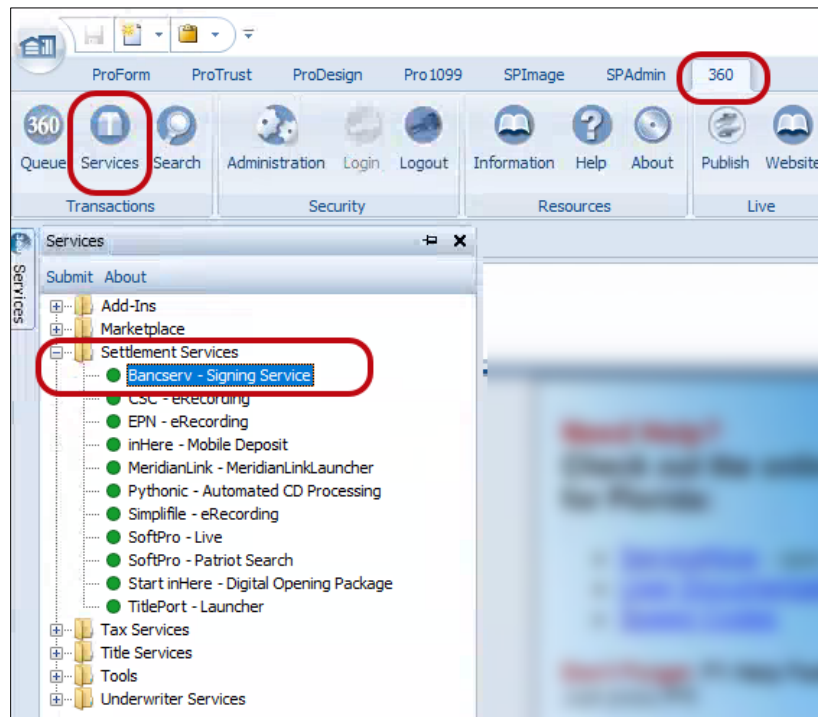


## Managing Bancserv Transactions in SoftPro 360

### Submitting a Transaction to Bancserv

**Bancserv**, a signing services provider, can be found in the **SoftPro 360 Services** menu under **Settlement Services**. Double click **Bancserv** or highlight and click the **Submit** button to submit a transaction to this vendor.



You must link each transaction to a ProForm Order. If you already have ProForm order(s) open, they will be listed in the **Order Linking** dialog. The current active order is highlighted and entered in the **Selected Order Number** field. You have the ability to select from any of the open orders, or you may choose to overwrite the **Selected Order Number** with an order that is not currently open. Once you have confirmed the order to link, click OK to continue to the next screen.

The **Welcome** screen provides information about **Bancserv**.

To skip this screen in the future, check the **Skip Welcome Screen** check box at the bottom of the screen.

Click **Next** to continue.

**Welcome to Bancserv**

Bancserv is a nationwide mobile notary service that can facilitate all your document signing needs. Through a network of thousands of qualified signing agents, we coordinate and simplify the process of closing real estate transactions by sending a notary (or attorney where required) directly to an individual's home or workplace to get documents signed, notarized and promptly returned.

We offer:

- \* 15,000,000 E/O Policy
- \* Competitive Pricing
- \* 24/7 Availability
- \* Signing Agents Screened and Interviewed

For additional information about Bancserv please call 714-919-3131 or email customer service at [info@bancserv.net](mailto:info@bancserv.net)

☐ Skip Welcome Screen

Next Cancel

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

New users can contact customer service via email or the number listed.

Click **Next** to continue.

**Bancserv Login**

Provide your Bancserv account information.

Username:  \*

Password:  \*

New Account Setup:

To setup a new account with Bancserv please contact customer service at 714-919-3131 or send an email to [customers@bancserv.net](mailto:customers@bancserv.net)

Back Next Cancel

The **Signing Information** screen shows the signing date, time, location and borrower information.

**NOTE:** The signing must be scheduled with Bancserv 3 hours prior to the signing time. If more than two borrowers, they can be entered into the **Special Instructions** field on the **Additional Information** screen (shown later).

The screenshot shows the 'Signing Information' window for transaction 120504. It includes fields for 'Signing Date' (2/16/2012), 'Time' (12:00:00 AM), and a checked 'Closer to Set Time' option. The 'Signing Address' is 480 Main Street, Raleigh, NC 27609. There are links for 'Buyer/Borrower', 'Seller', and 'Property Address'. Borrower/Signer 1 is Brenda Buyer with phone (919) 555-8856. Borrower/Signer 2 is blank. Navigation buttons 'Back', 'Next', and 'Cancel' are at the bottom.

The **Document Information** screen populates the **File/Escrow #** and **Loan #** from the Select order.

From the respective drop-downs, you can select who the documents are sent to, the method that the documents will be returned by the customer, how many document sets will be sent and the type of document package.

Click **Next** to continue.

The screenshot shows the 'Document Information' window for transaction 120504. It displays 'File/Escrow #' as 120504 and 'Loan #' as 4567416. Drop-downs show 'Documents will be sent to: Notary', 'Documents will be returned to customer by: Branch Drop Off', 'How many sets of documents: One Set', and 'Type of document package: Purchase-Buyer'. Navigation buttons 'Back', 'Next' (highlighted), and 'Cancel' are at the bottom.

The **Document Delivery** screen allows the user to select the document(s) that are to be delivered to **Bancserv**.

Documents can be attached to the SoftPro 360 transaction by selecting the **Attached Below** radio button or the blank radio button to access the drop-down for other options.

To attach a document, select **Browse** to attach .PDF documents from any location, **Attachment** to choose documents from the SPImage directory within ProForm or **ReadyDoc** to attach ProForm ReadyDocs.

Once a document is attached, use the **Rename** button to rename the document in the document package window or the **Delete** button to delete the document from the list.

Click **Next** to continue.

The screenshot shows the 'Document Delivery' window in the Bancserv application. The window title is 'Bancserv - 120504'. The Bancserv logo is in the top right corner. The main heading is 'Document Delivery'. Below it, the text 'Documents will be sent by:' is followed by a radio button selected for 'Attached Below' and an empty text field. Under 'Documents in this package:', there is a table with one row: 'Document Package' with a date of '2/6/2012'. To the right of the table are buttons: 'Browse', 'Attachment', 'ReadyDoc', 'Rename', and 'Delete'. At the bottom are 'Back', 'Next', and 'Cancel' buttons.

Document Package	2/6/2012

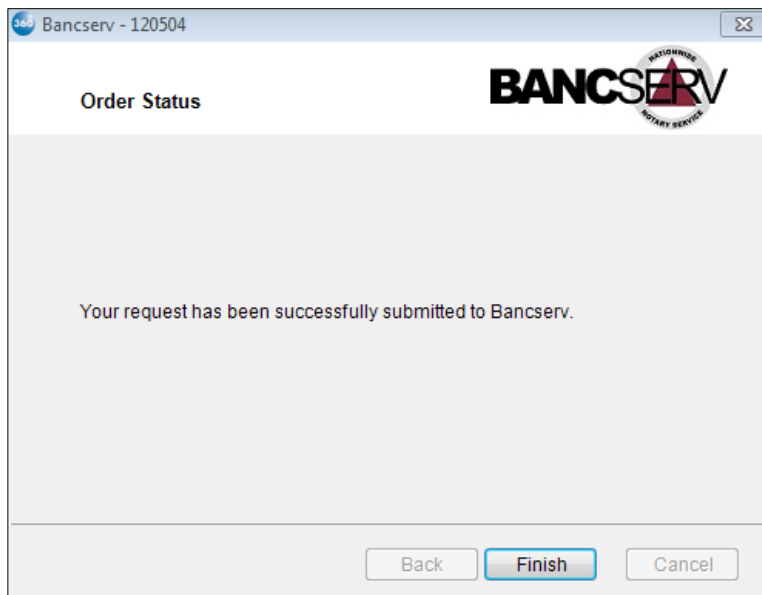
The **Additional Information** screen allows you to select which trip this is, if this is a **Provident Loan** and to enter any special instructions.

Click **Submit** to complete the submission process and send your request to Bancserv.

The screenshot shows the 'Additional Information' window in the Bancserv application. The window title is 'Bancserv - 120504'. The Bancserv logo is in the top right corner. The main heading is 'Additional Information'. Below it, the text 'Which trip is this?:' is followed by a dropdown menu showing '1st Trip'. Below that, the text 'Is this a Provident loan?:' is followed by a dropdown menu showing 'No'. A note in parentheses says: '(If Yes is selected, make sure to include specific instructions to the notary with your document package)'. Below this is a text area labeled 'Special Instructions:'. At the bottom are 'Back', 'Submit', and 'Cancel' buttons.

Once the transaction has been successfully submitted to **Bancserv**, the **Order Status** screen will show a successful message.

Click **Finish** to continue.



The transaction will now show in the **SoftPro 360** queue with a **Status** of **In Progress**.

Queue									
Review	Deliver	Views: ACTIVE ORDER	Filter: All Providers						
	Transaction Number	Provider	Service	Status	Linked Order	Created By	Created On	Completed On	Description
	417101-20-120206-00...	Bancserv	Bancserv	In Progress	120504	Melanie	2/6/2012 10:...		Escrow #: 120504

## Receiving a Remit from Bancserv

Once Bancserv has received your order they will send an invoice which changes the **Status** of your transaction to **Updated**.

To view the invoice, highlight the transaction and click the **Next Step** button.

Queue						
Next Step	Deliver	Views: Active Order	Filter: Bancserv			
	Transaction Number	Vendor	Product	Status	Linked Order	Created By
	360999-10-110411-002862	Bancserv	Bancserv	Updated	2011040006	Jacky

This opens the **Review** screen. To view the document click the **View**

 icon.

Review BancServ - 2024010011

Select All

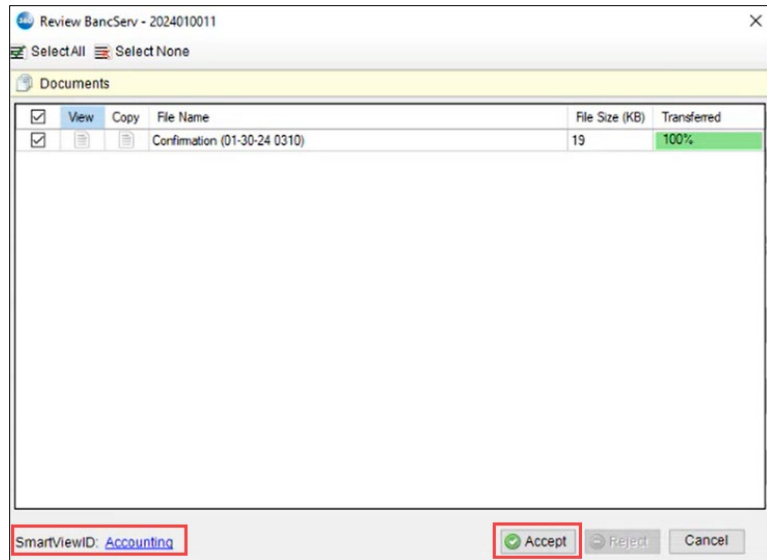
Select None


Documents

<input checked="" type="checkbox"/>	View	Copy	File Name	File Size (KB)	Transferred
<input checked="" type="checkbox"/>			Confirmation (01-30-24 0310)	19	100%

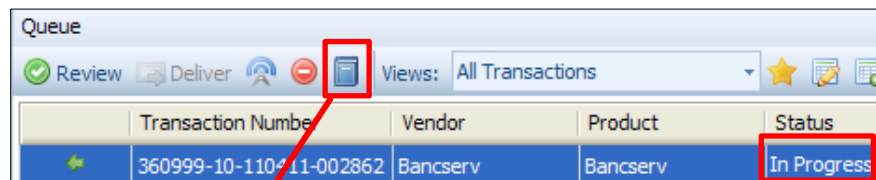
To accept the document to your ProForm order, click the **SmartViewID** link to select the folder where the document will be held.

Click the **Accept** button to continue.



The document(s) will be available to you from within your ProForm order via the **SPImage**  icon located on the ProForm Menu bar. For SoftPro Select users, documents are available by clicking the **Attachments** link located on the Order ribbon.

The transaction will then return to **In Progress**.



**Bancserv** notifies the user via the **SoftPro 360 Log** when the following occurs:

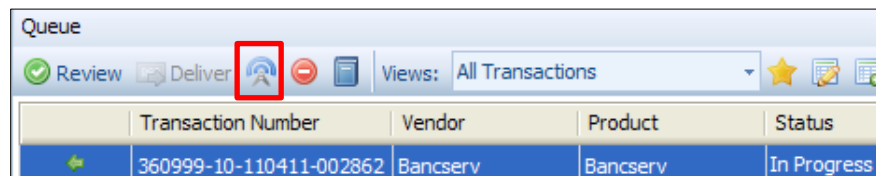
- a closer/notary is assigned to the closing
- documents have been successfully uploaded
- the closing has occurred
- if the transaction has been updated

## Updating a Transaction

You may update an existing **Bancserv** transaction through **SoftPro 360**.

Double click the transaction in the queue or click on the

**Update**  icon.



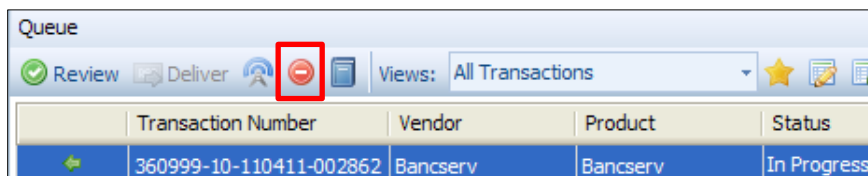
This will open up the transaction information originally submitted so you may make your changes. **SoftPro 360** will send the updated information to **Bancserv**. **NOTE: A user may not update a transaction if the closing date and/or time have passed.**


## Canceling a transaction

You may cancel a **Bancserv** transaction through **SoftPro 360**.

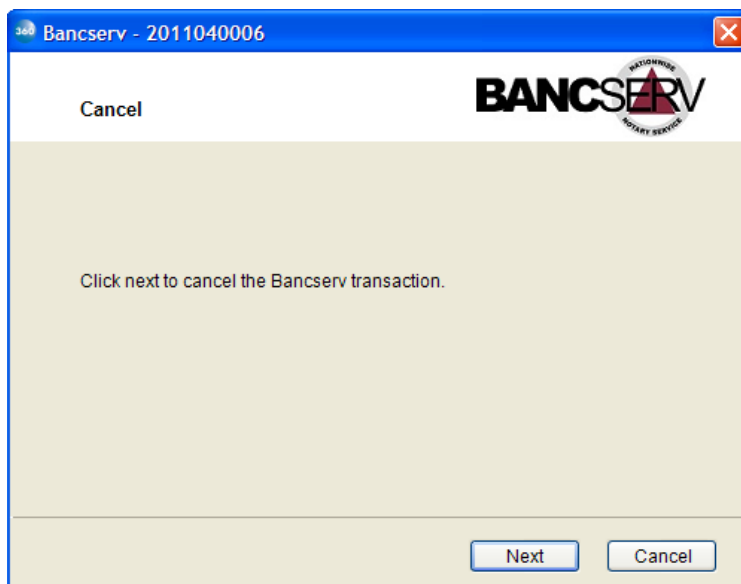
To do so, highlight the transaction in the **SoftPro 360** queue and click the

**Cancel**  icon.



Queue				
	Transaction Number	Vendor	Product	Status
	360999-10-110411-002862	Bancserv	Bancserv	In Progress

From the **Cancel** dialog, click the **Next** button to submit the request to Bancserv.



**Bancserv - 2011040006**

**BANCSEV**

Cancel

Click next to cancel the Bancserv transaction.

Next Cancel

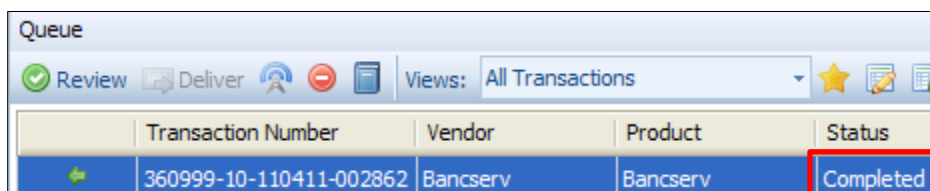
**SoftPro 360** will send a cancellation request to **Bancserv**, the transaction status will show **In Progress** while **Bancserv** determines if the cancellation request can be processed.


If **Bancserv** can proceed with cancellation, **Bancserv** will cancel the transaction and the **SoftPro 360 Queue** will update the Status to **Canceled**. If **Bancserv** cannot process the cancellation, the transaction will show as **In Progress**.

**NOTE:** No transactions may be cancelled within 2 hours of the scheduled closing time, or if the closing date and/or time have passed.

## Completing a Transaction

Once the closing has taken place, the transaction status will change to **Completed** in the **SoftPro 360 Queue**.



Queue				
	Transaction Number	Vendor	Product	Status
	360999-10-110411-002862	Bancserv	Bancserv	Completed