Bancserv Integration
User Guide for Agencies

11/30/2025

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History

| Date	Version	Details

10/14/2025	v2.0	This release includes:
		• Functional enhancements
		   ○ 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
		• Aesthetic enhancements
		   ○ 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
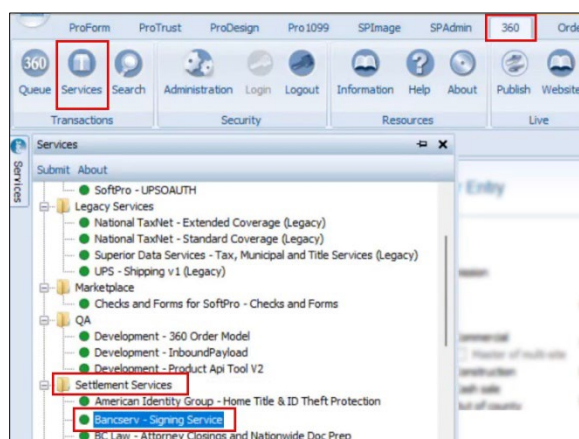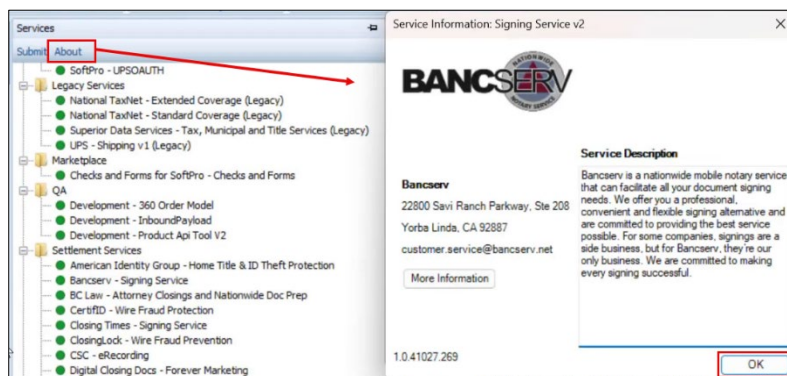

For additional information about Bancserv, click the **About** link on the **Services** toolbar. The **About** screen is displayed with Bancserv contact information and the Service Description.
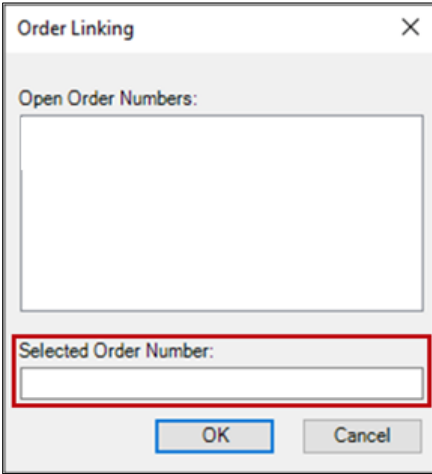
Click **OK** to close.

Select a ProForm Order
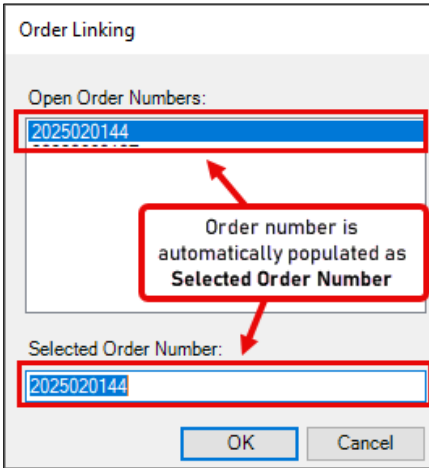
Each request must be linked to a ProForm Order.

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

   b. If a single order is open, the order number is shown in the **Open Order Numbers** field and the **Selected Order Number**
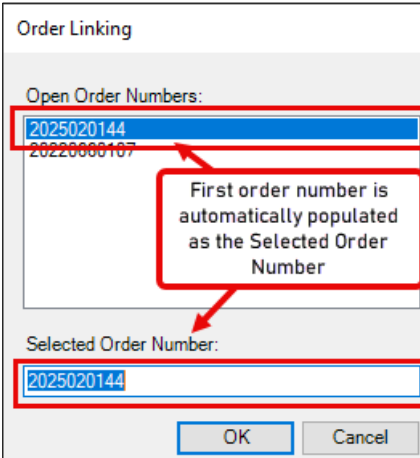
      NOTE: The **Selected Order Number** field can be overwritten with an order that is not open.

   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

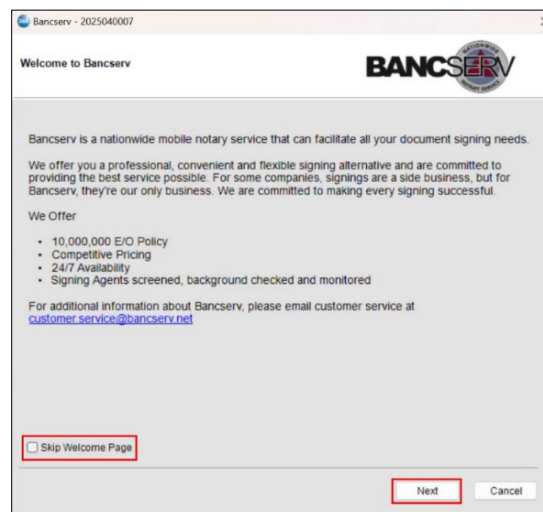2. Press the **OK** button to continue

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.

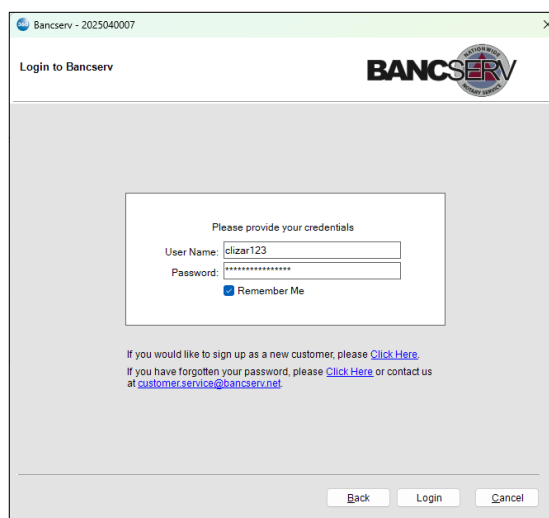Click the **Next** button to continue.

Logging In and Authentication

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

Check the **Remember Me** check box to avoid seeing the Loing 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)
- **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
- **Type of Documents** –(required) The user selects from a list of available documents to be signed
- **Sets of Documents** – (required) The user selects how many sets of documents are to be signed
- **Lender** – (required) this field is a drop down of available lenders

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** (required)
  - **Name** The user selects a name from a drop-down of available ProForm Order Contacts
  - **Email** once the Signer is selected, the field is populated with the email address from the selected ProForm Order Contact if one exists
  - **Phone** this field is populated from the mobile phone of the selected ProForm Order Contact and is required but can be overwritten
- **Signer 2** (optional)
  - **Name** The user selects a name from a drop-down of available ProForm Order Contacts. The ProForm Order Contact selected in Signer 1 cannot be used
  - **Email** once the Signer is selected, the field is populated with the email address from the selected ProForm order Contact if one exists
  - **Phone** this field is populated from the mobile phone of the selected ProForm order 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 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, how they are to be sent, and how they are to be returned.

- **Docs sent to:** (required) This field allows the user to select who is receiving the documents:

- o **Notary**
- o **Borrower/Signer/Other**
- **Docs sent by:** (required) This field allows the user to select how the documents are to be sent
  - o **Fedex**
  - o **UPS**
  - o **Email**
  - o **Customer Upload** – this option enables the **Add Documents** button for uploading and is only available if the documents are being sent to Notary
  - o **Branch Pickup**
  - o **Other**
    If Other is selected, a text field is enabled allowing the user to enter a sent by method

- **Docs returned by:** (required) This field allows the user to select how documents are to be returned
  - o **Fed Ex return label will be provided** – label must be created with Fedex outside of this application
  - o **UPS return label will be provided** – label must be created with UPS outside of this application
  - o **Fed Ex**
  - o **Branch Drop Off**
  - o **Other**
    If Other is selected, a text field is enabled allowing the user to manually enter who the documents are returned to
  - o **Manual/Duplicate orders**

Adding Documents

If enabled, clicking the **Add Documents** button opens the **Documents Screen.** From here, users have the option to:
- o **Browse:** Browse your computer to find documents to submit
- o **Attachments:** Attach documents from the ProFrom attachments
- o **Rename**: Rename added documents before submitting
- o **Delete:** Delete documents from the list of documents before submitting

Click the **OK** button to upload the documents.

Once the document options are selected, click the **Next** button.

The Documents to Deliver screen will be displayed with a list of the attached documents.

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.

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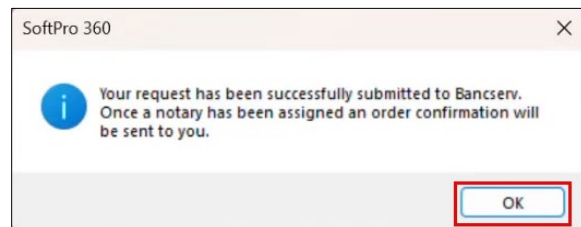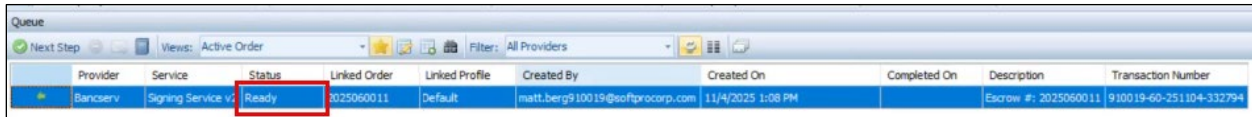
The transaction shows in the **360 Queue** with the **Status** set to **In Progress**.

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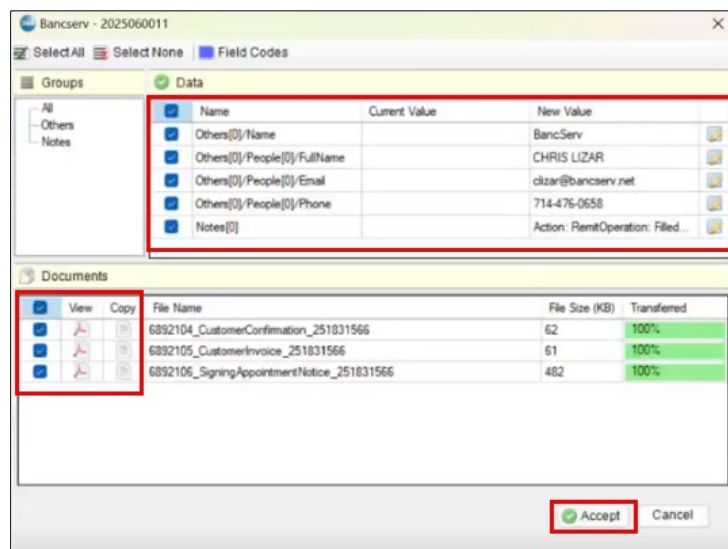
BancServ sends three documents, **Customer Confirmation**, **Customer Invoice** and a **Signing Appointment Notice**.

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 in the **Order Notes** in the ProForm order when the remit is accepted.
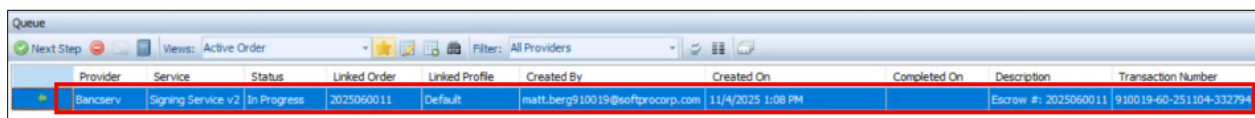
- **View:** View documents sent from BancServ on screen.
- **Copy:** Save a copy of the document to the clipboard.
- **Accept:** Attach the document(s) to the ProForm order.
- **Cancel:** Closes the screen without accepting data/documents.

The accepted documents are saved as **Attachments** to the ProForm order.
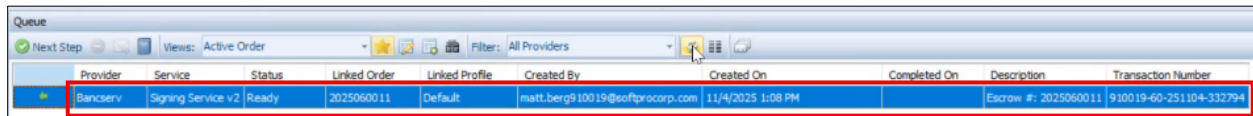
Click the **Accept** button to continue.

Once accepted, the **360 Queue** is updated to show the transaction as **In Progress** until the signing is completed.
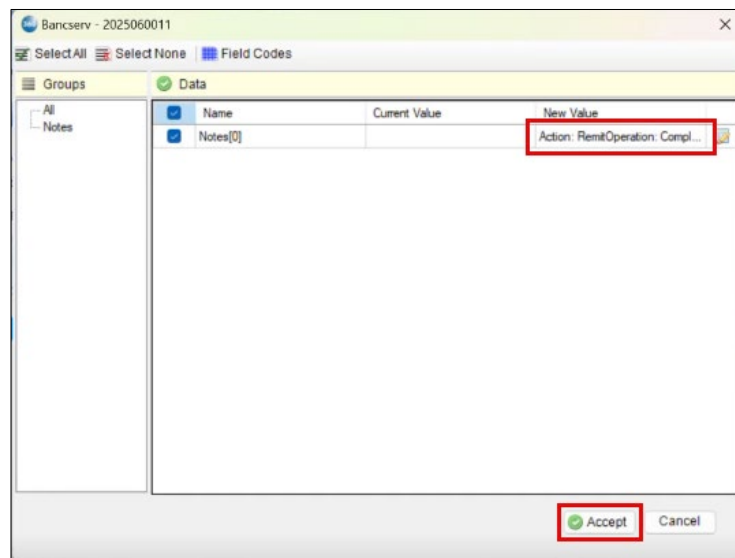
BancServ sends a remit and the **360 Queue** once again updates the **Status** of the transaction to **Ready** indicating data and documents are available.

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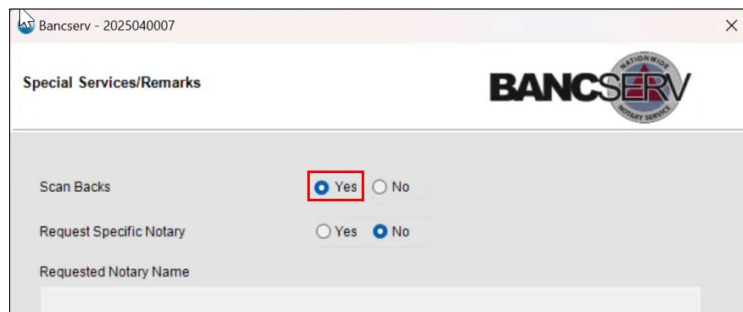
Click the **Accept** button to write this to the **Notes** screen.

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

Accepting a Scan Back

If Yes was selected for **Scan Backs** when submitting the original request, BancServ will remit 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.
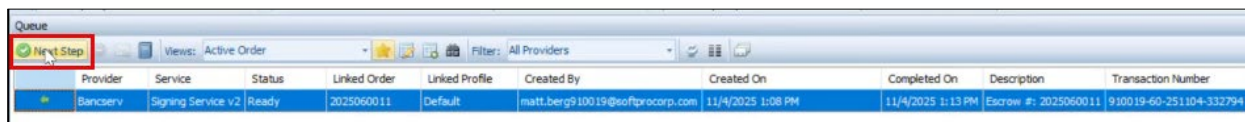
As noted previously, documents can be viewed on screen, and/or copied to the clipboard. Click the Accept button to accept the data/documents into the ProForm order.
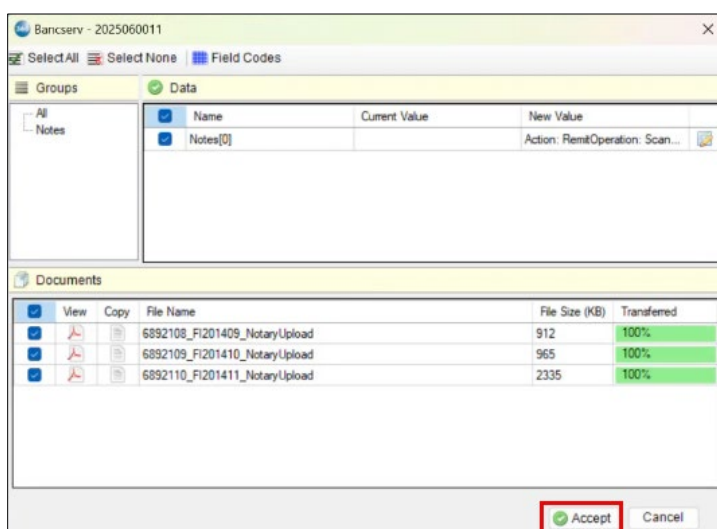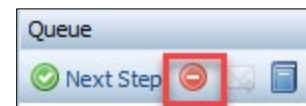

Once the documents are accepted, the **360 Queue** shows the **Status** as **Completed**.
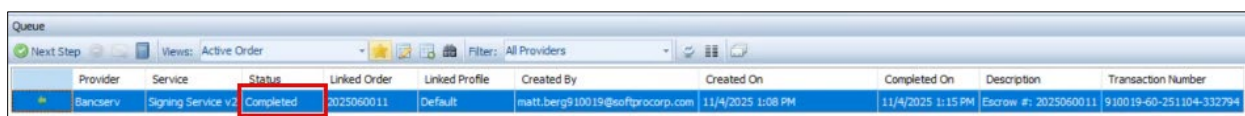
Cancelling a Transaction

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.
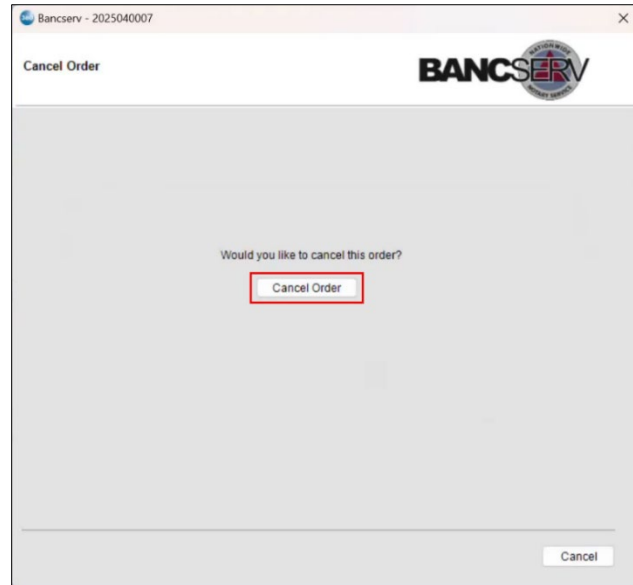

From the **Cancel Order** screen, click the **Cancel Order** button. Once the order is canceled, the user is returned to the **360 Queue** and the **Status** is then set to **Cancelled**.

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.

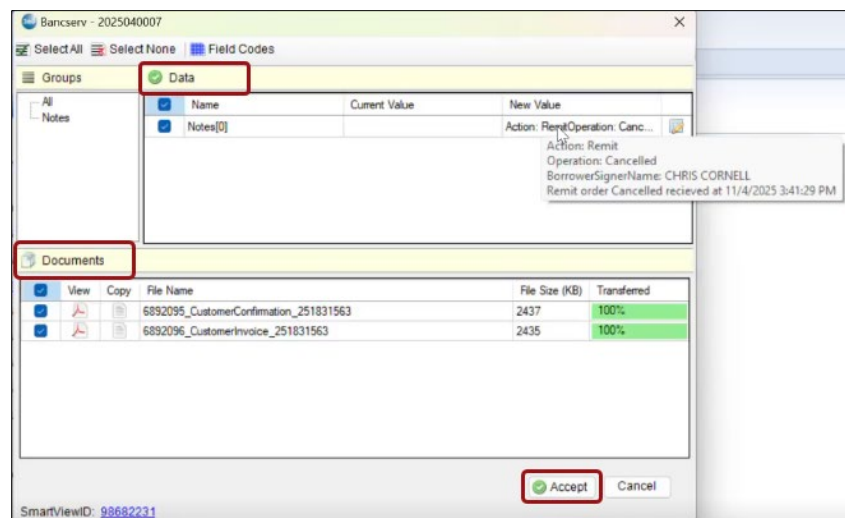Highlight the transaction and click the **Next Step** button.

The **Review** screen displays the **Notes**; this is an 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.
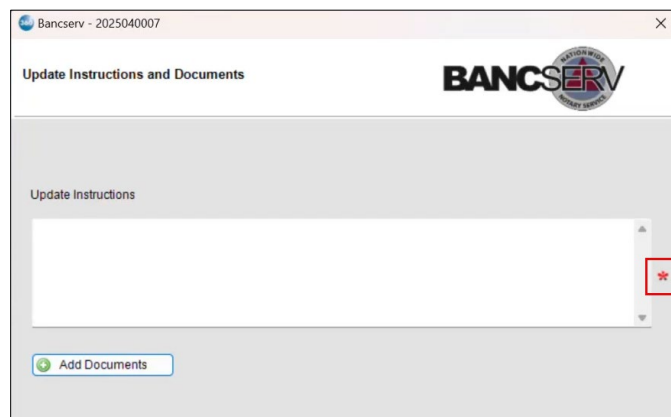
Updating a Transaction

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 Steps** button.

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 is fulfilled, and the **red** asterisk is no longer shown.

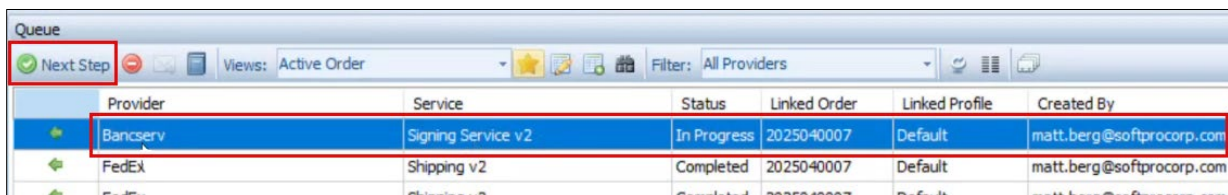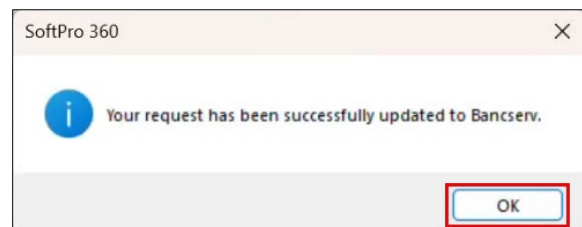Click the **Submit** button to continue.

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