smartmail & smartportal - Recipient Access

Overview: This job aid reviews the process of accessing email content sent via encrypted smartmail delivery. It also will walk through all of the additional features available such as: replying to emails, uploading documents, as well as searching for property specific emails and documents.

1. Email recipients will receive a **smartmail** delivery notification which will come from noreply@smartviewonline.net and the subject line will list the sender. The sender information will also appear in the body of the smartmail.

   Click the **View smartmail** link within the body of the smartmail message you received in your email inbox.

2. Recipients accessing the email will be challenged for authentication. You will be asked for your email address and password. Enter your email address (the same address where the email was sent) and password, then click the "**Log In**" button.

   Please Note: If this is the first smartmail message you are receiving, please see the **New User Registration** Job Aid for instructions on completing the one-time smartmail account registration.

3. Recipients accessing the email may be challenged for a **Secondary Authentication**. If you receive this, there will be a 6 digit code sent to you via text message. **Enter the code received.**

   You may also be prompted to "agree" to read the smartmail and any included document links. **Check the box I** agree.

   Then click the **View** button.

   If you do not receive either of these, proceed to step 4.
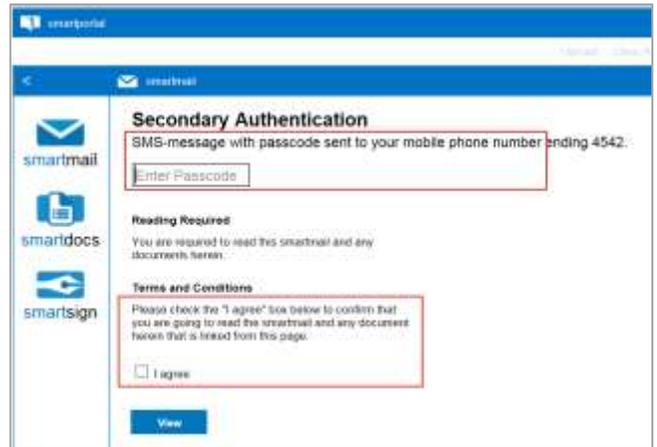
4. Once you have successfully logged in, you will be presented with **smartmail** HTML email. From this web page you can view the Subject and Body of the **smartmail,** as well as open any of the document links.

5. **While viewing any smartmail message, there are options in the top right corner:**

   Next = Navigate to the next smartmail message sent to your address (if applicable).
   Previous = Navigates to the previous smartmail message sent to your address (if applicable).
   Reply = Allows you to send an encrypted reply to the Sender of the original email message.
   Upload = Allows you to upload and return documents securely back to our system.
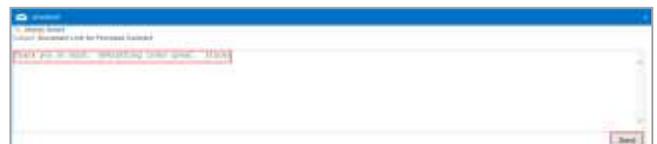

6. To **Reply** to any message, while viewing the message itself, click the **Reply or Reply All** link in the top right corner of the page.


7. Enter your text response in the window provided, adding as much information as you like.

   Click the **Send** button to deliver your response as an encrypted email Reply.

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8. To **Upload** documents in response to any message, while viewing the message requesting the document, click the **Upload** link in the top right corner of the page.
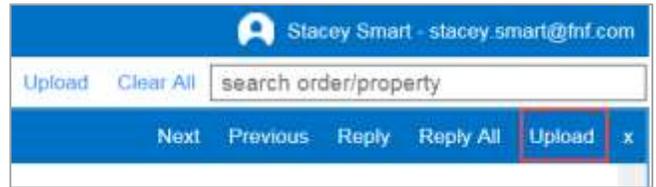

9. Enter any **Comments** in regards to the documents being returned in the field along the top of the page.

   To Upload documents, click the **Browse** button to locate a document saved anywhere on your Computer. OR
   Drag-and-Drop documents to the grey upload area.

   Once all documents you wish to return are listed in the window, click the **Upload** button to return those documents.

10. Click **OK** to the Upload confirmation.
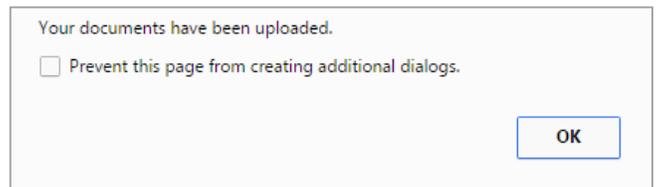
11. All smartmail messages sent to your same email address, will all be available on the **smartmail** tab of our smartportal website.

    While viewing any smartmail message, click the **smartmail icon** along the left side of the page to access additional smartmail messages.


12. All smartmail messages sent to your same email address will be shown in the smartmail Inbox, with the most recent received email listed along the top.

    Single-click on any email message listed to access the message.

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13. While viewing any smartmail message, click the **smartdocs icon** along the left side of the page to access additional document links sent to you in a smartmail message.

   **Single click on any document** listed to view the document.
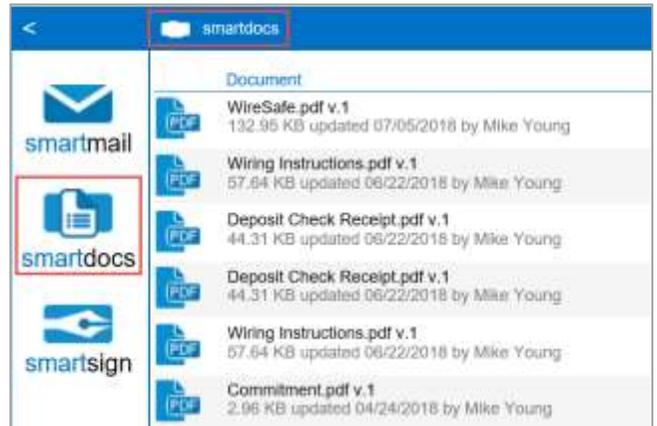
14. While viewing any smartmail message, click the **smartsign icon** along the left side of the page to access any documents that need to be electronically signed or competed as well as locate completed copies of documents.

    Single click on any smartsign request listed to view the request.
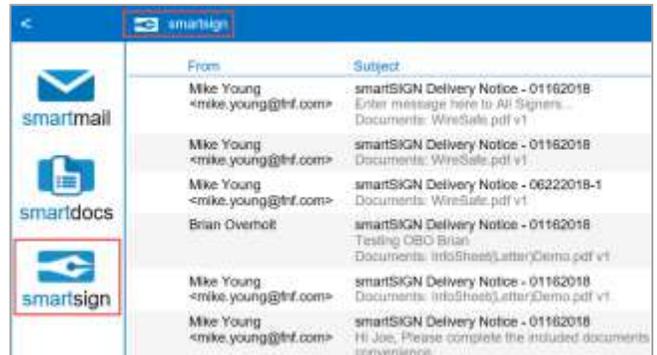
15. To search for file specific smartmails or documents, Click in the **Search Order/Property** box on the top right.

    You can enter any part of the property address or any part of the order number and press enter.
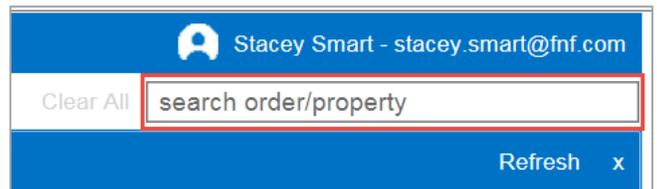
   It will return a list of all your possible matches.

16. **Click on the order row** for the order that you were looking for and then **click on the smartmail, smartdocs, or smartsign tab** depending on what you are looking for.

    It will list all of the smartmails, smartdocs, or smartsigns that are specific to the selected property.
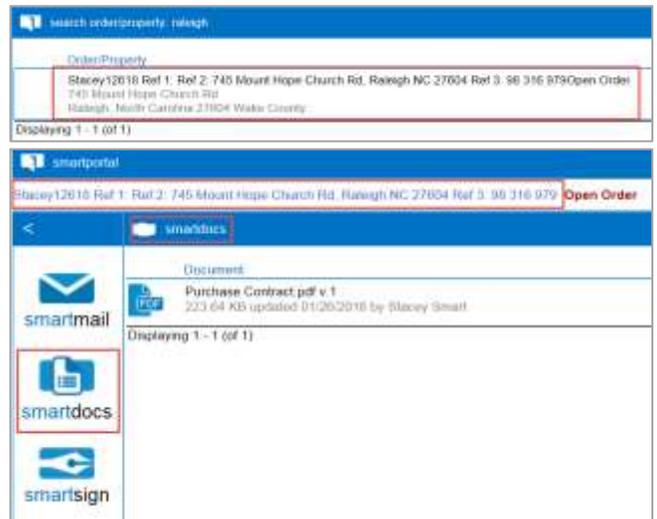
17. After clicking on the order row, a **Contacts** link will appear to the left of the search order/property field.

    Click on Contacts will show you the smartview Office's contact information for that specific property. They can include a smartview employee.
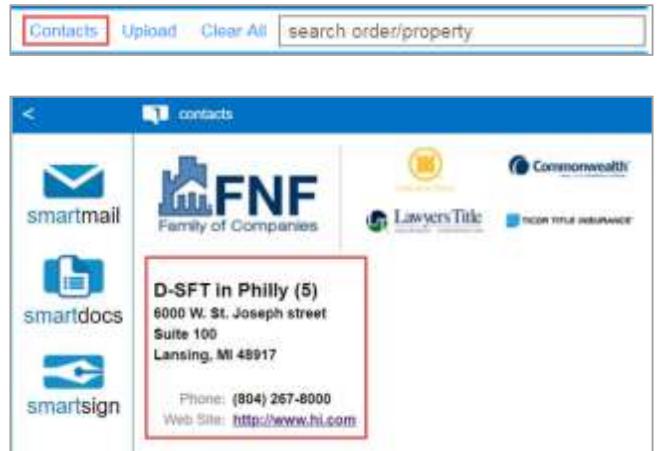
18. When you are finished working on that property, click on the **clear all** link on the top right next to the search order/property box.

19. To view all account related activity, click on **Your Name** in the top right corner, then click the **Activity** link.
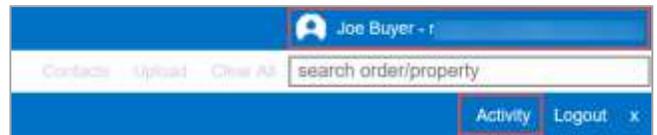
20. All account related activity will be listed, showing the date and time of each action.

    Activity tracked includes: account logins, smartmail messages viewed, documents viewed, smartsign requests viewed, replies sent, and documents uploaded.

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