

Transparent Transactions FAQs

Questions	Answers
How long does the link in the email remain active so the agent can create their account?	The link stays active for three business days.
How do we send another email invitation to the agent if they deleted the first one and still need to create their account?	Open SoftPro Live, create a new message and select View and Notify for the applicable agent. When a milestone is triggered, the email is automatically sent.
How does the agent receive their username and password?	The email address entered in SoftPro is the required username. The password, account and app preferences are set after clicking the link within the email.
Is there a support number agents can call if they are locked out of their account?	Agents can call 800-487-1927 or contact Zendesk through the app or website.
How do I open SoftPro Live?	Open from the 360 Settlement Services folder or click the Publish button from the 360 ribbon.
How can I verify the documents we have set up to automatically share out have been sent?	Open SoftPro Live, click the Documents tab. Sent documents are identified with a green check mark.
What is the best way to ensure all data being shared to the app and portal is current?	Open SoftPro Live, click Post .
Why is the View Milestones icon grayed out?	The inHere Milestones template has not been applied to the order. Click the Apply Templates button from within the order to overlay the milestones.
Why are only certain milestones being color-coded on the app and portal?	The triggers within SoftPro aren't being completed, therefore, automation is not able to fire and push the milestone to the app and portal.
How can I verify the milestones have been completed?	Navigate to the Checklist Tasks or Requested Tasks screen, click the View Milestones  icon, and verify they have been completed.
Can we use SoftPro Live/inHere for Buyers and Sellers?	Not at this time; the first phase of this implementation is for real estate agents only. In some markets attorneys apply as well.