Live/Track is an integrated product used to push milestones, documents, and messages to the inHere application and portal.

> **NOTE**: Live/Track inHere is currently configured only for Listing Brokers/Agents, Selling Brokers/Agents, and in some markets, Attorneys.

〉 Order ribbon – identifies the active linked order

〉 **Order** tab provides a single place to view your order information (i.e., contacts, templates, permissions, documents, etc.)

>> » **Templates** section lists the templates; the applied template is bolded. Templates are applied via the automation process and should **never be accessed manually**. Contact your management for template updates.

>> » **Post Summary** shows the number of documents, contacts, tasks and messages available after posting.

>> » **Permission Summary** combines all the permissions set on each tab in one place.

> **NOTE**: Use the **Documents**, **Contacts**, and **Messages** tabs to set specific **View** and **Notify** permissions for each. The **Tasks** option is currently not configured.
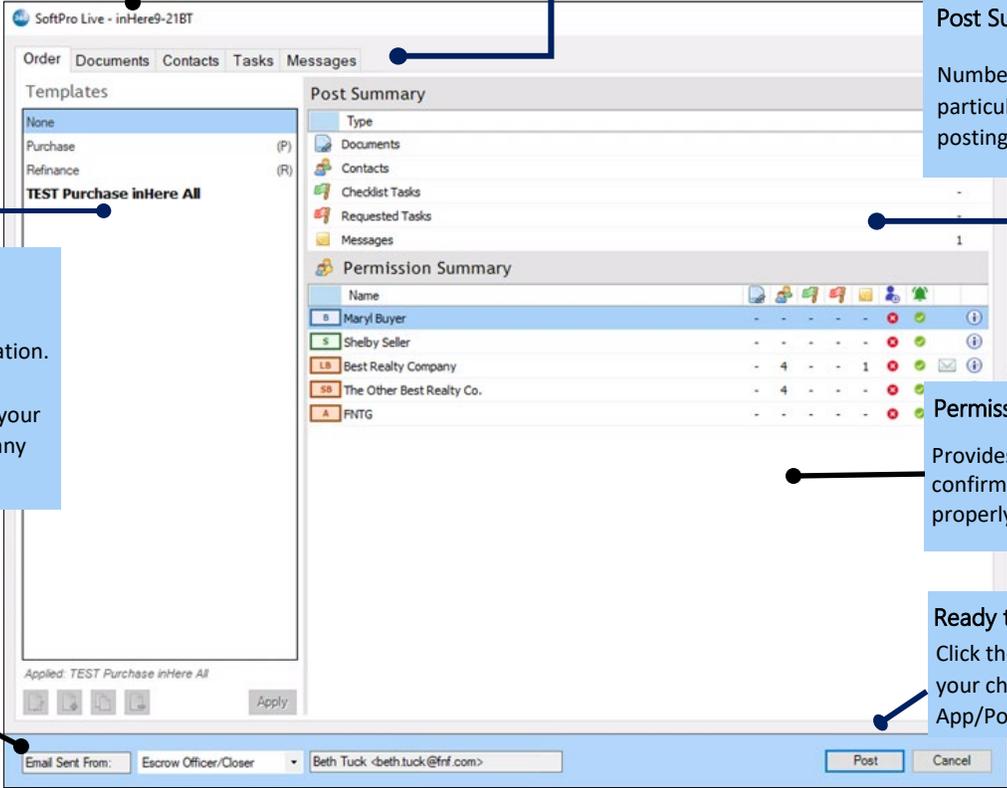
Order Number

Know what order you are working with.

Navigate

Choose a tab to make changes to a particular area.

Post Summary

Number of items for a particular order after posting.

Templates

Shows templates applied by automation. **Do not make any changes.** Contact your management for any needed changes.

Permission Summary

Provides a single place to confirm everyone is set up properly.

Email Sent From

Identifies the title, name and email address of person selected. This remains until manually changed.

Ready to apply your changes?

Click the **Post** button to post your changes to the inHere App/Portal.

NOTE: The **Email Sent From** selection only applies to documents and messages **manually** sent from SoftPro Live. Automated milestone update emails display the **Escrow Officer/Closer** or the email contact selected by your operation's management.

Reach out to your manager with questions on your operation's automated **Email Sent From** contact.

The **Permission Summary** provides permissions in once place for each contact shown.

Documents column shows the number of documents each contact can view.

Users column shows the number of contacts each contact can view.

Checklist Tasks column (**Not applicable**) shows the number of checklist tasks each contact can view.

Requested Tasks column (**Not applicable**) shows the number of requested tasks each contact can view.

Messages column shows the number of messages each contact can view.

	Name	📄	👥	🚩	🚩	✉	Registration	Notification	
B	Bob Buyer	-	-	-	-	-	⊖	⊖	ⓘ
S	Sally Seller	-	-	-	-	-	⊖	⊖	ⓘ
LB	Capital Pacific	-	6	-	-	-	✅	✅	✉ ⓘ
SB	American Realty LLC	-	6	-	-	-	✅	✅	✉ ⓘ
A	Chicago Title Insurance Company	-	-	-	-	-	⊖	⊖	ⓘ
A2	Chicago Title Company, LLC	-	-	-	-	-	⊖	⊖	ⓘ
U	Chicago Title Insurance Company	-	-	-	-	-	⊖	⊖	ⓘ

Post   Cancel

Registration column shows the view and registration status of all people associated with the contact. Do they have View permissions for inHere® app & portal? Have they registered for inHere®?

- ✅ Contact has been granted View permission to at least one item and all people associated with this contact have registered.

- ❌ Contact has been granted View permission to at least one item but no people associated with this contact have registered. Click the Information icon to view details.

- ⚠️ Contact has been granted View permission to at least one item but at least one person associated with this contact has not registered. Click the Information icon to view details.

- ⊖ View permission has not been granted for this contact.

Notification column shows the notify and receiving notification status of all people associated with this contact. Do they have Notify permissions (enabled notifications) for the inHere® app & portal? Have they opted out?

- ✅ All people associated with this contact will receive notifications when the notify checkbox is checked.

- ❌ All people associated with this contact have opted out of receiving notifications in their Preferences settings.

- ⚠️ Some people associated with this contact have opted out of receiving notifications in their Preferences settings.

- ⊖ Notify permission has not been granted for this contact.

✉   The **Envelope** icon indicates the contact has been granted at least one permission to receive email updates.

ⓘ   The **Information** icon allows you to view the specific User Details including, documents, contacts, tasks (not applicable), and messages for a contact. It also includes the Registration and Notification status.
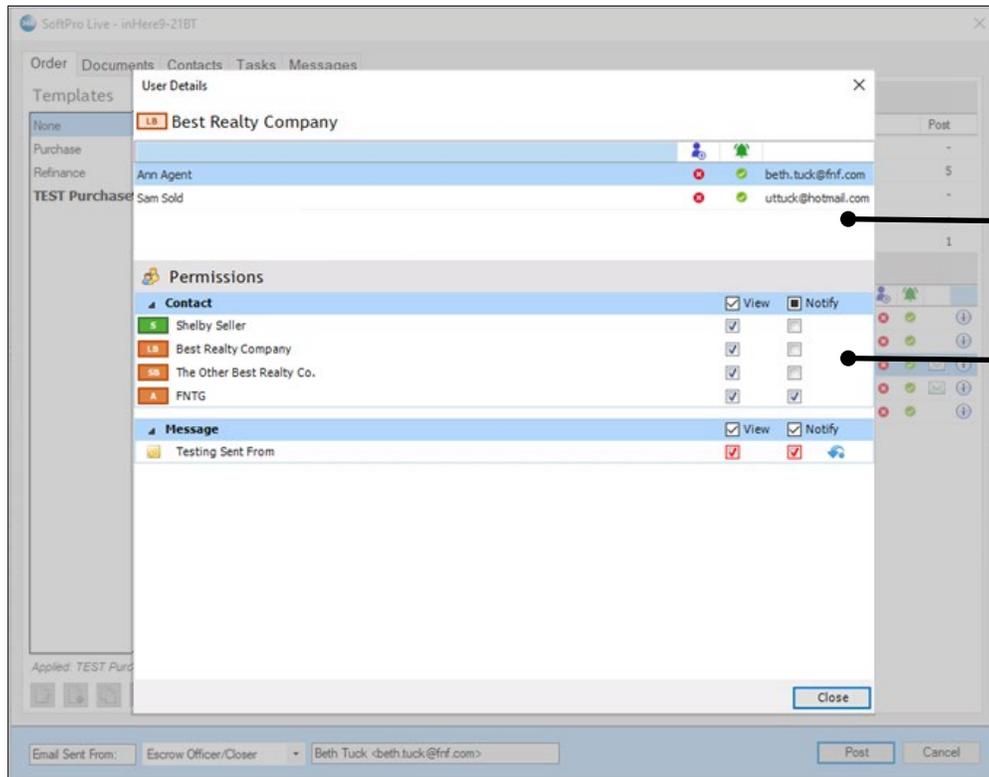
Registration and notification status shown here.

The **View** and **Notify** permissions for each contact shown here.