

## Using the Novare Live Integration

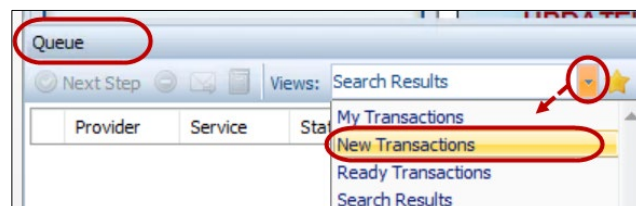
Novare Live enables the Client to submit an order request, update an order, send documents and communicate with you. Follow the steps in the applicable section to utilize the Novare Live integration.

- › [Accepting and Opening the Initial Order | Page 1](#)
- › [Receiving a Message | Page 5](#)
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**NOTE:** You can skip to page 11 if your document is already set up to be shared in the Novare Live template (i.e., LNR).

### Accepting and Opening the Initial Order

- From the **360** ribbon, click the **Queue** button
- Click the **Queue** tab (at the bottom of your screen)
- From the **Views** drop-down, select **New Transactions**



NOTE: Use the column headers to sort your transactions (i.e., sorting **Created On** in ascending order brings the oldest transaction to the top).

Queue							
Next Step		Views: New Transactions		Filter: All Providers			
Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	
SoftPro	Live	New			SoftPro Live	10/1/2019 4:29 PM	
SoftPro	Live	New			SoftPro Live	10/1/2019 4:34 PM	
SoftPro	Live	New			SoftPro Live	10/4/2019 11:53 AM	

- Highlight the transaction you wish to work on
- Click the **Next Step** button


Queue

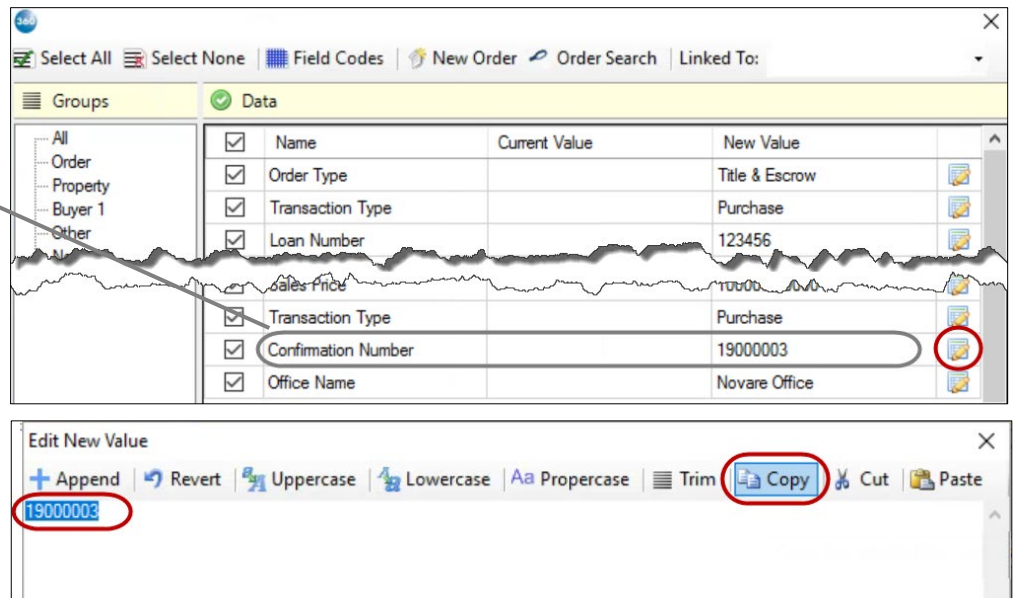
Next Step

</

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The **Review** window opens showing the order data.

6. Locate the **Confirmation Number** entry
7. Click the **Edit**  icon
8. Highlight the number
9. Click the **Copy** button (or press **Ctrl + C** to copy to your clipboard)
10. Click the **Close** button
11. Click the **New Order** button



The Review window displays order data. The Confirmation Number field is highlighted. The Edit icon is circled. Below it, the Edit New Value window shows the Confirmation Number field with the value 19000003 highlighted, and the Copy button is circled.

From the **New Order** window,

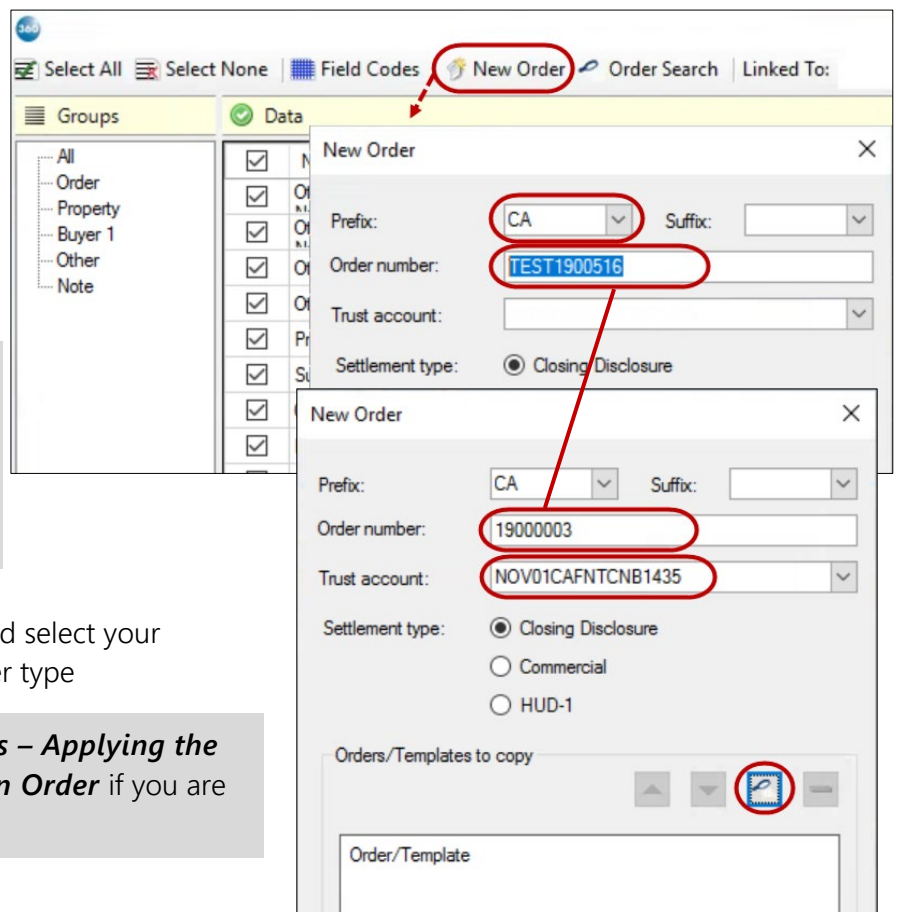
12. From the **Prefix** drop-down, select the corresponding state
13. Place your cursor in the **Order number** field; press **Ctrl + V** to paste the number from **Steps 8-9**
14. From the **Trust account** drop-down, select the account

NOTE: Refer to the job aid, **Reference Guide – Guide to Selecting the Correct Speed Code/Trust Account** if you are unsure which **Trust account** to

15. Click the **Search** button to search for and select your template(s) based on the state and order type

NOTE: Refer to the job aid, **Templates – Applying the Correct Template when Opening an Order** if you are unsure which **Trust account** to select.

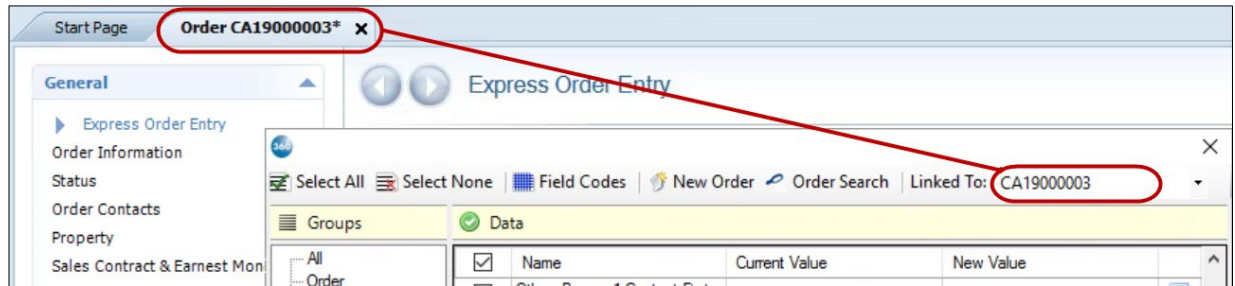
16. Click the **OK** button to generate the order



The New Order window shows the Prefix set to CA, the Order number set to TEST1900516, and the Trust account set to NOV01CAFNTCNB1435. The Search button is circled.

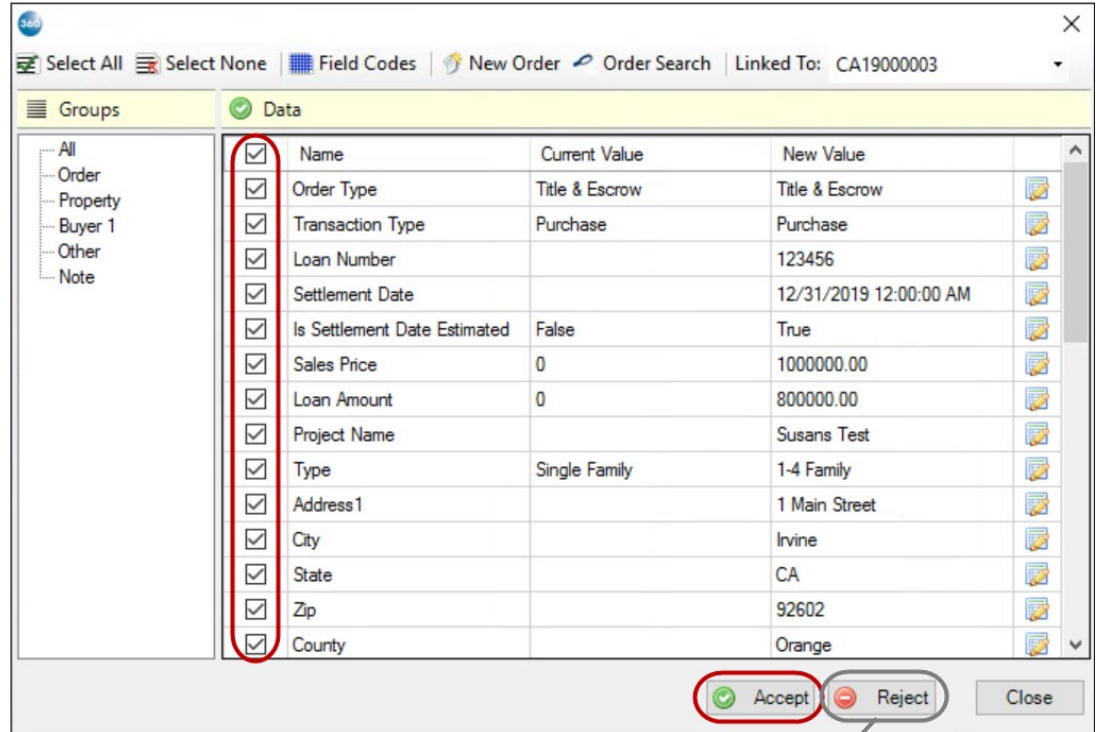
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Your new order opens in the background and is now linked to the Client's order.



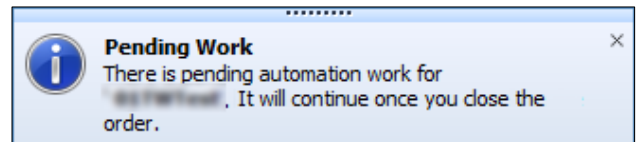
With the **Review** window still open,

17. Verify data you wish to pull into your order
18. Uncheck the check box(es) for data you do not wish to import
19. Click the **Accept** button to apply the incoming order details and publish any documents to smartview

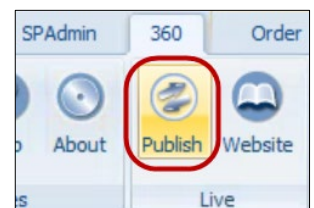


NOTE: The **Reject** button prohibits the ability to create a new order and prompts you to enter a reason for the cancellation. A message is sent to the client citing the reason entered.

You may see the **Pending Work** message display in the lower right corner. The message states: **There is pending automation work for 'your order number'. It will continue once you close the order.**



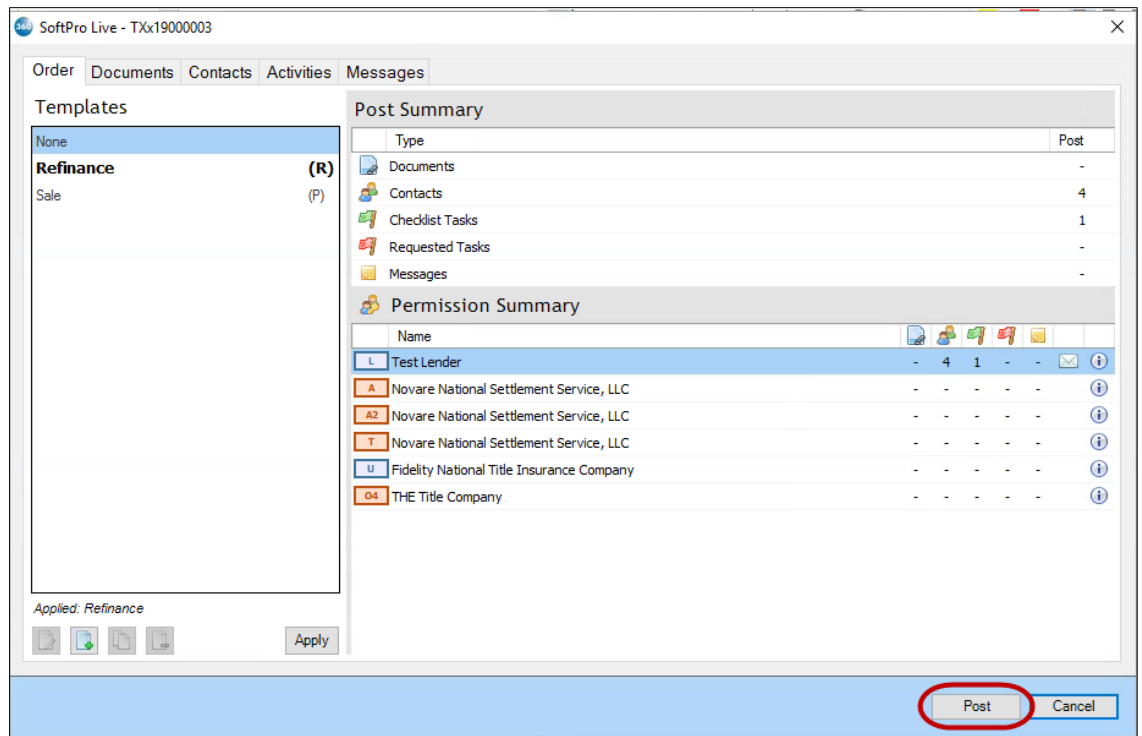
20. **Save** your order
21. From the **360** ribbon, click the **Publish** button



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22. Click the **Post** button

**IMPORTANT:** You must **Publish** and **Post** to update the status in Novare Live. This is also required when sending updates or any communication back to the client.



23. **Save** and **Exit** the order; you **must** exit the order for the automation process to continue

When the automation process completes,

- › **Order Notes** is updated with a **Note** identifying the order information

Order Notes

Data Source: SP Live

All (1) Integration (1) Title (0) Closing (0)

Type	Linked From	Created	Last Modified	Note	Category
		12/11/2019 ...	Susan River...	Provider Name: Novare National Settlement Service UAT Submitter's Role: Other Created By: Andrienna.Rosales@fnf.com Loan Number: 123456 Loan Amount: 800000.0000 Sales Price: 1000000.0000 Transaction Type: Purchase Confirmation Number: 19000003 Office Name: Novare Office	Integration

- › If imported, documents are accessible via the corresponding smartview order

<input type="checkbox"/>	Loan Documents
<input type="checkbox"/>	Separator Sheets
<input checked="" type="checkbox"/>	Borrower - 123 Main Street Refinance.pdf.pdf v1 !NEW

## Using the Novare Live Integration

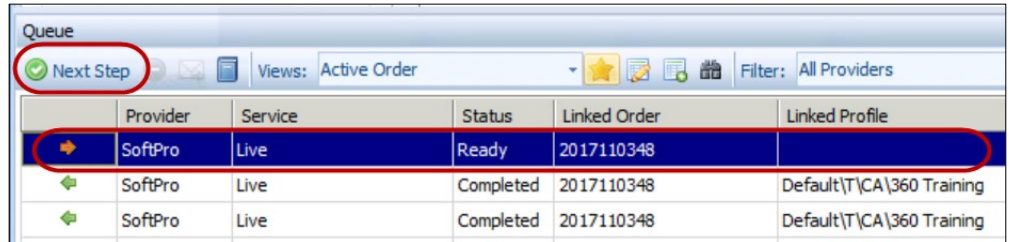
### Receiving/Sending Messages on Existing Orders




You and the Client can send messages and documents via Novare Live on existing orders.

#### Receiving a Message

When the Client sends a message via Novare Live, it appears in your **Active Orders Queue** as a new item with a **Status** of **Ready**. To view the message,

1. Highlight the entry in the grid
2. Click the **Next Steps** button

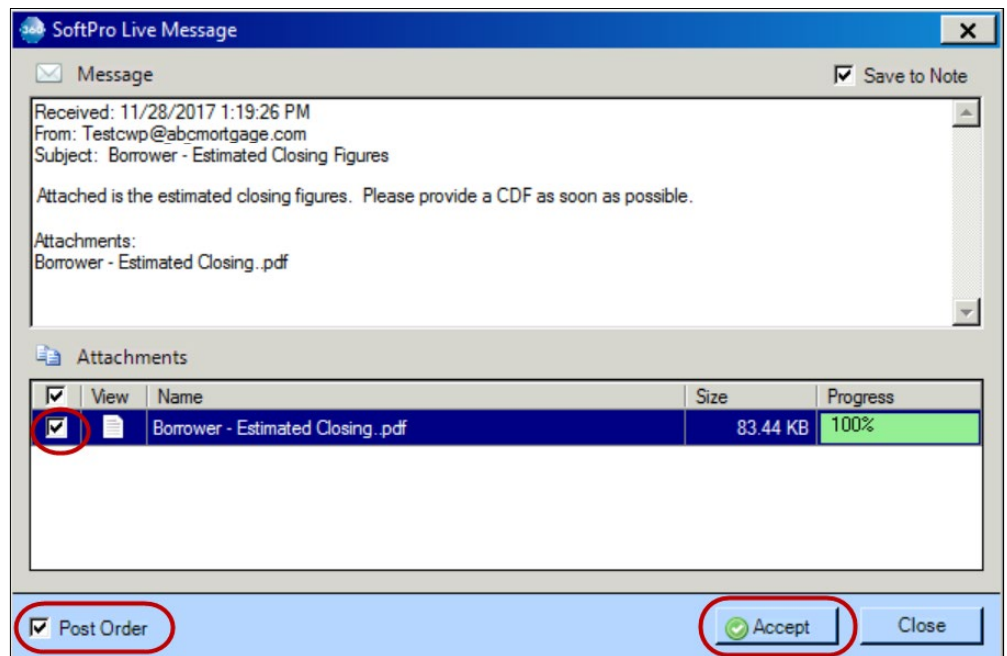


	Provider	Service	Status	Linked Order	Linked Profile
	SoftPro	Live	Ready	2017110348	
	SoftPro	Live	Completed	2017110348	Default\T\CA\360 Training
	SoftPro	Live	Completed	2017110348	Default\T\CA\360 Training

The **Novare Live Message** window is displayed with the message and list of documents, if applicable.

To publish any attached documents to smartview,

3. Verify the **Attachment** check box is checked
4. Check the **Post Order** check box if you intend to send another message back to the Client
5. Click the **Accept** button
6. When prompted, click the **Post** button




**SoftPro Live Message**

☒ Message
 ☒ Save to Note

Received: 11/28/2017 1:19:26 PM  
 From: Testcwp@abcmortgage.com  
 Subject: Borrower - Estimated Closing Figures  
 Attached is the estimated closing figures. Please provide a CDF as soon as possible.  
 Attachments:  
 Borrower - Estimated Closing .pdf

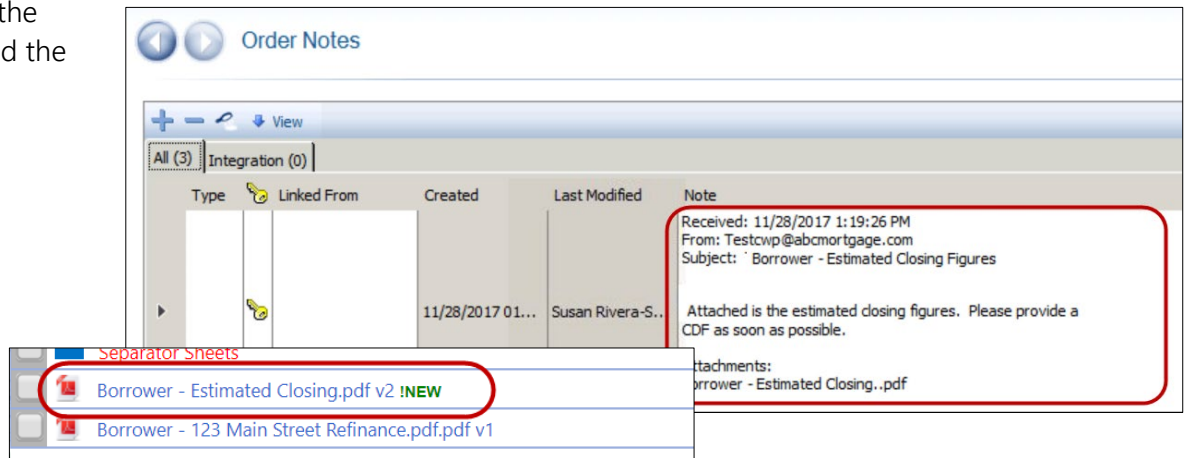
**Attachments**

<input checked="" type="checkbox"/>	View	Name	Size	Progress
<input checked="" type="checkbox"/>		Borrower - Estimated Closing .pdf	83.44 KB	100%

☒ Post Order

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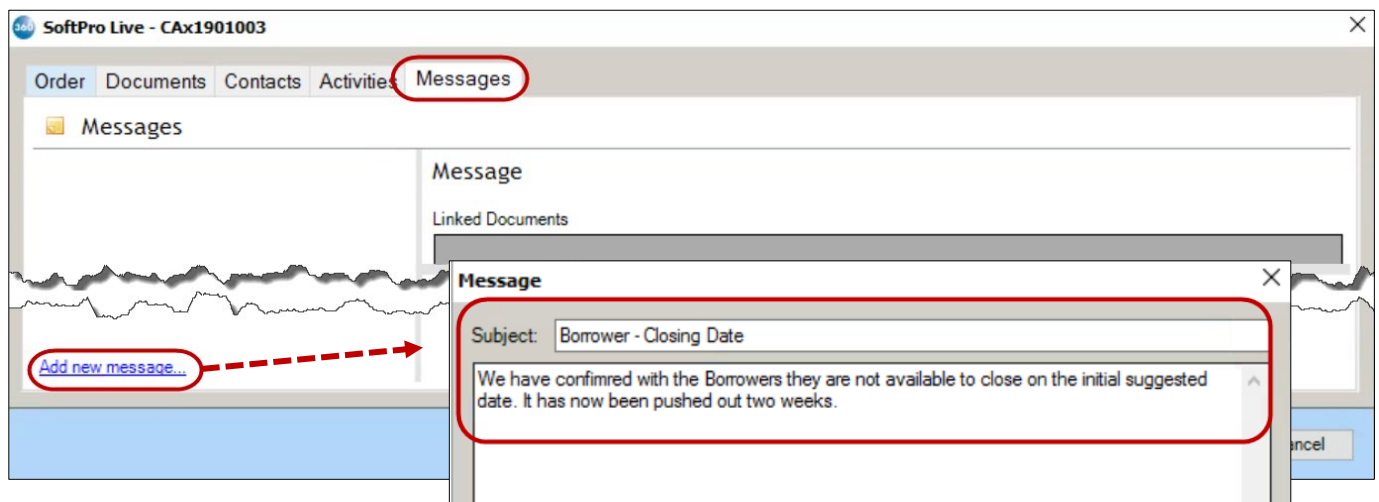
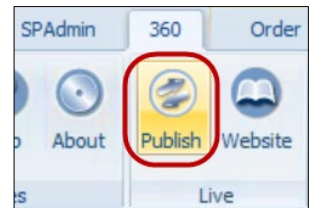
The message writes to the **Order Notes** screen and the documents publish to smartview.



### Sending a Message

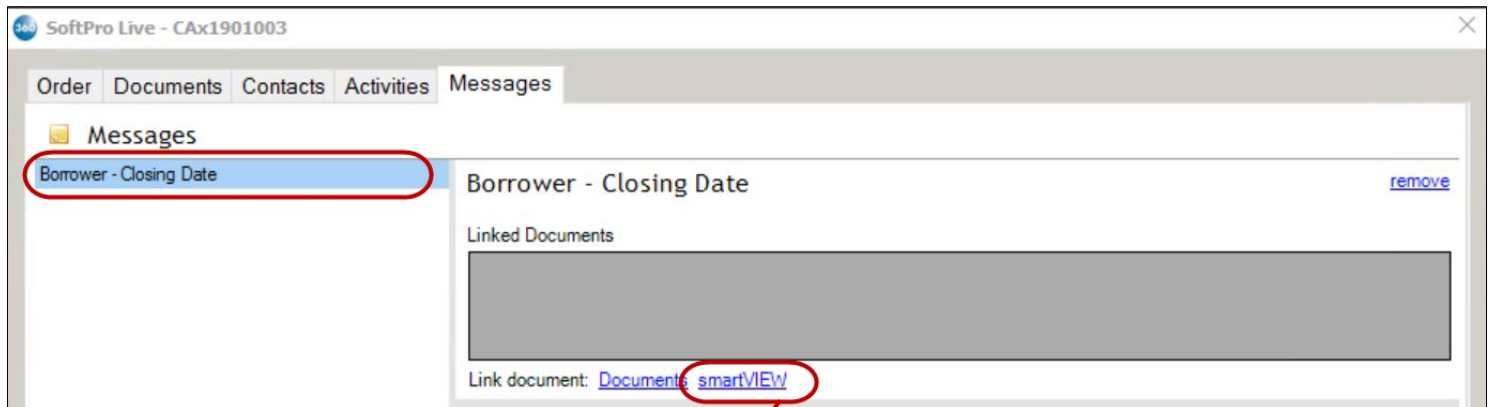
To send a message to the Client via Novare Live, with the order open,

1. From the **360** ribbon, click the **Publish** button
2. Click the **Messages** tab
3. Click the **Add new message** link (lower left corner)
4. In the **Message** window, enter the **Subject** and your message
5. Click the **OK** button



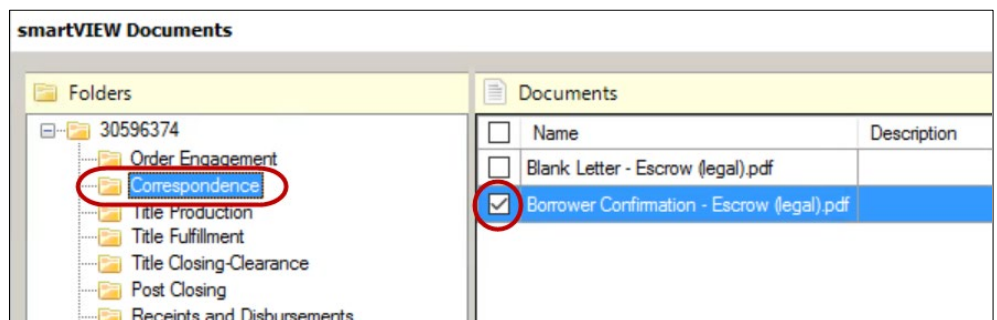
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The new message appears in the **Messages** column.



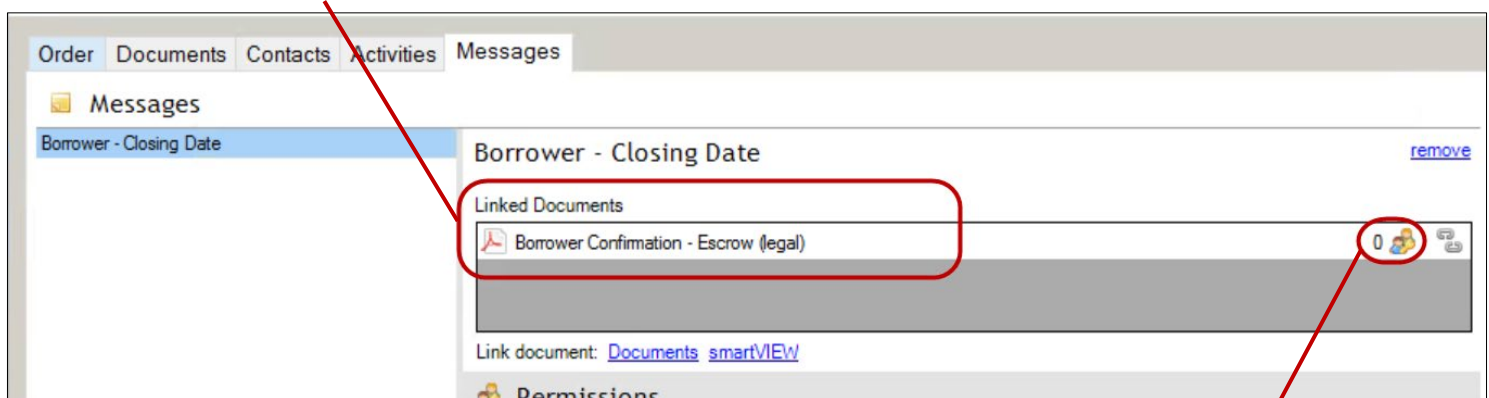
If you wish to include a document with your message,

6. Click the **smartview** link to open the **smartview Documents** window
7. Expand the folder where the document is housed
8. Check the check box for the document(s) you wish to make available




9. Click the **OK** button

The linked document appears to the right.




The recipient of the document(s) must be granted permission to view the document. As indicated by the

**Permissions**  icon, no recipients have permissions. Once permissions are granted, this indicates the number of parties with permission.

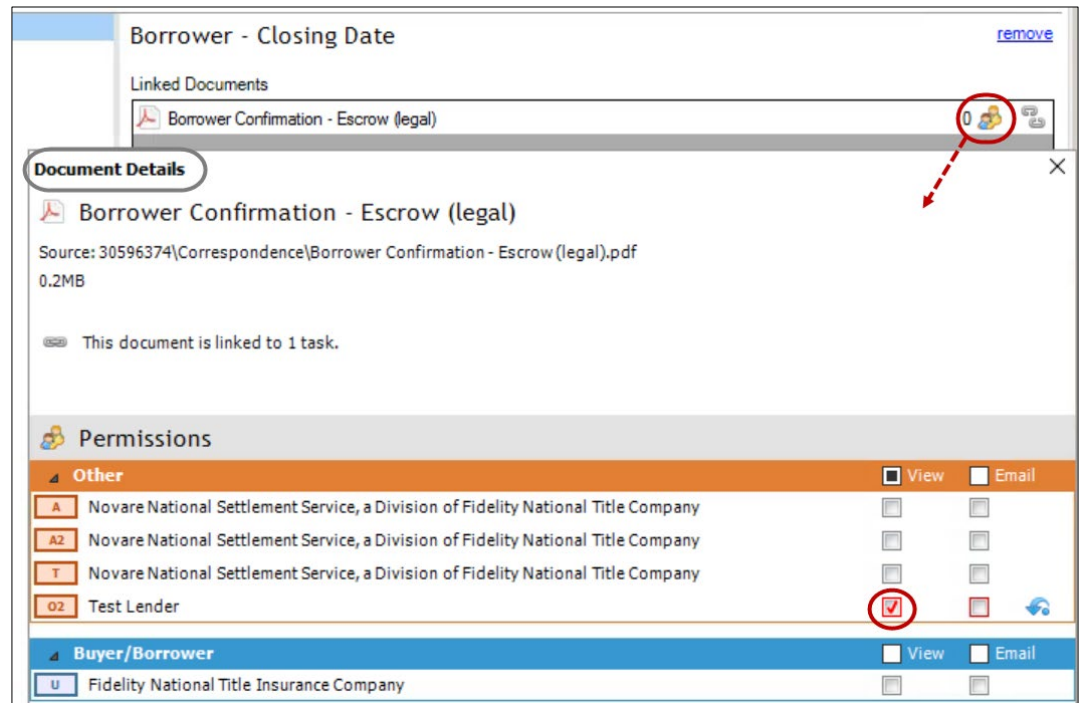
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- Click the **Permissions**

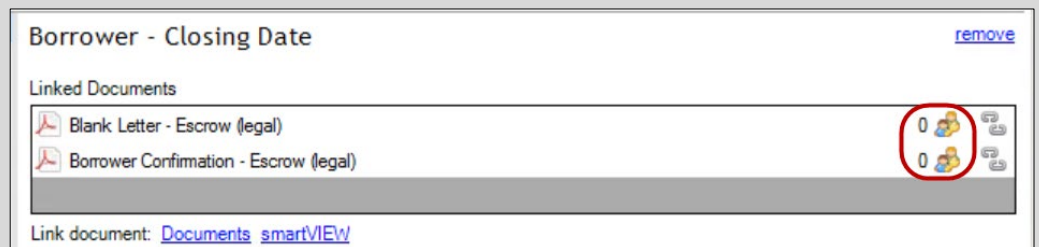
 icon (to the right of the linked document)

- From the **Document Details** window, check the **View** check box for the party you wish to give permission

- Click the **Close** button



**IMPORTANT:** Viewing permissions are granted on an individual document basis. You **must** click the **Permissions**  icon to grant permission for **each** linked document when sending with a message.



The **Messages** window now shows the number of recipients granted permission to view the linked document.



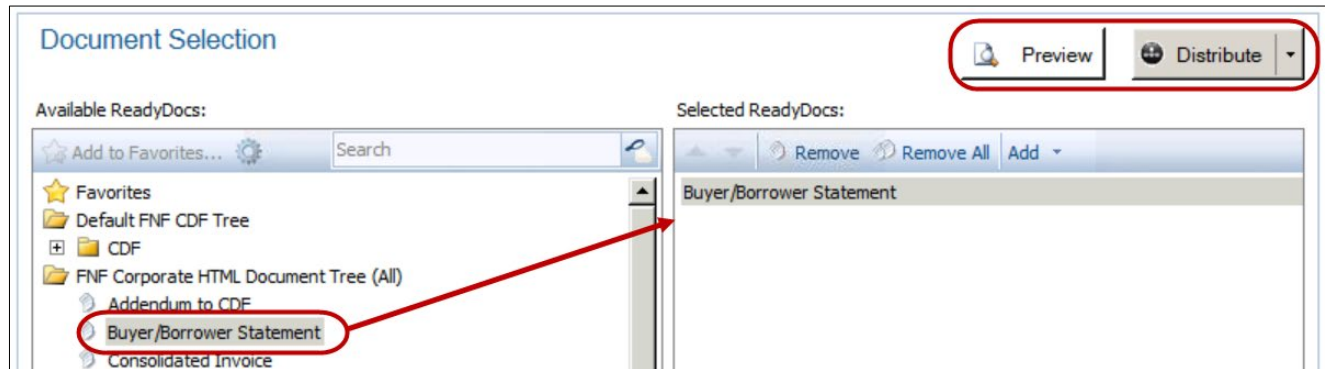
- Click the **Post** button

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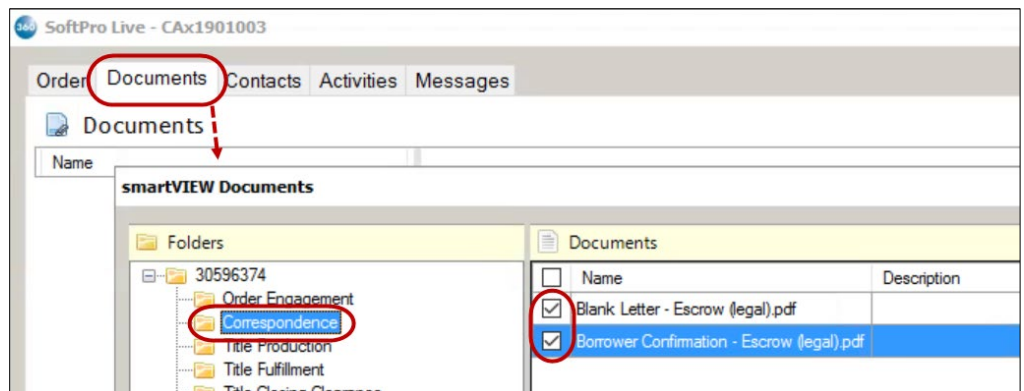
### Making Documents Available to the Client

With your SoftPro Select order open,

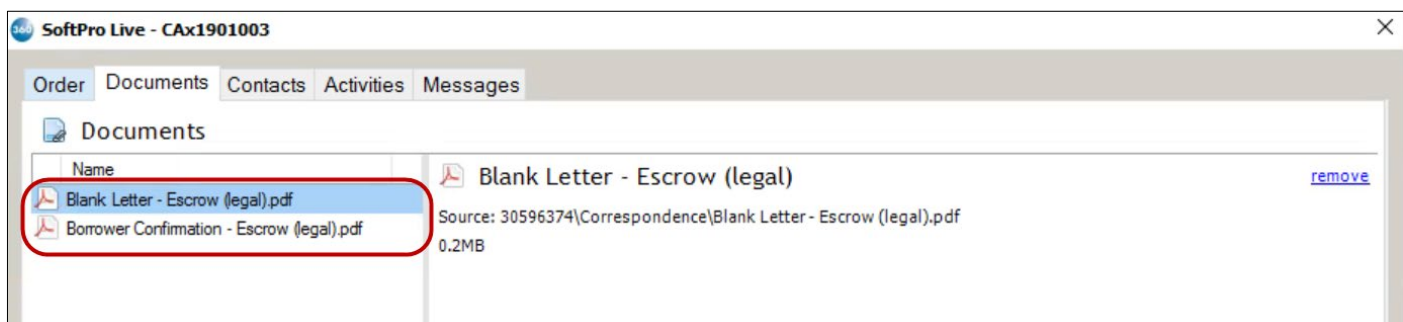
1. From the **Order** ribbon, click the **Documents** button
2. Search for and select the document(s) you wish to send
3. **Preview** and **Distribute** the document(s) to smartview



4. From the **360** ribbon, click the **Publish** button
5. Click the **Documents** tab to open smartview Documents window
6. Expand the folder where the document is housed
7. Check the check box for the document you wish to make available
8. Click the **OK** button

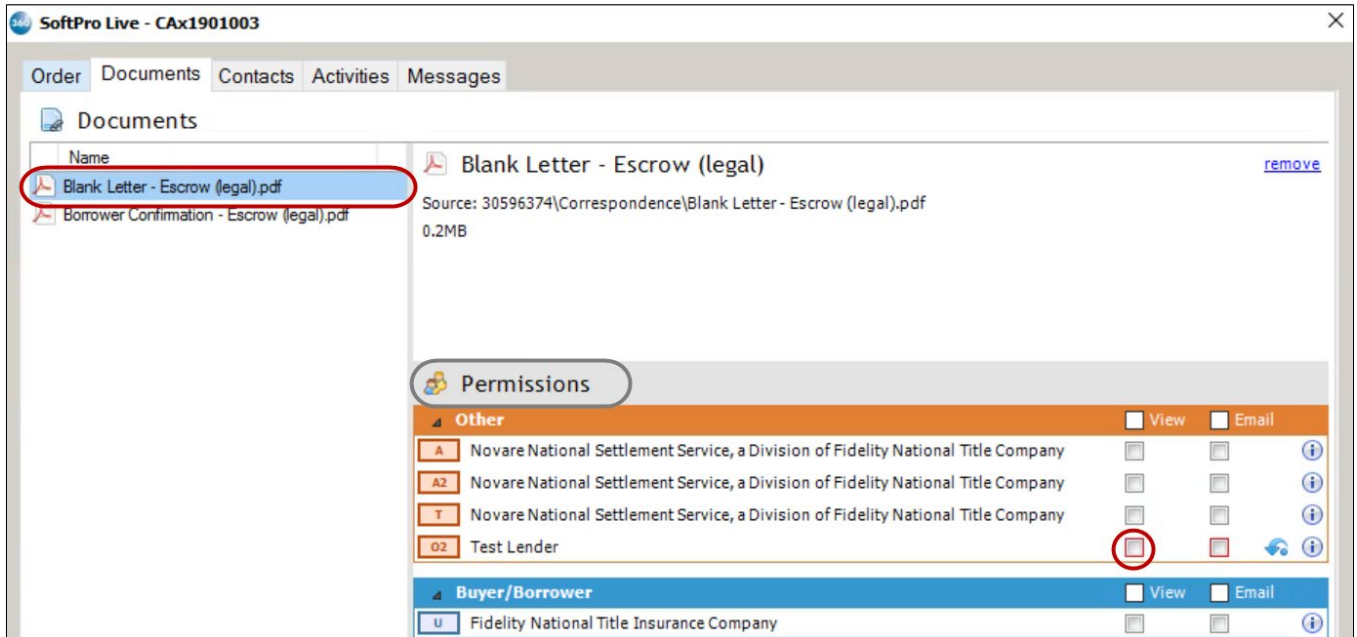


The document(s) appear in the **Documents** section

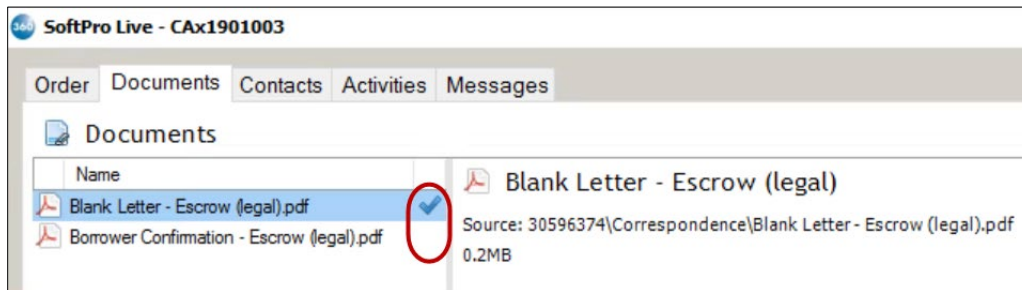


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9. Grant permission to view the document(s)
  - a) Highlight a document on the left
  - b) In the **Permissions** section, check the check box for the corresponding party
  - c) Repeat **Steps a-b** for each document listed



A checkmark after the document name indicates permission is granted for that document.



10. Click the **Post** button

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### Communicating Order Changes to the Client

This process alerts the Client to changes that have occurred in the order and must be done even if no messages or documents are sent.

To communicate order changes to the Client (i.e., Settlement date changes, tasking, order details, etc.) you must,

1. Click the **Publish** button
2. Click the **Post** button

