



PACIFIC COAST TITLE COMPANY

smartVIEW TIPS

4/21/14

Update Your smartVIEW Email Address!

smartVIEW

Dashboard Locate Manage Correspondence Subscribe Report Contacts My Profile Admin

MY PROFILE

Basic Advanced User Documents

Basic Information

First Name:
Sharon

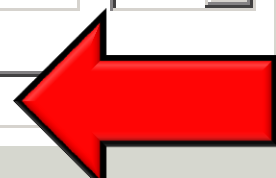
Middle Name:

Last Name:
Green

Suffix:
▼

Business e-mail address:
sgreen@pct.com

Click "My Profile"
Tab
Change to
@pct.com





PACIFIC COAST TITLE COMPANY

smartVIEW Info & Tips

9/20/2013

smartLINK Icon Not Working?
Try This New Link!!!

<https://www.smartviewonline.net/>



**Copy the link above and paste it into
your Internet Explorer address bar
When you're able to connect to smartLINK
(smartVIEW Online) and login please call
Sharon Green or Jose Hill and they will
repair your Desktop icon so it works properly.**



smartVIEW Universal Viewer

REDACTION WITH smartMARKUP
Call Sharon Green for Training
479-427-6114


The Undersigned Seller hereby instruct and authorize Escrow Holder to disburse

() TRANSFER () All Net Proceeds, or () \$ _____
To: _____
Attn: _____
Escrow No.: _____

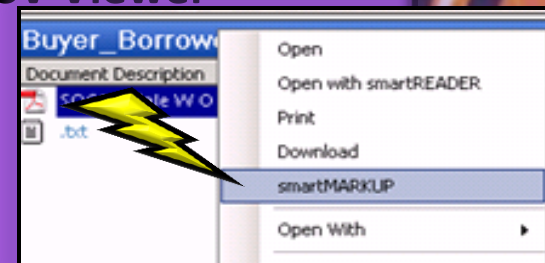
() HOLD check for PICK-UP
() CALL when check is ready for PICK-UP, PHONE NUMBER _____
() WIRE funds to (Bank Name) _____
Address _____
Routing No. _____
Account No. _____

() MAIL () FEDERAL EXPRESS check to _____

Page 3 of 3...



- View the Document in Bottom SV Viewer
- Right Click On the Document
- Select smartMARKUP
- Let Document Build
- Press "Draw Redaction" button
- Draw Black Out of Sensitive Information (i.e. Buyers Deposit Acct Info, Seller's Wire Info)
- Click Print Icon > smartPRINT to file



No Need to Print Your Prelim!
Write on Them With smartMARKUP!
Lots of Ready-Made Stamps
Add ALL of Your Notes Electronically!
Call Sharon for More Info

DocuSign Coming Soon! Electronic Signing!



PACIFIC COAST TITLE COMPANY

smartVIEW Info & Tips

6/11/2013

**ALWAYS CLOSE YOUR ORDERS
IN smartVIEW Online (smartLINK)**

**#1 Click
Open
Order**



Order # / Enter

smartBOARD Place Order **Orders** Contacts

ORDER INFORMATION

BACK TO: [Orders](#) > Order Information

51003249 Ref 1: 16 769 322 Ref 2: 11530 Santo Court, Dublin CA 94568 Ref 3: Yong Lei , Muying Lu Status: **Open Order**

Correspondence Subscribe

Current Status: Open Order

Integrated Target 1 # : 51003249
PCT Danville 451 FSLA, 318 Diablo Road, Suite 150,

Integrated Target 2 # : 51003249
PCT Danville 451 FSLA, 318 Diablo Road, Suite 150,

Order Information:
11530 Santo Court, Dublin CA 94568 County: Alameda

Buyer/Borrower: Yong Lei , Muying Lu
Seller/Owner: Nathaniel Rodriguez , Latisha Rodriguez
Transaction: Residential Sale
Closer: Robbie Elliott

Order Detail Report Add Document(s) Email Document(s) Fax Document(s)

Create Project Order
Close Order
Cancel Order
Copy Order

ORDER DETAIL



Modified: 06/07/2013 4:41 PM
Modified By: Robbie Elliott
Posted: 05/08/2013 8:14 PM
Posted By: Robbie Elliott

**Use Your smartVIEW Checklist!!
Verify File Closed / Docs Uploaded
Scan Checklist into smartVIEW**

CLOSE ORDER

smartVIEW # shows here

Are you sure you want to close order number **16769322**

#3 Click Yes

Yes No

**#2 Click
Close Order**

**Please Call if You Need Help!
Sharon / 479-427-6114**



PACIFIC COAST TITLE COMPANY

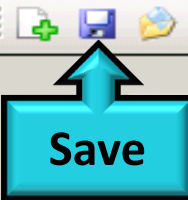
smartVIEW Info & Tips

6/03/2013

**Auto Publish to smartVIEW by SAVING
Out Of Your New Impact Order**

Impact/SQL Escrow [Pacific Coast Title Company]

File Edit Ticklers Disburse Wires Receipts Documents Projects Reports Misc. Naf Op

 Save

**Press The "Save"
Button to Save The Order
So Your File Will Publish**

PACIFIC COAST
TITLE COMPANY

Impact Widget Dashboard

65002369 /Fredell S. Goldberg Sharon Green 06/03/2013





PACIFIC COAST TITLE COMPANY

smartVIEW Info & Tips

6/24/2013

SMARTVIEW COMMENTS LOG!



Right Click On Document
Select "Comment Log"

smartVIEW

Dashboard | Locate | Manage | Correspondence

MANAGE DOCUMENTS

13313603

SG2 Ref 1: 13 313 603 Ref 2: 1234 Property Address, San Bernardino CA 99999 Ref 3: Buyer Corporation [Open Order](#)

Full View Upload Package

Folders

- Accounting
- In Order Documents
- Dept File
- PENDING ITEMS
- Prelims and Updates_TITLE INPUT
- Search Packages_TITLE INPUT
- Recording and Policy_TITLE INPUT
- Reviewed Docs Approvals_TITLE INPUT
- ESCROW INFO FOR TITLE REVIEW
- Selling Documents
- State and Federal Tax Documents
- Handwritten Bills_Inspections
- Other Documents
- Other Borrower Documents
- Other Documents
- Other Closing Package
- General Correspondence_Notes_Other
- Other Closing_Amended HUD
- Operator Sheets
- Other Sale
- Office Documents

Search Packages_TITLE INPUT ONLY

Document Description	Comments	Version	Posted By
SearchPkg.pdf	Testing Comments Log	0.1	Sharon G

Document Comments Log

New Comment:
JUST TYPE IN THIS BOX AND CLICK SAVE

Save Cancel

Document Comments Log

03/21/2013 12:25 PM (Sharon Green)
Testing Comments Log AGAIN

03/21/2013 12:25 PM (Sharon Green)
Testing Comments Log

Open
Open with smartREADER
Print
Download
smartMARKUP
Open With
Send To
Share
Mark Private
Mark Published
Mark Public
Check Out
Check In
Undo Check Out
Comment Log
Version History
View History

Type Text Here &
Press "Save"

Comments
Saved Here!!



PACIFIC COAST TITLE COMPANY

smartVIEW Info & Tips

5/20/2013 Impact v8.0

EXCITING CHANGES FOR IMPACT/SMARTVIEW

DSI is Giving PCT an Improved Interface Between Impact and smartVIEW TONIGHT!

(You Do NOT Have To Be Out of Impact During This Change)

Beginning Tomorrow Morning!:

1. When you're finished opening an order and save out of your file, Impact will automatically publish it to smartVIEW within 2 minutes
2. Your changes in Initial Questions will automatically publish to smartVIEW
3. You still must publish your Order Sheet to smartVIEW





PACIFIC COAST TITLE COMPANY

smartVIEW Info & Tips

4/09/2013

PUBLISH YOUR ORDER SHEETS TO SMARTVIEW



- * Documents
- * Title Instructions
- * Publish Button

Print

Printer: \\PCTQPRTP01\\Pleasanton-Doc201

Processing: ☐ At Time: 02:10:20 PM

Email Me: ☐

Copies: Number of copies: 1 ☐ Collate

Range: 1 To 999

Buttons: OK, Preview..., Email..., Publish, Cancel



Order Title Search

Click the No Button



This escrow file has already been sent to the Title Department. Do you wish to send an amended request?

Yes No

Send Documents to SmartVIEW

Document Name	Document Folder
Title Instructions	Open Order Documents

Use the Drop Down Menu to Publish to Open Order Documents

Buttons: Cancel, OK