

Bancserv User Guide

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History

Date	Version	Details
10/14/2025	v2.0	<p>This release includes:</p> <ul style="list-style-type: none">• Functional enhancements<ul style="list-style-type: none">○ Application now uses REST API format○ Simplified process for updating existing orders○ Ability to attach additional documents and notes to an existing order○ Scanback remits can now be received at any time after the order is complete○ Enhanced support for Mitek identity verification• Aesthetic enhancements<ul style="list-style-type: none">○ Revised workflow with streamlined screen layouts and enhanced validation○ Addition of a Summary/Validation screen to validate entries prior to submission

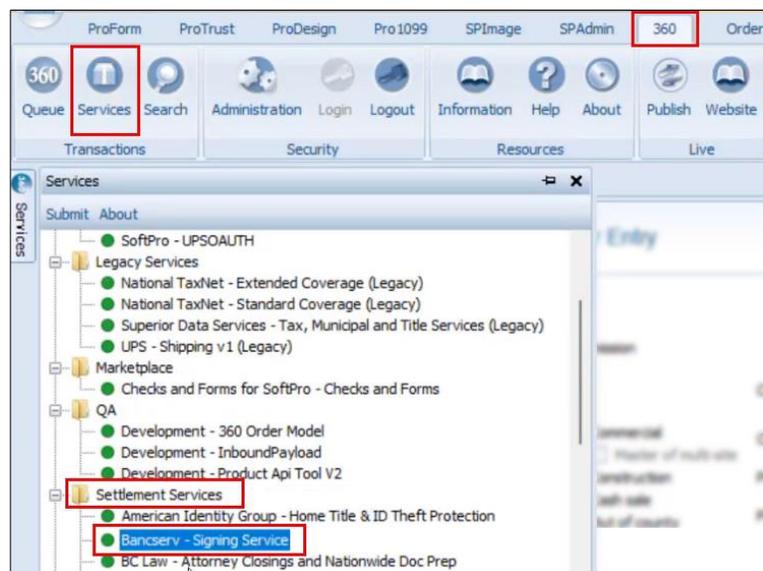
Introduction

The Bancserv integration with SoftPro 360 provides users the ability to connect directly to any notary signing service in the Bancserv network. Users are able to send orders and documents to the preferred notary signing service without leaving ProForm.

Accessing

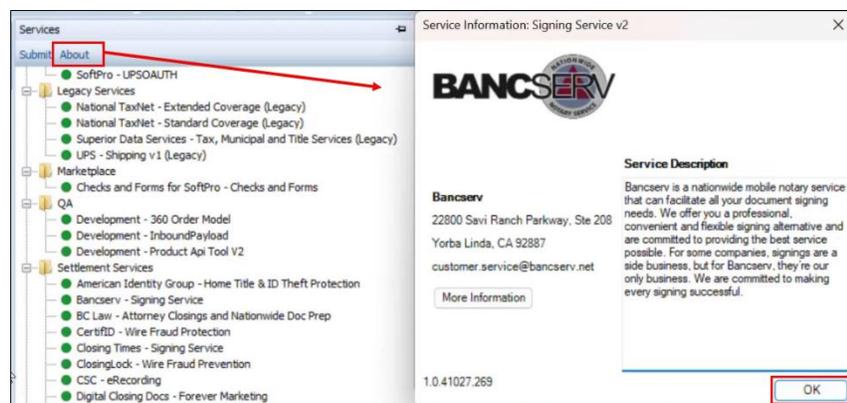
From the **360** ribbon, click the **Services** button to open the **Services** tab.

1. Click the **Settlement Services** folder to expand
2. Double-click the **Bancserv – Signing Service** entry



For additional information about Bancserv, click the **About** link on the **Services** toolbar. The **About** screen is displayed with Bancserv contact information and the Service Description.

Click **OK** to close.



Select a ProForm Order

Each request must be linked to a ProForm Order.

1. From the **Order Linking** window
 - a. If no order is open, enter the corresponding order in the **Selected Order Number** field

The screenshot shows the 'Order Linking' dialog box. It has a title bar with a close button (X). Below the title bar is a section labeled 'Open Order Numbers:' with an empty list box. Below that is a text input field labeled 'Selected Order Number:' which is currently empty. At the bottom are 'OK' and 'Cancel' buttons.

- b. If a single order is open, the order number is shown in the **Open Order Numbers** field and the **Selected Order Number**

NOTE: The **Selected Order Number** field can be overwritten with an order that is not open.

The screenshot shows the 'Order Linking' dialog box. The 'Open Order Numbers:' list box contains one entry, '2025020144', which is highlighted in blue. Below it, the 'Selected Order Number:' text input field also contains '2025020144'. A red callout box with arrows pointing to both the list entry and the input field contains the text: 'Order number is automatically populated as Selected Order Number'. 'OK' and 'Cancel' buttons are at the bottom.

- c. If multiple orders are open, all order numbers appear in the **Open Order Numbers** field, and the first order is displayed in the **Selected Order Number** field. Highlight an order in the **Open Order Numbers** field to select the applicable order

2. Press the **OK** button to continue

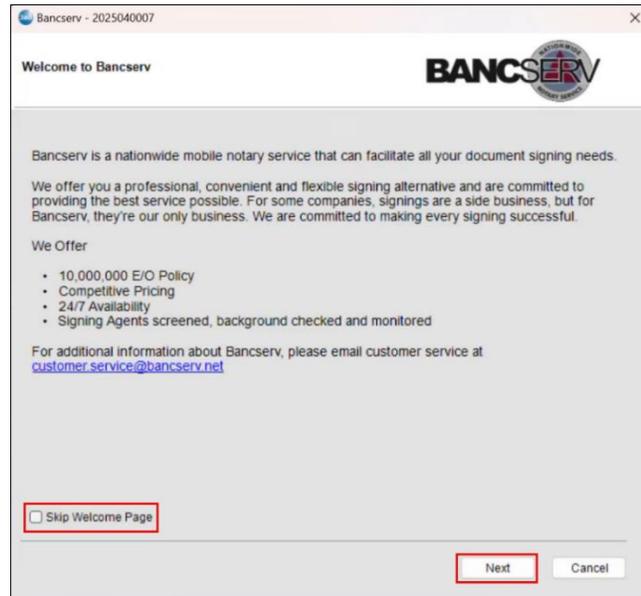
The screenshot shows the 'Order Linking' dialog box. The 'Open Order Numbers:' list box contains two entries: '2025020144' (highlighted in blue) and '20220000107'. Below it, the 'Selected Order Number:' text input field contains '2025020144'. A red callout box with arrows pointing to the first list entry and the input field contains the text: 'First order number is automatically populated as the Selected Order Number'. 'OK' and 'Cancel' buttons are at the bottom.

Welcome Screen

After a ProForm Order is linked, the **Welcome** screen displays.

You can check the **Skip Welcome Screen** check box to skip having the **Welcome** screen display each time you log into Bancserv.

Click the **Next** button to continue.



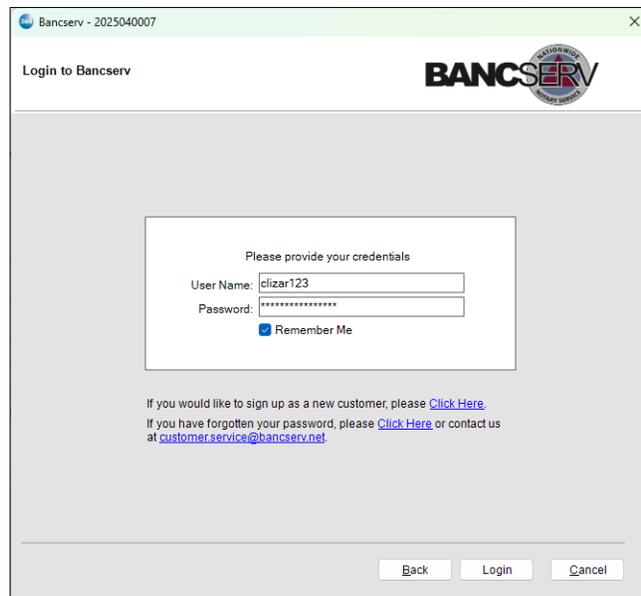
Logging In and Authentication

Existing users enter your **Bancserv** username and password.

Check the **Remember Me** check box to avoid seeing the Login window going forward.

To set up an account with **Bancserv** contact customer service via email or the number listed.

Click **Next** to continue.



Basic Order Information Screen

Once logged into Bancserv, the **Basic Order Information** screen displays. All required fields, as noted by the **red** asterisk, must be completed to enable the **Next** button.

From here users select:

- **Signing Date** (required) – must be a valid date today or later
- **Time** (required) – this is a free form field; users can enter a specific time or text as needed (i.e., *Open, afternoon, etc.*)
- **Escrow/File #** – pulls in the linked ProForm order number
- **Loan #** (required) – pulls data from ProForm order if entered; can be manually entered here
- **Mitek** (required) – select from the drop-down,
 - **No** - no appointment is to be scheduled
 - **Mitek Only** – only an appointment for identity validation is scheduled with Mitek. No signing is scheduled
 - **Mitek Add-on** - identity validation is added on to the signing appointment
- **Sets of Documents** – This field is required if the Mitek field is set to **No** or **Mitek Add-on** and is disabled if the Mitek field is set to **Mitek Only**. The user selects how many sets of documents are to be signed
- **Type of Documents** – This field is required if the Mitek field is set to **No** or **Mitek Add-on** and is disabled if the Mitek field is set to **Mitek Only**. The user selects from a list of available documents to be signed
- **Lender** (required) – contains a drop-down list of available Lenders. If **Type of Documents** is set to **Purchase-Cash Transaction** or **Seller Package**, the Lender field defaults to **None or Not Applicable**. If Other is selected, a text field is displayed allowing the user to enter a lender name

Click **Next** to continue once all required information has been entered.

Signer Information Screen

The **Signer Information** screen allows the user to select who is to be present at signing and where the signing is to take place.

- **Signer 1**
 - **Name** (required) – select from the drop-down populated from the ProForm Order Contacts or select Other, which displays a text field to enter a Signer Name
 - **Email** once the Signer is selected, the field populates with data entered in ProForm for the selected Contact
 - **Phone** (required) – once the Signer is selected, the field populates with data entered in the mobile phone of the ProForm order for the selected Contact and can be overwritten
- **Signer 2** (optional)
 - **Name** select from the drop-down populated from the ProForm Order Contacts or select Other, which displays a text field to enter a Signer Name; users cannot select the same Contact selected for Signer 1.
 - **Email** once the Signer is selected, the field populates with data entered in ProForm for the selected Contact
 - **Phone** once the Signer is selected, the field populates with data entered in

The screenshot shows the 'Signer Information' screen in the Bancserv application. The window title is 'Bancserv - 2025060011'. The screen is divided into sections for 'Signer 1', 'Signer 2', and 'Signing Address'.
 - **Signer 1:** Contact is 'Destiny Hannah', Email is 'dh@gmail.com', and Phone is '(541)555-1515'.
 - **Signer 2:** Contact is '- Select -', Email is empty, and Phone is '() - -'.
 - **Signing Address:** Address is 'Buyer', Address Line is '2555 Walnut Street', City/State/Zip is 'Denver OH 80205-'.
 At the bottom, there are 'Back', 'Next', and 'Cancel' buttons.

This screenshot is similar to the previous one but highlights the 'Other' contact selection and the 'Name' field for both Signer 1 and Signer 2 with red boxes. The 'Name' fields have a red asterisk, indicating they are required. The 'Other' selection in the Contact dropdown for both signers is also highlighted.

the mobile phone of the ProForm order for the selected Contact and can be overwritten

- **Signing Address**
 - **Address** (required) – drop-down selections are:
 - **Buyer** – pulls the Buyer’s address from the ProForm order
 - **Seller** – pulls the Seller’s address from the ProForm order
 - **Property** – pulls the Property Address from the ProForm order
 - **Custom** – if selected, allows the user to manually enter in an address in the **Address Line** fields

Click the **Next** button to continue.

Documents To Deliver Screen

The **Documents to Deliver** screen allows the user to select the document(s) that are to be delivered to **Bancserv**, who they are to be sent to and how they are to be sent and returned.

Select from the respective dropdowns,

- **Docs sent to:** (required) select who is receiving the documents:
 - **Notary**
 - **Borrower/Signer/Other**
- **Docs sent by:** (required) select how the documents are to be sent
 - **Fedex**
 - **UPS**
 - **Email**
 - **Customer Upload** – this option enables the **Add Documents** button for uploading and is only available if documents are being sent to the Notary
 - **Branch Pickup**
 - **Other** – if selected, a text field is enabled allowing the user to enter a sent by method
- **Docs returned by:** (required) select how documents are to be returned
 - **Fed Ex return label will be provided** – label must be created with Fedex outside of this application
 - **UPS return label will be provided** – label must be created with UPS outside of this application
 - **Fed Ex**
 - **Branch Drop Off**

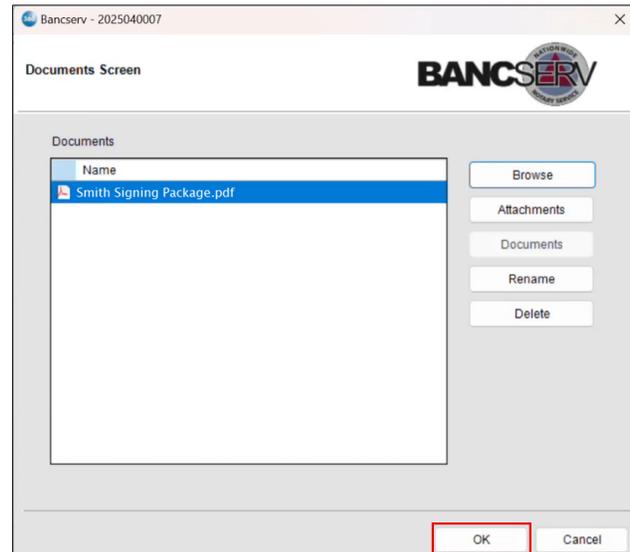
- **Other** - If selected, a text field is enabled allowing the user to manually enter who the documents are returned to
- **Manual/Duplicate orders**

Adding Documents

If enabled, clicking the **Add Documents** button opens the **Documents Screen**.

From here, users have the option to,

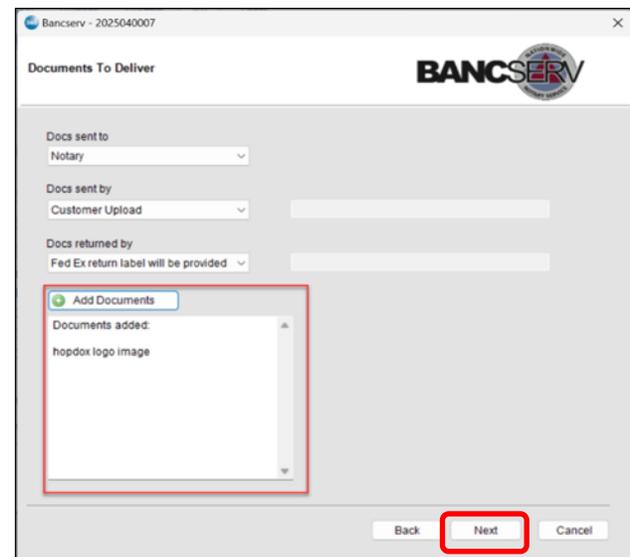
- **Browse:** Browse your computer to find documents to submit
- **Attachments:** Attach documents from the ProForm order or a document repository (i.e., smartVIEW)
- **Documents:** Select documents from ProForm ReadyDocs
- **Rename:** Rename added documents before submitting
- **Delete:** Delete documents from the list of documents before submitting



Click **OK** to upload the documents.

The **Documents to Deliver** screen is displayed with a list of the attached documents.

Click the **Next** button to continue.



Special Services/Remarks Screen

The **Special Services/Remarks** screen is displayed, and the user can enter additional information as needed for the signing.

- **Scan Backs** – The user should select Yes if scan backs are allowed for this transaction
- **Request Specific Notary**
- **Requested Notary Name** – If Yes is selected for Request Specific Notary, this field is enabled to manually enter a notary name
- **Language & Special Needs** – Select a specific language if necessary
- **Remarks/Comments**

Click the **Next** button.

Summary Screen

The **Summary** screen shows an overview of the request along with the **Fee Estimate** for the transaction.

Click the **Submit** button.

Escrow	2025040007
Loan	55225522
Lender	Bank of America
Signing Date	10/30/2025
Signing Time	afternoon
Doc Type	Purchase-Residential
Doc Sets	1 Set
Signer 1	Chris Cornell
Signer 2	
Street Address	45 Hawthorne Ave
City/State/Zip	Larkspur, CA, 94939
Document Sent To	Notary
Document Sent By	Customer Upload
Document Returned By	Branch Drop Off

Fee Estimate	
Purchase	\$ 175
Total	\$ 175

Once submitted, a message is displayed citing the order was successfully submitted to Bancserv and an order confirmation is to be sent once a notary has been assigned.

Click **OK** to close the integration.

The transaction shows in the **360 Queue** with the **Status** set to **In Progress**.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Provider Reference Number	De:
Bancserv	Signing Service v2	In Progress	2025040007	Default	matt.berg@softprocorp.com	10/14/2025 3:18 PM		2025040007	Esc
FedEx	Shipping v2	Completed	2025040007	Default	matt.berg@softprocorp.com	10/9/2025 5:49 PM	10/10/2025 5:5...		Fed
FedEx	Shipping v2	Completed	2025040007	Default	matt.berg@softprocorp.com	10/9/2025 5:46 PM	10/10/2025 5:5...		Fed

Accepting Data & Documents

In the **360 Queue** the transaction **Status** is updated to show as **Ready** when BancServ accepts the request and remits back with documents and/or data.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction Number
Bancserv	Signing Service v2	Ready	2025060011	Default	matt.berg@softprocorp.com	11/4/2025 1:08 PM		Escrow #: 2025060011 910019-60-251104-332794	

BancServ sends three documents, **Customer Confirmation**, **Customer Invoice** and a **Signing Appointment Notice**.

Select the transaction and click the **Next Step** button to open the **Review** screen. The **Review** screen allows the user to view, copy, and accept the data and documents into the ProForm order.

Information displayed in the **Data** section is written to the **Order Notes** in the ProForm order.

- **View:** View documents sent from BancServ on screen.
- **Copy:** Save a copy of the document to the clipboard.
- **Accept:** Attach the document(s) to the ProForm order and save the documents to the corresponding document repository order (i.e., smartVIEW) identified in the lower left.
- **Cancel:** Closes the screen without accepting data/documents.

Bancserv - 2025040007

Select All Select None Field Codes

Groups Data

Name	Current Value	New Value
Others[0]/Name	BancServ	BancServ
Others[0]/People[0]/FullName	CHRIS LIZAR	CHRIS LIZAR
Others[0]/People[0]/Email	clizar@bancserv.net	clizar@bancserv.net
Others[0]/People[0]/Phone	714-476-0658	714-476-0658
Notes[0]		Action: RemitOperation: File...
Notes[1]		Action: RemitOperation: Conf...

Documents

View	Copy	File Name	File Size (KB)	Transferred
		6892087_CustomerConfirmation_251831563	61	100%
		6892088_CustomerInvoice_251831563	60	100%
		6892089_SigningAppointmentNotice_251831563	481	100%

SmartViewID: 98682231

Accept Cancel

The accepted documents are saved as **Attachments** to the ProForm order and to the selected order in the document repository.

Click the **Accept** button to continue.

Once accepted, the **360 Queue** is updated to show the transaction as **In Progress** until the signing is completed.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction Number
Bancserv	Signing Service v2	In Progress	2025060011	Default	matt.berg910019@softprocorp.com	11/4/2025 1:08 PM		Escrow #: 2025060011	910019-60-251104-332794

BancServ sends a remit and the **360 Queue** once again updates the **Status** of the transaction to **Ready** indicating data and documents are available.

Click the **Next Step** button to open the **Review** screen. The screen displays the **Action: Remit Operation Completed** note.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction Number
Bancserv	Signing Service v2	Ready	2025060011	Default	matt.berg910019@softprocorp.com	11/4/2025 1:08 PM		Escrow #: 2025060011	910019-60-251104-332794

Click the **Accept** button to write this to the **Notes** screen.

Bancserv - 2025060011

Select All | Select None | Field Codes

Groups: All, Notes

Name	Current Value	New Value
Notes[0]		Action: RemitOperation, Compl...

Accept | Cancel

The **360 Queue** is updated to show the **Status** as **Completed**.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction Number
Bancserv	Signing Service v2	Completed	2025060011	Default	matt.berg910019@softprocorp.com	11/4/2025 1:08 PM	11/4/2025 1:13 PM	Escrow #: 2025060011	910019-60-251104-332794

Accepting a Scan Back

If **Yes** was selected for **Scan Backs** when submitting the original request, BancServ remits a scan back when one is available.



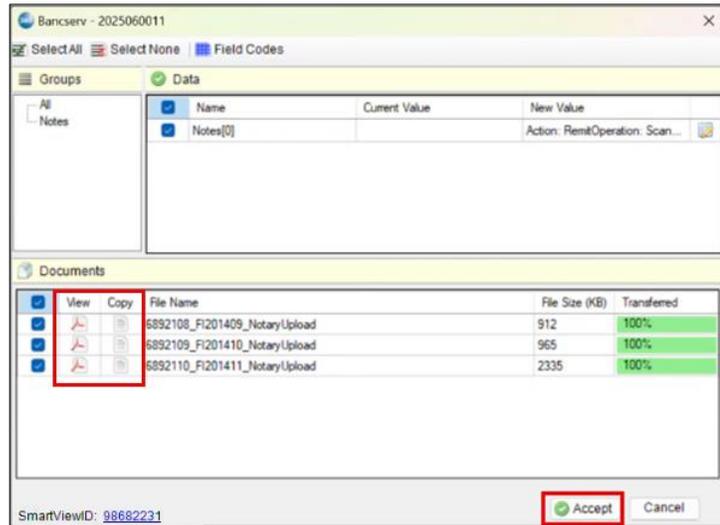
The **Status** of the transaction is updated to **Ready** once the scan back documents have been received from BancServ.

Select the corresponding transaction and click the **Next Step** button to open the **Review** screen and accept the signed/notarized documents.

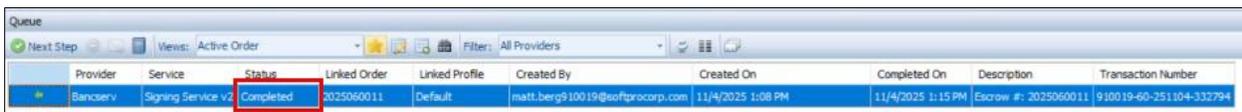


As noted previously, documents can be viewed on screen, and/or copied to the clipboard.

Click the **Accept** button to accept the data/documents into the ProForm order and the document repository order identified in the lower left.



Once the documents are accepted, the **360 Queue** shows the **Status** as **Completed**.

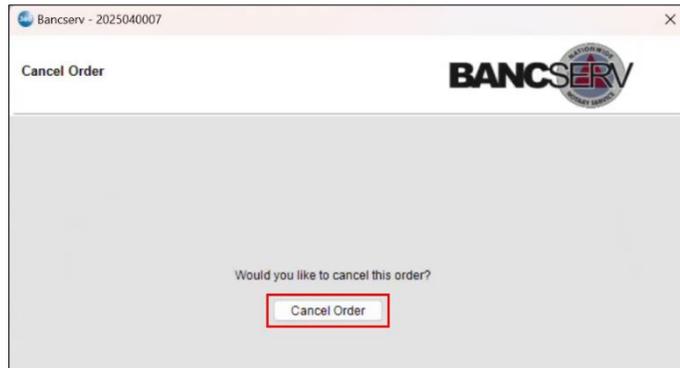


Canceling a Transaction

The user may cancel a **Bancserv SoftPro 360** transaction when the **Status** is set to **In Progress**. To do so, highlight the transaction in the **360 Queue** and click the **Cancel** icon on the toolbar.



From the **Cancel Order** screen, click the **Cancel Order** button. Once the order is canceled, the user is returned to the **360 Queue**, and the **Status** is then set to **Cancelled**.



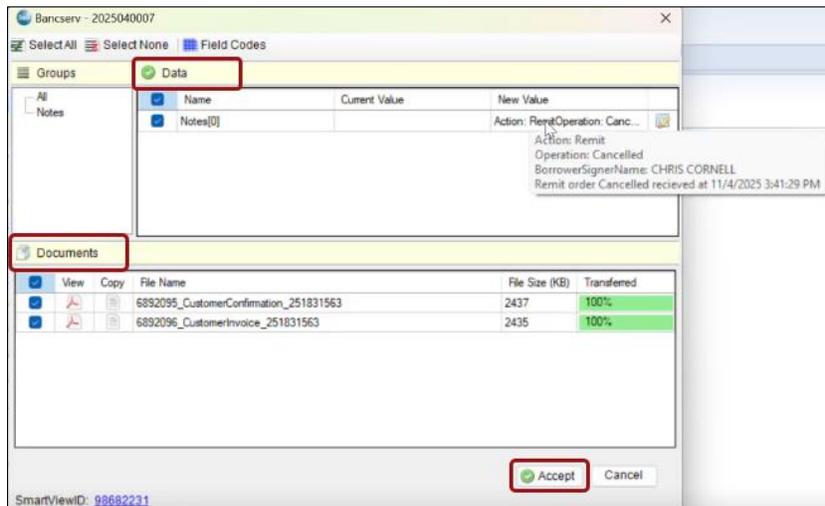
Once the transaction is cancelled by BancServ, a remit is generated and the **360 Queue Status** is updated to **Ready**, allowing the user to accept the cancellation into the ProForm order.

Highlight the transaction and click the **Next Step** button.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction Number
Bancserv	Signing Service v2	In Progress	2025040007	Default	matt.berg910019@softprocorp.com	11/4/2025 12:46 PM		Escrow #: 2025040007	910019-60-251104-332760
Bancserv	Signing Service v2	In Progress	2025040007	Default	matt.berg910019@softprocorp.com	11/4/2025 10:57 AM		Escrow #: 2025040007	910019-60-251104-332654
Bancserv	Signing Service v2	Ready	2025040007	Default	matt.berg910019@softprocorp.com	11/4/2025 10:40 AM		Escrow #: 2025040007	910019-60-251104-332634
Bancserv	Signing Service	Processing	2025040007	Default	matt.berg910019@softprocorp.com	11/4/2025 9:49 AM			910019-60-251104-332569

The **Review** screen displays the **Notes**; this is a confirmation of the cancellation to be written to the **Order Notes** in the ProForm order, and the **Documents** section shows the **Customer Confirmation** document as well as a **Customer Invoice** from BancServ.

Click the **Accept** button to pull the data and documents into the ProForm order.



The **360 Queue** is then updated to show the **Status** as **Cancelled** and no further action can be taken on this transaction.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction Number
Bancserv	Signing Service v2	In Progress	2025040007	Default	matt.berg910019@softprocorp.com	11/4/2025 12:46 PM		Escrow #: 2025040007	910019-60-251104-332760
Bancserv	Signing Service v2	Cancelled	2025040007	Default	matt.berg910019@softprocorp.com	11/4/2025 10:57 AM		Escrow #: 2025040007	910019-60-251104-332654
Bancserv	Signing Service	Processing	2025040007	Default	matt.berg910019@softprocorp.com	11/4/2025 9:49 AM			910019-60-251104-332569

Updating a Transaction

If sending additional instructions or documents to Bancserv is required, they can be sent from the same transaction if the status is **In Progress**. From the **360 Queue**, highlight the transaction and click the **Next Step** button.

Provider	Service	Status	Linked Order	Linked Profile	Created By
Bancserv	Signing Service v2	In Progress	2025040007	Default	matt.berg@softprocorp.com
FedEx	Shipping v2	Completed	2025040007	Default	matt.berg@softprocorp.com

The **Update Instructions and Documents** screen displays allowing the user to enter instructions and/or upload documents. Refer to the [Adding Documents](#) section for steps to attach documents.

The **Update Instructions** field displays a **red** asterisk; if documents are added without entering instructions, the requirements are fulfilled, the **red** asterisk is no longer shown.

Click the **Submit** button to continue.

A message displays citing the request has been successfully updated; click **OK** to return to the **360 Queue**.

