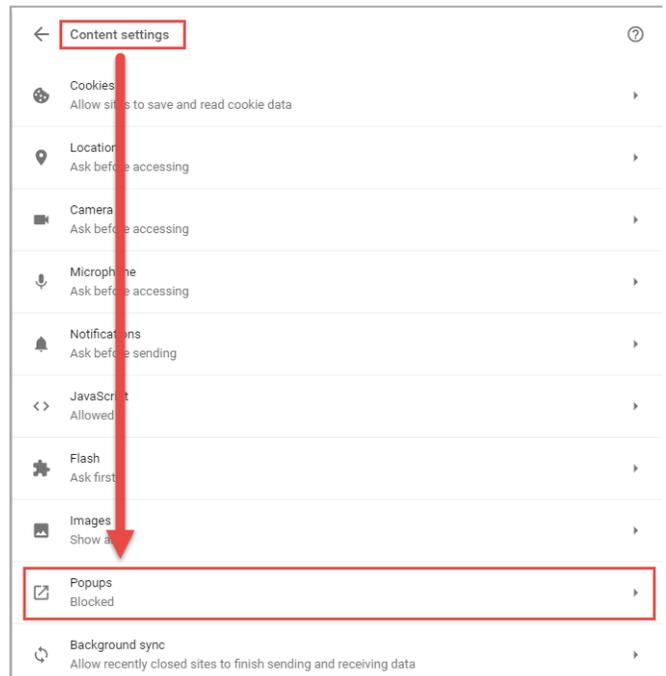
6. Choose **Settings** from the menu.



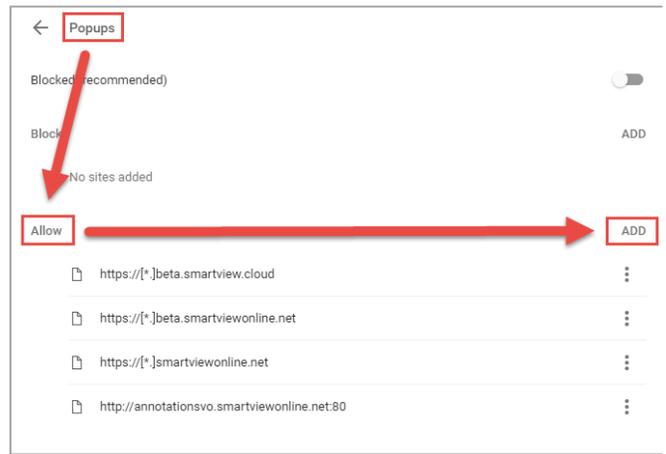
7. Under Privacy and Security, click **Content settings**.



8. In Content settings, click **Popups**.



9. Next to Allow, click ADD.



10. Enter [https://\[*\].smartviewonline.net](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.

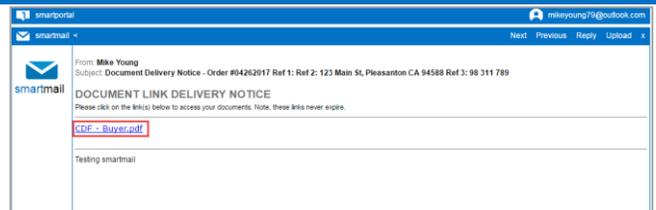
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Internet Explorer Troubleshooting

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.

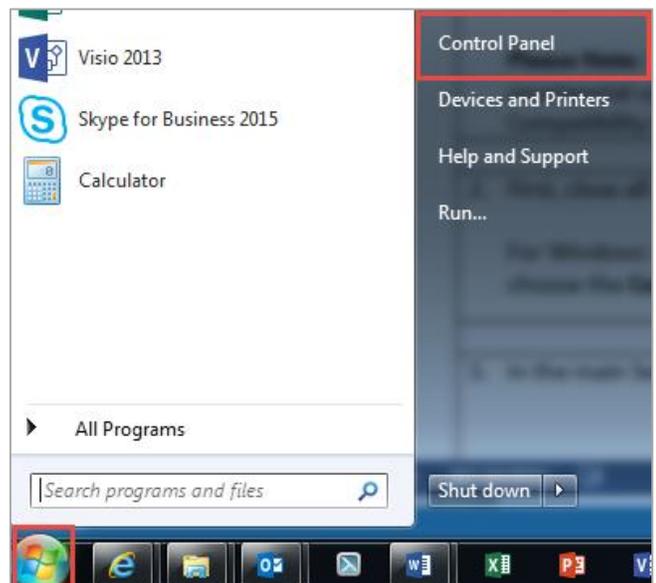
1. If you are attempting to click a document link within a smartmail using Internet Explorer as your browser, and the link is not responding, add the smartportal document storage site to your Pop-up blocker exception list.



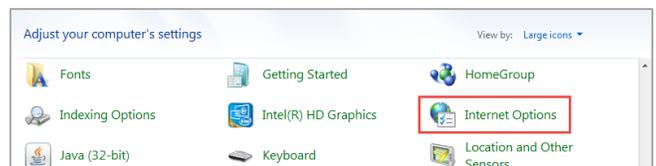
Please Note: It is recommended you access smartportal using Internet Explorer 11, without Compatibility Mode enabled.

2. First, close all open Internet Explorer windows.

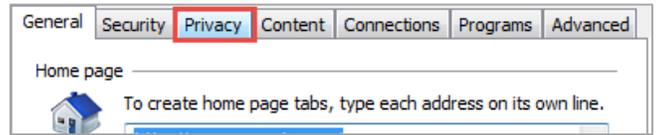
For Windows 7 Users, click the **Windows** icon, and choose the **Control Panel** option.



3. In the Control Panel, choose the **Internet Options** icon.



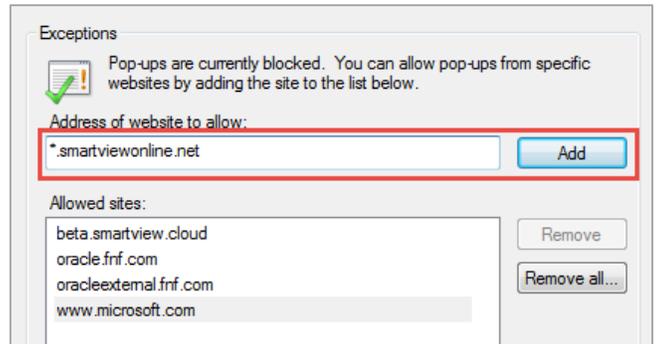
4. Select the **Privacy** tab along the top of the Internet Options window.



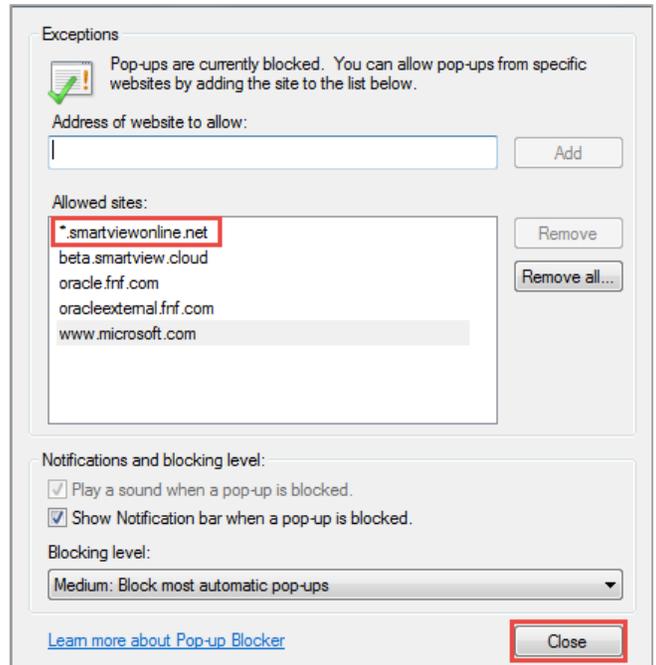
5. In the **Pop-up Blocker** section, click the **Settings** button.



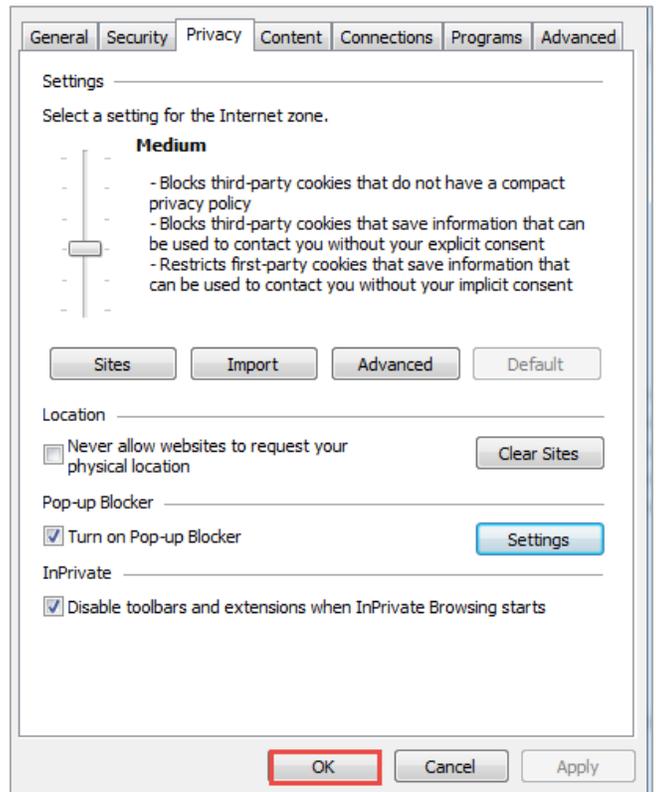
6. In the **Address of website to allow:** field, enter the entry of: *.smartviewonline.net, then click the **Add** button.



7. Once the *.smartviewonline.net entry is listed in the **Allowed Sites:** window, click the **Close** button.



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.

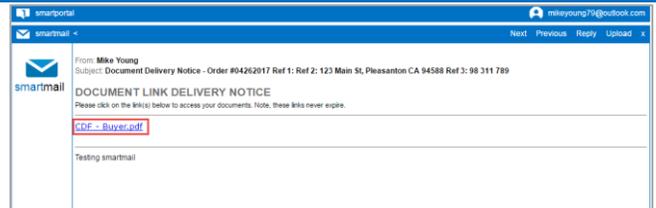
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iPhone/iPad Troubleshooting

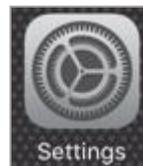
Overview: This Job Aid offers suggestions to resolve common issues while working in smartportal from an iPhone or iPad device.

Once Logged in to smartportal from my iPhone/iPad, clicking the document links don't respond.

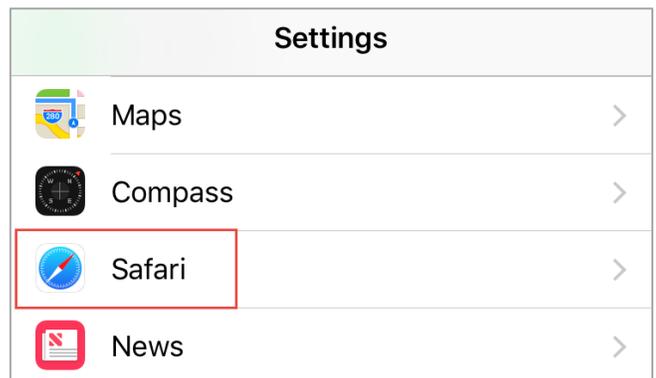
1. If you are attempting to click a document link within a smartmail message from your iPhone/iPad, and the link is not responding, check the **Block Pop-Ups** setting on your device.



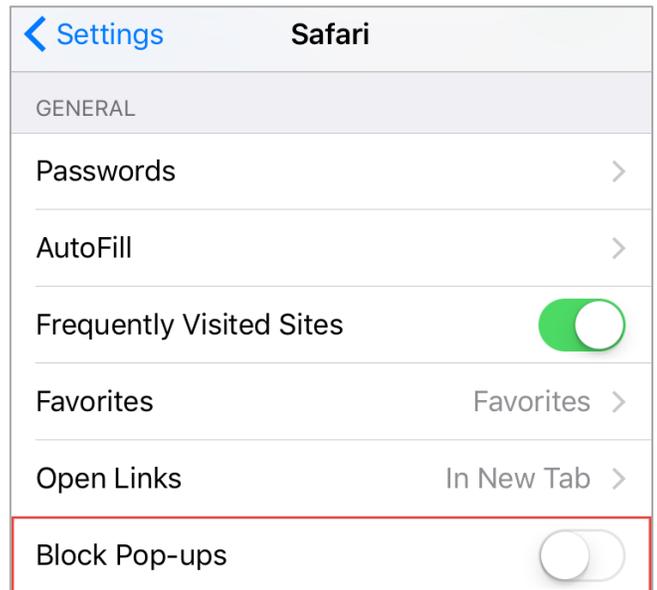
2. Choose the **Settings** icon on your Device.



3. In the main Settings screen, select the **Safari** option.

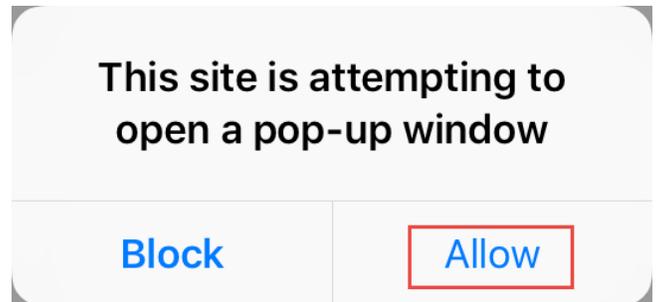


4. Turn the **Block Pop-ups** option off, so that the selection bubble shows white.



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.



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.

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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.

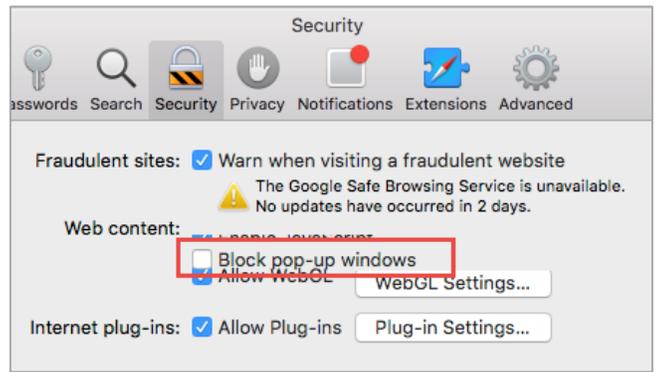
Please Note: You can also use the **Command+Comma (,)** shortcut keys, in lieu of clicking through the menu.



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**.



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- 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.
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