

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.

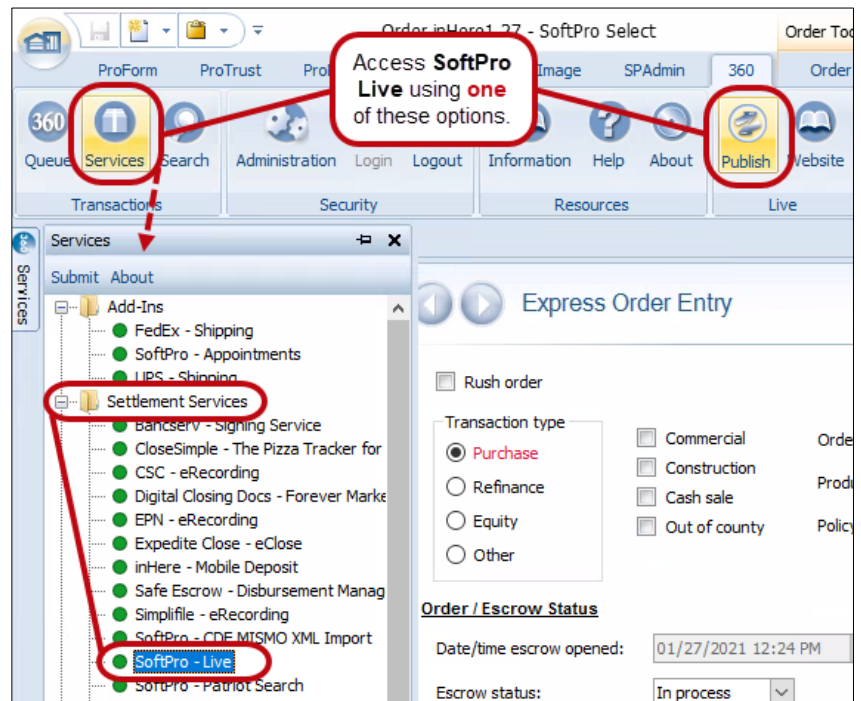
### Sharing a smartview Document

From your SoftPro order,

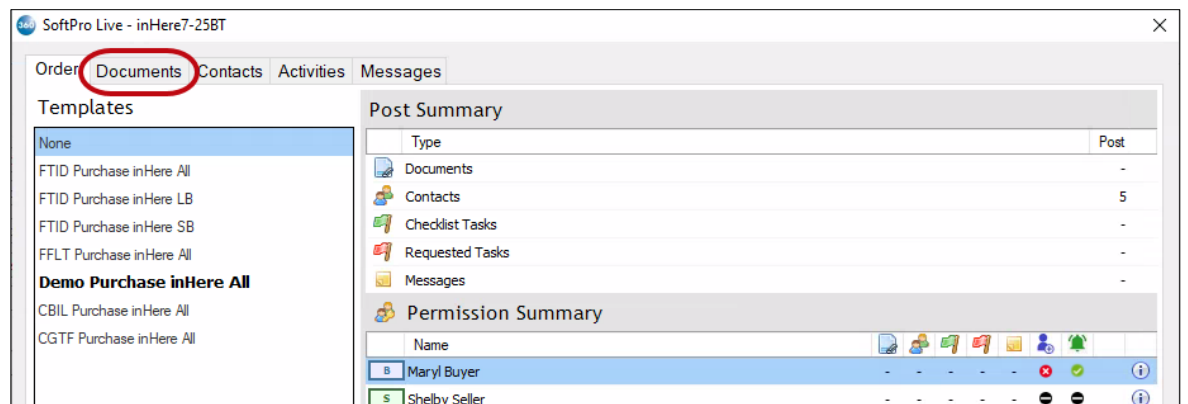
1. Click the **360** tab
2. Access **SoftPro – Live**

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



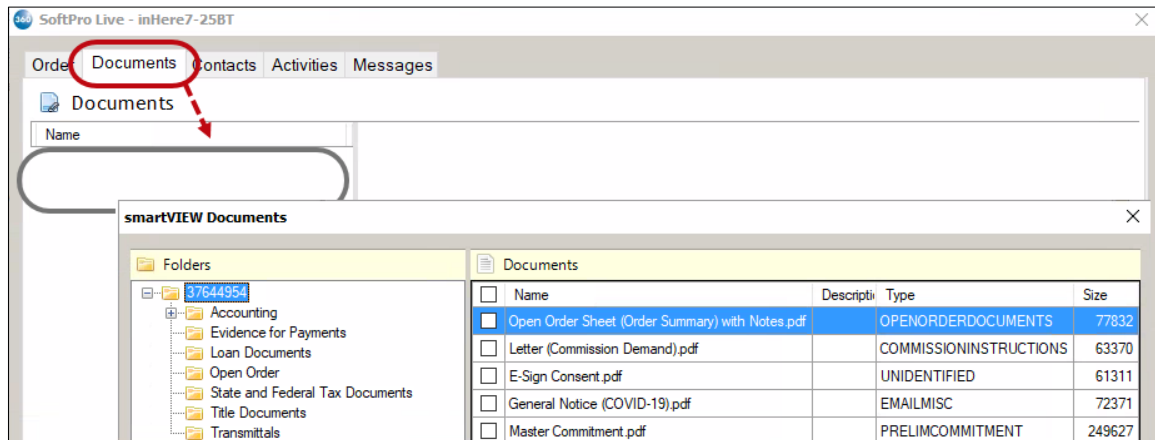
3. From the **SoftPro Live** window, click the **Documents** tab



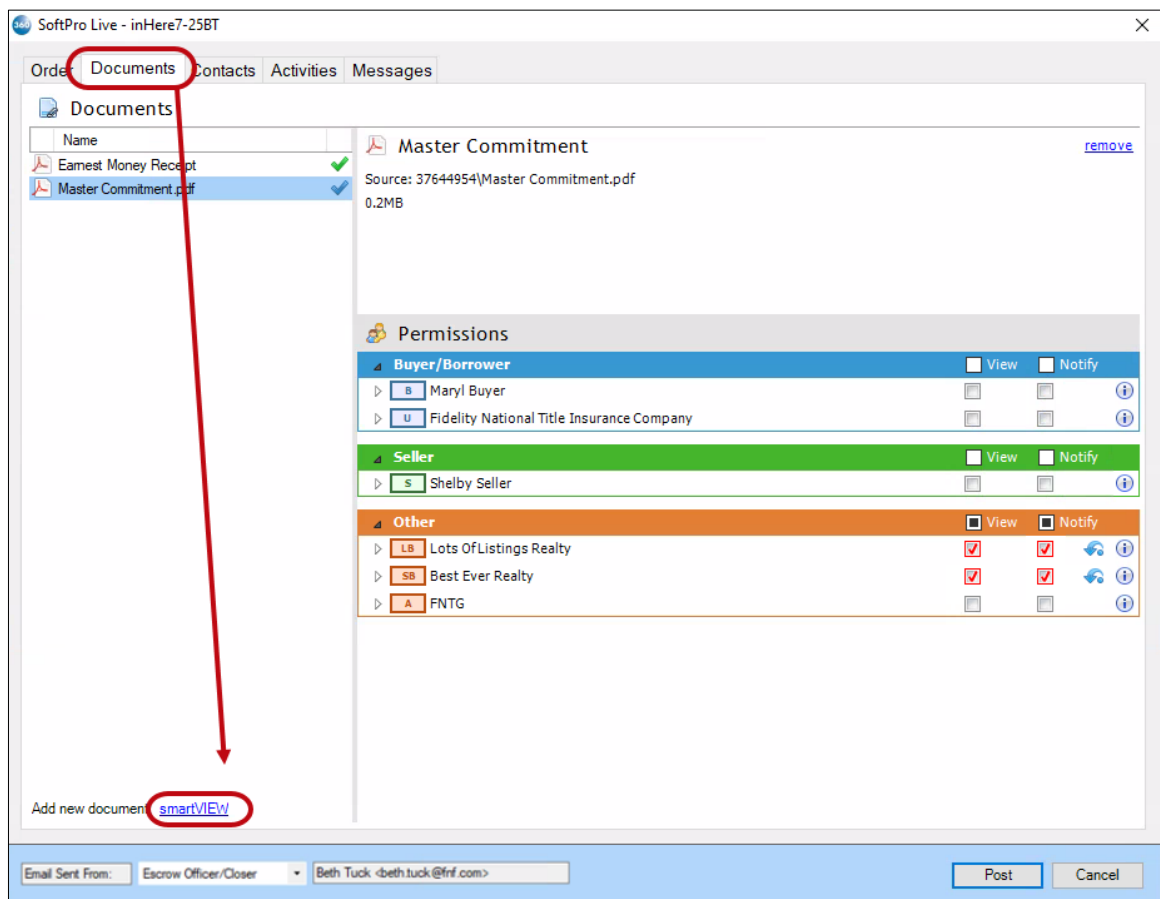
### 4. Add a document

#### a) Access smartview Documents

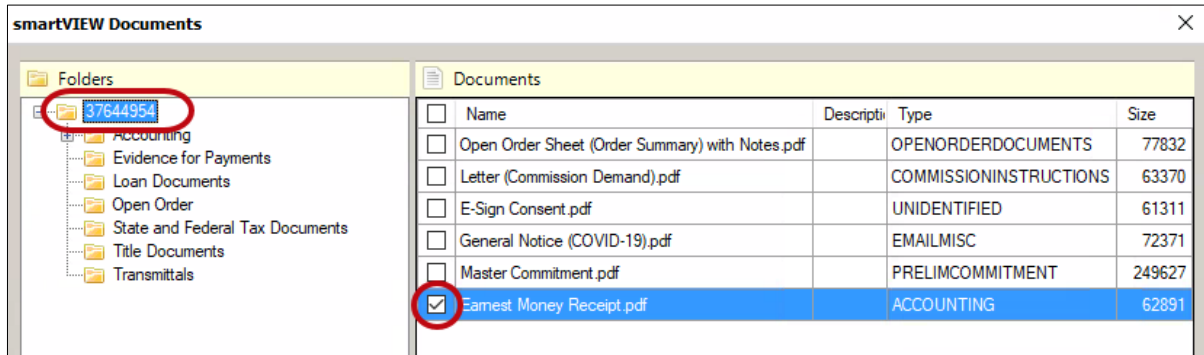
- › If this is the first document to be uploaded, the **smartview Documents** window opens immediately



- › 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)

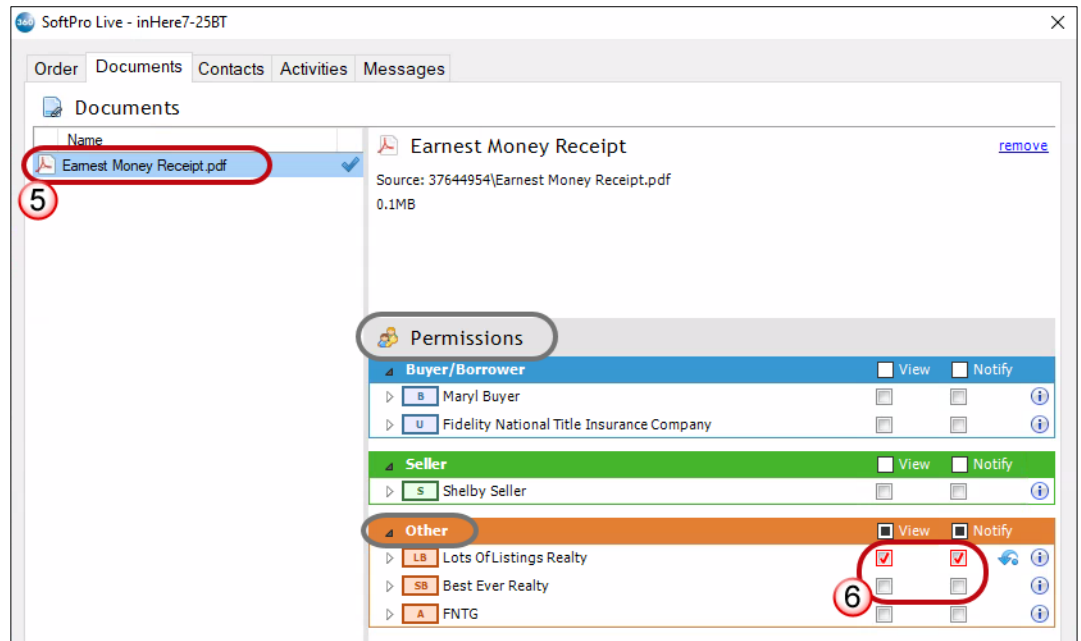


- d) Click the OK button

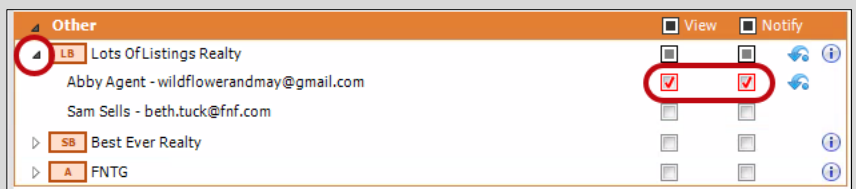
The documents show in the **Documents** section in SoftPro Live.

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



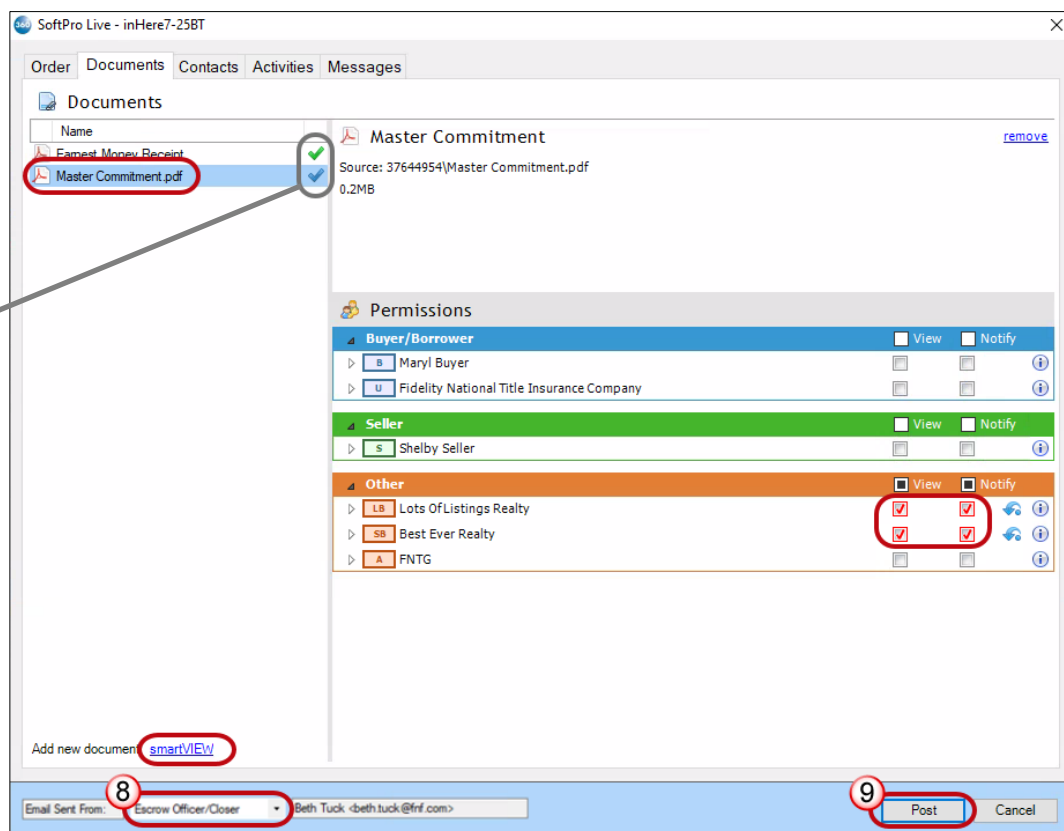
**NOTE:** You can set an individual's **View** or **Notify** settings by clicking the drop-down versus setting all at the LB/SB level.



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

**NOTE:** Documents with a green  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



The screenshot shows the 'SoftPro Live - inHere7-25BT' window. The 'Documents' tab is active, displaying a list of documents. The 'Master Commitment.pdf' document is highlighted with a blue checkmark icon, indicating it is pending. A red circle highlights the 'smartVIEW' button in the 'Add new document' section. The 'Permissions' section shows a table with columns for 'View' and 'Notify' for various roles: Buyer/Borrower, Seller, and Other. The 'Other' section has red checkmarks in the 'View' and 'Notify' columns for 'Lots Of Listings Realty', 'Best Ever Realty', and 'FNTG'. At the bottom, the 'Email Sent From' field is set to 'Escrow Officer/Closer' with a dropdown arrow, and the 'Post' button is highlighted with a red circle.

**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](mailto: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.