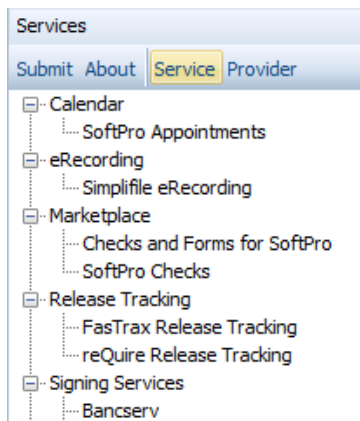


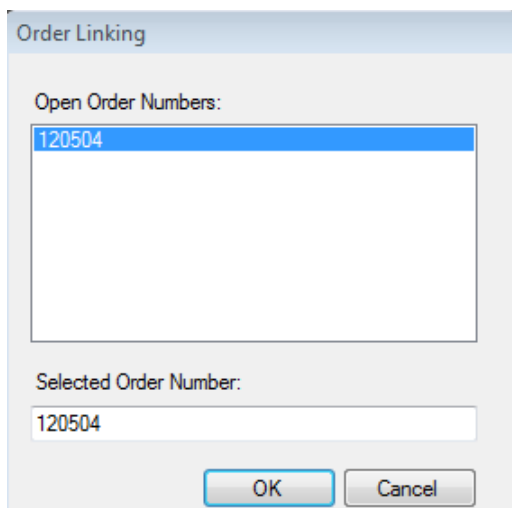
Managing Bancserv Transactions in SoftPro 360

Submitting a Transaction to Bancserv

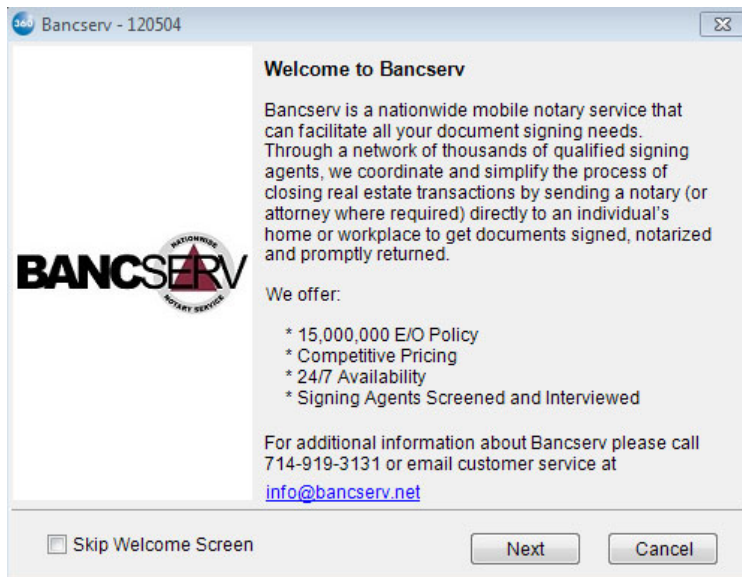
Bancserv, a signing services provider, can be found in the **SoftPro 360** Services menu under Signing Services. Double click **Bancserv**, or highlight and click on the **Submit** button to submit a transaction to this vendor.



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.

A screenshot of a software window titled "Bancserv - 120504". The window displays a "Bancserv Login" screen. At the top right is the Bancserv logo. Below the title, it says "Provide your Bancserv account information." There are two input fields: "Username:" and "Password:", each followed by a red asterisk. Below these fields is a section titled "New Account Setup:" which contains text about contacting customer service at 714-919-3131 or via email at customers@bancserv.net. At the bottom, there are three buttons: "Back", "Next" (which is highlighted with a blue border), and "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 you have more than two borrowers, they can be entered into the Special Instructions box on the Additional Information Screen.

The screenshot shows the 'Signing Information' screen in the Bancserv application. The window title is 'Bancserv - 120504'. The Bancserv logo is in the top right. The screen contains the following fields and controls:

- Signing Date:** 2/16/2012 (calendar icon)
- Time:** 12:00:00 AM (time picker icon)
- ☒ Closer to Set Time
- Signing Address:** 480 Main Street
- City:** Raleigh
- State:** NC
- Zip:** 27609
- Links: [Buyer/Borrower](#), [Seller](#), [Property Address](#)
- Borrower/Signer 1:** Brenda Buyer
- Phone:** (919) 555-8856
- Ext:** []
- Alternate:** () - -
- Ext:** []
- Borrower/Signer 2:** []
- Phone:** () - -
- Ext:** []
- Alternate:** () - -
- Ext:** []
- Buttons: Back, Next, Cancel

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 screenshot shows the 'Document Information' screen in the Bancserv application. The window title is 'Bancserv - 120504'. The Bancserv logo is in the top right. The screen contains the following fields and controls:

- File/Escrow #:** 120504
- Loan #:** 4567416
- Documents will be sent to:** Notary (dropdown menu)
- Documents will be returned to customer by:** Branch Drop Off (dropdown menu)
- How many sets of documents:** One Set (dropdown menu)
- Type of document package:** Purchase-Buyer (dropdown menu)
- Buttons: Back, Next, Cancel

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.

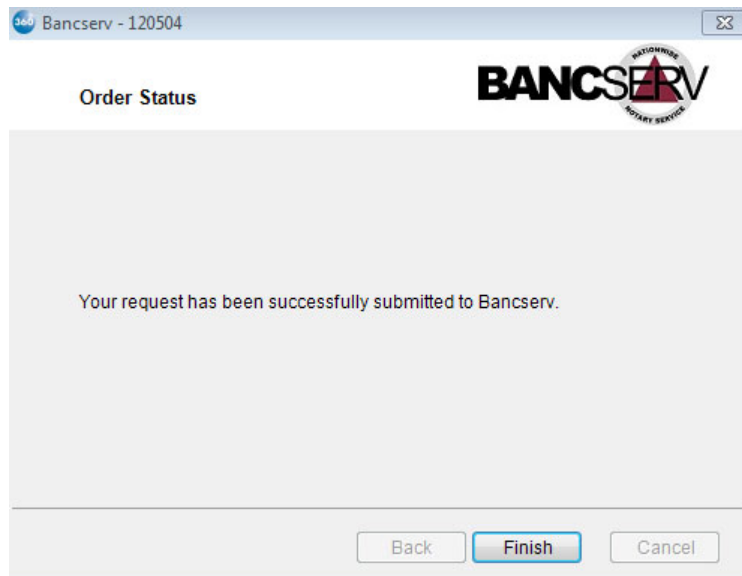
Select **Browse** to attach .PDF documents from any location, **Attachment** to choose documents from the SPImage directory within ProForm or **ReadyDoc** to attach ProForm ReadyDocs. The **Rename** button will rename the document in the document package window. The **Delete** button will delete the document from the list. Click **Next** to continue.

The screenshot shows the 'Document Delivery' window for Bancserv - 120504. The window has a title bar with the Bancserv logo and a close button. The main content area is titled 'Document Delivery' and features the Bancserv logo. Below the title, there is a section 'Documents will be sent by:' with two radio buttons. The first radio button is selected and labeled 'Attached Below'. The second radio button is unselected and has a dropdown menu next to it. Below this, there is a section 'Documents in this package:' with a table. The table has two columns: 'Document Package' and 'Date'. The first row shows 'Document Package' and '2/6/2012'. To the right of the table are five buttons: 'Browse', 'Attachment', 'ReadyDoc', 'Rename', and 'Delete'. At the bottom of the window are three buttons: 'Back', 'Next', and 'Cancel'.

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.

The screenshot shows the 'Additional Information' window for Bancserv - 120504. The window has a title bar with the Bancserv logo and a close button. The main content area is titled 'Additional Information' and features the Bancserv logo. Below the title, there is a section 'Which trip is this?:' with a dropdown menu showing '1st Trip'. Below this is a section 'Is this a Provident loan?:' with a dropdown menu showing 'No'. Below this is a text area for 'Special Instructions:'. At the bottom of the window are three buttons: 'Back', 'Submit', and 'Cancel'.

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.

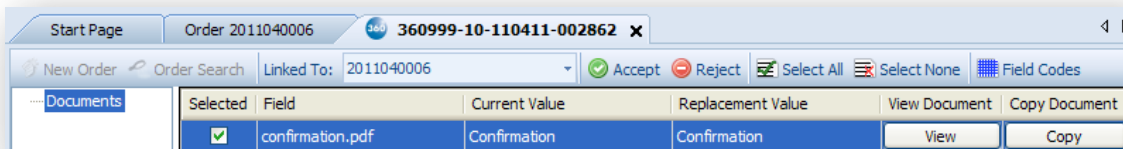
Queue									
Review	Deliver			Views: ACTIVE ORDER			Filter: All Providers		
	Transaction Number	Provider	Service	Status	Linked Order	Created By	Created On	Completed On	Description
	417101-20-120206-00...	Bancserv	Bancserv	In Progress	120504	Melanie	2/6/2012 10:...		Escrow #: 120504

Receiving a Remit from Bancserv

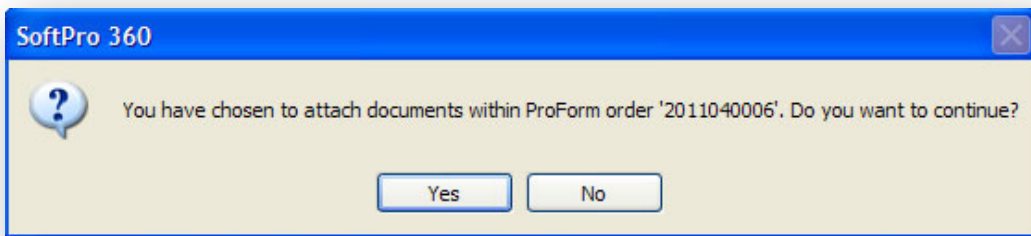
Once Bancserv has received your order they will send an invoice which will change the status of your transaction to "Updated".

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

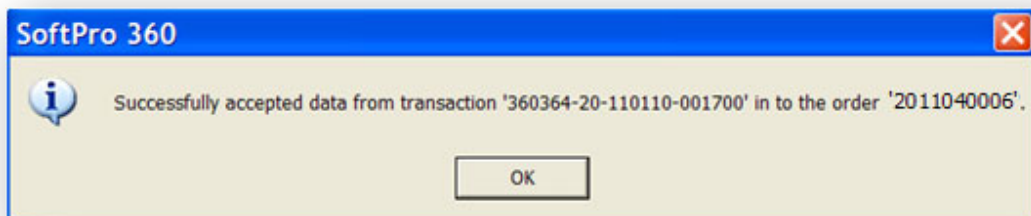
To view the invoice highlight the transaction and click **Review**. This will open the transaction review screen.




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.

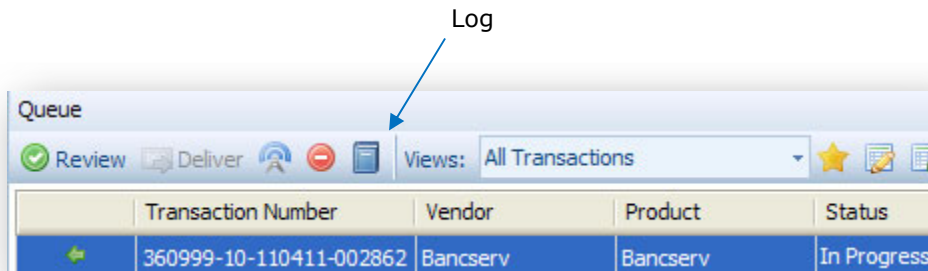


If you select **Yes**, you will receive the following confirmation. Click **OK** to continue.



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".

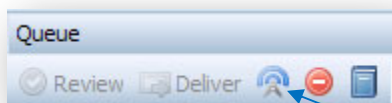


Bancserv will notify the user via the **SoftPro 360 log** when the following occur:

- 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

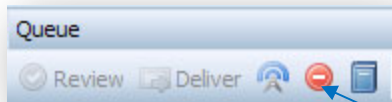
You may update an existing **Bancserv** transaction through **SoftPro 360**.



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.**

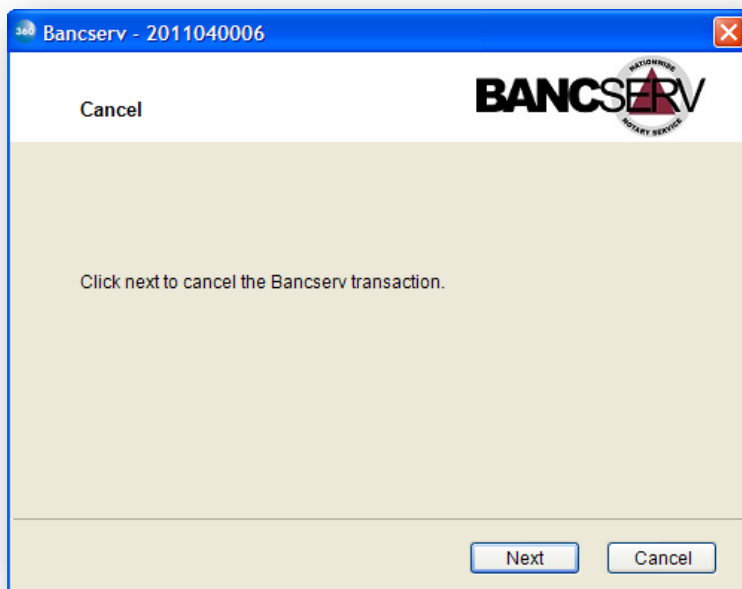
Canceling a transaction

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.

Queue				
 Review	 Deliver			Views: All Transactions   
	Transaction Number	Vendor	Product	Status
	360999-10-110411-002862	Bancserv	Bancserv	Completed