

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**

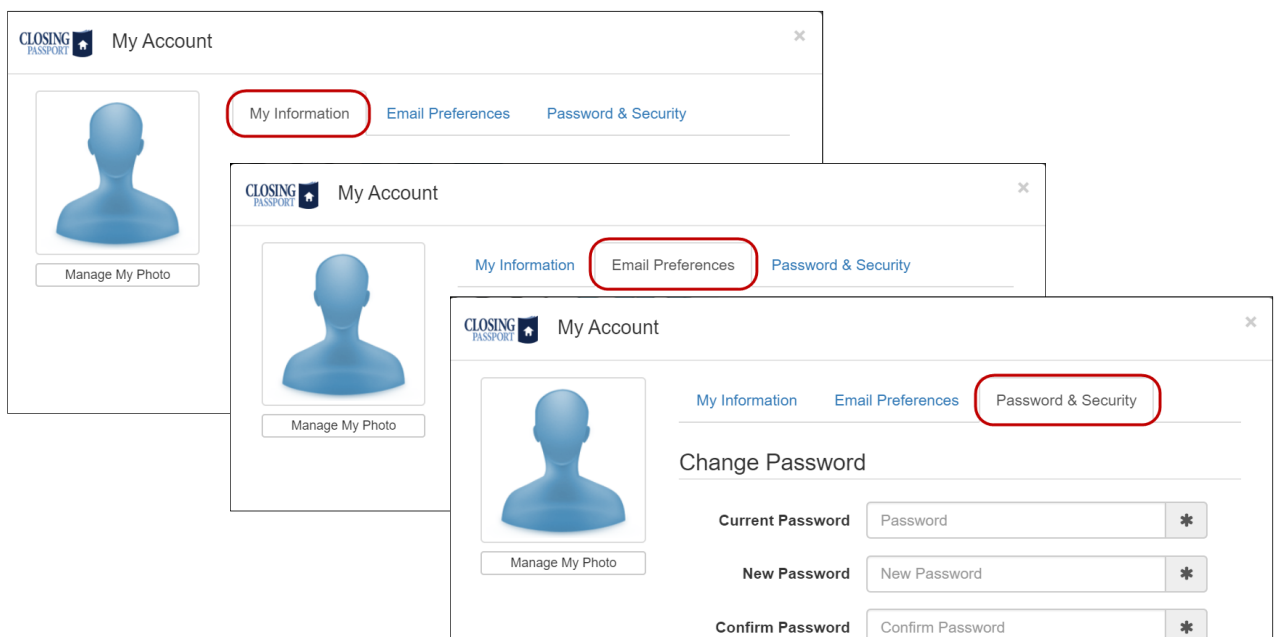


3. Enter information as needed

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

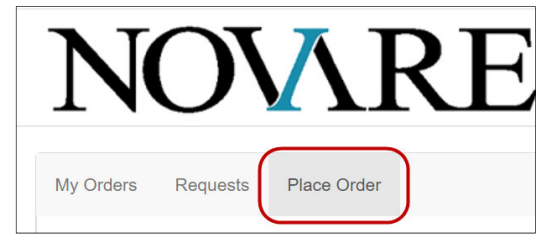
NOTE: The Contact information entered on this screen automatically populates as the Order Contact information.

- › **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

Transaction Information

Remember: required fields are identified with a red asterisk *

* — Denotes a required field

Provider	Novare National Settlement Serv	Transaction Type	Select Transaction Type
Office	Novare National Settlement Serv	Loan Number	
Order Type	Select Order Type	Product Type	Select Product Type
Sales Price	\$	Est. Settlement Date	
Loan Amount	\$	Marketing Rep	
Your Role	Select Your Role		

Please select an item in the list.

Please fill out this field.

Please select an item in the list.

Please fill out this field.

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.

Order Type

Select Order Type

Select Order Type

Title & Escrow

Transaction Type

Select Transaction Type

Select Transaction Type

Purchase

Refinance

Equity

Product Type

Select Product Type

Select Product Type

Sale/ Re-Sale

Refinance

Equity / 2nd Mortgage

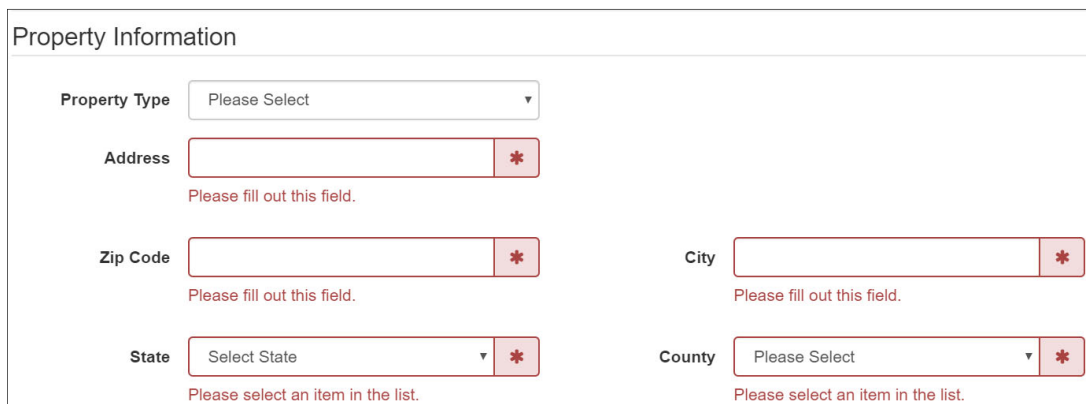
Equity / HELOC

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

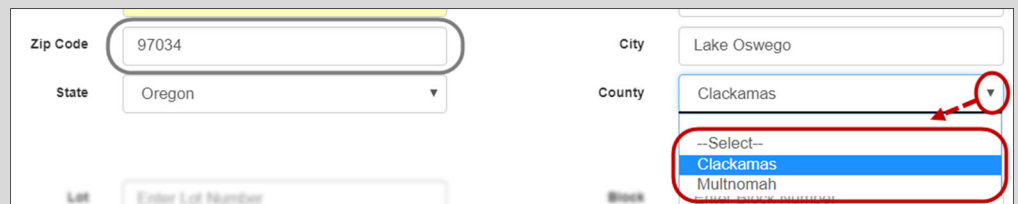


4. Property

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

- Check the applicable radio button for **Buyer/Borrower** or **Seller**
- 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
- Enter **Name(s)**; first and last names are required fields if individuals

Joint

Parties

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

Party ☒ Buyer/Borrower ☐ Seller Party Type **b** Joint

c First Name Bobby A Borrower Suffix

First Name Becky Middle Name Borrower Suffix

Individual

Party ☒ Buyer/Borrower ☐ Seller Party Type **b** Individual

c First Name Bobby A Borrower Suffix

Organization

Party ☒ Buyer/Borrower ☐ Seller Party Type **b** Organization

c 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)

d ☒ Use Property Address

e 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

Type	Name(s)	Address	Phone	Email	Edit	Delete
Buyer/Borrower	Bobby Borrower, Becky Borrower	123 Main Street, Lake Oswego, OR, 97034	(111) 222-3333		Edit	Delete

Add

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

Select Party Type, enter First and Last name for each party then click the ADD button to add the party to the form.

Party Type ☒ Buyer/Borrower ☐ Seller

Buyer/Borrower

Type	Name(s)	Address	Phone(s)
Buyer/Borrower	Bobby A Borrower Becky Borrower	123 Main Street Lake Oswego, OR 97034	It (111) 222-3333

--Select--
--Select--
Joint
Individual
Organization

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)

Contacts

You have been added as a Contact for the order in the grid below. If you need to add more contacts, select a Contact Type, complete the contact form then click the ADD button to add the contact to the order form.

Type	Name(s)	Address	Phone(s)	Email
Lender	ABC Mortgage CWP Test Test User CWP	123 Abc Raleigh, NC 27601	w: (1__) ____	testcwp@abcmort...

Company

First Name

Address

City

Work Phone

Fax

Contact Type

Last Name

Zip Code

State

Mobile Phone

Email

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

Payoffs

To request a payoff demand, enter the existing loan information. Use the Comments section to provide additional payoff information if needed.

Lender Name	First Lender Name	Loan Number	First Loan Number	Loan Amount	First Loan Amount
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8. **Notes and Attachments**

- a) **Notes**, enter as needed

Notes and Attachments

Notes

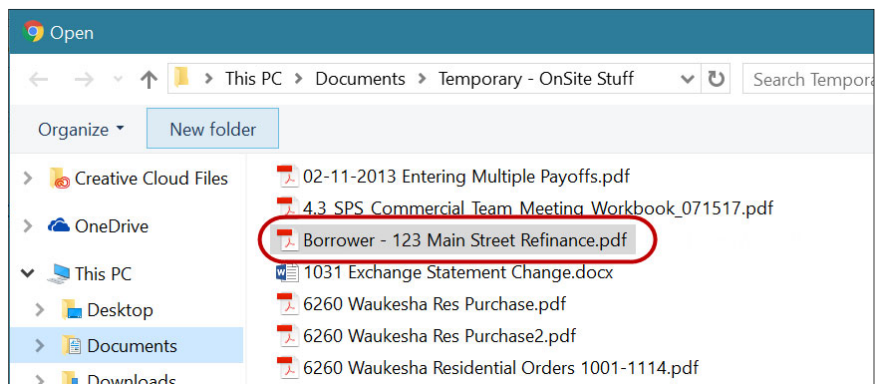
Enter notes here

Files

Choose Files No file chosen

- b) **Files**, add as needed

- click the **Choose Files** button
- locate the file you wish to attach
- 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.

Please fill out all required fields.

Cancel
Submit Order

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).

- Click the **Continue** button to return to the dashboard

Order Confirmation
×

Thank you

Your order has been submitted. An email receipt will be delivered to michelle.leonard@softprocorp.com.

Your confirmation number is: **19000123**

Continue

- To view the new order, click the **Requests** tab

My Orders

Requests

Place Order

Find Order Requests

	Loan ...	Conf...	Related ...	Requ...	Property Address	Trans....	Status	Buyer/Borrower
★	123456	19000003	[CA19000003]	12/10/2019	1 Main Street	Purchase	Active	Andrienna Rosales
★	123456789	19000002	[CA19000002]	12/09/2019	1 main street	Purchase	Active	buyer one

Viewing Existing Orders

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

My Orders

Place Order
Recent Orders:

CWP346

CWP342RLC

CWP343RLC

1114CWPTTest1

1114CWPTTest3

1114CWPLWC3

Find Orders:

Order No.	Property Address	Trans....	Status	Buyer Name
2017110338	789 Any Street	Refinance	InProcess	—
2017110348	123 Main Street	Refinance	InProcess	Bobby A Borrower and Becky Borrower
CWP340A	567 Orange Street	Purchase	InProcess	Wally Wonka

To view the order progress,

- 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

My Orders Place Order Recent Orders: 2017110348 CWP346 CWP342RLC CWP343RLC 1

Order #2017110348 — 123 Main Street, Lake Oswego, OR 97034

Transaction Type	Refinance
Order Status	InProcess
Order Date	11/27/2017
Settlement Date	—
Settlement Time	—
Buyer(s)/Borrower(s)	Bobby A Borrower and Becky Borrower
Seller(s)	—
Closer	—
Disbursement Date	—

Information received from the Escrow/Title Provider

My Orders Place Order Recent Orders: 2017110348 CWP346

Order #2017110348 — 123 Main Street, Lake

Transaction Type	Refinance
Order Status	InProcess
Order Date	11/27/2017
Settlement Date	12/07/2017
Settlement Time	12:00 AM
Buyer(s)/Borrower(s)	Bobby A Borrower and Becky Borrower
Seller(s)	—
Closer	Emily Escrow
Disbursement Date	12/12/2017

› Messages tab – incoming/outgoing messages are displayed here

Messages Tasks Contacts Documents

New Message

Subject	Message	Created By	Date
need updated commitment	Please update the commitment with new effective date	testcwp@abcmortgage....	11/09/2017
Hello there	This is a new message	Fidelity National Title Group	11/09/2017

- » 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

Messages - Order No. 2017110348

New Message

From: Testcwp@abcmortgage.com To: Fidelity National Title Group Attachments: Select files...

Subject:

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	
▶ 	ABC Mortgage CWP Test	1_____	Test User CWP	
 	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	
	ALTA Commitment 6-17-06.pdf	View	Download
	deed of trust.pdf	View	Download