



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

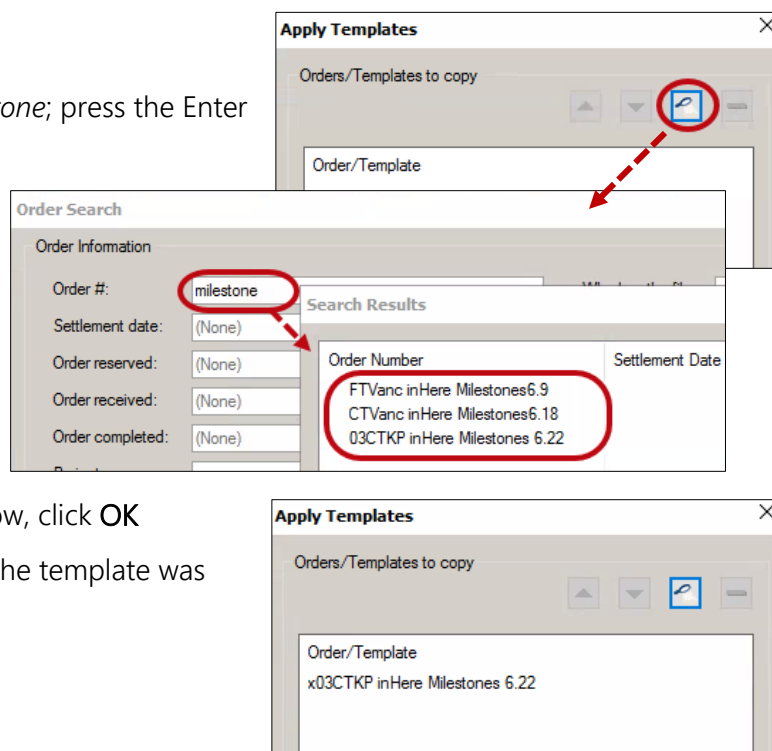
Skip to **Creating a Message** if the applicable template has been applied and you wish to learn how to send messages.

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

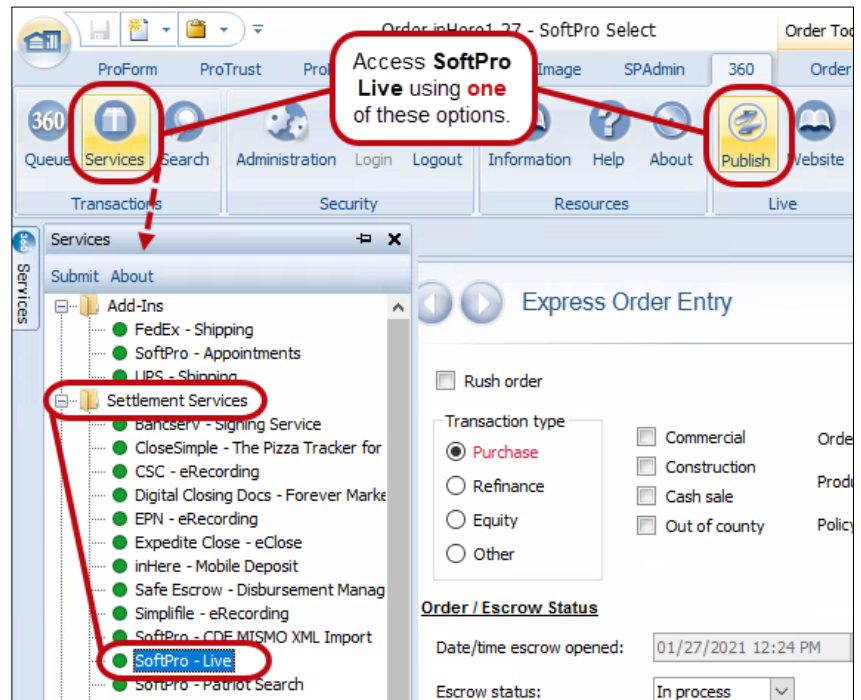
2. Access SoftPro – Live

From the 360 ribbon,

- › Click the **Publish** button, if active

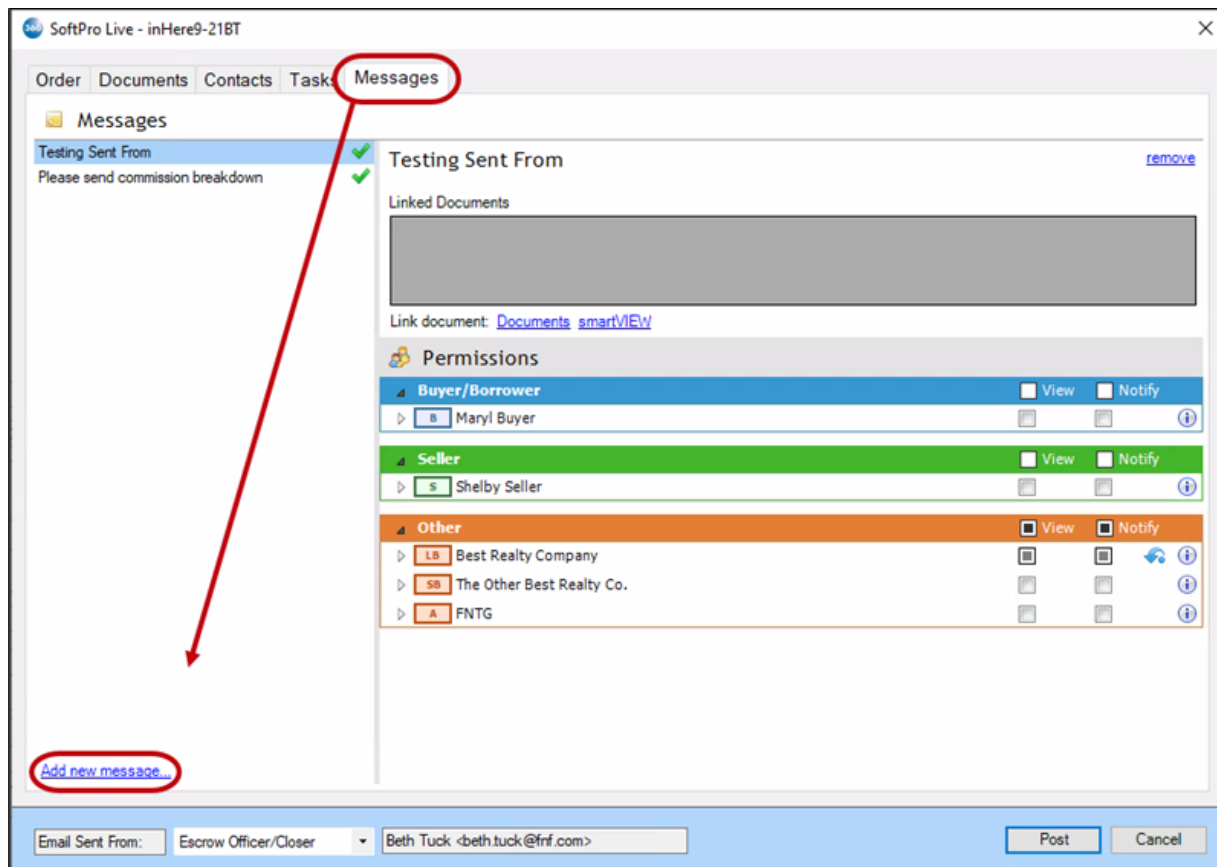
-Or-

- 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

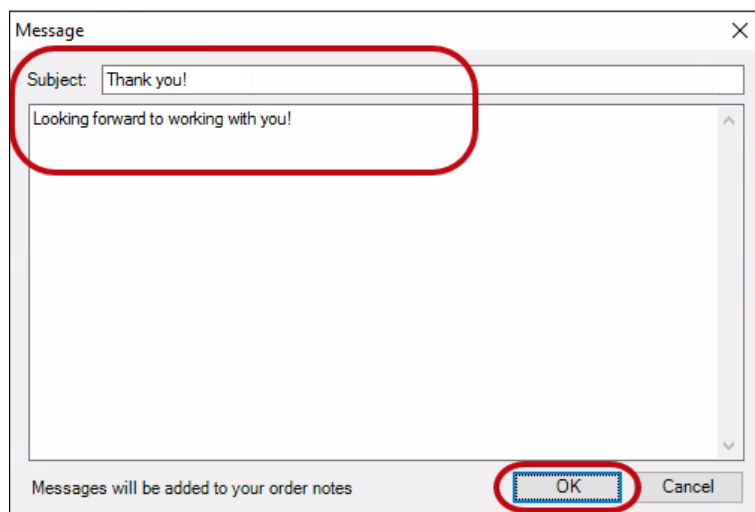


5. When prompted, enter the,

› **Subject**

› **Message**

6. Click **OK**



Message

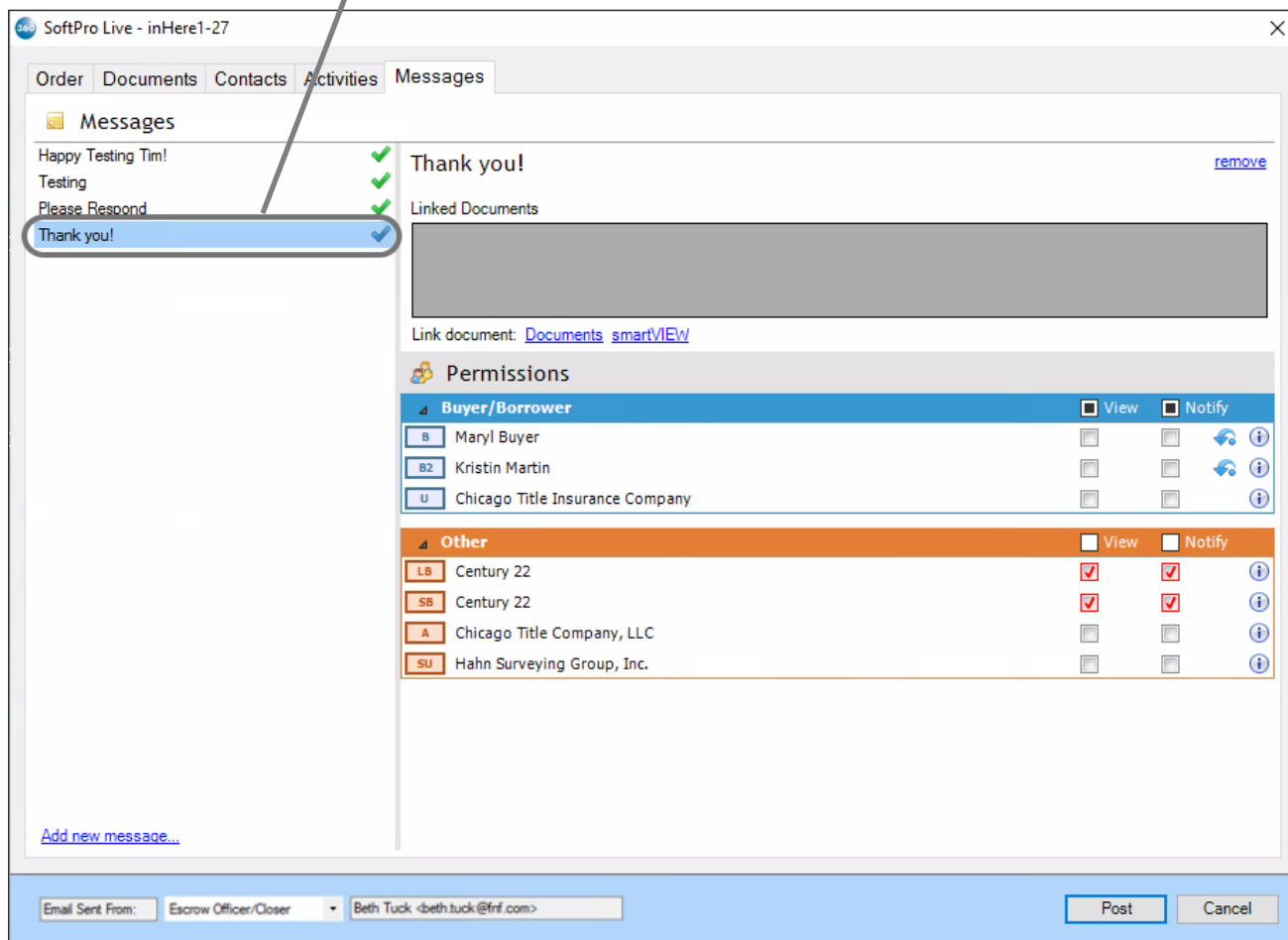
Subject: Thank you!

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

[Add new message...](#)

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

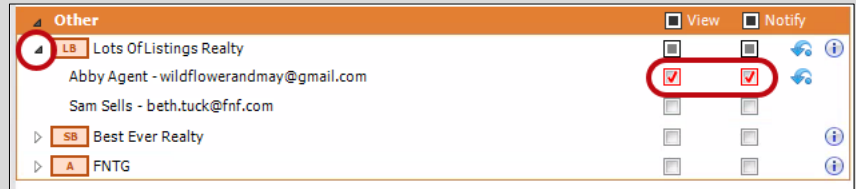
Post Cancel

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

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



	View	Notify
Other		
LB Lots Of Listings Realty	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Abby Agent - wildflowerandmay@gmail.com		
Sam Sells - beth.tuck@fnf.com		
SB Best Ever Realty	<input type="checkbox"/>	<input type="checkbox"/>
A FNTG	<input type="checkbox"/>	<input type="checkbox"/>

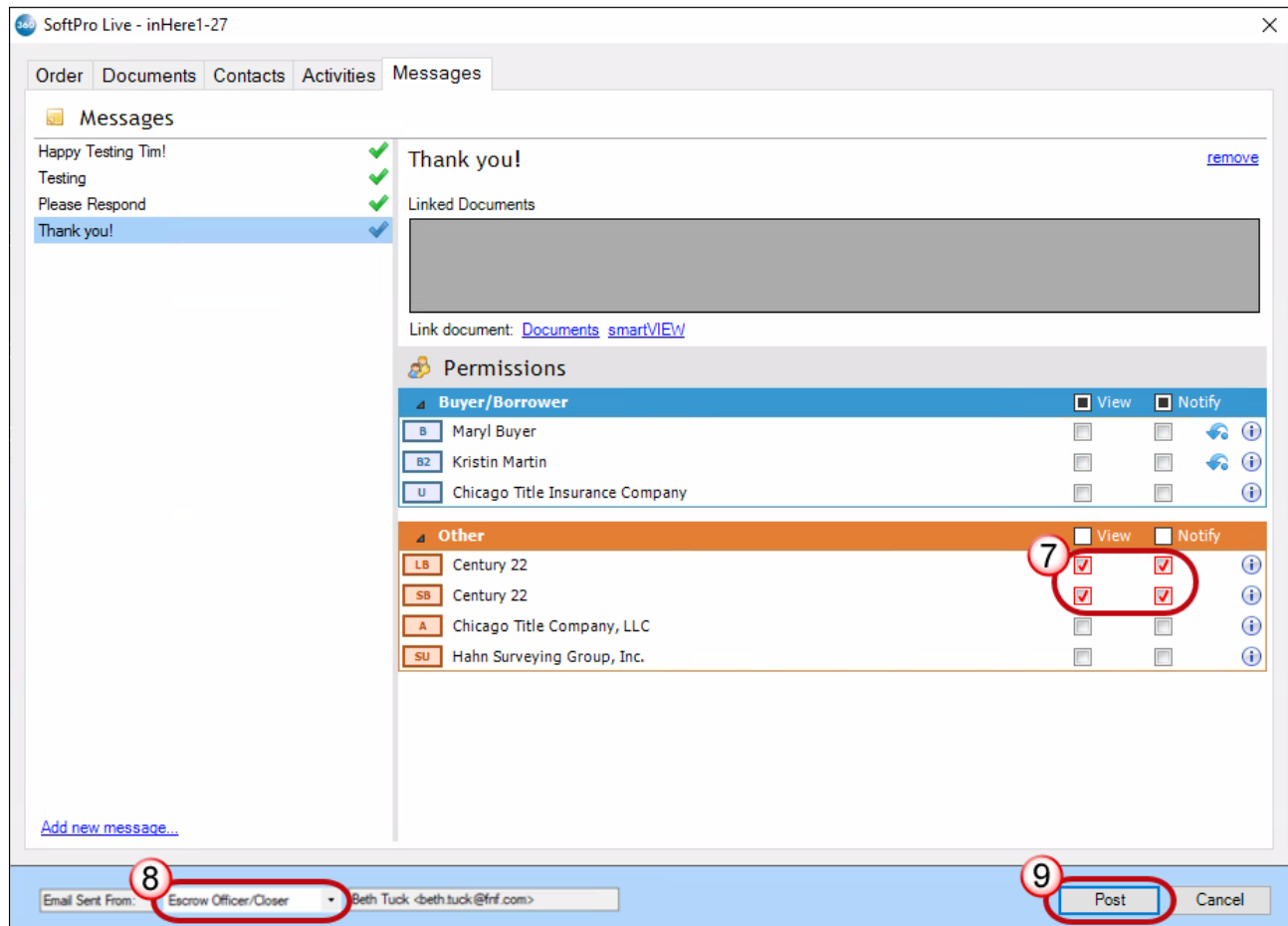
REMINDER: Only available for the Listing Broker/Agent and Selling Broker/Agent.

- 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 - 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"/>
B2 Kristin Martin	<input type="checkbox"/>	<input type="checkbox"/>
U Chicago Title Insurance Company	<input type="checkbox"/>	<input type="checkbox"/>

Other

	View	Notify
LB Century 22	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SB Century 22	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
A Chicago Title Company, LLC	<input type="checkbox"/>	<input type="checkbox"/>
SU Hahn Surveying Group, Inc.	<input type="checkbox"/>	<input type="checkbox"/>

[Add new message...](#)

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

Post Cancel