

Sending Through inHere Automation

Your operation is set up to send the Wire Instructions to the Buyer, Seller and Attorney contacts entered in the Select order. This automatically happens when the required actions (triggers) are completed in the order in the correct sequence to ensure a successful transmission.

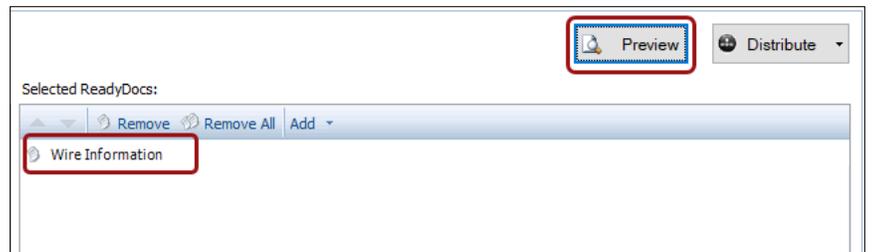
Publishing any one of the following documents to smartVIEW must be done **prior** to updating the **E01.E.Deliver Wire Instructions** task and saving/exiting the order to trigger the automation process.

- > **Wire Information**
- > **WireSafe Fraud Alert (Buyer Only)**
- > **WireSafe Fraud Alert (Lender Only)**
- > **WireSafe Fraud Alert (Seller Only)**

Continue to next steps if publishing the **Wire Information** document; otherwise skip to [step 9](#) to update the Task.

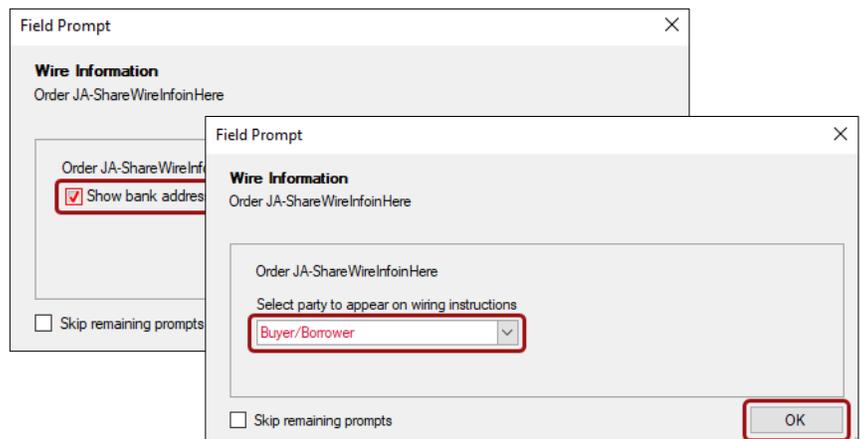
Publishing the Wire Information Document

1. Click the **Documents** button
2. Search for and select the **Wire Information** document



3. **Preview** the documents and answer prompts; click **OK** after each

NOTE: The document can be prepared for one party at a time. When prompted select either **Buyer/Borrower** or **Seller**.



4. **Publish** to smartVIEW

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5. Rename the document depending upon which you are publishing
 - » **Wire Information – Buyer**
 - » **Wire information – Seller**
 - » **Wire Information - Lender**

smartview Document Post

All documents use same Folder

All documents use same Comments

Document Name	Comments	Publish as PDF	Publish as Word	Folder
Wire Information - Buyer		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Documents
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	

smartview Order ID : 98718672

6. Click **OK** to complete

If preparing a second **Wire Information** document,

7. Click the **Start New** button
8. Repeat **steps 3-6**; selecting the second party when prompted

Finished?

BEST PRACTICE: Verify the documents were published to smartVIEW **before** completing the **Checklist Task**. The automation process fails if the documents are not found in smartVIEW and the documents then need to be sent via a manual process.

Once the document(s) is published, you can then update the **Checklist Task**.

9. Click the **Checklist Tasks** button
10. Select the **E09.E.Deliver Wire Instructions** entry in the grid
11. From the **Status** drop-down, select **Completed**

Checklist Tasks

Status	Task	Milestone	Category	Occurs	Due Date
Required	E01.A.Open Escrow Order	No		Pre-closing	
	E01.B.Review PSA for Important Dates	No		Pre-closing	
	E01.C.Deliver Escrow Agreement; Provide Important...	No		Pre-closing	
	E01.D.Receive Fully Executed Escrow Agreement	No		Pre-closing	
	E01.E.Deliver Wire Instructions	No		Pre-closing	
	E01.F.Annotate related ALMA File	No		Pre-closing	
	E01.G.Third Party Acknowledgement of Escrow Fun...	No		Pre-closing	
	E01.H.Acknowledge receipt of Escrow Funds	No		Pre-closing	
	E02.A.Upload PSA to SmartView	No		Pre-closing	
	E02.B.Upload Executed Escrow Agreement to Smar...	No		Pre-closing	
	E02.C.Receive Vendor Invoices and Wire Instructions	No		Pre-closing	
	E02.D.Notify parties of anticipated Closing Date	No		Pre-closing	
	E02.E.Receive Lender Closing Instructions	No		Pre-closing	

Occurs: Code: Task: Status:

12. **Save** and **exit** the order

The automation process is initiated and verifies the corresponding Wire documents (i.e., **Wire Information – Buyer / Seller, Wire Fraud Aler, etc.**) are present in smartVIEW.

- > If the document(s) is found, the email notification(s) is sent to the designated contact(s).

The email identifies the,

- » Order information: **Order #, Property Address** and **Transaction Type**
- » Summary: **Wire [Information or Fraud]** Document
- » Link to access the document

NOTE: If the recipient does not have an inHere account, they are prompted to create.

- > If the document(s) is not found, manual posting is required.

- 1) From SoftPro, **Publish** the applicable document(s) to smartVIEW
- 2) From **360 >Settlement Services**, open the **SoftPro-Live** integration
- 3) Click the **Post** button

This triggers the email notification to the Agent indicating their order is in inHere and the document(s) is now available.