



EXPLORE YOUR  
**SOFTPRO**  
**SERVICE**  
**OPTIONS**



INTRODUCTION

# SoftPro Services

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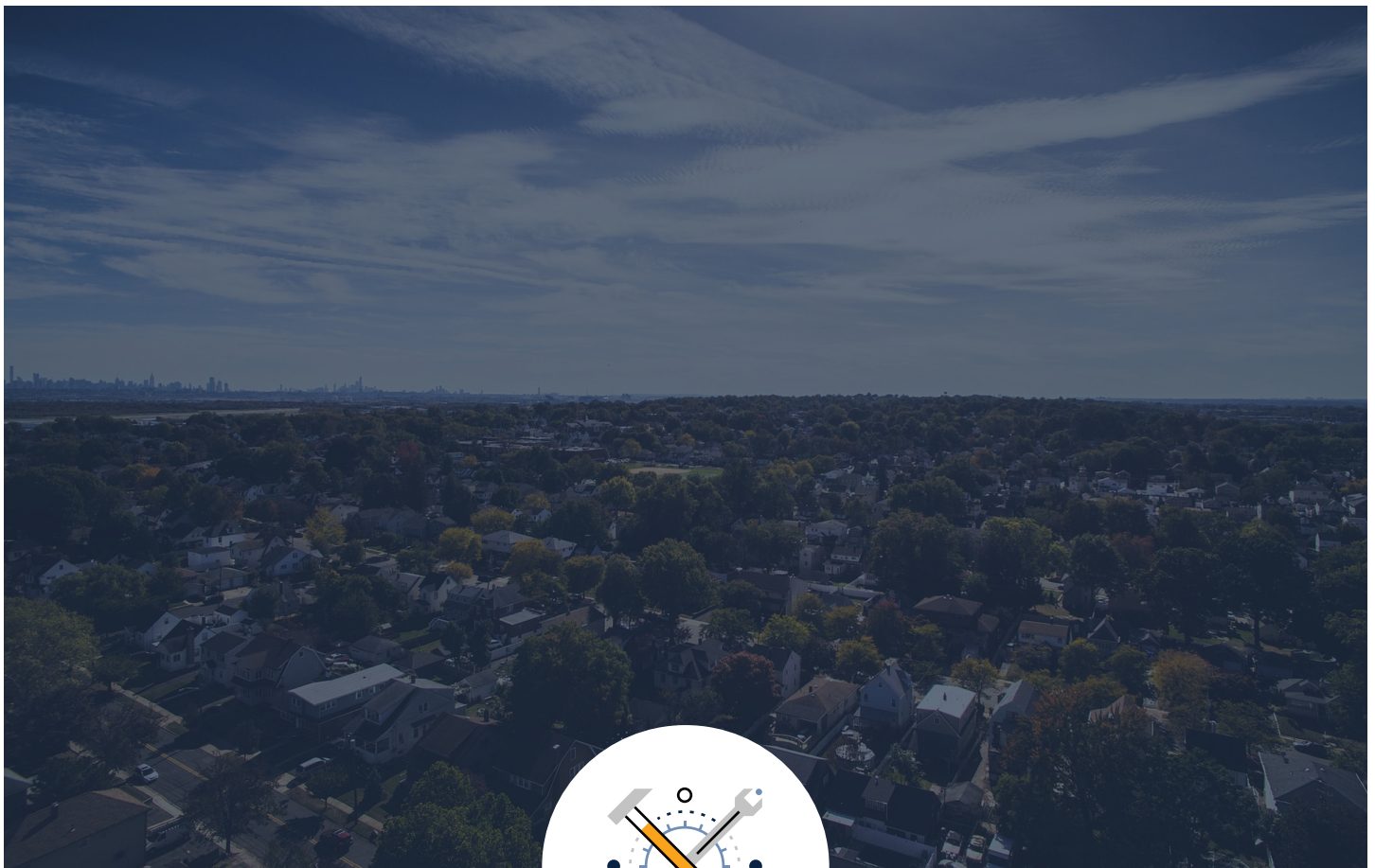
SoftPro's award-winning closing and title software allows organizations to hit the ground running with cutting-edge solutions. As a SoftPro customer, you'll have access to a wide variety of SoftPro services that have been designed to save you time and money.



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# Annual Maintenance

## *The Best Customer Support in the Industry*

Every SoftPro product includes free Maintenance Service for the first 60 days after purchase. You then have the option of subscribing to SoftPro's Annual Maintenance Service, which includes:

- Unlimited toll-free telephone support
- Access to an experienced, nationally-recognized technical support team for prompt answers to questions
- Automatic software updates to keep your documents compliant with industry regulations
- Regular software updates including feature enhancements and the implementation of customer suggestions

### FOR MORE INFORMATION:

Visit [www.softprocorp.com/software-services/software-maintenance/](http://www.softprocorp.com/software-services/software-maintenance/)  
or call us at **800-848-0143** – ext. 1 or  
email [Sales@SoftProCorp.com](mailto:Sales@SoftProCorp.com).

# Custom Development



By taking advantage of SoftPro's custom development services, you'll be able to customize your software and integrations for your specific needs. No matter if your company is small or large, our Custom Development Team can help build the right solution tailored for your business to help you run as efficiently as possible.

**Our team can help you with a wide range of custom development projects including:**

- Web Order Entry customization & integration
- CRM integration
- Legacy software integration
- Data import for order or template creation
- Third party accounting integrations
- Calendar/Scheduler integration and customization
- Policy Jacket Manager
- Wire-In Utility
- Batch invoice payment
- Hyperlinked policies/commitments
- Fillable PDF documents
- Custom integrations with third party vendors



## DO YOU HAVE A CUSTOMIZATION REQUIREMENT THAT'S NOT LISTED HERE?

Call us to discuss our solutions for any and all custom development projects.

To learn more and request a quote, please visit us at [www.softprocorp.com/software-services/custom-development/](http://www.softprocorp.com/software-services/custom-development/) or call **800-848-0143** – ext. 7546 or email [support@softprocorp.com](mailto:support@softprocorp.com).



# Training

SoftPro offers several different training options tailored to meet your specific training needs, whether you've been using our products for years or just a few days. We offer classes for beginner and advanced users on virtually every topic and module we sell.

## WEB-BASED

There's no need to leave the comfort and convenience of your home or office with our Web-Based Training. This training option provides a time-efficient, cost-effective method of training and delivering knowledge to your staff. All webinar sessions last 90-120 minutes.

## ON-SITE

Have a SoftPro trainer come directly to your office with a customized training program built for you and your staff. SoftPro's On-Site Training option is a great choice for any organization looking to maximize the features and functionality of the SoftPro applications to meet specific business requirements and objectives.

## FREE MONTHLY WEBINARS

SoftPro offers free webinars on a monthly basis to all of our customers. The webinars are specific to the edition of SoftPro you use - either Select or Standard/Enterprise. The webinars feature tips and tricks for using the software and cover some of our most frequently asked questions.

### FOR MORE INFORMATION & PRICING:

Visit [www.SoftProCorp.com/SoftPro-Training/](http://www.SoftProCorp.com/SoftPro-Training/)  
or contact us at **800-848-0143** – Option 5.  
Or email [TrainingAdmin@SoftProCorp.com](mailto:TrainingAdmin@SoftProCorp.com).

# Trust Account Reconciliation



SoftPro's Trust Account Reconciliation Service helps ensure compliance with ALTA Best Practice #2 and puts reconciliations in the hands of experienced, trained professionals. Our team will review your trust account to ensure that it is in sync with monthly bank activity and provide the critical reconciliation reports required by your state and underwriters.

## MONTHLY 3-WAY RECONCILIATION

- A complete 3-way reconciliation: reconciling bank balance, book balance and escrow trial balance will be completed
- A reconciler will work with you on clearing any outstanding and/or exception items
- Preparation of escrow trust accounts with trial balances
- Lists of all open escrow balances. The trial balance provides information on all files with open balances including those files with old balances and negative balances
- Results of the reconciliation are delivered as monthly reports:
  - Escrow trial balance report
  - Book balance report
  - Statement proofing register
  - Receipts & disbursements report
  - Bank adjustments report
- A segregation of duties ensuring the reliability of the reconciliation by providing an independent reconciler other than those with signing authority.

## DAILY RECONCILIATION SERVICES

Our Daily Trust Account Reconciliation Service provides an extra layer of fraud protection, alerting you of any irregularities on your trust accounts. This simple and affordable solution allows you to spend your time more profitably and focus on your core business.

In addition to everything you receive with Monthly 3-Way Reconciliation, Daily Reconciliation also includes:

- An extra layer of protection against fraud, alerting you of any irregularities on your trust account
- A daily reconciliation of receipts and disbursements
- Daily clearing of all items that do not require investigation or additional information

### FOR MORE INFORMATION:

Visit [www.softprocorp.com/software-services/reconciliation-services/](http://www.softprocorp.com/software-services/reconciliation-services/) or call

**800-848-0143** – ext. 1.

### FOR A FREE QUOTE:

Visit [www.softprocorp.com/request-a-quote/](http://www.softprocorp.com/request-a-quote/)

# Consulting



**SoftPro's Consulting Service provides you with continued education to assist in utilizing our suite of SoftPro products to the fullest.**

This service provides you with the opportunity to have a seasoned industry specialist analyze your current business processes and workflow and supply recommendations to streamline your use of our applications and your internal business practices around them. SoftPro Consulting can be purchased in two ways; hourly remote web sessions for targeted requests or onsite for a more in-depth approach.

## HOURLY CONSULTATIONS

Hourly consultations are typically used when there is a specific topic request. For example, a company may want to discuss how to better use templates to assist their users with efficiency.

## ONSITE CONSULTATIONS

Onsite consultations allow the consultant to work directly with management and users for a specified number of days.

## THE PROCESS:

- Observe your workflow and utilization of SoftPro applications
- Analyze your internal business processes
- Review findings
- Discuss areas for efficiency gains/improvements
- Formulate game plan for process improvements and application changes
- Implement changes and provide training to appropriate personnel specific to these changes

## THE RESULTS:

- Documented report on observations
- Projected goals
- Itemized account for changes already implemented
- Projected plan(s) for any deferred items to be implemented

## PRICING:

Hourly services may be purchased at a rate of \$125 per hour. This would include web-based screen sharing. Onsite Consulting Services per day\*:

1 day	2 days	3 days	4 days	5 days
\$1,200	\$2,200	\$3,300	\$4,000	\$4,800

\*The onsite consultation costs above do not include a required 3 hours at \$125/hr for documentation and reporting of your analysis or the travel expenses that will be incurred. These additional costs will be included in your quote for approval prior to booking.

**FOR MORE INFORMATION:**

Visit [www.softprocorp.com/software-services/softpro-consulting/](http://www.softprocorp.com/software-services/softpro-consulting/) or call us at **800-848-0143** or email [Consulting@SoftProCorp.com](mailto:Consulting@SoftProCorp.com).





# Custom Reports & Documents

With our custom reports and documents services, you never have to leave our application in order to produce a document for your transaction or rekey your data.

Simply send us a sample of your MS Excel file or Word document or a brief description of your reporting needs. We will contact you with any questions to further define your needs and send you a quote.

## FOR MORE INFORMATION:

Visit [www.softprocorp.com/software-services/custom-reports-and-docs/](http://www.softprocorp.com/software-services/custom-reports-and-docs/) or call us at **800-848-0143** – ext 1 or email [support@softprocorp.com](mailto:support@softprocorp.com).

# Regulatory & Compliance Guidance



Our industry has seen countless regulatory changes over the past few years. This ever-changing regulatory environment has emphasized the strong need for SoftPro to remain a resource to help you be compliant and be prepared for industry changes.

- Monitor regulatory and compliance issues at a federal, state and local level
- Receive job aids and guidance on regulatory changes
- Get notified of regulatory and compliance updates, such as 2016 ALTA Commitment, TRID Amendments, CFPB changes, and so much more
- Rely on a trusted resource for compliance matters



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Visit **[blog.softprocorp.com](https://blog.softprocorp.com)** and subscribe at **[info.softprocorp.com/blog-subscription](https://info.softprocorp.com/blog-subscription)** and never miss important updates about industry regulatory changes.



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