



SPImage User Guide

SoftPro Select 4.0 | Friday, August 21, 2015

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SoftPro Select Overview

SoftPro Select is the most complete office solution for the real estate and title industries. See [what you can do](#) with SoftPro Select and [inquire](#) today about switching to Select from SoftPro Standard/Enterprise Editions. The SoftPro Select family of products offer solutions at each level of your needs:

ProForm

ProForm is the leader in title insurance order and closing automation. Enter order data to produce professional closing and title insurance forms. Manage order tasks and run reports to track your business. Customize screens for your workflow.

ProTrust

ProTrust is the choice for trust account management and reconciliation. Works seamlessly with your ProForm data. Print daily and monthly reports according to your criteria.

Pro1099

With Pro1099, your 1099-S filing is now automated. Pro1099 will produce your yearly IRS 1099-S submission file using the data you enter once in ProForm.

SPImage

SPImage enables you to scan documents and associate them with your ProForm orders — making it easy to view images, archive complete files and retrieve when needed.

SPAdmin

SPAdmin is the security module of SoftPro .NET. With it, you manage SoftPro users and their permissions, adjust global program preferences, and create Lookup tables.

Resources

Online

- SoftPro Select on the Internet: www.softprocorp.com
- mySoftPro login: www.softprocorp.com/mySoftPro/mySoftProLogin.asp
- Register with mySoftPro to access the support knowledge base, document downloads, and more.

Support

- [SoftPro Solution Center](#)
- **(800) 848-0143**
- Monday to Friday from 8:00 A.M. to 5:30 P.M. EST
- Platinum-level support hours: Monday to Friday from 8:00 A.M. to 10:00 P.M. EST, Saturday 11:00 A.M. to 2:00 P.M. EST

Sales

- Call your SoftPro representative to register for platinum support service or inquire about products
- [SoftPro Select Sales](#)
- **(800) 848-0143**
- Monday to Friday from 8:30 A.M. to 5:30 P.M. EST
- sales@softprocorp.com

About

SPIImage allows users to scan or import documents into SoftPro Select, allowing the user to easily attach these documents with ProForm orders.

Note: Scanners used with SPIImage should be **Windows Image Acquisition (WIA)** Compliant. Features include.

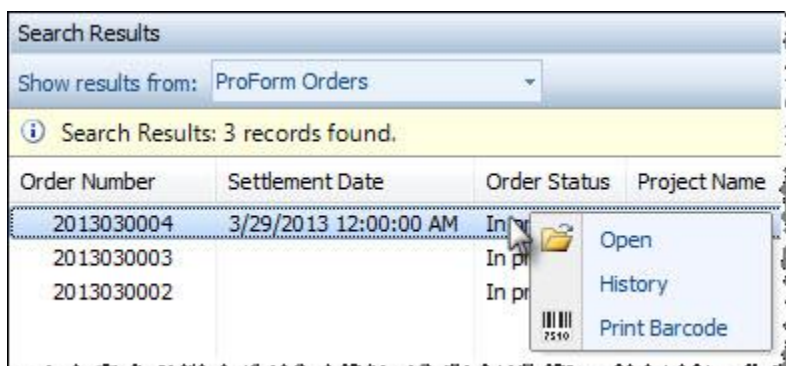
- Scan paper documents from a desktop scanner directly into ProForm
- Drag & drop .pdfs from a desktop computer or other network location
- Import .pdfs from a local computer or network location
- Associate new documents with orders automatically
- Attach new documents to orders with the click of a button
- Preview scanned/imported documents
- Remove unnecessary documents

Print a barcode cover sheet

The barcode cover sheet is the initial sheet for scanning a document or a batch of documents. It associates scanned, attached, or published documents with the appropriate ProForm order. The barcode cover sheet can be printed from within an open ProForm Order's Default ReadyDocs tree:

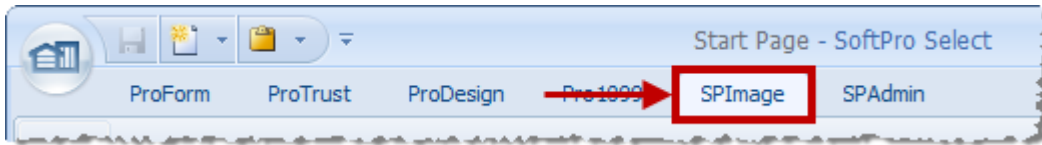
Order Tab > Documents > Default > General > Barcode Cover Sheet. When the barcode cover sheet is printed, it displays the title "Cover Sheet," the order number, and the barcode. It can be printed quickly from ProForm order search, as well:

- Complete an order search, right click on an order in the **Search results** pane, and select **Print Barcode** from the pop-up menu:

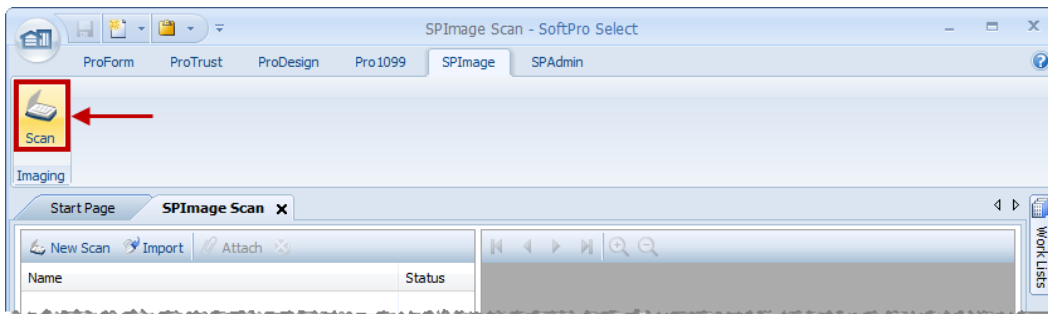


Scan a document

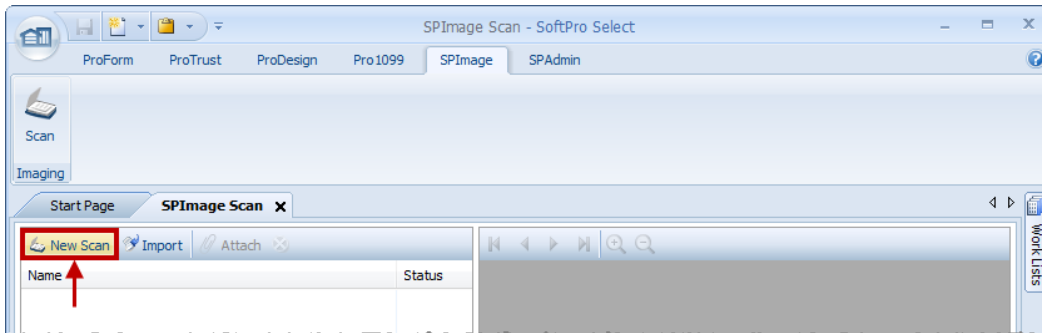
1. Select the **SPIImage** Tab:



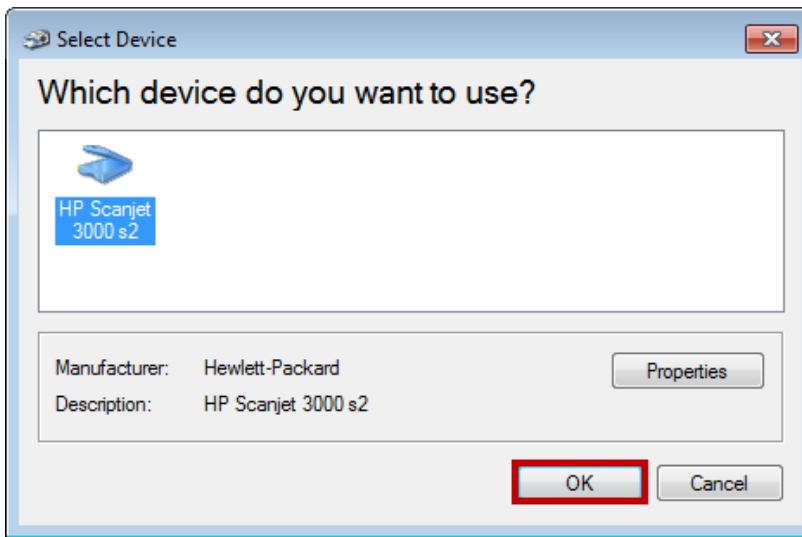
2. Click the **Scan** button to open scan tab:



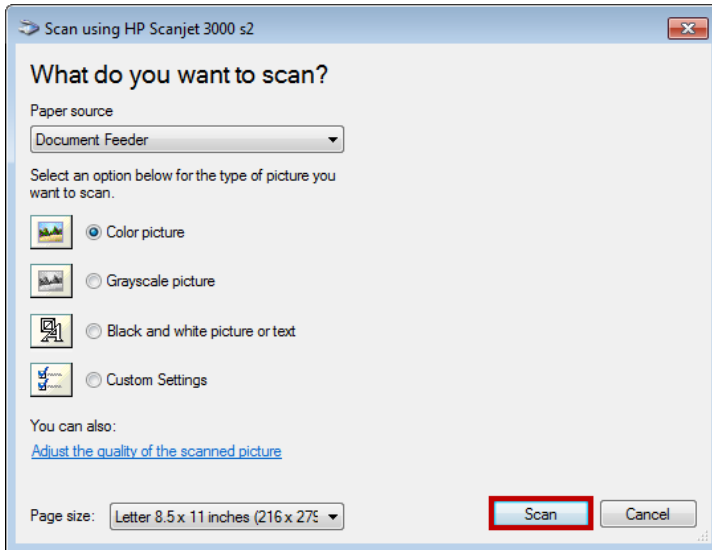
3. Click the **New Scan** button:



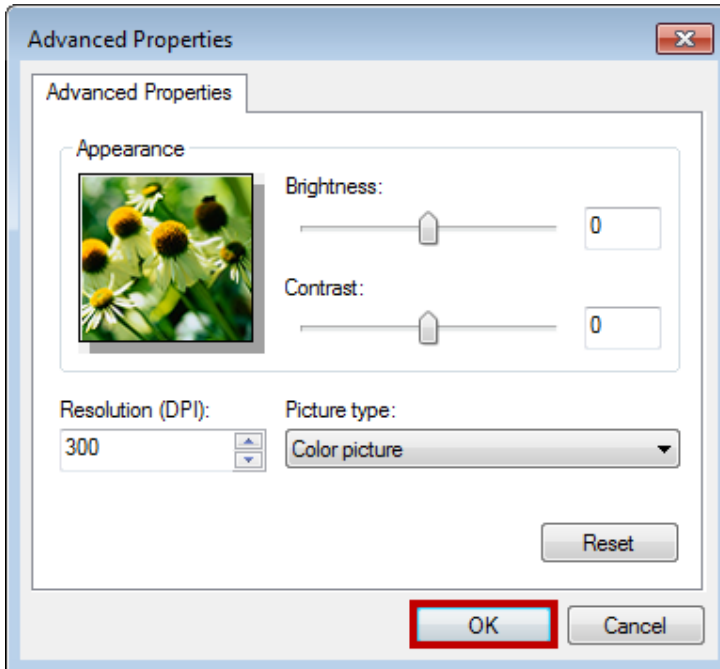
4. Confirm Properties and then select **OK** from the Select Device screen:



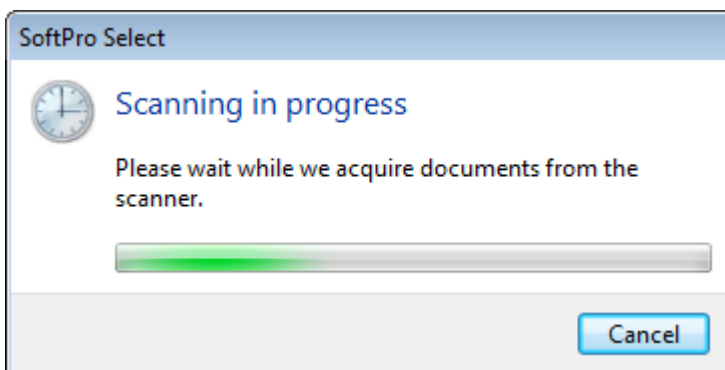
5. Select **Paper** source, **type of picture**, and **size of paper** being scanned. Be sure to **choose Letter 8.5 x 11 inches (216 x 279 mm)**. Press **Scan**:



6. You may also adjust the **quality** of the scan by clicking the "Adjust the quality of the scanned picture" option. After configuring, click **OK**:

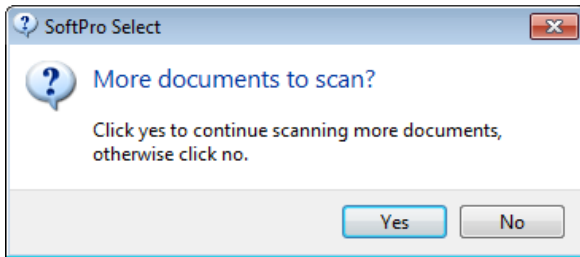


7. You will see the Progress dialog:

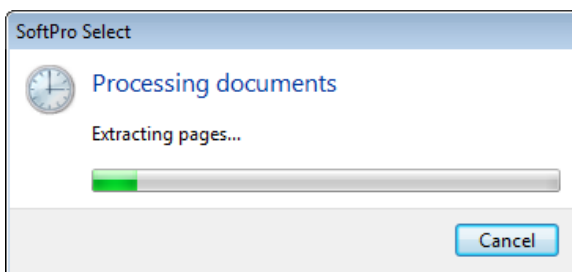


8. You will then see the **More documents to scan?** dialog.

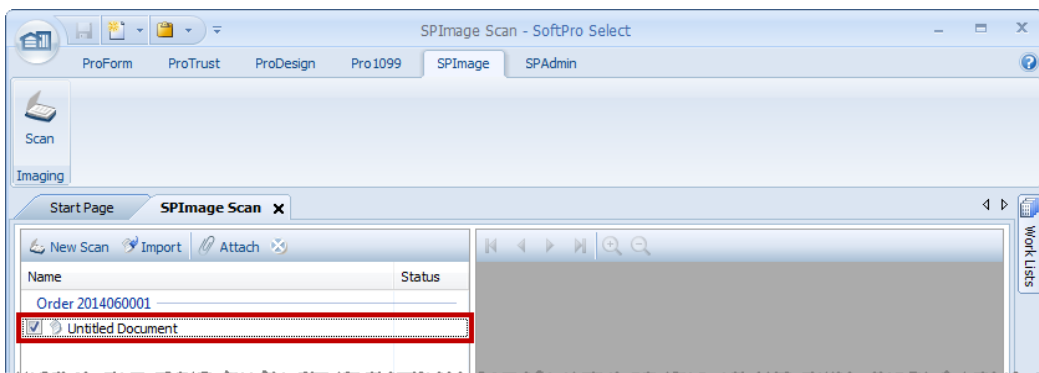
- If you have more documents to scan, **put them in the scanner before clicking Yes.**
- If you don't have any more documents to scan, click **No**:



9. The program will **continue the scanning process** OR proceed to **process** the documents you just scanned:

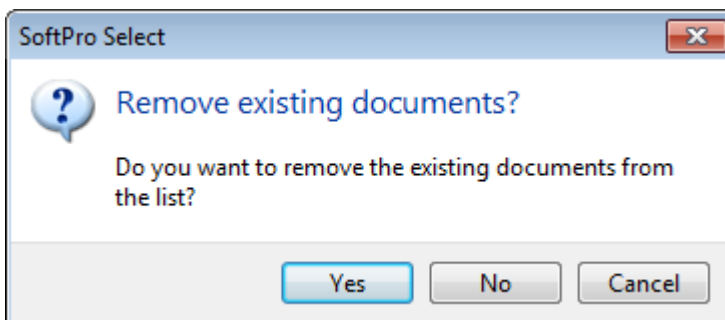


10. The document(s) just scanned will process and then display in the **SPIImage** window:



11. To scan a new document, start the process over by returning to Step 3 above.

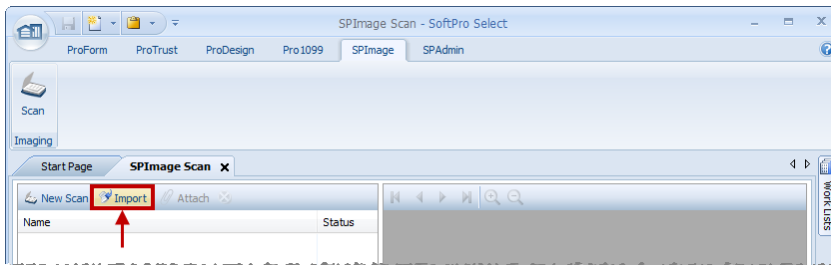
- **NOTE:** If you try to scan another .pdf into SPIImage while documents are already displayed, you will receive a warning message:



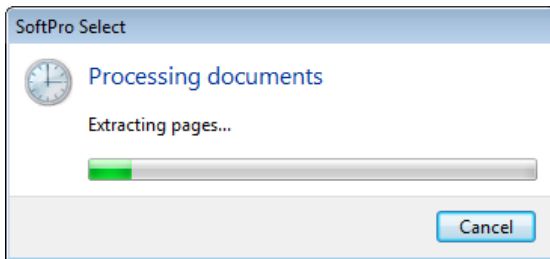
- **Yes** will totally delete all items currently in the list.
- **No** will import the new item with the name **Untitled Document** and add it to the current list.
- **Cancel** will cancel the process.

Import a document

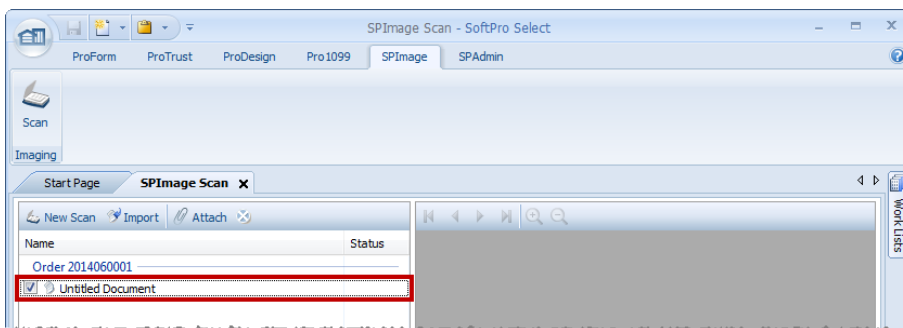
1. Press the **Import** button and select your document. **Note:** to import a .pdf into SPSImage, the .pdf document must have a barcode cover page.



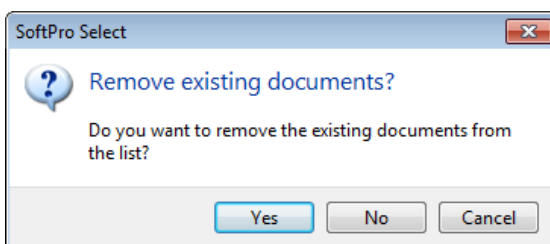
2. The program will proceed to **process** the document you selected:



3. The document just imported will display in the **SPImage** window:



4. To import a new document, start the process over by returning to Step 1 above.
 - **Note:** If you try to import another .pdf into SPSImage while documents are already displayed, you will receive a warning message:

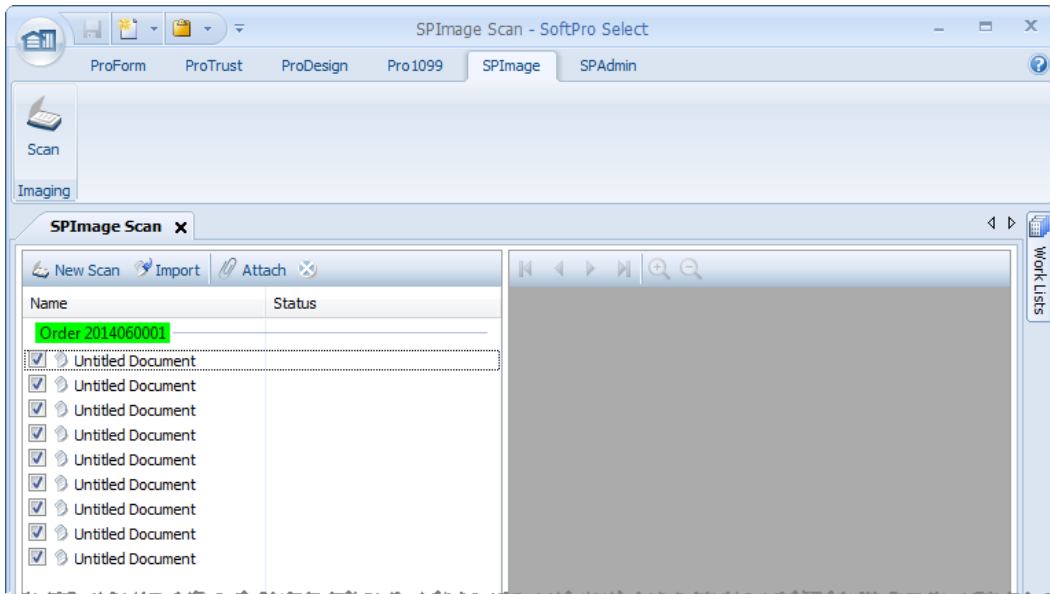


- **Yes** will totally delete all items currently in the list.
- **No** will import the new item with the name Untitled Document and add it to the current list.
- **Cancel** will cancel the process.

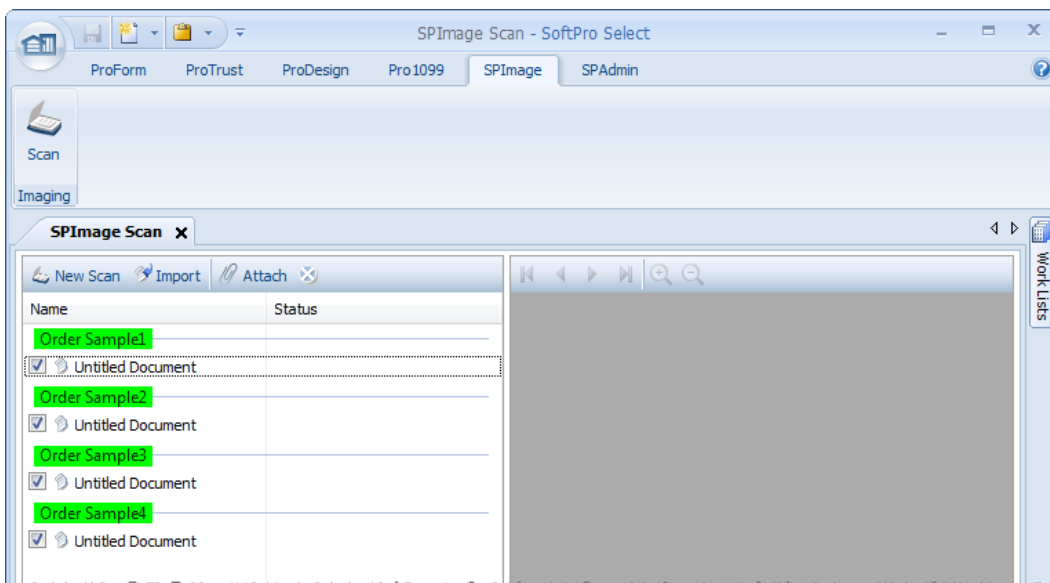
Importing with multiple barcode pages

You may only import one .pdf document at a time. HOWEVER, if that single .pdf document contains multiple barcode cover pages, SPImage will split the .pdf into separate documents automatically.

- In this example, a document was imported which contained **9 copies of the same barcode cover sheet**. Therefore, SPImage split the document into 9 Untitled Documents, which **all appear** under the same order:

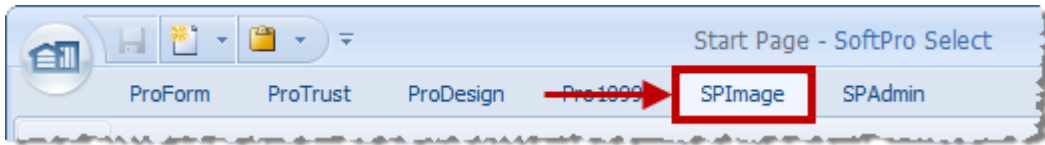


- **If four different cover sheets for four different orders** are present in the same .pdf, SPImage would split the document into four parts and associate with the respective orders when importing:

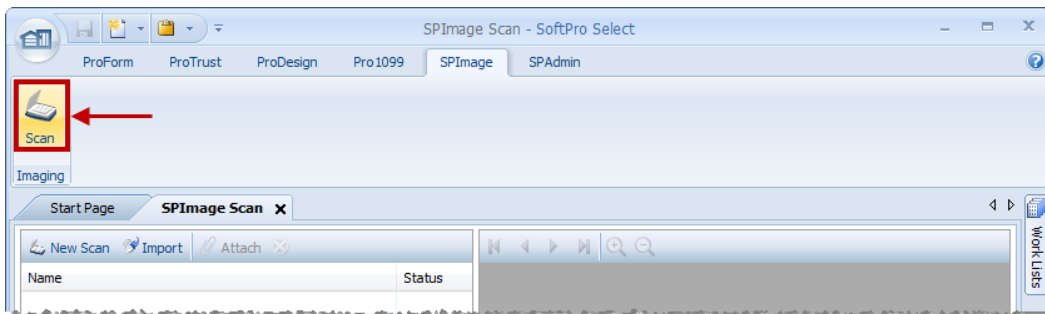


Drag & drop a document

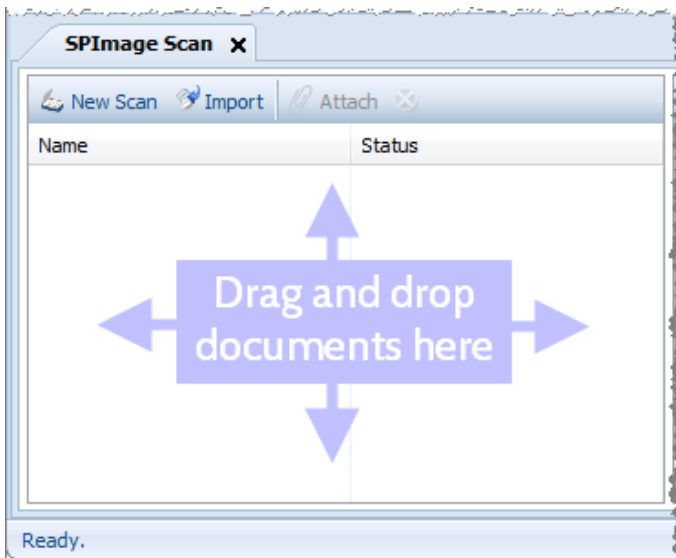
1. Select the **SPIImage** Tab:



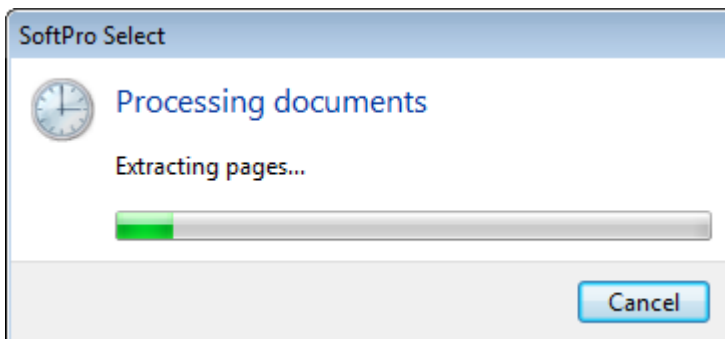
2. Click the **Scan** button to open scan tab:



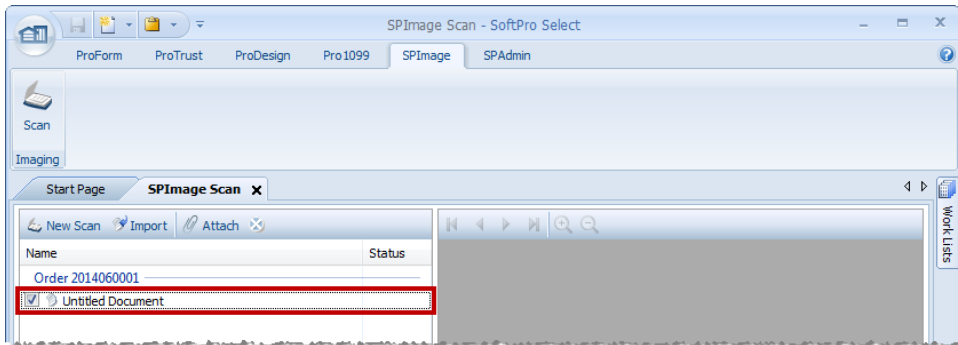
3. Drag a **.pdf** from your computer into the SPIImage window. **NOTE:** You may simultaneously drag as many .pdfs as you wish into this window:



4. The program will proceed to **process** the document you selected:

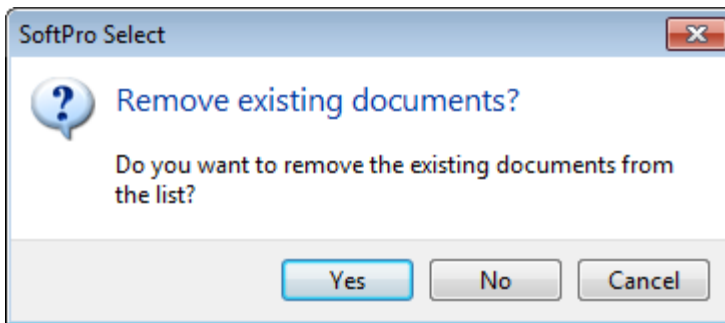


5. The document(s) just dragged/dropped will display in the **SPIImage** window:



6. To drag/drop a new document, start the process over by returning to Step 3 above.

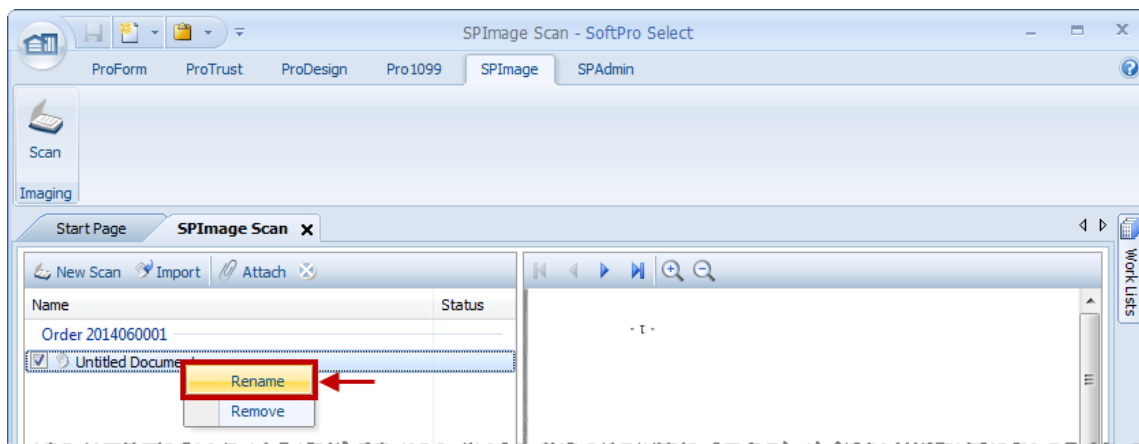
- **NOTE:** If you try to drag/drop another .pdf into SPIImage while documents are already displayed, you will receive a warning message:



- **Yes** will totally delete all items currently in the list.
- **No** will import the new item with the name **Untitled Document** and add it to the current list.
- **Cancel** will cancel the process.

Rename a document

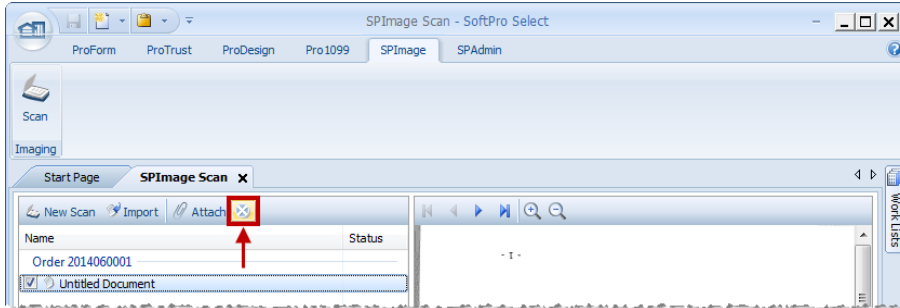
Right click on the **Untitled Document** within SPIImage and choose **Rename**. Type the new document name and press **Enter**:



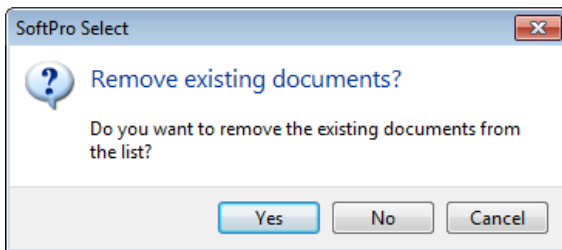
Remove documents

Remove documents by using checkboxes

1. Make sure that **only** the documents you wish to delete are checked.
2. Click the **Remove** button:

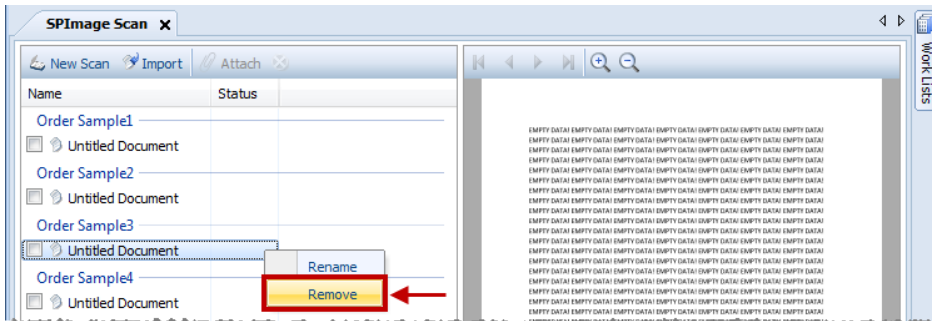


3. Select **Yes** on the **Remove selected documents?** screen:

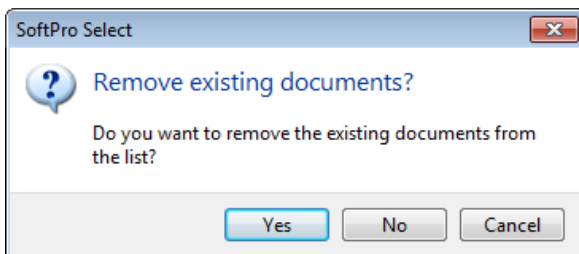


Remove a single document by right-clicking or using the Delete key

1. **Right click** on any document. It does not matter if the document is checked or unchecked. Click the **Remove** option from the context menu or use the **Delete** key:

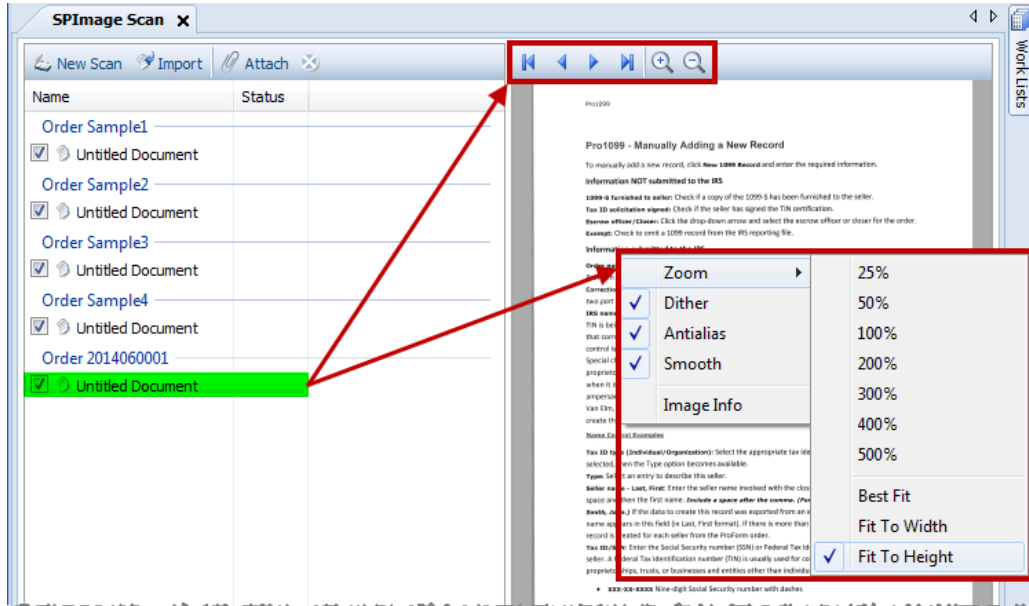


2. Select **Yes** on the **Remove selected documents?** screen:



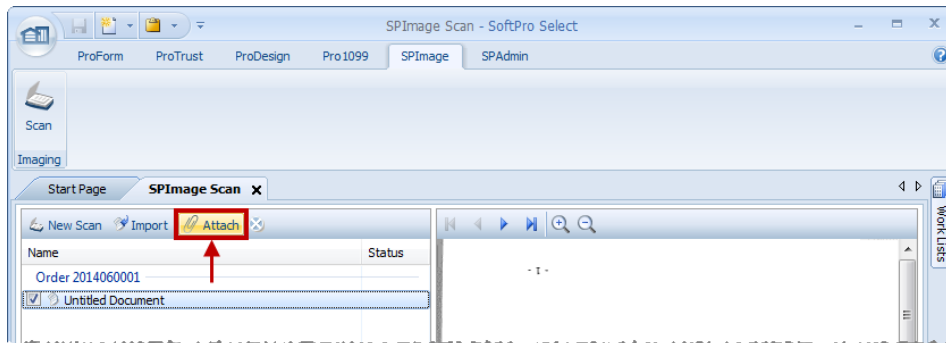
Previewing documents

Click a **document** in the left pane to preview the document in the right pane. **NOTE:** The barcode cover sheet is removed by SImage upon import. Use the buttons at the top of the preview pane to navigate forward and backward through the document or to zoom in and out on the document. **Right click** anywhere in the preview pane to view various scaling/display options:



Attaching documents to ProForm orders

1. Using the **checkboxes** on the left side of the screen, select the documents that you wish to attach.
2. Click the **Attach** button:



3. The Attach button moves documents from SImage into the **Attachment folder** for each corresponding order.
- **NOTE:** SImage cannot attach multiple files with the same name to an order. SImage will give you an error if this is the case. You must rename files with duplicate names and try attaching again.

4. Once documents have been attached, they are completely removed from the SPIImage screen. You will need to go to the order attachments to view them/work with them further.

Licensing

Upon opening and successfully logging on to SoftPro Select for the first time, the application checks for a license key. If a key has not been entered, a prompt appears to call SoftPro to request a key. SoftPro will e-mail a license key file with the extension **.SPK**. To install the license key, double-click the **.SPK** file from any client workstation.

A license is acquired the first time action is taken within a module (ProForm, ProTrust, SPIImage, etc.). Simply navigating to the module's tab will not acquire a license. Likewise, opening the application will not acquire a ProForm license – action must be taken in ProForm.

Licenses for all modules are released when SoftPro Select is closed. Module licenses are also released when all module screens are closed and the user navigates to another module tab. For example, open SoftPro Select, view the ProForm start page, and click the ProTrust tab - no licenses are acquired.

However, open the Reconciliation screen in ProTrust, and a ProTrust license is acquired. Leave the Reconciliation screen open and click the ProForm tab, the ProTrust license is still acquired and will not be released until the Reconciliation screen is closed. This process takes approximately 3 minutes.

Exception: ProClear and Positive Pay are licensed separately from ProTrust.

SoftPro Sales

SoftPro's dedicated sales staff is ready to answer your questions.

Contact your account representative for information about the latest SoftPro products, the SoftPro Annual Maintenance Service Plan, Platinum Level Support Plan, upgrade options and prices, and more. Contact the [SoftPro Solution Center](#) with any technical questions or problems.

Contacting your SoftPro sales representative

Sales phone:	1 (800) 848-0143
Local calling area:	1 (919) 829-1122
Fax:	1-919-755-8350
Web:	www.softprocorp.com
Sales e-mail:	sales@softprocorp.com
Sales hours:	Monday to Friday from 8:30 A.M. to 5:30 P.M. EST.

Note: When sending e-mail, please include your company name, city, and state to ensure prompt handling of your request.

SoftPro Solution Center

SoftPro's technical support staff is the best in the industry. Use the information below to contact them.

SoftPro Solution Center 1 (800) 848-0143

phone:

Local calling area: (919) 829-1122

Fax: (919) 755-8350

Web: www.softprocorp.com

mySoftPro: www.softprocorp.com/mySoftPro/mySoftProLogin.asp

(Register with mySoftPro to access the Support Knowledge Base, Document Downloads, and more).

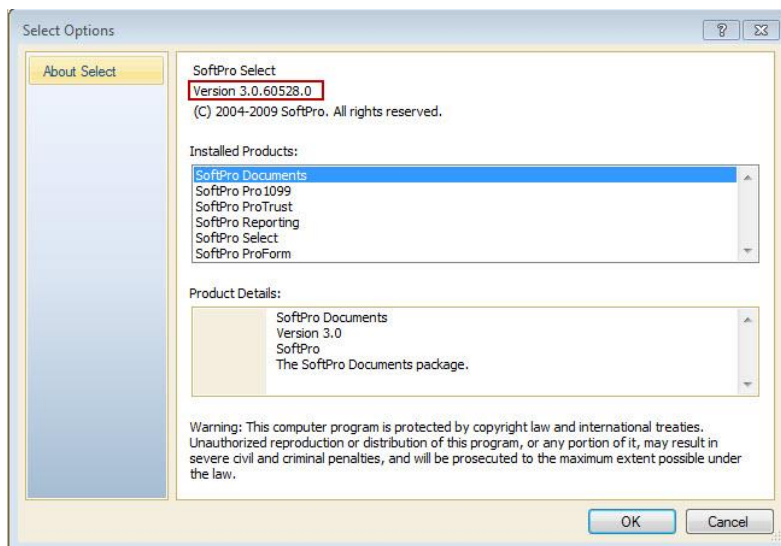
Solution Center hours Monday to Friday, 8:00 A.M. to 5:30 P.M. EST.

Platinum Level Support Monday to Friday, 8:00 A.M. to 10:00 P.M. EST.

hours Saturday, 11:00 A.M. – 2:00 P.M. EST.

Before calling technical support, please have the following information ready:

- Program version number - select the **File Menu** button, then **Select Options** of SoftPro Select to find this information.



- Text of any error message you have encountered.
- Name and version number of your operating system.

Subscribing to SoftPro's annual maintenance service program can extend technical support service. Subscribing to platinum maintenance service gives you access to technical support for longer hours during the week and on Saturday. For more information, call [SoftPro Sales](tel:800-848-0143) at 800-848-0143. You can e-mail SoftPro Sales at sales@softprocorp.com.