

USING THE OVERLAY FUNCTION IN PROFORM

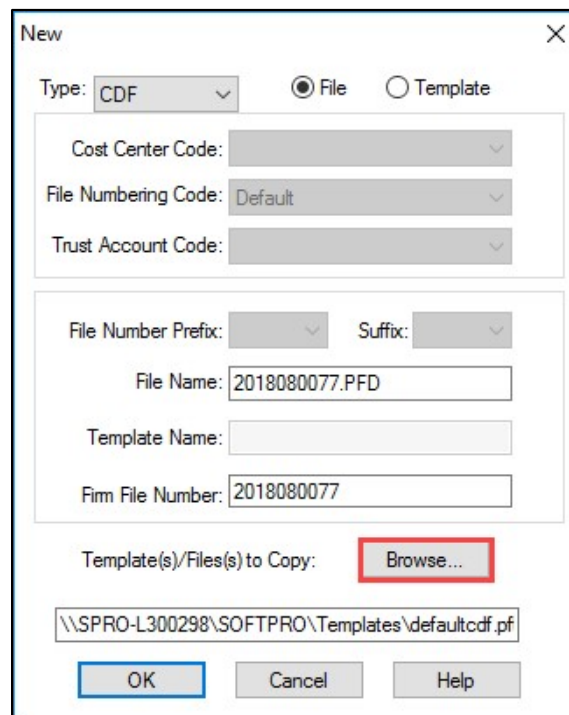
The overlay function in ProForm is used to copy one file's information or part of the information into another file. **ProForm Data files** (*.pfd), **ProForm Templates** (*.pft), and **ProForm Text Overlay files** (*.pxt) can be used to overlay information into a file. The overlay process is the same for each file type.

Overlaying when Creating a New File:

1. From the menu bar, select **File > New** or click the **New** icon on the toolbar.



2. Click **Browse** to search for the template or file to copy.



New

Type: CDF File Template

Cost Center Code:

File Numbering Code: Default

Trust Account Code:

File Number Prefix: Suffix:

File Name: 2018080077.PFD

Template Name:

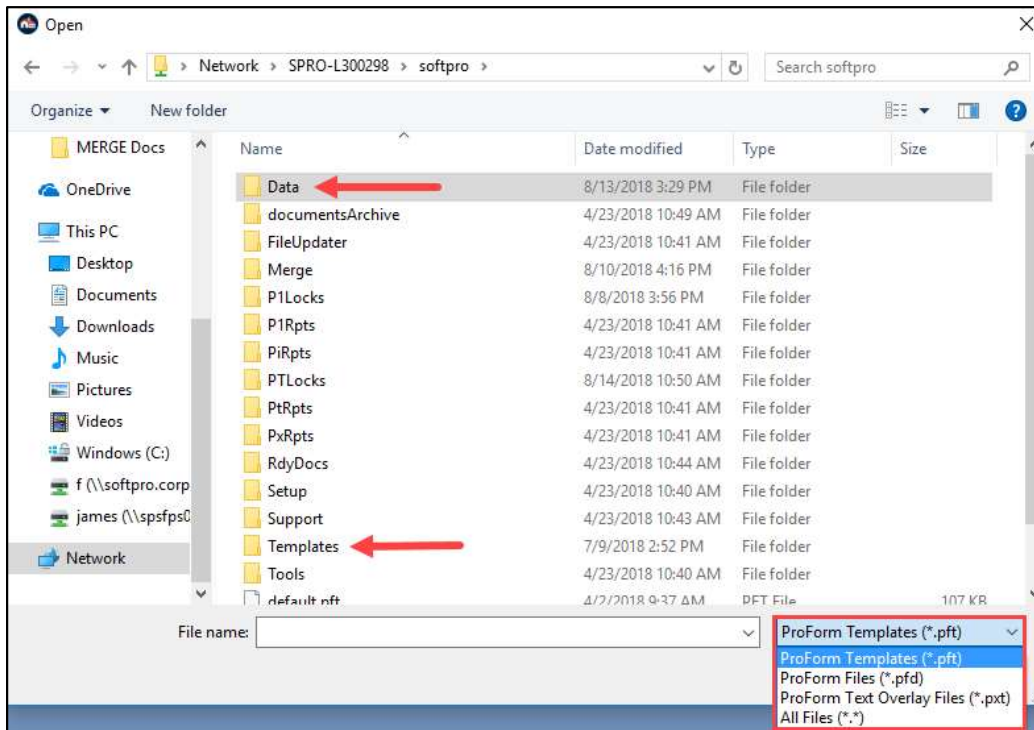
Firm File Number: 2018080077

Template(s)/Files(s) to Copy: **Browse...**

\\SPRO-L300298\SOFTPRO\Templates\defaultcdf.pf

OK Cancel Help

3. By default, **ProForm Templates** (*.pft) will appear. You can opt to search for **ProForm Data files** (*.pfd) or **ProForm Text Overlay files** (*.pxt) by choosing the correct file type in the **File Type** field and by navigating to the applicable folder.



4. After selecting the file you want to copy, click **Open**. You can copy more than one file at a time by holding the **Ctrl** key down while selecting each of the files that you want to copy. Release the **Ctrl** key after you have made your selections and choose **Open**.
5. Click **OK** to create the new file.

Overlaying into an Existing File:

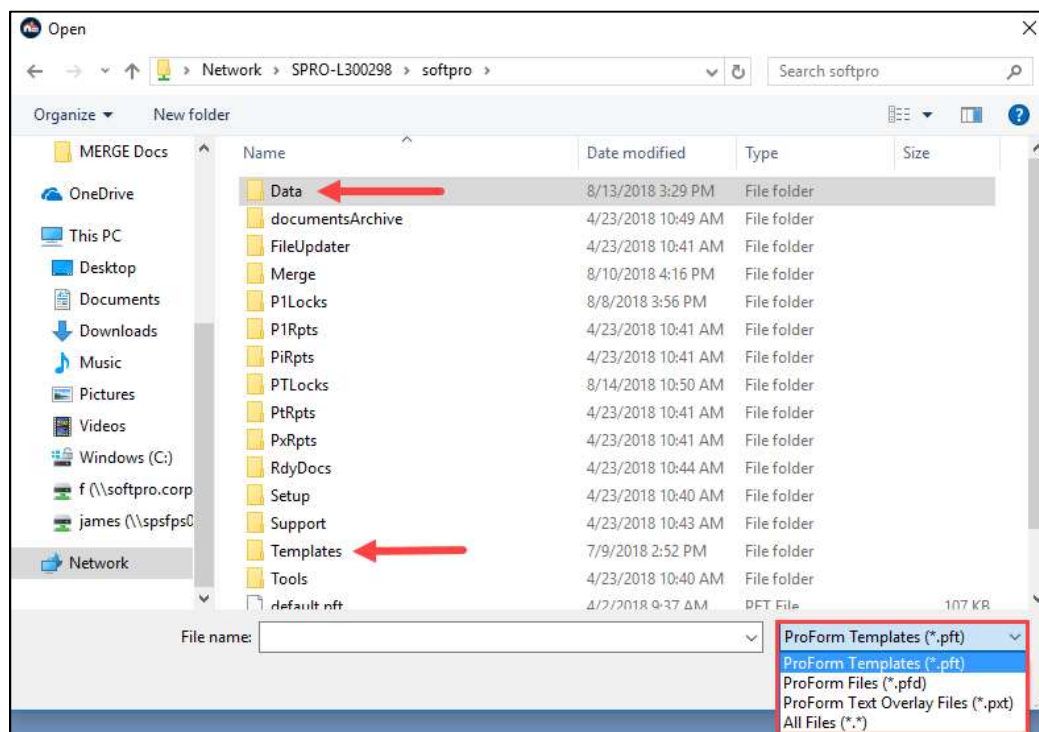
1. Open the existing file in ProForm by selecting **File > Open** from the menu bar or by clicking the **Open** icon on the toolbar.



2. Select **File > Overlay File/Template** or click the **Overlay File/Template** icon on the toolbar.



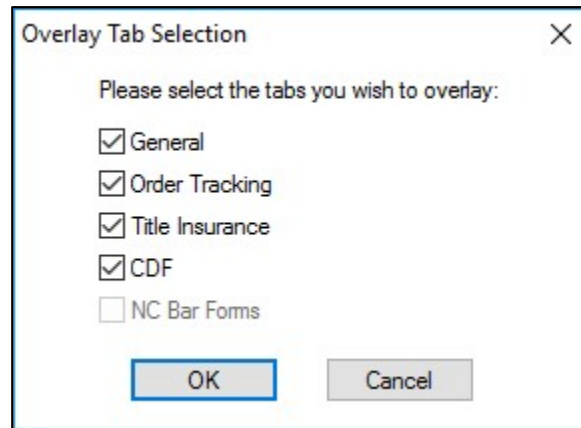
3. By default, **ProForm Templates (*.pft)** will appear. You can opt to search for **ProForm Data files (*.pfd)** or **ProForm Text Overlay files (*.pxt)** by choosing the correct file type in the **File Type** field and by navigating to the applicable folder.



4. After selecting the file you want to copy, click **Open**. You can copy more than one file at a time by holding the **Ctrl** key down while selecting each of the files that you want to copy. Release the **Ctrl** key after you have made your selections and choose **Open**.

Choosing Tabs to Overlay:

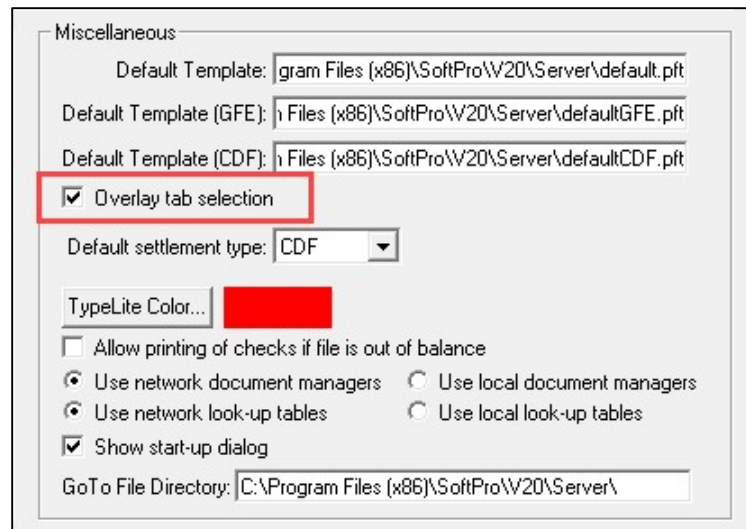
ProForm offers the option to choose the tabs you want to include when overlaying a file or template. When this option is activated, a window will appear every time you select a file or template to overlay. It will allow you to select the tabs that you want included when the file is overlaid. The information from tabs that are not checked will not be included. By default, all tabs will be checked on the **Overlay Tab Selection** window. After selecting all of the tabs that you want included, choose **OK** to continue. (If you select **Cancel** nothing will be overlaid.)



NOTE: You will only have access to those tabs for modules that you have purchased licenses and have installed.

To active this option:

1. From the menu bar, select **Tools > Preferences.**
2. Click the **Overlay Tab Selection** check box.



3. Click **OK.**

NOTE: For Enterprise users, this option will need to be activated in **SPAdmin.**