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

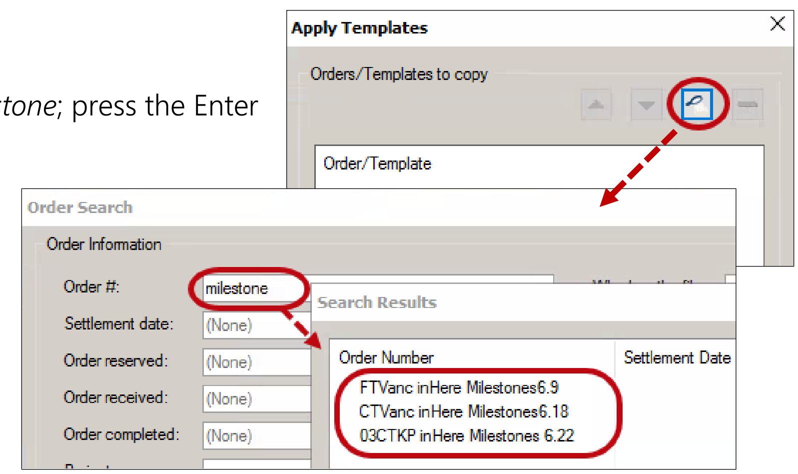
Skip to [Creating a Message](#creating-a-message) if the applicable template has been applied and you wish to learn how to send messages.

Verifying and Applying the inHere Milestone Template

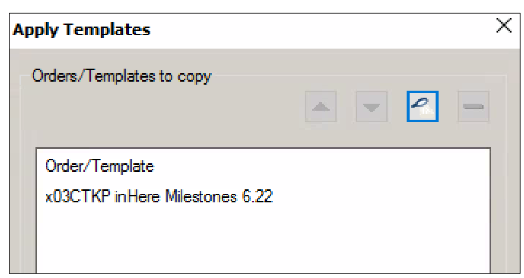
The first step to creating an inHere order, is to apply your operation's inHere Milestone template. Follow these steps to verify the template was applied to an existing order when the order was opened, and if not, apply the template from within the order.

From within your SoftPro order,

1. Click the **Checklist Tasks** or **Requested Tasks** button
2. Click the **View Milestones** icon
   - If milestones icon is greyed out,
     i. Click the **Apply template** button
     ii. Click the **Search** icon
     iii. In the Order # field, enter *milestone*; press the Enter key
     iv. Double click your operation's template to apply



     v. From the **Apply Template** window, click **OK**
     vi. Click the **OK** button to confirm the template was applied



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

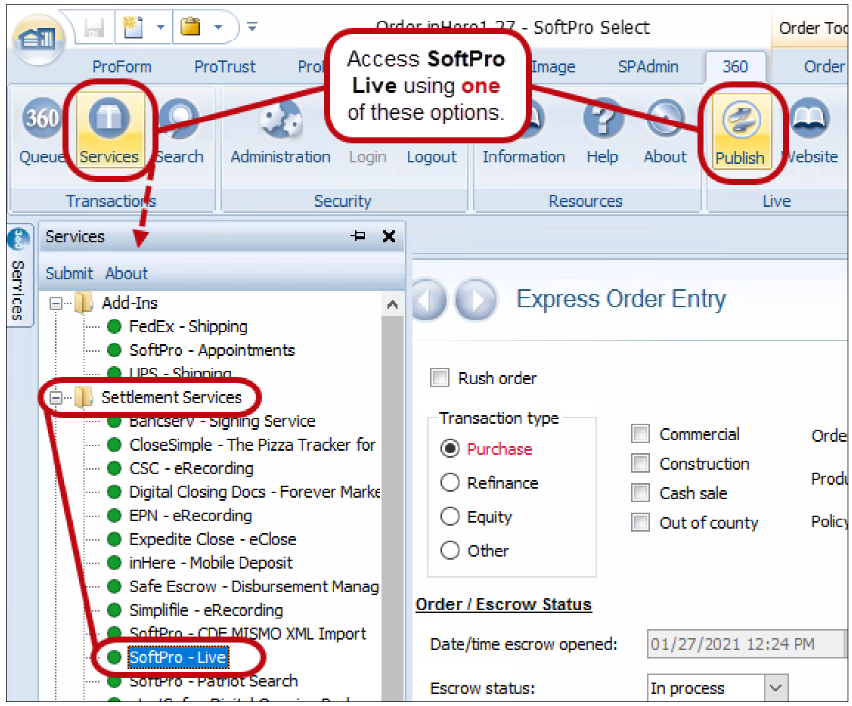
   -Or-

   a) Click the **Services** button

   b) Expand the **Settlement Services** folder

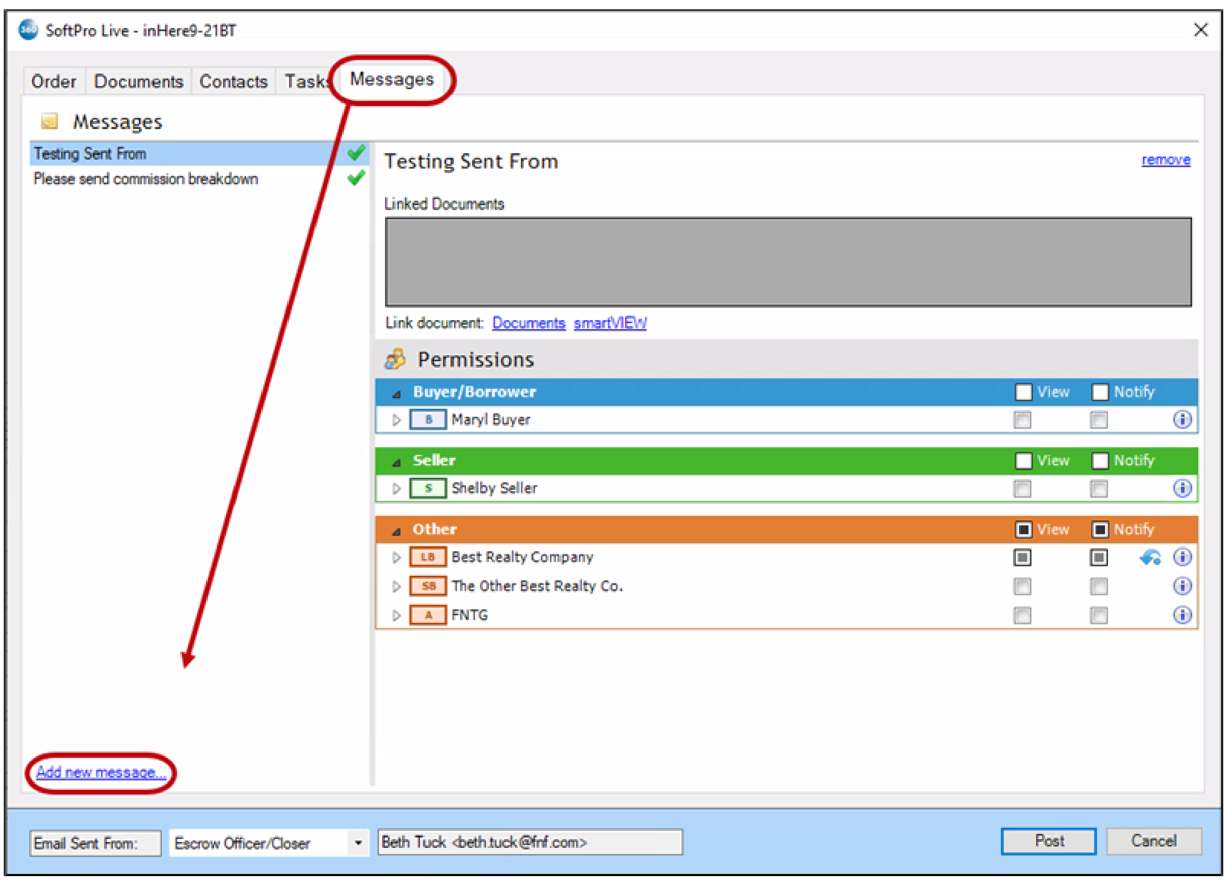
   c) Double-click **SoftPro – Live**

   d) Click **OK** when prompted for the linked order

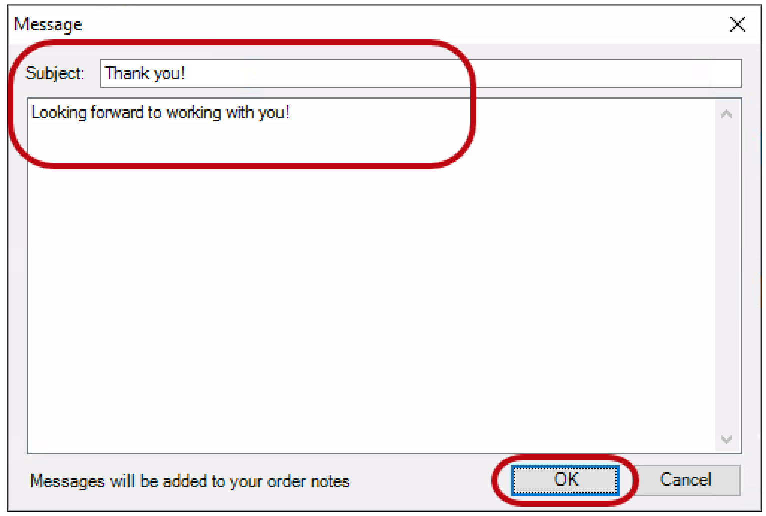


3. From the **SoftPro Live** window, click the **Messages** tab

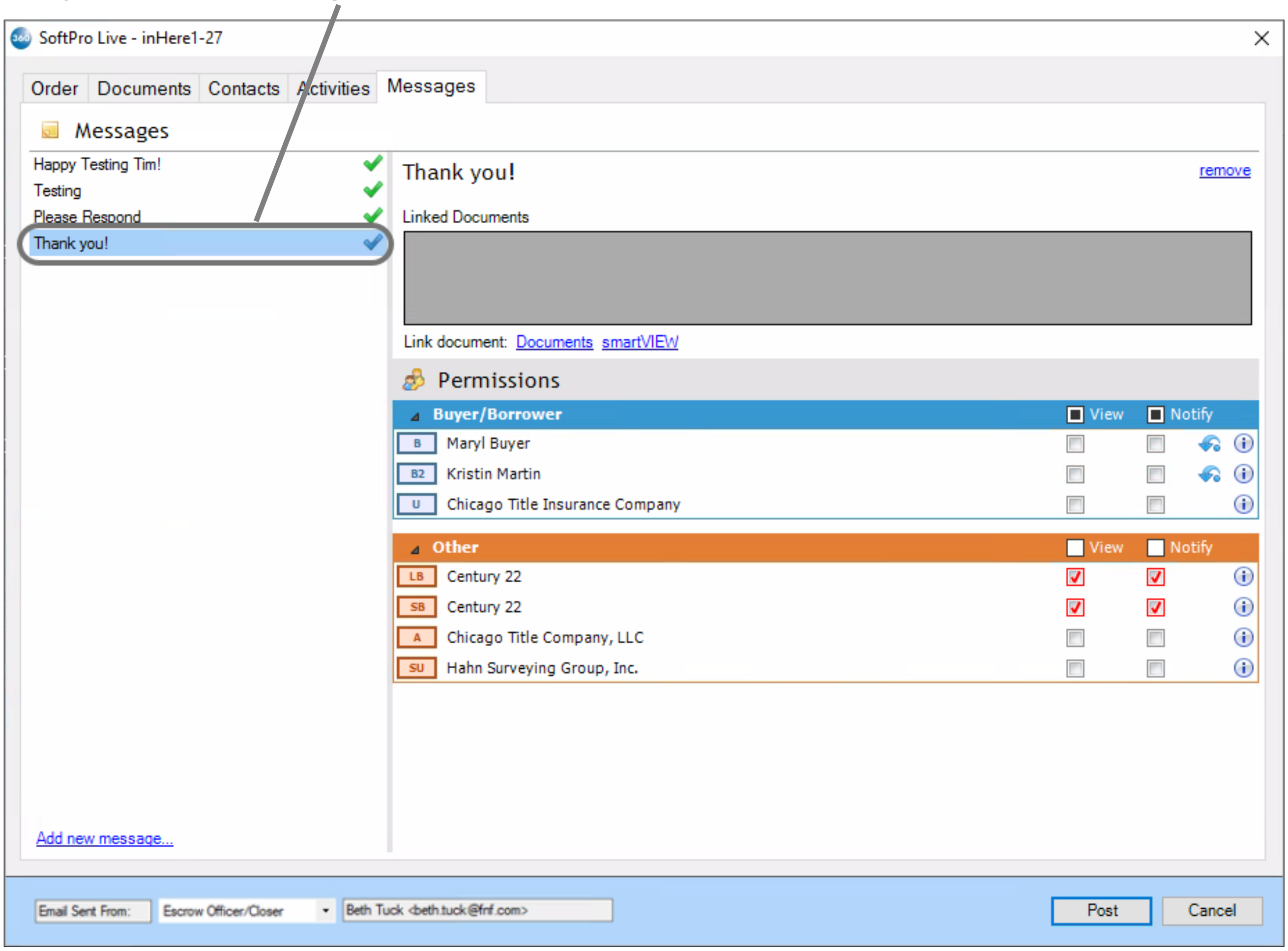
4. Click the **Add new message** link



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

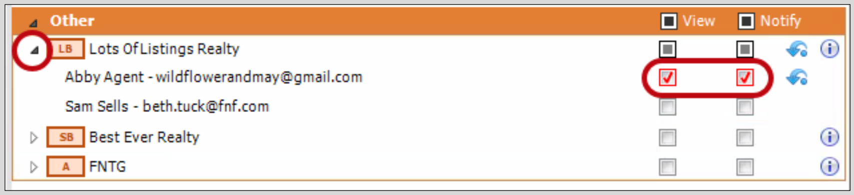


Your message is added to **Messages** section.



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

> **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