

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

NOTE: Live/Track inHere is currently only available for Listing Brokers/Agents, Selling Brokers/Agents, and in some markets, Attorneys. Always verify the inHere Milestones Template has been applied to the order before proceeding to SoftPro Live.

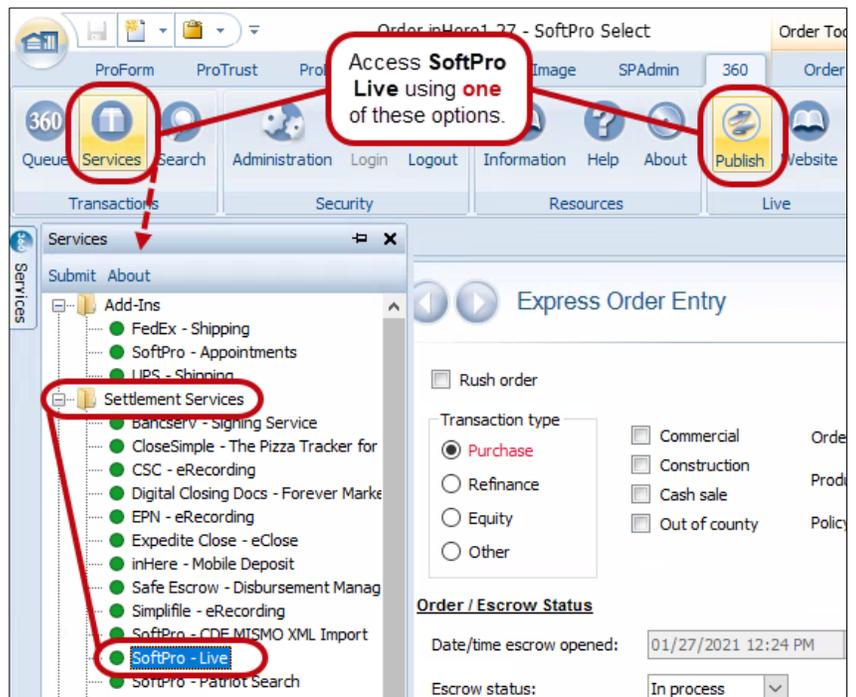
Sharing a smartview Document

From your SoftPro order,

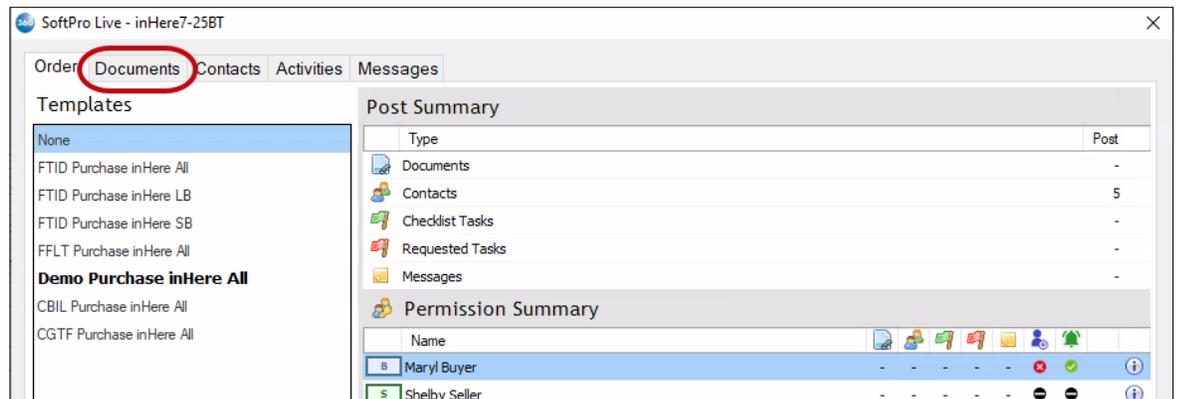
1. Click the **360** tab
2. Access **SoftPro – Live**

From the **360** ribbon,

- a) Click the **Publish** button, if active
- Or-
- a) Click the **Services** button
 - b) Expand the **Settlement Services** folder
 - c) Double-click **SoftPro – Live**
 - d) Click **OK** when prompted for the linked order



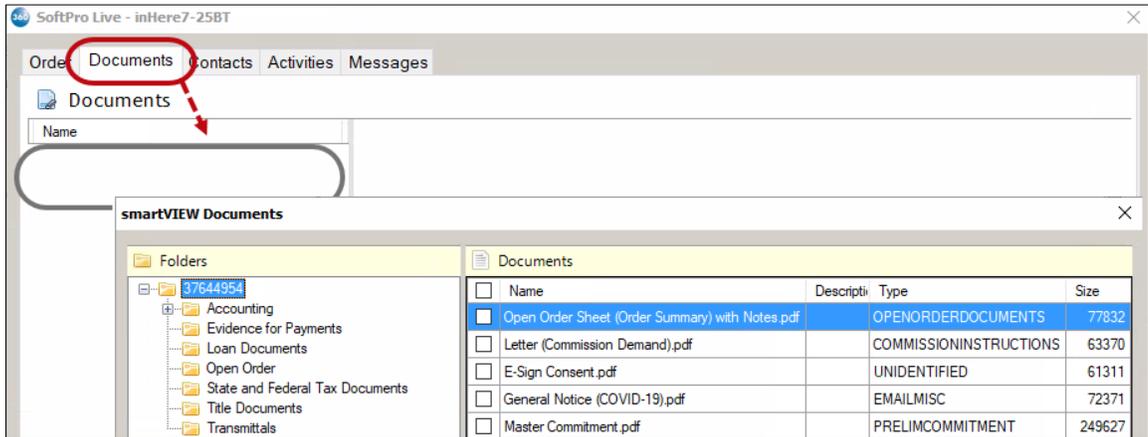
3. From the **SoftPro Live** window, click the **Documents** tab



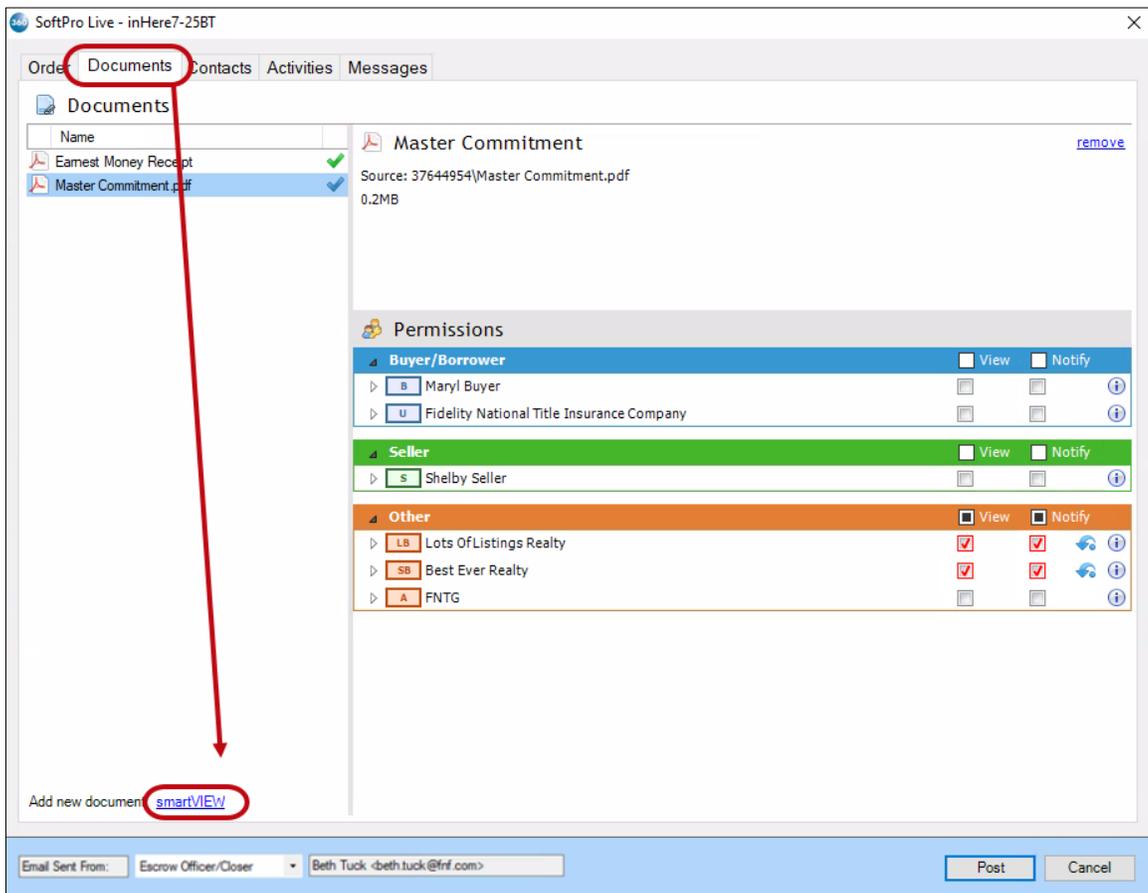
4. Add a document

a) Access smartview Documents

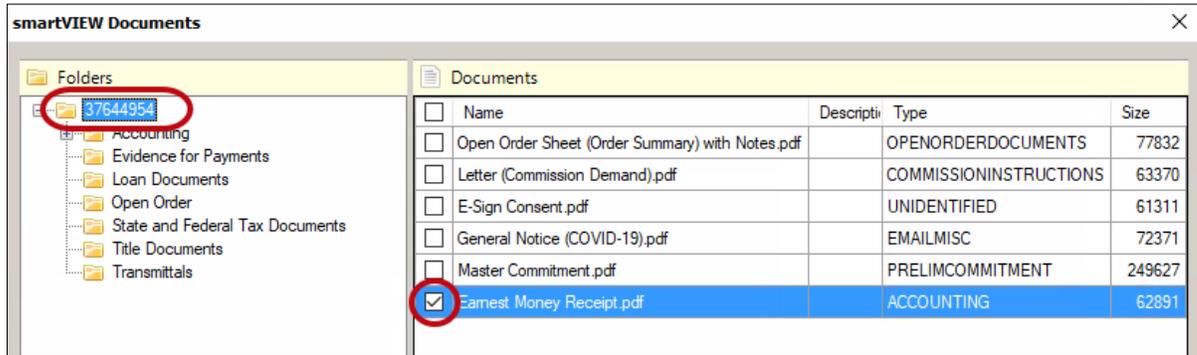
› If this is the first document to be uploaded, the **smartview Documents** window opens immediately



› If other documents have been uploaded previously, click the **smartview** link from the **Documents** tab



- b) Select the smartview folder to locate the document(s) you wish to add
- c) Check the check box for the applicable document(s)

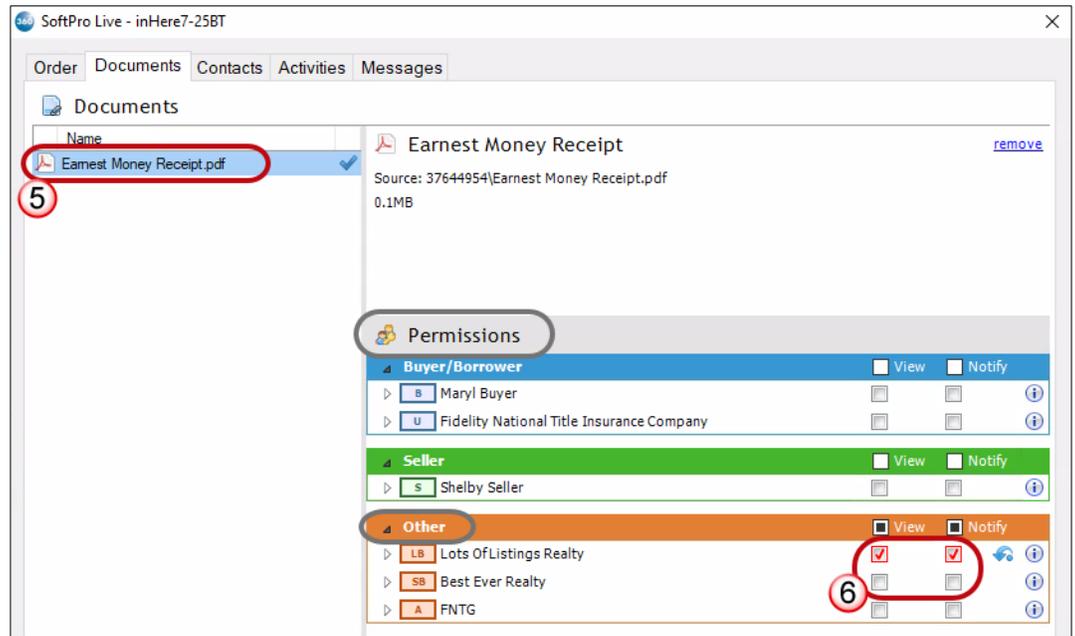


- d) Click the OK button

The documents show in the **Documents** section in SoftPro Live.

- 5. Highlight a newly added document
- 6. In the **Permissions > Other** section, check the,

- a) **View** check box to share the document with all corresponding **LB** and/or **SB** contacts
- b) **Notify** check box to send a notification indicating a new document is posted

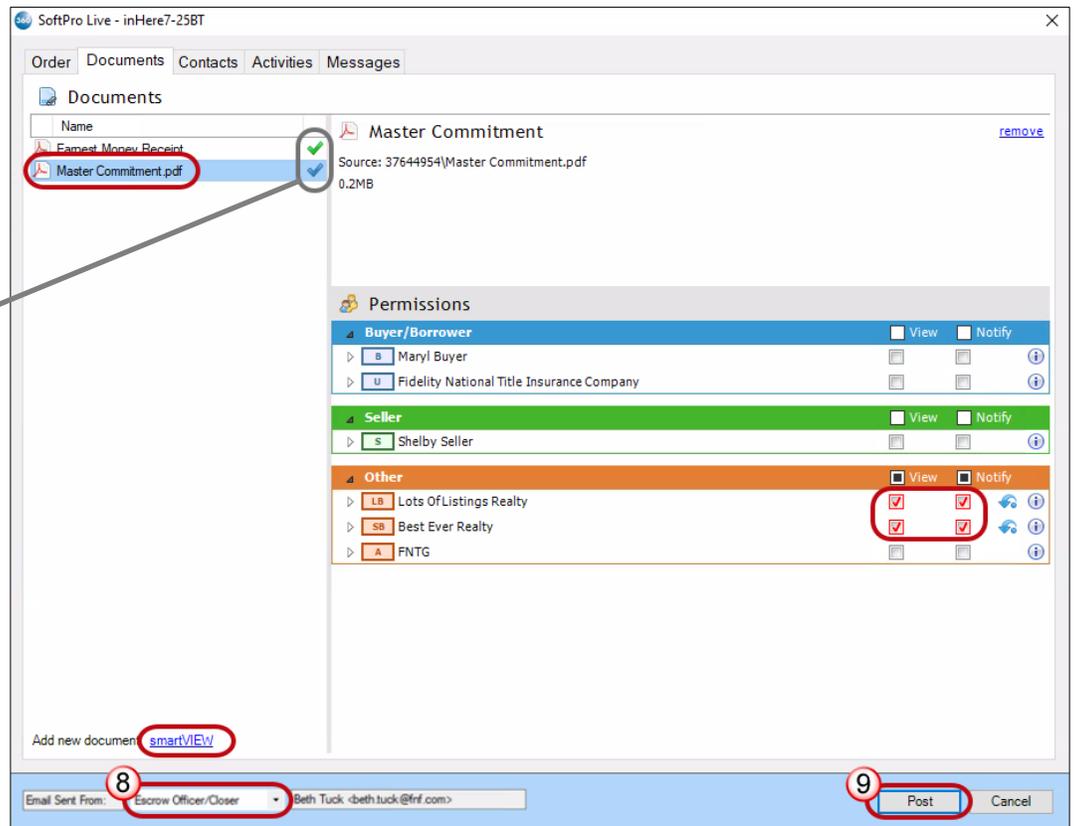


NOTE: You can set an individual's **View** or **Notify** settings by clicking the drop-down versus setting all at the LB/SB level.



- Repeat **steps 5-6** for each newly added document

NOTE: Documents with a green check mark indicates a document has already been shared to inHere. Documents with a blue check mark indicates the document is pending and will be shared once posted.



- Verify or select the Contact to display in the **Email Sent From** field

NOTE: Selecting an individual name from the drop-down, shows the corresponding email address. Selecting **Default** from the drop-down, shows the noreply@inHere.com email address. The contact selection remains until manually changed or a system update occurs.

- Click the **Post** button

SoftPro Live Document Rules

Automatically Posting a smartview Document from SoftPro Live to inHere

Documents must be available in smartview and match the rule prior to completing the milestone in SoftPro Select.

From SoftPro Select,

- Complete the applicable step (trigger) to complete the corresponding milestone
- Save and exit the order

The automation process posts the milestone and the document to inHere.

To verify the document is posted,

1. Open SoftPro Live
2. Click the **Documents** tab
3. Verify the document shows a green checkmark; if the checkmark is blue, click the **Post** button

NOTE: Your operation may have SoftPro Live Document Rules setup which automatically post specific documents to inHere once recognized in smartview and a milestone has been triggered and completed. Reach out to your manager for a list of your operation's document rules.