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.
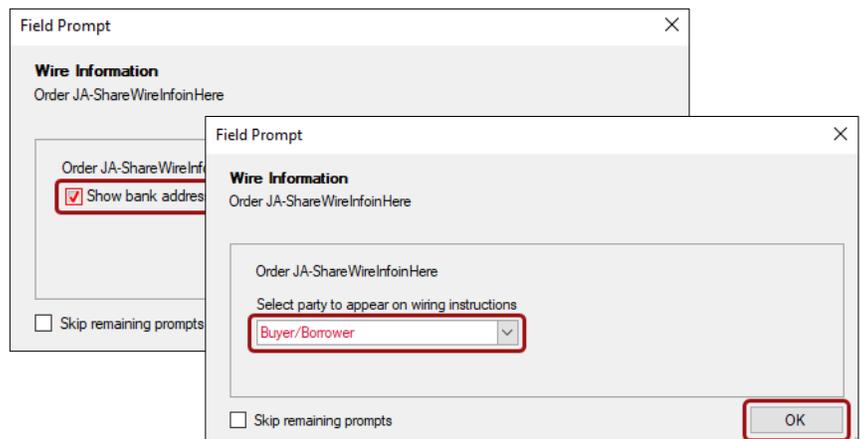
Publishing the Wire Information Document

1. Click the **Documents** button

2. Search for and select the **Wire Information** document
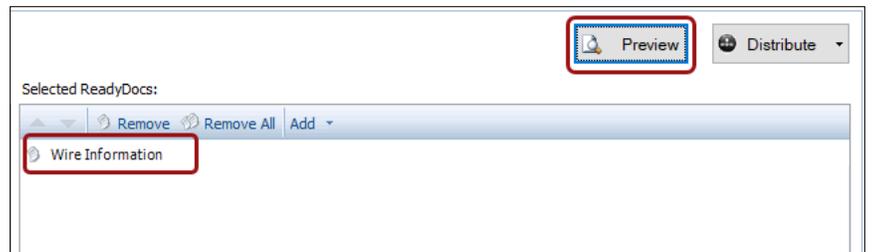
3. **Preview** the documents and answer prompts; click **OK** after each

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

4. **Publish** to smartVIEW

5. Rename the document depending upon which you are publishing

   » **Wire Information – Buyer**

   » **Wire information – Seller**

   » **Wire Information - Lender**

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

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**

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.