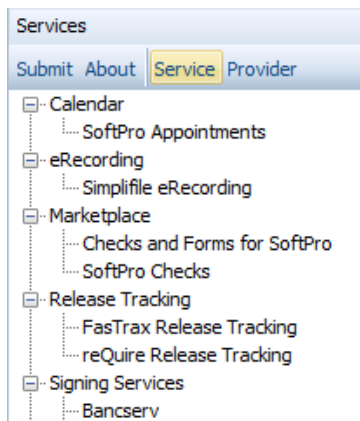# Managing Bancserv Transactions in SoftPro 360

## Submitting a Transaction to Bancserv

Bancserv, a signing services provider, can be found in the **SoftPro 360** Services menu under Signing Services. Double click **Bancserv**, or highlight and click on 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 will be 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.
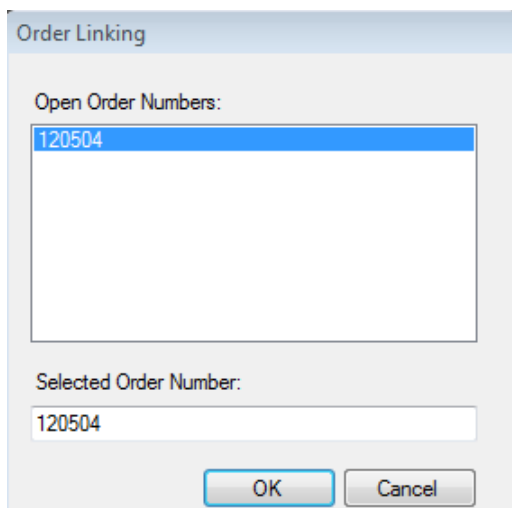
The **Welcome** screen will provide information about **Bancserv**. To skip this screen in the future, click the **Skip Welcome Screen** option at the bottom of the screen. Click **Next** to continue.
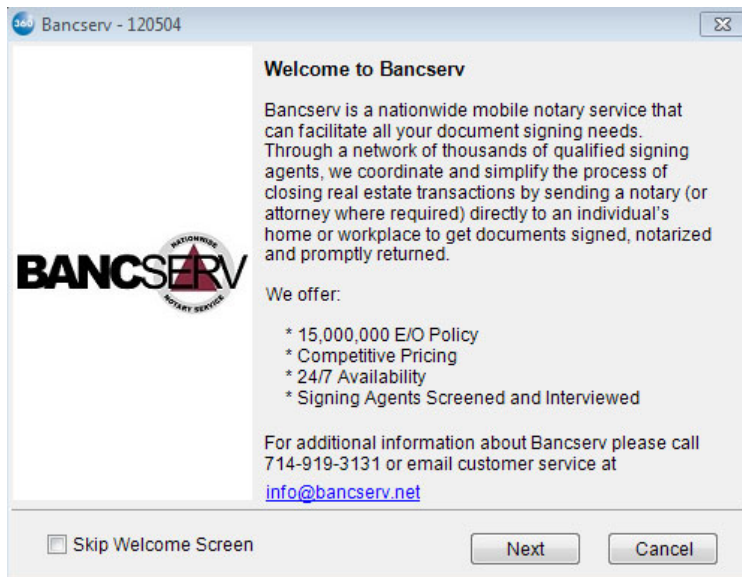
Existing users enter your **Bancserv** username and password and click **Next**. New users can contact customer service via email or the number listed. Click **Next** to continue.

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 you have more than two borrowers, they can be entered into the Special Instructions box on the Additional Information Screen.

The **Document Information** screen will show the File/Escrow Number and Loan Number. You can then choose who the documents will be 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 **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 **Attached Below** or click the blank radio button to access the drop down for other options.
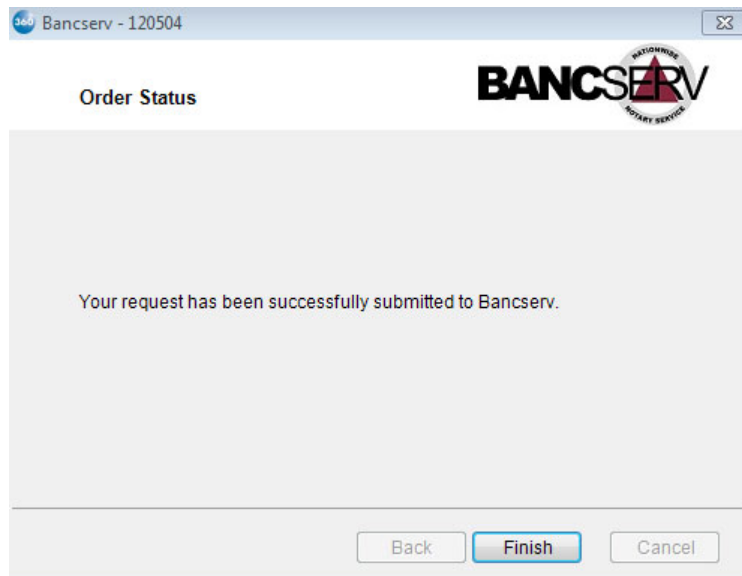
Select **Browse** to attach .PDF documents from any location, **Attachment** to choose documents from the SPImage directory within ProForm or **ReadyDo**c to attach ProForm ReadyDocs. The **Rename** button will rename the document in the document package window. The **Delete** button will delete the document from the list. Click **Next** to continue.

The **Additional Information** screen will allow you to select which trip this is, if this is a **Provident Loan** and any special instructions. Click **Submit** to complete the submission process and send your request to Bancserv.

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

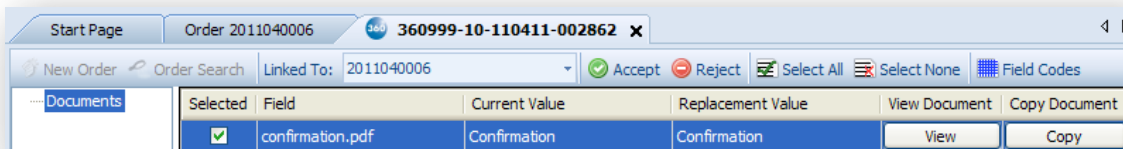The transaction will now show in the **SoftPro 360** queue with an "*In Progress"* status.

Receiving a Remit from Bancserv

Once Bancserv has received your order they will send an invoice which will change the status of your transaction to "Updated".

To view the invoice highlight the transaction and click **Review.** This will open the transaction review screen.

To view the document click the **View** button. To accept the document to your Proform order click **Accept** and the following message will appear.   Selecting **No** will go back to the review screen to allow you to make additional edits, selecting **Yes** will apply all selected values to the ProForm order.
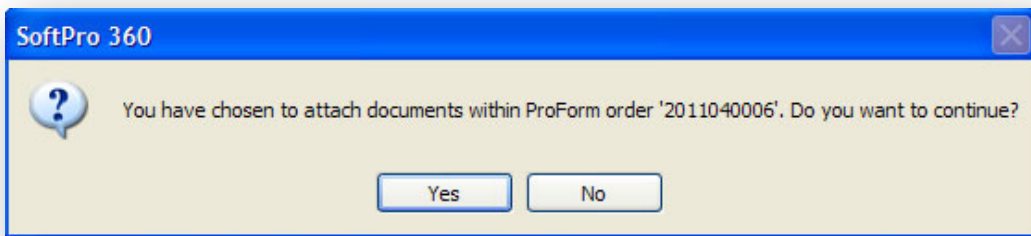

If you select **Yes**, you will receive the following confirmation. Click **OK** to continue.
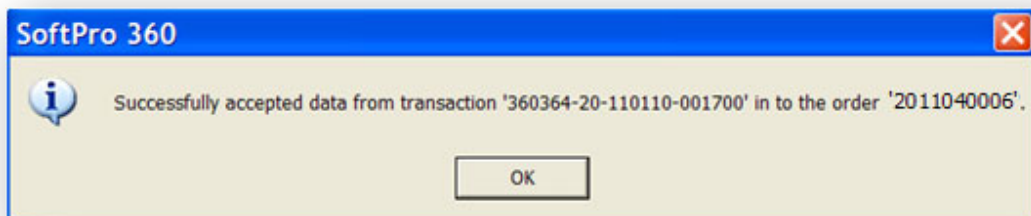
The document(s) will be available to you from within your ProForm order via the SPImage icon located on the ProForm Menu bar. For SoftPro Select users, documents are available by clicking on the **Attachments & Documents History** link located in the documents tab.

The transaction will then return to "In Progress".

Log
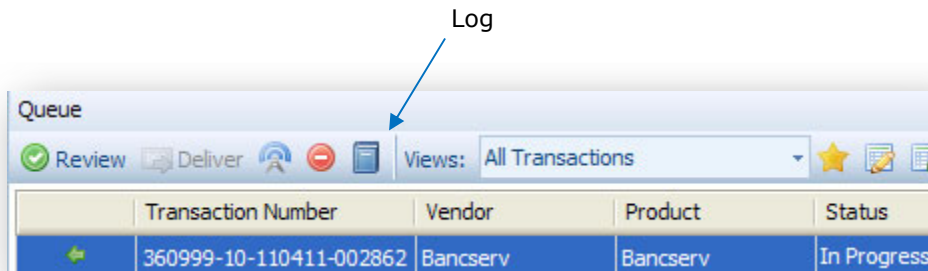
Bancserv will notify the user via the **SoftPro 360 log** when the following occur:

- 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**.

Update the transaction
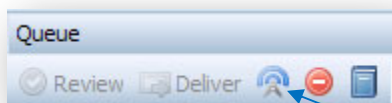
To do so, double click the transaction in the queue or click on the **update** icon shown above. This will open up the transaction information originally submitted so you may make your changes. **SoftPro 360** will send the updated information to **Bancserv**. **NOTE: A user may not update a transaction if the closing date and/or time have passed.**
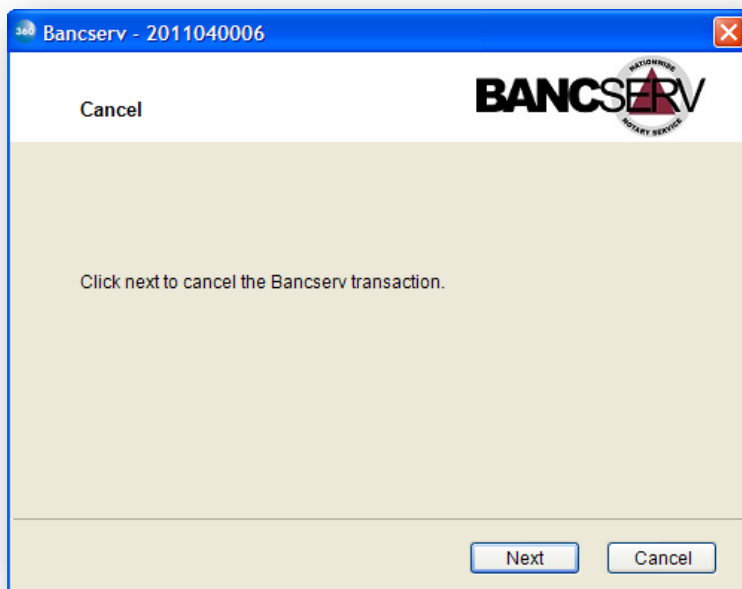
Canceling a transaction

You may cancel a **Bancserv** transaction through **SoftPro 360**. To do so, highlight the transaction in the **SoftPro 360** queue and click on the **cancel** icon:
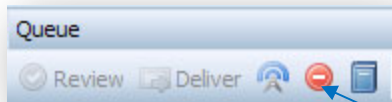
Cancel a transaction

You will see the following dialog box.

Click **Next** to cancel the transaction. You will then receive a notification that your request has been submitted to **Bancserv**.

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 **SoftPro 360** will reflect this. 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.