

- 4800 Falls of Neuse Road, Suite 400
- Raleigh, NC 27609
- Sales & Service: 800-848-0143
- Email: sales@softprocorp.com
- Web: www.softprocorp.com

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.

C P	roForm Er	nterprise	Edition										
File	Reports	View	Tools	Services	Support	Window	Help						
		8 B	Ø	🙁 🗋	88	🏝 📰 🗏	13	🕺 🗊 🔎	Ø	1	2	E	o 🖉 🗖

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

Type:	CDF	~	File	OTe	mplate
Co	st Center	Code:			\sim
File N	umbering	Code: De	fault		~
Trust	Account	Code:			\sim
٦	File I Femplate I		18080077.	PFD	
F	irm File Nu	umber: 20	18080077		
Т	emplate(s)/Files(s) to	Copy:	Brows	e
\\S	PRO-L300	298\SOF	TPRO\Ten	nplates\def	aultcdf.pf

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.

- 4800 Falls of Neuse Road, Suite 400
- Raleigh, NC 27609
- Sales & Service: 800-848-0143
- Email: sales@softprocorp.com
- Web: www.softprocorp.com

		~			2
Organize 🔻 New folder					0
🦲 MERGE Docs \land	Name	Date modified	Туре	Size	
🐔 OneDrive	📃 Data	8/13/2018 3:29 PM	File folder		
	documentsArchive	4/23/2018 10:49 AM	File folder		
This PC	📙 FileUpdater	4/23/2018 10:41 AM	File folder		
E Desktop	🦲 Merge	8/10/2018 4:16 PM	File folder		
Documents	P1Locks	8/8/2018 3:56 PM	File folder		
🕹 Downloads	P1Rpts	4/23/2018 10:41 AM	File folder		
Music	PiRpts	4/23/2018 10:41 AM	File folder		
Pictures	PTLocks	8/14/2018 10:50 AM	File folder		
Videos		4/23/2018 10:41 AM	File folder		
	PxRpts	4/23/2018 10:41 AM	File folder		
🖆 Windows (C:)	RdyDocs	4/23/2018 10:44 AM	File folder		
🛫 f (\\softpro.corp	Setup	4/23/2018 10:40 AM	File folder		
🛫 james (\\spsfps0	Support	4/23/2018 10:43 AM	File folder		
	🔜 Templates	7/9/2018 2:52 PM	File folder		
- INEEWOIK	Tools	4/23/2018 10:40 AM	File folder		
~	🗋 default off	Δ/2/2018 9-37 ΔM	PFT File	107 KB	
File nam	e:		V ProForm T	emplates (*.pft)	×

- 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.







- 4800 Falls of Neuse Road, Suite 400
- Raleigh, NC 27609
- Sales & Service: 800-848-0143
- Email: sales@softprocorp.com
- Web: www.softprocorp.com
- 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.

organize 🔹 New folder				····	1
MERGE Docs	Name	Date modified	Туре	Size	
🛆 OneDrive	Data	8/13/2018 3:29 PM	File folder		
	documentsArchive	4/23/2018 10:49 AM	File folder		
This PC	FileUpdater	4/23/2018 10:41 AM	File folder		
E Desktop	Merge	8/10/2018 4:16 PM	File folder		
Documents	P1Locks	8/8/2018 3:56 PM	File folder		
🕹 Downloads 👘	P1Rpts	4/23/2018 10:41 AM	File folder		
Music	PiRpts	4/23/2018 10:41 AM	File folder		
Pictures	PTLocks	8/14/2018 10:50 AM	File folder		
Videos	PtRpts	4/23/2018 10:41 AM	File folder		
	PxRpts	4/23/2018 10:41 AM	File folder		
Windows (C:)	RdyDocs	4/23/2018 10:44 AM	File folder		
🛫 f (\\softpro.corp	🔜 Setup	4/23/2018 10:40 AM	File folder		
🛫 james (\\spsfps0	Support	4/23/2018 10:43 AM	File folder		
Network	🔜 Templates	7/9/2018 2:52 PM	File folder		
TACEMOR	Tools	4/23/2018 10:40 AM	File folder		
~	🗋 default off	Δ/2/2018 Q-37 ΔM	PFT File	107 KB	
File nan	ne:		 ProForm 1 	Templates (*.pft)	

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.)

Using the Overlay Function in ProForm

- 4800 Falls of Neuse Road, Suite 400
- Raleigh, NC 27609
- Sales & Service: 800-848-0143
- Email: sales@softprocorp.com
- Web: www.softprocorp.com



Overlay Tab Selection	×
Please select the tabs you wish to overlay:	
General	
Order Tracking	
Title Insurance	
CDF	
NC Bar Forms	
OK Cancel	

<u>NOTE</u>: 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.

Default Template: gram Files (x8	6)\SoftPro\V20\Server\default.pft
Default Template (GFE): h Files (x86)\S	oftPro\V20\Server\defaultGFE.pft
Default Template (CDF): h Files (x86)\S	oftPro\V20\Server\defaultCDF.pft
Overlay tab selection	
Default settlement type: CDF 🔹	1
TypeLite Color	-
TypeLite Color	of balance
Allow printing of checks if file is out	of balance C Use local document managers
Allow printing of checks if file is out	-
	-

3. Click **OK.**

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