Novare Live enables you to quickly add a new order, update the order, send documents and communicate with your Escrow/Title Provider. Follow these steps to submit a new order request.

Account Setup

The Account Settings allows you to setup certain information (i.e., company information, role, contact information, etc.) alleviating the need to enter it on an as order basis. You can also enter/modify your email preferences and security settings.

After logging into Novare Live,

1. Click your name (upper right)

2. Select **Account Settings**

3. Enter information as needed

   〉 **My Information** tab – here you can enter your contact information and role

    > NOTE: The Contact information entered on this screen automatically populates as the Order Contact information.

    〉 **Email Preferences** tab – identifies which companies you wish to receive emails from: the default setting is set for you

    〉 **Password & Security** tab – you can update your password and security questions as needed
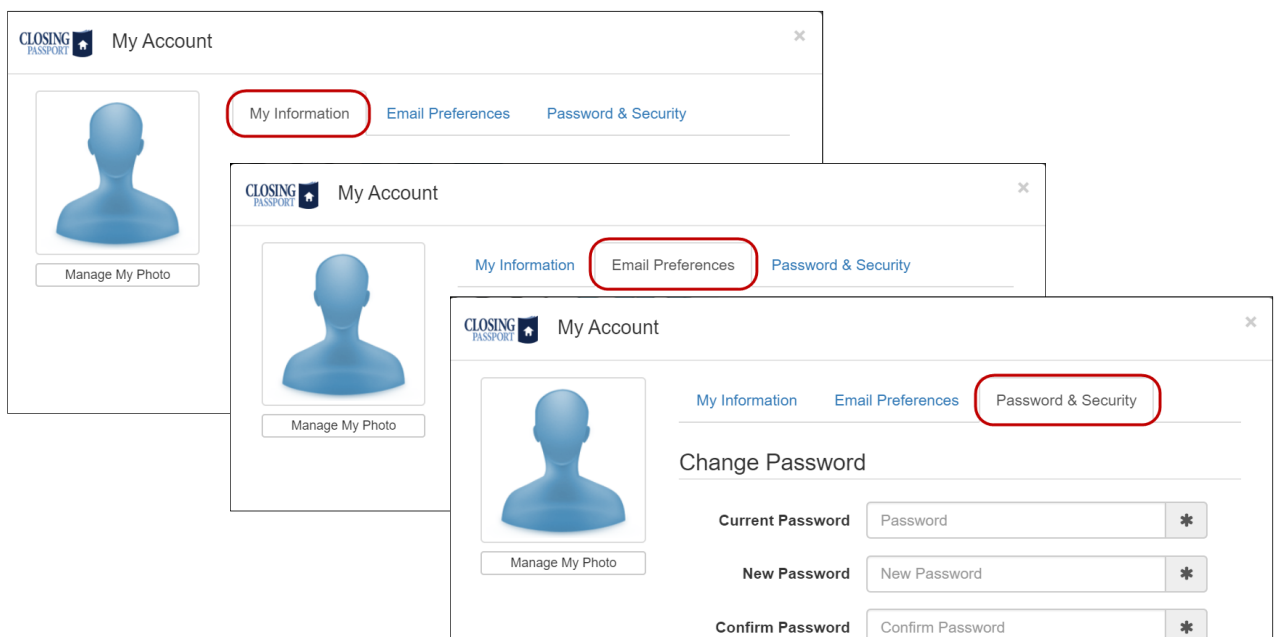
Entering a New Order

1. Log into the **Customer Portal** if not already open

2. Click the **Place Order** tab
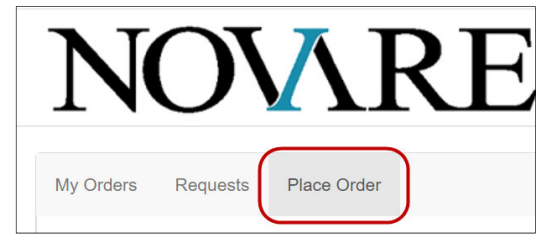
3. **Transaction Information** select from the corresponding drop-down or enter the pertinent information

> Remember: required fields are identified with a **red** asterisk

REMINDER: The **Loan Number** and **Loan Amount** are required fields when completing your order request. If the loan amount is not known enter *0.00*.

a) **Order Type** = select **Title & Escrow**

b) **Transaction Type** = select based on transaction

c) **Product Type** = select based on transaction

NOTE: Select the,
- **Refinance** – for 1st and 2nd for **straight** refinance
- **Equity / 2nd Mortgage** – for 1st and 2nd Home Equity loans (**not** HELOC)
- **Equity / HELOC** – for 1st and 2nd HELOC loans

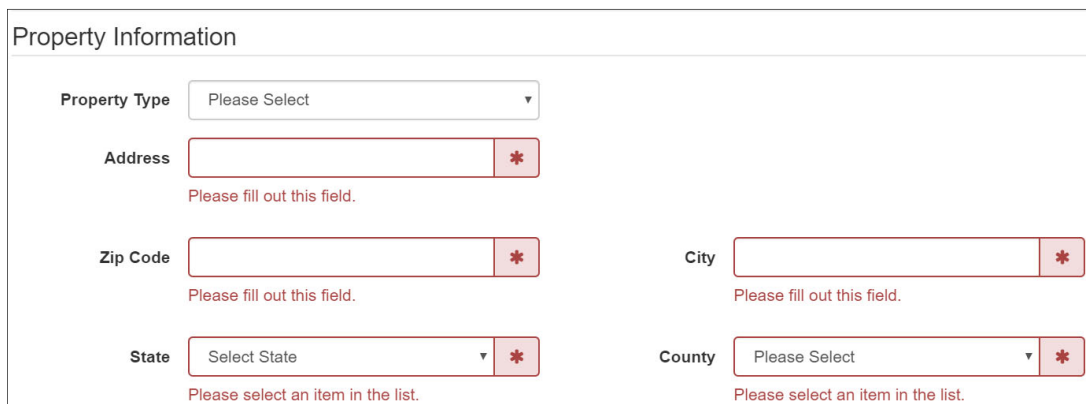**IMPORTANT:** Opening the order incorrectly, delays title document delivery up to 3 additional days.

You can scroll down the page to access each new section or click the section link to the left of the active window.
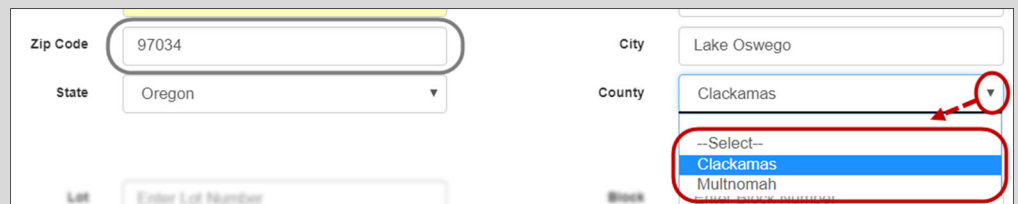

4. **Property**

   a) Select the **Property Type** from the drop-down

   b) Enter the **Address** and **Zip Code,** the **City**, **State** and **County** fields populate based on the zip code entered

> NOTE: If the **Zip Code** entered is applicable to more than one **City** or **County**, a drop-down becomes available to select the corresponding **City** or **County**.

5. **Parties**

   a) Check the applicable radio button for **Buyer/Borrower** or **Seller**

   b) From the **Party Type** drop-down, select,

   > **Joint** – two sets of name fields are active; this is the default selection

   > **Individual** – one set of name fields is active

   > **Organization** – entity name field is active

   c) Enter **Name(s)**; first and last names are required fields if individuals

Parties

Select party (buyer or seller), enter related information then click the ADD button to add the party to the form.

Joint

Party (•) Buyer/Borrower ( ) Seller   Party Type: Joint ▾

First Name: Bobby | A | Borrower | Suffix
First Name: Becky | Middle Name | Borrower | Suffix

Individual

Party (•) Buyer/Borrower ( ) Seller   Party Type: Individual ▾

First Name: Bobby | A | Borrower | Suffix

Organization

Party (•) Buyer/Borrower ( ) Seller   Party Type: Organization ▾

Organization Name: Brown Corporation

d) Contact's address

> If you wish to use the property address, check the **Use Property Address** check box

> If a different address, enter the **Address** and **Zip Code**; the **City** and **State** populate based on the zip code entered

e) Enter applicable contact information (i.e., **Phone**, **Mobile**, **Email**, **Fax**)

☑ Use Property Address

Address: 123 Main Street   Zip Code: 97034
City: Lake Oswego   State: Oregon
Phone: (215) 896-4259   Mobile:
Email: bborrower1@gmail.com   Fax:

f) Click the **Add** button to add them to grid

Once added, you can use the **Edit** or **Delete** buttons to make changes or remove the entry.

> NOTE: If you need to add additional parties to the transaction,
>
> 〉 select the **Party Type** from the drop-down and the corresponding fields become available
>
> 〉 Repeat **Steps 5a – f** above

6. **Contacts** – you are automatically added as a Contact in the grid (based on your **Account Settings** information). If you need to add additional contacts,

   a) Enter pertinent information

   b) Click the **Add** button so the new contact appears in the grid (below the fields)

7. **Payoffs** – enter as applicable; use the **Notes** field if additional information is necessary

8. **Notes and Attachments**

   a) **Notes**, enter as needed

   b) **Files**, add as needed

      i. click the **Choose Files** button

      ii. locate the file you wish to attach

      iii. double-click (or press the **Open** button) to select
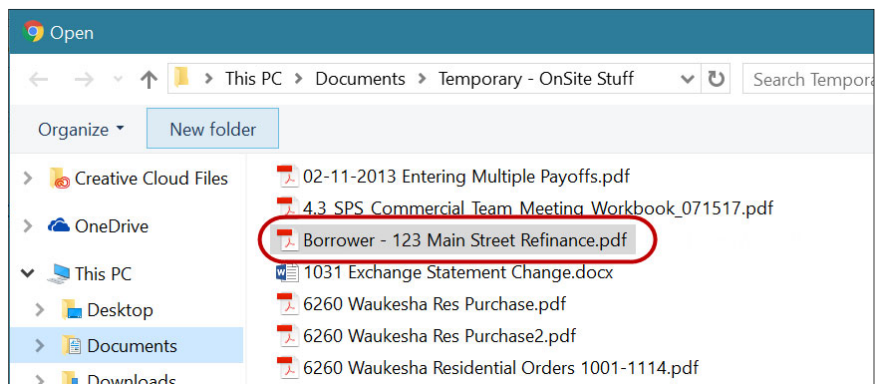
NOTE: If any **required** information is missing, the message *Please fill out all required fields* appears next to the **Cancel/Submit Order** buttons. The **Submit Order** button remains inactive until all required information is entered.

9. Click the **Submit Order** button

The **Order Confirmation** window shows your confirmation number.

> NOTE: Your final order number will be the property state abbreviation plus the confirmation number (i.e., TX19000123).

10. Click the **Continue** button to return to the dashboard

11. To view the new order, click the **Requests** tab

Viewing Existing Orders

Novare Live automatically updates once the order is opened and accepted by the Escrow/Title Provider. Views are permission based.

To view the order progress,

1. Click the order to open

Your order automatically updates based on information entered by the Escrow/Title Provider.

Information sent to the Escrow/Title Provider

Information received from the Escrow/Title Provider

⟩ **Messages** tab – incoming/outgoing messages are displayed here

» Click the **New Message** button to create a new message

» Secure messages can be sent/received from the Escrow/Title Provider only

» Documents can be attached to the message

⟩ **Tasks** tab – view the status of items entered

Messages	Tasks	Contacts	Documents	
Task Name		**Status**	**Requested**	**Completed**
02. Commitment Delivered to Client		Completed	—	11/27/2017
04. Clear to Close		Required	—	—
05f. Payoff Demands Delivered		None	—	—

⟩ **Contacts** tab – identifies the contacts associated with the order (i.e., Lender, Title Company)

	Messages	Tasks	Contacts	Documents		
		Name		**Phone**	**Main Contact**	
▶	L	ABC Mortgage CWP Test		1_____	Test User CWP	
◢	A	Bedrock Title and Escrow Company		(831)555-5555	Emily Escrow	
		First Name	**Last Name**	**Phone**	**Email**	
		Emily	Escrow	—	stacey.barker@fnf.com	
		Bedrock Title and Escrow Company	—	(831)555-5555	smrstoll@comcast.net	

NOTE: Click the **Expand** ▣ icon next to the **Name** field to view specific contact name and their associated contact information.

⟩ **Documents** tab – displays documents sent by the Escrow/Title Provider; you may view or download

Messages	Tasks	Contacts	Documents		
		Name			**Document**
PDF		ALTA Commitment 6-17-06.pdf		View	Download
PDF		deed of trust.pdf		View	Download