

Sending Invitation Email Manually

The inHere email invitation is automatically sent when a milestone has been triggered in the order. However, an invitation may also be sent manually if the customer has missed the window to create the inHere account (72 business hours).

Follow these steps to manually resend the email invitation with a link to create their inHere account.

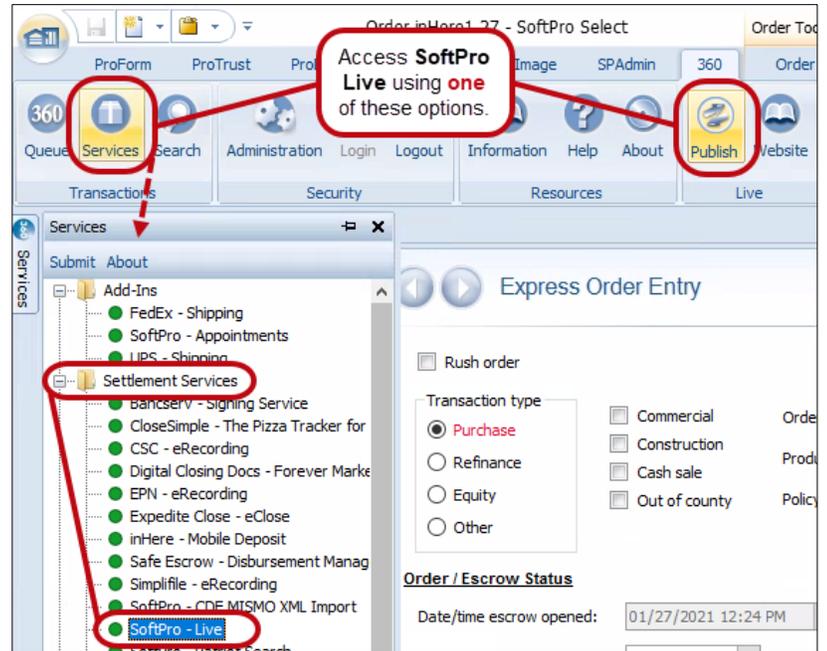
Creating a Message

From your SoftPro order,

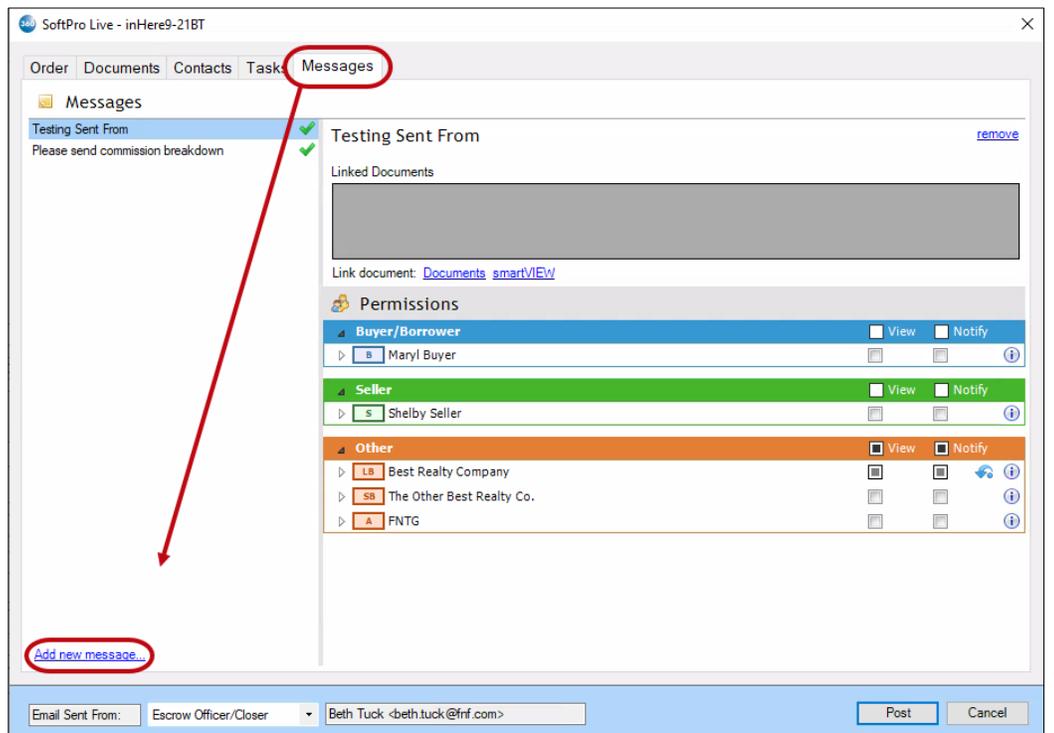
1. Click the **360** tab
2. Access **SoftPro – Live**

From the **360** ribbon,

- > 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 **Messages** tab
4. Click the **Add new message** link



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5. When prompted, enter the,
 - > Subject
 - > Message
6. Click OK

Message

Subject: Thank you!

Looking forward to working with you!

Messages will be added to your order notes

OK Cancel

Your message is added to **Messages** section.

SoftPro Live - inHere1-27

Order Documents Contacts Activities Messages

Messages

Happy Testing Tim! ✓

Testing ✓

Please Respond ✓

Thank you! ✓

Thank you! [remove](#)

Linked Documents

Link document: [Documents smartVIEW](#)

Permissions

Buyer/Borrower		View	Notify	
B	Maryl Buyer	<input type="checkbox"/>	<input type="checkbox"/>	i
B2	Kristin Martin	<input type="checkbox"/>	<input type="checkbox"/>	i
U	Chicago Title Insurance Company	<input type="checkbox"/>	<input type="checkbox"/>	i
Other		View	Notify	
LB	Century 22	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	i
SB	Century 22	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	i
A	Chicago Title Company, LLC	<input type="checkbox"/>	<input type="checkbox"/>	i
SU	Hahn Surveying Group, Inc.	<input type="checkbox"/>	<input type="checkbox"/>	i

[Add new message...](#)

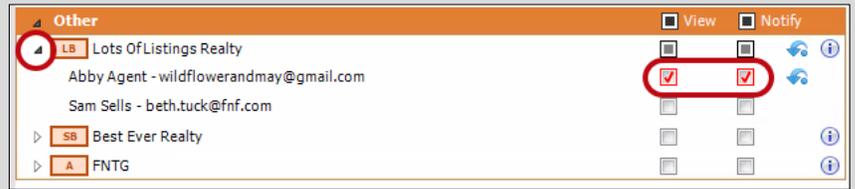
Email Sent From: Escrow Officer/Closer | Beth Tuck <beth.tuck@trf.com>

Post Cancel

7. In the **Permissions** section, check the,
 - > **View** check box to share the message with the corresponding Contact
 - > **Notify** check box to send a notification to the corresponding Contact indicating a new message has been posted

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



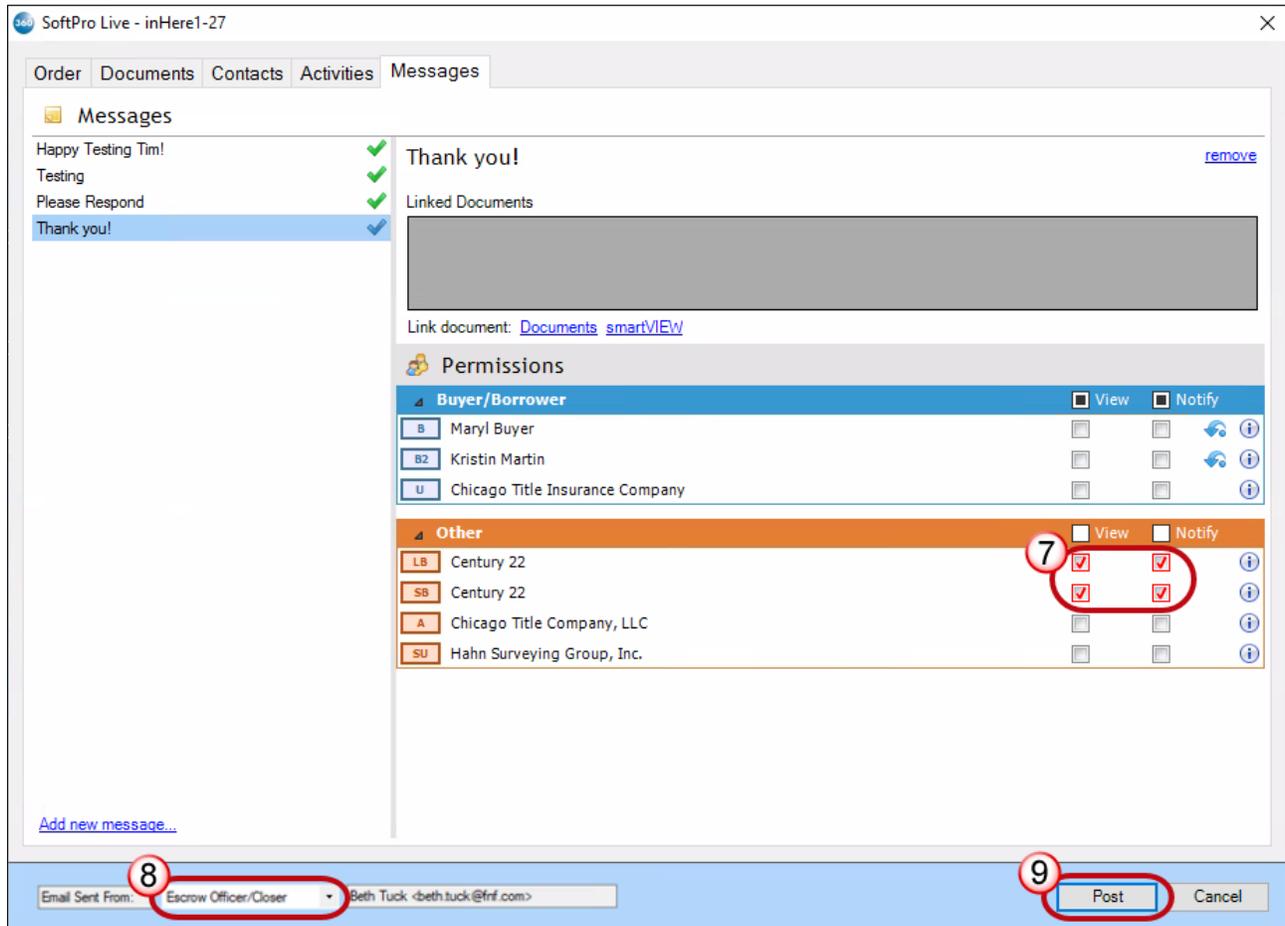
REMINDER: Only available for the **Listing Broker/Agent** and **Selling Broker/Agent**.

8. 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.

9. Click the **Post** button



The inHere email invitation is sent to the selected contact(s).