



Recipient USER GUIDE

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.

Table of Contents

User Guides (click below to navigate directly to a section)

New User Registration	3
Recipient Access	7

**If you are experiencing issues accessing Document Links within a smartmail message, a setting needs to be adjust for your pop-up blocker. Please refer to the troubleshooting guides below for the steps on adjusting this setting. For additional technical assistance, please email smartview support at SVHelp@fnf.com or call 1-888-435-7313, Option 4.

Troubleshooting Guides (click below to navigate directly to a section)

Password Reset	11
Adding Mobile Number	13
Android Troubleshooting.....	16
Chrome Troubleshooting.....	18
Edge Troubleshooting.....	22
Firefox Troubleshooting	27
Internet Explorer Troubleshooting	32
iPhone/iPad Troubleshooting.....	35
Safari Troubleshooting	37

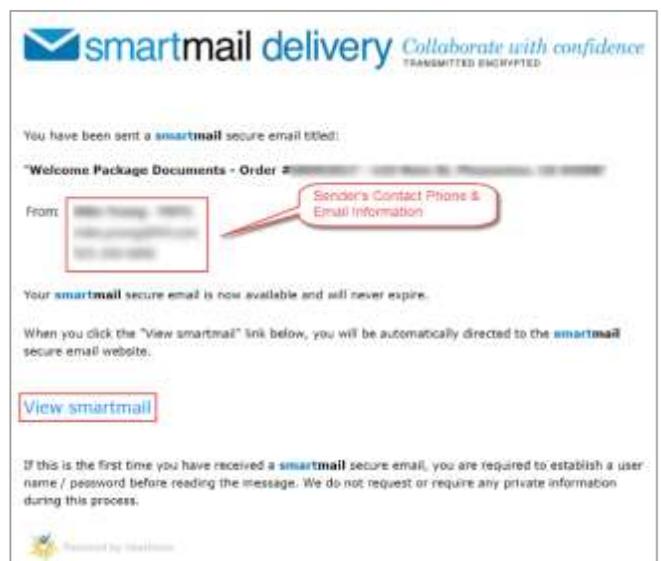
New User Registration

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.



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

4. 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.

5. 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.

- 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.

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

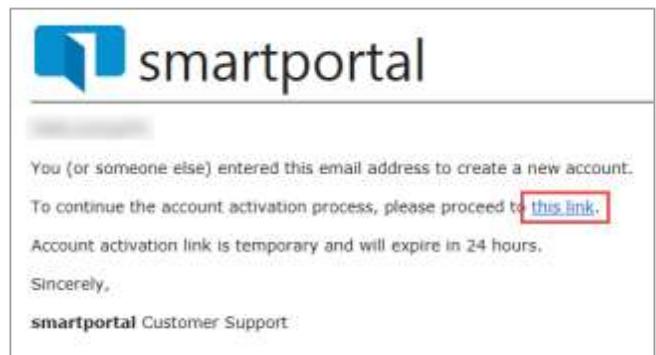
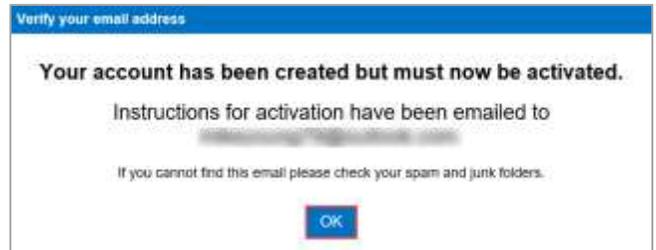
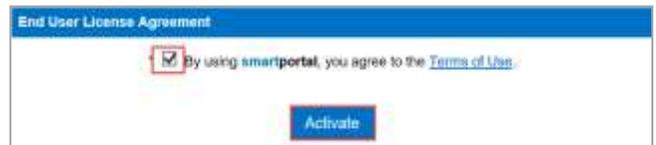
Click the **OK** button to confirm, and the window/tab will close automatically.

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

- 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.

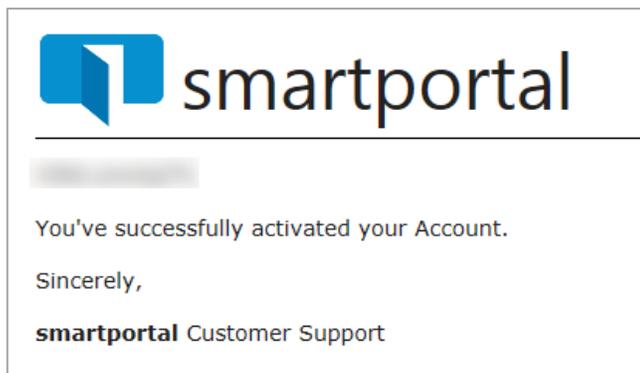
Click the **View** button.

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.

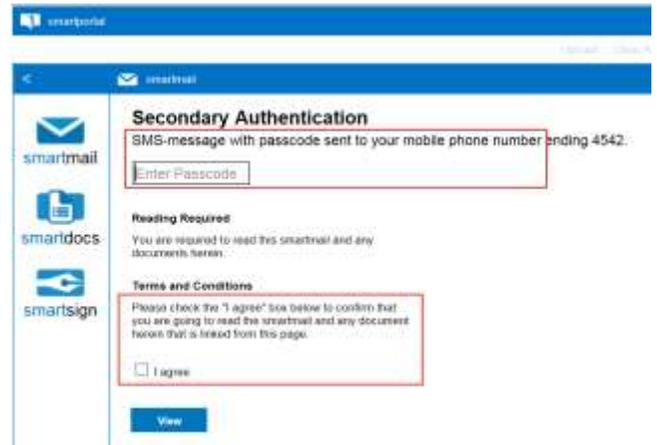
[Click Here to Go Back to Table of Contents](#)

- Recipients accessing the email may be challenged for a **Secondary Authentication**. If you receive this, there will be a 4 digit code sent to you via text message. **Enter the code received.**

You may also be prompted to “agree” to read the smartmail and any included document links. **Check the box I agree.**

Then click the **View** button.

If you do not receive either of these, proceed to step 4



- 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.

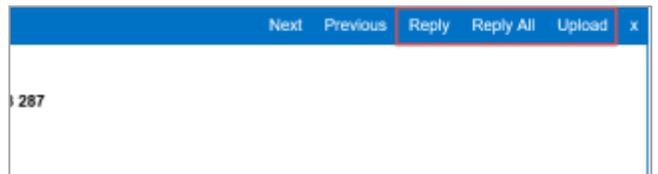


- All smartmail messages sent to your same email address will be shown in the smartmail Inbox, with the most recent received email listed along the top.

Single-click on any email message listed to access the message.

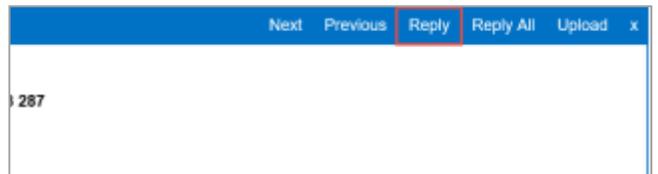


- While viewing any smartmail message, there are options in the top right corner:
Next = Navigate to the next smartmail message sent to your address (if applicable).
Previous = Navigates to the previous smartmail message sent to your address (if applicable).
Reply = Allows you to send an encrypted reply 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.



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

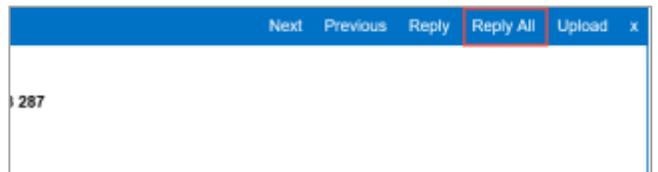
Click the **Send** button to deliver your response as an encrypted email Reply.



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

Reply to All Recipients

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



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

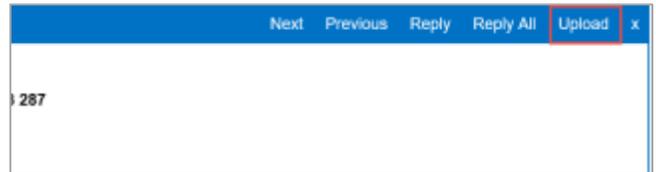
Click the **Send** button to deliver your response as an encrypted email Reply.



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

Document Upload

12. 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.



13. 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.

[Click Here to Go Back to Table of Contents](#)

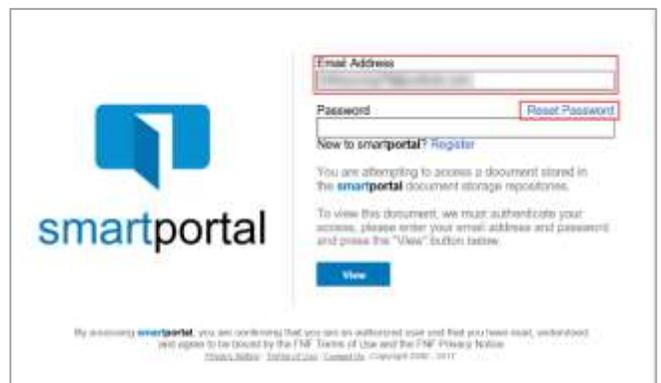
Password Reset

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.

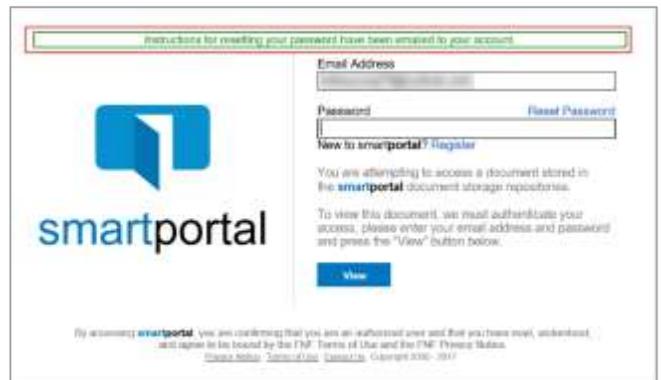
1. If you forgot your password, you can reset it.

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 is a form with an 'Email Address' field, a 'Password' field, and a 'Reset Password' link highlighted with a red box. Below the form, there is a 'View' button and some text about document access. At the bottom, there is a small disclaimer.

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 previous one, but it features a green message box at the top of the page that reads: "Instructions for resetting your password have been emailed to your account." The 'Reset Password' link remains highlighted in red.

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.



The screenshot shows an email from smartportal. The header includes the smartportal logo and name. The body of the email contains the following text: "You (or someone else) entered this email address to reset the password of your account. To continue the password reset process, please proceed to [this link](#). Password reset link is temporary and will expire in 24 hours. Sincerely, smartportal Customer Support". The words "this link" are highlighted with a red box.

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:

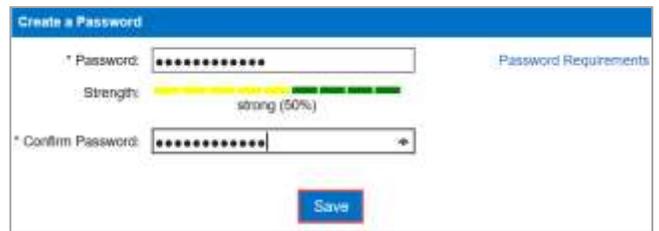
Your Password must meet the following criteria:

- 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.

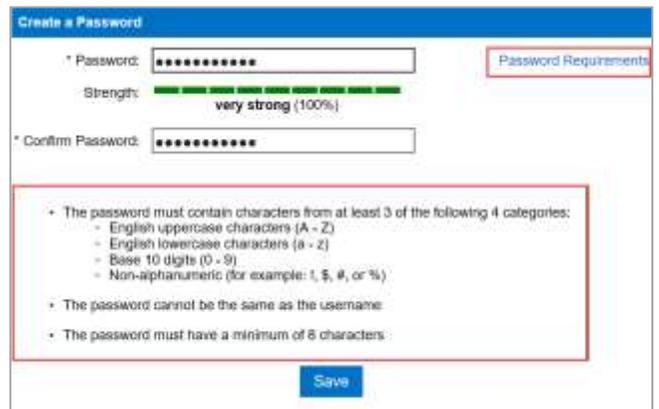
Once you've entered a Password that rates Strong and meets all criteria above, re-enter it in the **Confirm Password** field.

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.



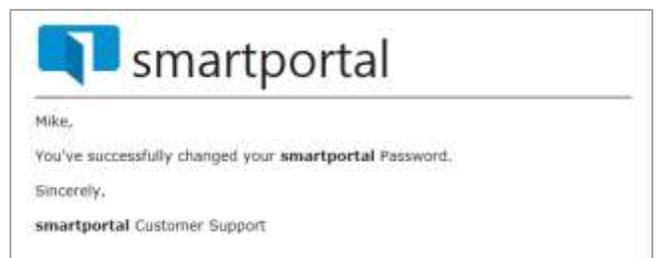
The screenshot shows a 'Create a Password' form. It has two input fields: '* Password:' and '* Confirm Password:'. The password strength meter is at 'strong (50%)'. A 'Save' button is at the bottom right. A 'Password Requirements' link is at the top right.



The screenshot shows the 'Create a Password' form with the password strength meter at 'very strong (100%)'. A red box highlights the 'Password Requirements' section, which lists:

- 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.



[Click Here to Go Back to Table of Contents](#)

Adding Mobile Number

Overview: This job aid reviews the process of adding your mobile number to your smartportal profile. This mobile number will be used to send an additional verification code when accessing your smartmails, which provides an additional layer of security.

1. When you receive a smartmail and a form of dual authentication is required, a passcode will be sent as a text to your mobile number.

If you have not already added your mobile number to your smartportal profile, you will receive this error message.



Click OK.

2. Click on **your name** on the top right. This will open your smartportal User Profile.



3. Click **Edit** to the right of the Mobile Number section.



4. Enter your **Mobile Number** and click the **Save** button.

Recommended Option: While adding your Mobile Number, we also recommend selecting the **Require Two Factor Authentication to login** checkbox option, before clicking the Save button. Selecting this option will allow you to complete one two-factor authentication process for each login, instead of for each individual email.



5. Click **OK**.

You will be returned to your user profile and your phone number will now be included.



6. Click on the **smartmail icon** on the left to return to your list of smartmails.



7. Click on the **unopened smartmail** and it will prompt you for the 2nd authentication, and possibly the read receipt check box.

Enter the Passcode that is sent to your mobile phone.

Check the box next to 'I agree'.

Click the **View button** and then you will be able to access the smartmail as well as any included 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.

[Click Here to Go Back to Table of Contents](#)

Android Troubleshooting

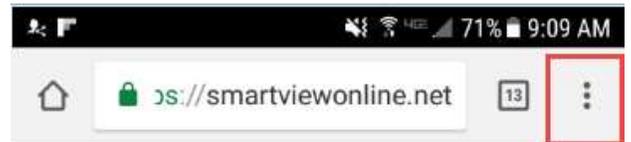
Overview: This job aid offers suggestions to resolve common issues while working in smartportal from an Android device.

Once logged in to smartportal from my Android device, the document links aren't responding.

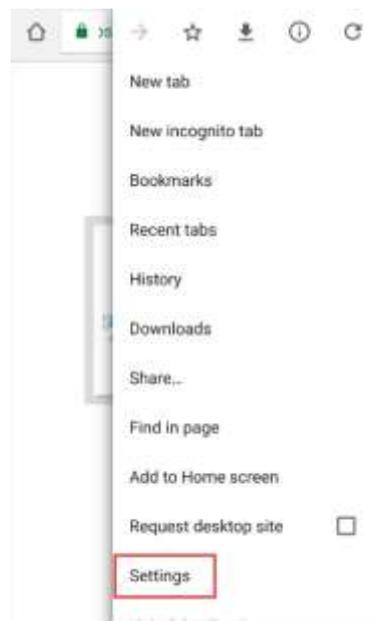
1. If you are attempting to click on a document link within a smartmail message from your Android device, and the link is not responding, check the Block Pop-Ups setting on your device.



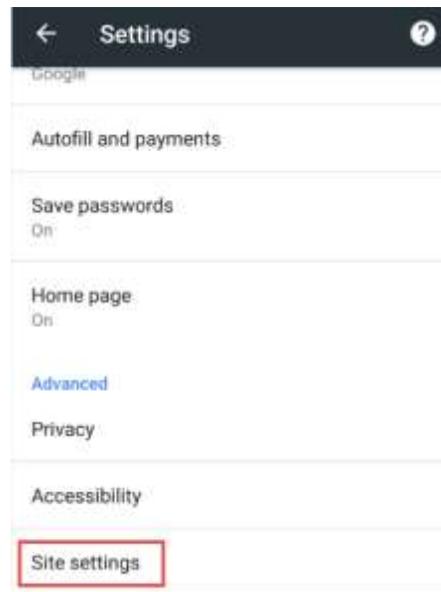
2. Choose the **Settings** icon on your Device.



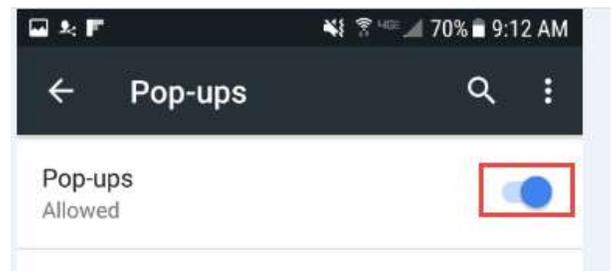
3. Go to **Settings**.



4. Go to **Site settings**.



5. Turn the Pop-ups setting to "**Allowed**".



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.

[Click Here to Go Back to Table of Contents](#)

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, the document links aren't responding.

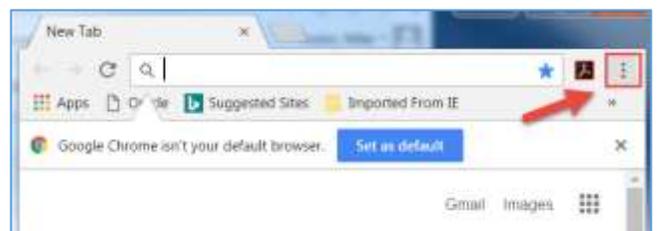
1. If you are attempting to click a document link within a smartmail using Google Chrome as your browser, and the link is not responding, add the smartportal document storage site to your Pop-up blocker exception list.
2. When the document link is clicked, and the document doesn't open as expected, you will see the Chrome pop-up blocker icon on the far right side of the address bar.
3. Click on this **Pop-up blocked** icon in the address bar, and select the option to **Always allow pop-ups from <https://www.smartviewonline.net>**.

Click the **Done** button.

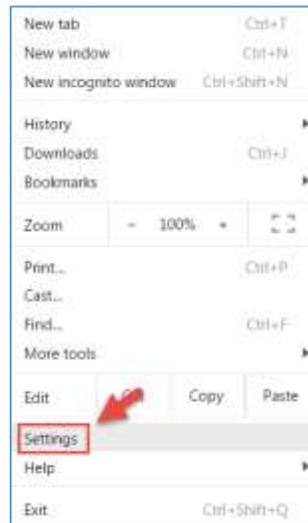
Return to the document link, click it again, and the document should open as expected.

If you do not see the Pop-up blocker icon in the address bar, follow Steps 4 – 10 to manually add this.

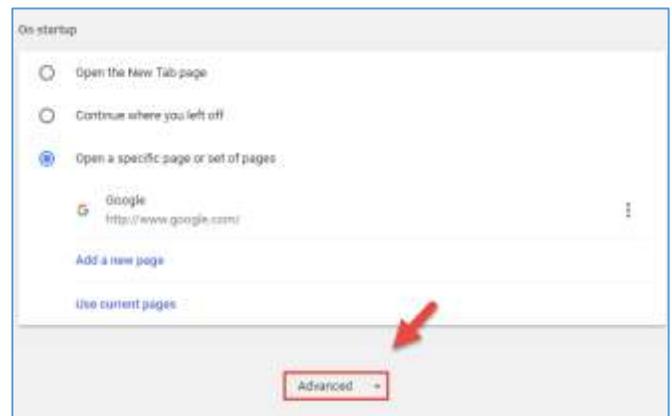
4. Open Google Chrome and click the  symbol.



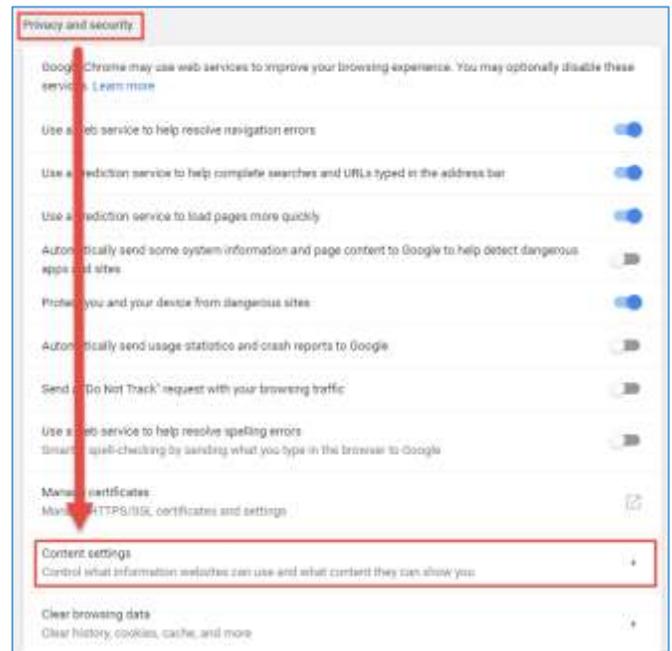
5. Choose **Settings** from the menu.



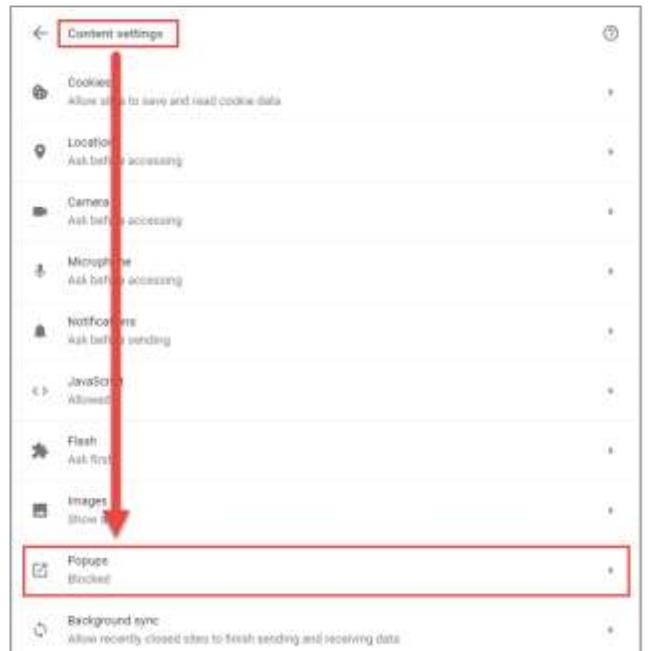
6. Scroll to the bottom and click **Show advanced settings...**



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 then 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.

[Click Here to Go Back to Table of Contents](#)

Edge Troubleshooting

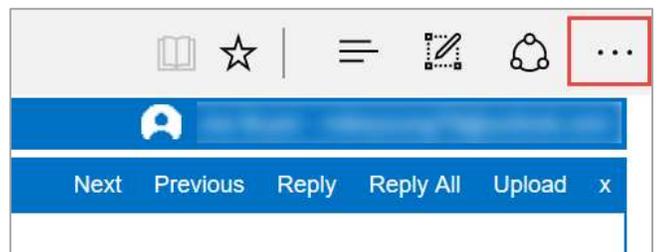
Overview: This job aid offers suggestions to resolve common issues while working in smartportal using Microsoft Edge as your internet browser.

Once Logged in to smartportal using Edge, the document links aren't responding.

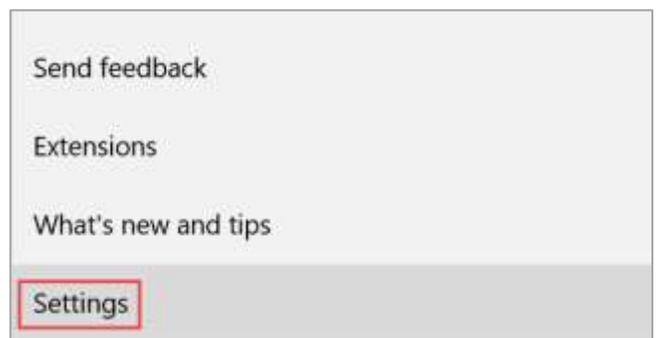
1. If you are attempting to click on a document link within a smartmail message using **Microsoft Edge** as your browser, and the link is not responding, add the smartportal document storage site to your Pop-up blocker exception list.



2. In Microsoft Edge and click the  symbol.



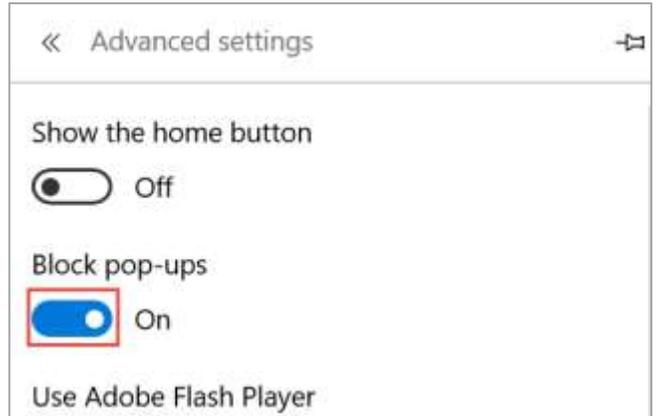
3. Choose **Settings** from the menu.



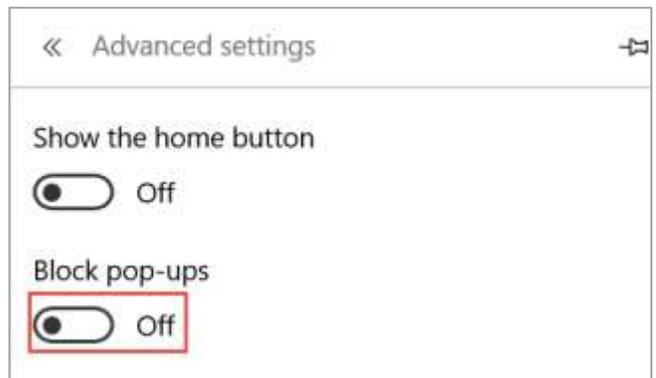
4. Scroll to the bottom and click **View Advanced Settings**.



5. In Advanced settings, in the **Block pop-ups** section, if the toggle is blue and set to **On**, click on the toggle icon.



6. The **Block pop-ups** setting will now show as **Off**, and the toggle icon will have a white background.

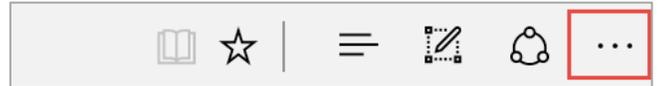


7. **Close and reopen** Microsoft Edge for the changes to take effect.

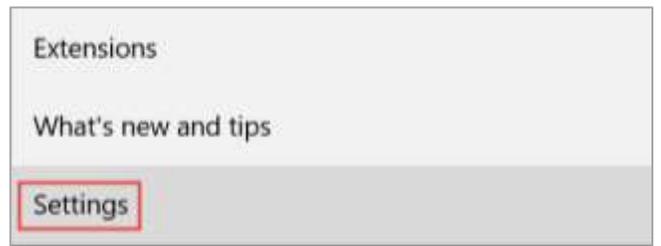
Then log back in to smartportal, and click the document links to access the documents.

Steps for clearing your cookies, cache, and temporary internet files in Microsoft Edge:

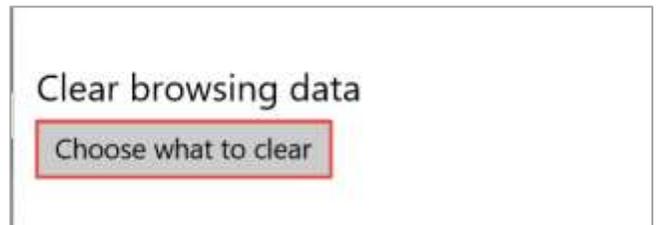
1. In Microsoft Edge and click the  symbol.



2. Choose **Settings** from the menu.



3. In the **Clear browsing data** section, click the **Choose what to clear** button.

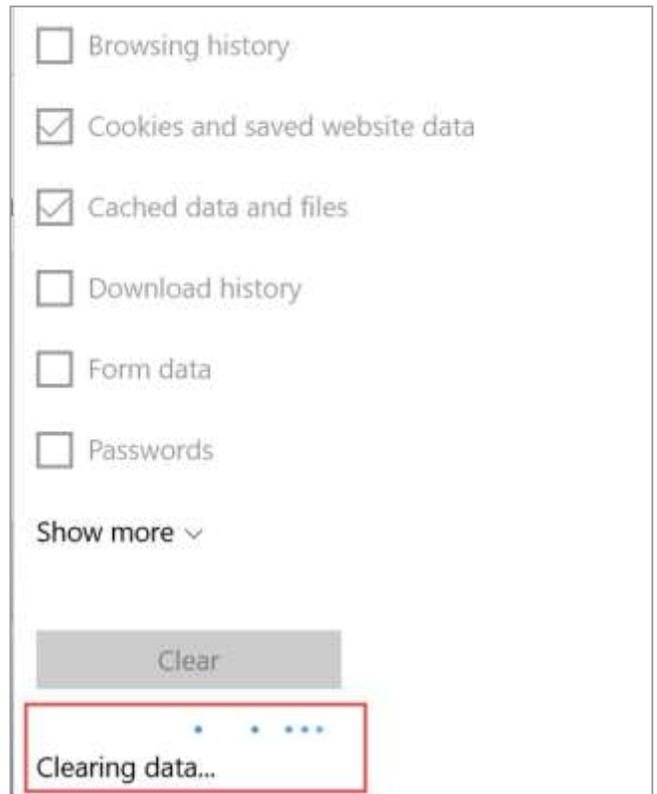


4. Be sure that the **Cookies and saved website data** and the **Cached data and files** options are selected.

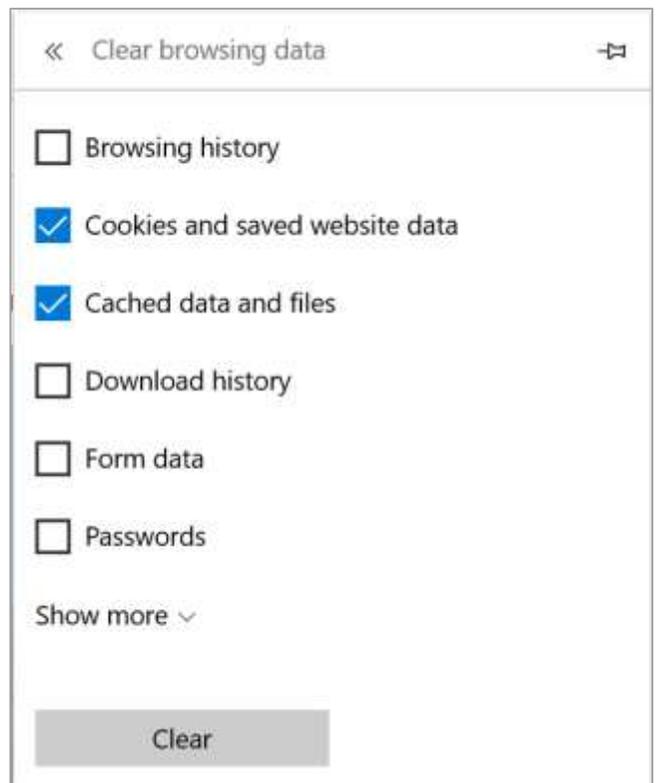
Click the **Clear** button below the checkboxes.



5. You will see the entry of **Clearing data...** along the bottom of the section as the selected items are cleared.



6. Once the section returns back to the original window, click back into the main Microsoft Edge window to close the Settings menu.



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.

[Click Here to Go Back to Table of Contents](#)

Firefox Troubleshooting

Overview: This job aid offers suggestions to resolve common issues while working in smartportal using Firefox as your internet browser.

Once Logged in to smartportal using Firefox, the document links aren't responding.

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



2. Click on the Options button on the yellow bar.



3. Select **Edit Pop-up Blocker Options...** from the menu.

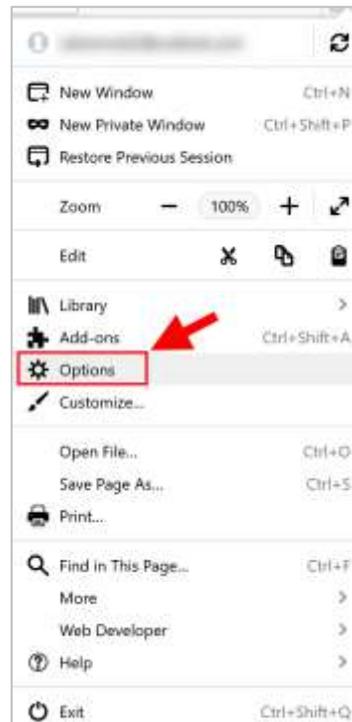


Steps for clearing your cookies, cache, and temporary internet files in Firefox:

1. Open Firefox and click the ☰ symbol.



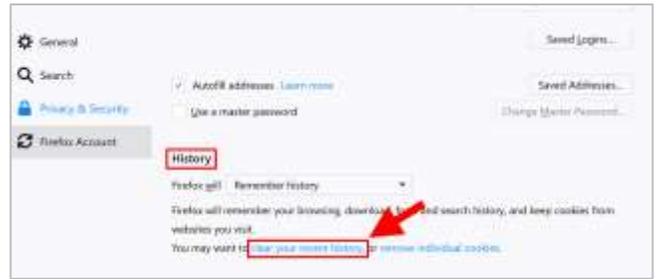
2. Choose **Options** from the menu.



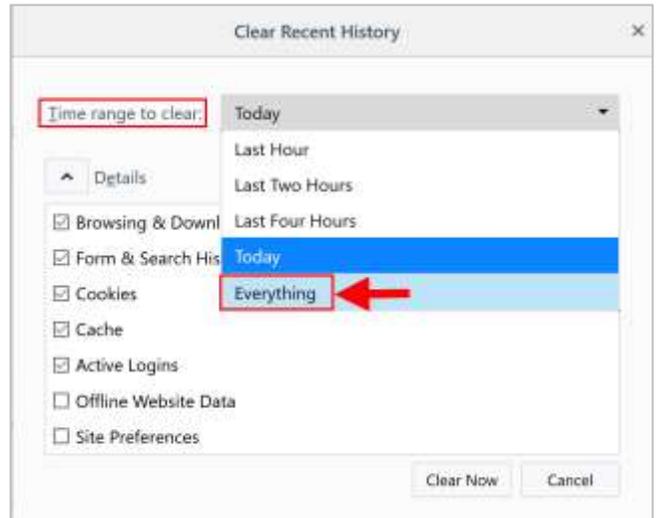
3. Click on **Privacy & Security** in the side menu.



4. Under History, click **clear your recent history**.

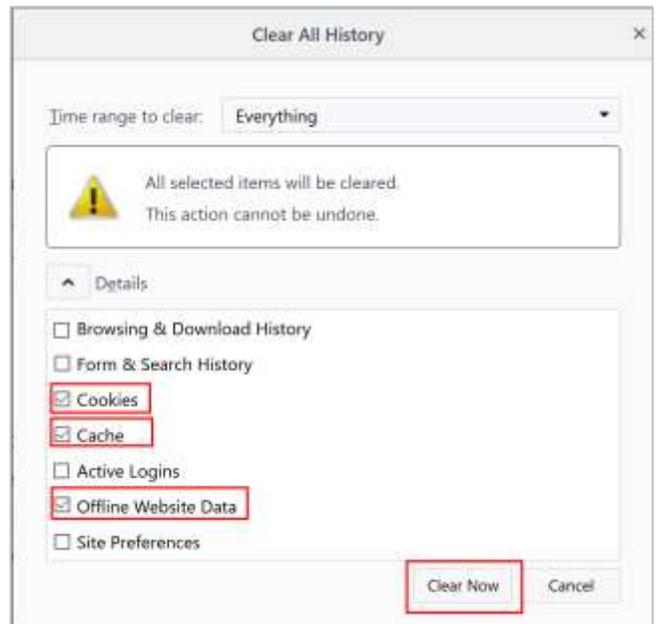


5. In the Time range to clear drop-down menu, Choose **Everything**.



6. In the Clear All History window, please be sure that the **Cookies, Cache and Offline Website Data** check boxes are checked. (Any other boxes with a checkmark can be unchecked.)

After verifying your check boxes, click the **Clear Now** button.



7. **Close and reopen** Firefox for the changes to take effect.

Then log back into smartportal to access your smartmail and any document links.



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.

[Click Here to Go Back to Table of Contents](#)

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, the document links aren't responding.

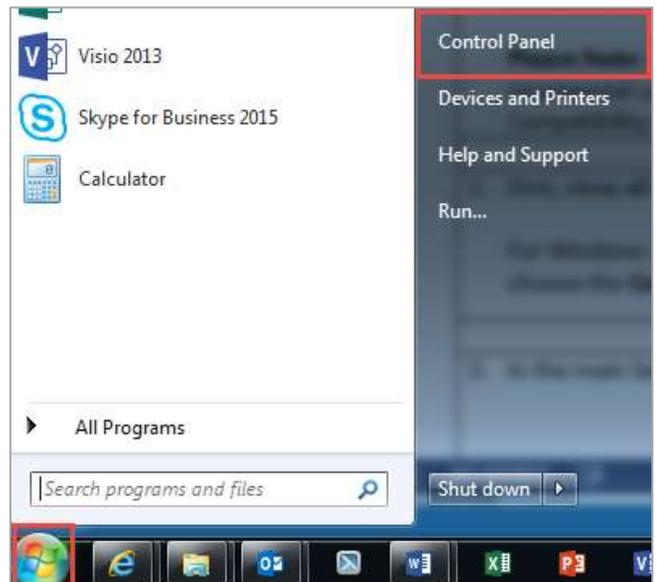
1. If you are attempting to click on a document link within a smartmail message using Internet Explorer as your browser, and the link is not responding, add the smartportal document storage site to your Pop-up blocker exception list.



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

2. First, close all open Internet Explorer windows.

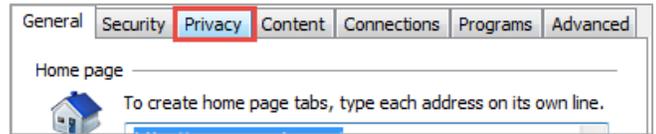
For Windows 7 Users, click the **Windows** icon , and choose the **Control Panel** option.



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



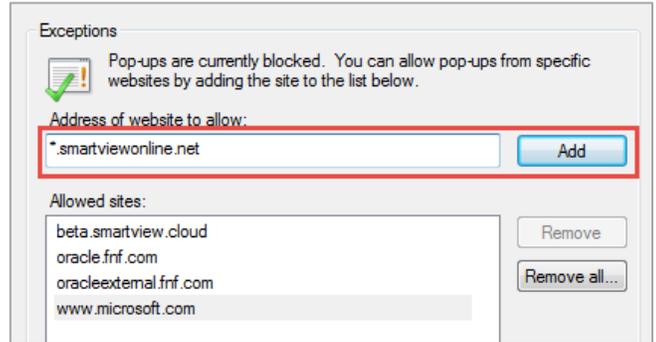
4. Select the **Privacy** tab along the top of the Internet Options window.



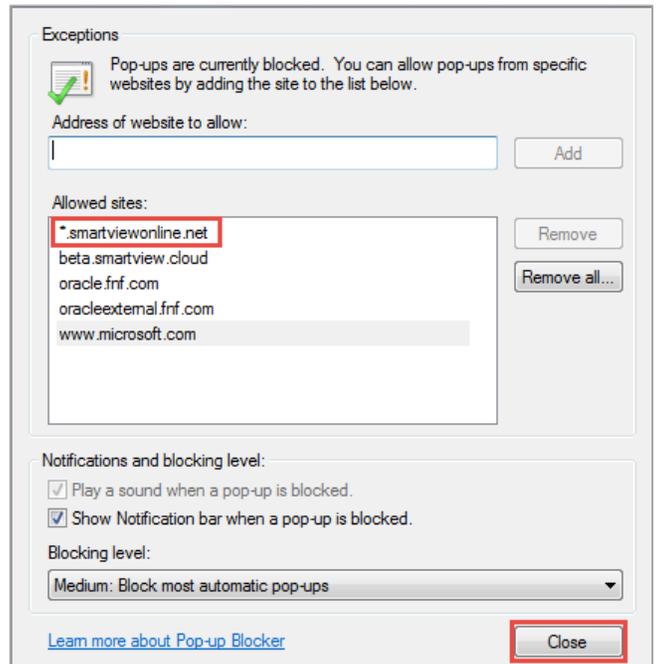
5. In the **Pop-up Blocker** section, click the **Settings** button.



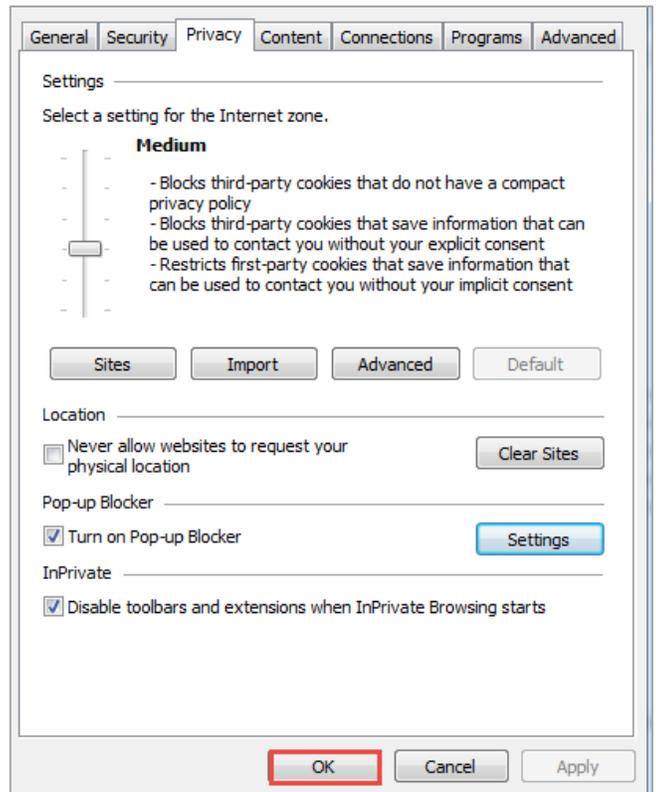
6. In the **Address of website to allow:** field, enter the entry of: ***.smartviewonline.net**, then click the **Add** button.



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. **Close and reopen** Internet Explorer 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.

[Click Here to Go Back to Table of Contents](#)

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, the document links aren't responding.

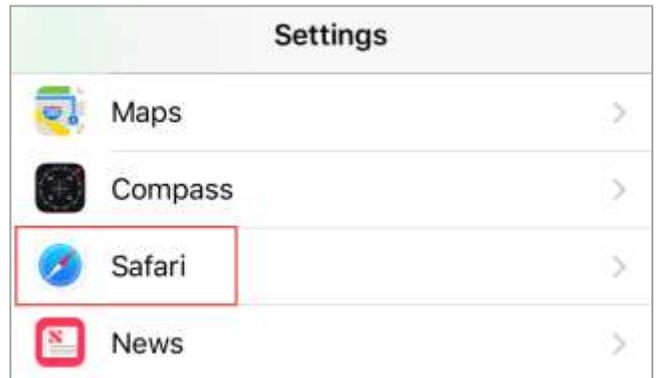
1. If you are attempting to click on a document link within a smartmail message from your iPhone/iPad, and the link is not responding, check the Block Pop-Ups setting on your device.



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.

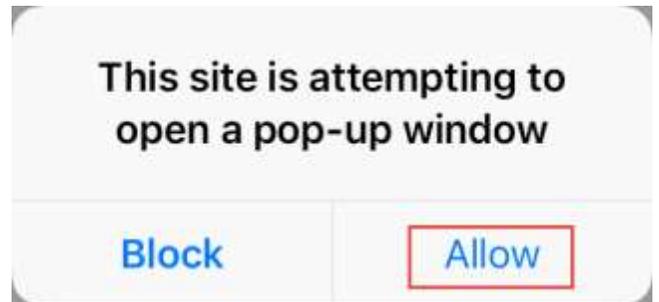
Please Note: With this setting turned off, you will now receive a prompt on your device regarding any pop-up. Turning this setting to off will NOT just allow any pop-up to open.



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.

[Click Here to Go Back to Table of Contents](#)

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, the document links aren't responding.

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



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**.



5. **Close and reopen** Safari 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.

[Click Here to Go Back to Table of Contents](#)