



#### SoftPro

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## Overlaying Text Files in ProForm

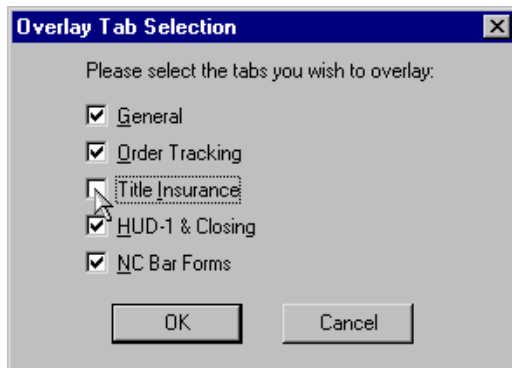
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You can copy, or *overlay* the data from an existing ProForm template or other data file onto a new file at the time you create it. You can also overlay data from other files or templates any time after a file is created.

1. Choose **File/Overlay File/Template**.
2. Enter the name of the file or template you wish to copy.

**Note:** The default drive and folder for data files appears in the **Look in:** field. You can select a different drive or folder to look in by clicking the down arrow next to the **Look in:** field.

3. Select **Open**. If the custom overlaying feature is enabled, the **Overlay Tab Selection** window will appear:



**<Tip:** Click a checkbox to select or clear it.

4. Choose the tabs that you want to overlay. (By default, all available tabs are selected.)
5. Select **OK**.

**Note:** If the custom overlay feature is not enabled, data from all available tabs will be copied. You can enable the overlay feature by selecting **Overlay tab selection** on the ProForm **Preferences** screen.

## Overlaying Text Files

You can overlay text files containing SoftPro field names and values on to ProForm data files and templates. When you overlay a text file, the values for the fields you include will be inserted into the fields in the ProForm file. Text files can be created using any text editor such as Microsoft Notepad, a word processor, or generated by a web-based order entry application.

1. Choose **File/Overlay File/Template**. The **Open** dialog will appear.
2. Enter **ProForm Text Overlay Files (\*.pxt)** in the **Files of type:** field to display text files renamed with a .pxt extension. Select **All Files (\*.\*)** if your text file has a different extension, such as .txt.
3. Choose the text file you want to overlay.
4. Select **Open**. If the custom overlay feature is enabled, the **Overlay Tab Selection** window will appear. Choose the tabs you want to overlay and select **OK** on the **Overlay Tab Selection** window to continue.

#### Text File Format

There is a certain format you must follow when creating a text file that you want to use with ProForm. Each line of your text file should contain a SoftPro field name, a non-alphanumeric character (such as an equal sign or colon), and the value that you want to appear in the field.

Your text files can specify values for as many ProForm fields as you want. The following is a sample text file that contains three ProForm fields and values:

```
BYR1NAM1=Fred Jones
SLR1NAM1=Sam Smith
LOANAMT=100000
```

When the sample text file above is overlaid onto a ProForm file or template, the values to the right of the equal signs will be inserted into the fields to the left of the equal signs. It will appear as if the values had been typed on screen. For instance, the field BYR1NAM1 (the first Buyer/Borrower name field on the **Buyer/Borrower, Officers & Signatures** screen) will fill in with **Fred Jones**.

### Value Formats

Values must be compatible with field types. Use the following guide when entering values in your text files. You do not have to use all capitals when typing SoftPro field names.

<b>Text Fields</b>	Values can be in any format, and will appear just as entered in the text file when overlaid. (For example, <b>BYR1NAM1=Fred Jones</b> .)
<b>Date Fields</b>	Value must be entered in <b>MM/DD/YY</b> or <b>MM/DD/YYYY</b> formats. (For example, <b>01/01/2000</b> .)
<b>Telephone Numbers</b>	Value must be entered in <b>(###)###-####</b> format. (For example, <b>(800)848-0143</b> .)
<b>Number Fields</b>	Value does not have to include a comma. Instead of a straight number value, you can enter an expression. (For example, <b>LOANAMT=100000</b> or <b>INTRATE=6.25</b> .)

### Checkboxes and Radio Button Fields

You can include checkbox and radio button fields in your text files as well. Type the SoftPro field name, an equal sign, and the value that you want to appear when you overlay the text file. For checkboxes, enter an **X** as the value to have the checkbox selected. For example, to have the **Adjust for Funding Net Check Option** selected, enter the following in a text file:

**ADJNET=X**

When the text file containing this line is overlaid onto a ProForm file, the **Adjust for Funding Net Check Option** field will be selected:

☒ Adjust for Funding Net Check Option

For multiple-choice fields, the value should be entered exactly as it is worded on screen. For example, to have **Purchase** selected as the **Transaction Type**:, enter the following in your text file:

**PURCREFI=Purchase**

When the text file containing this line is overlaid onto a ProForm file, the **Transaction Type**: field on the **File No., Settlement Dates, Notes** screen will be set to **Purchase**:

Transaction Type: ☒ Purchase ☐ Refinance ☐ Equity

### Saving Text Files

The default text file format extension is **.txt**. The ProForm Text Overlay File extension is **.pxt**. To give your text file the **.pxt** extension, you must include quotation marks around the entire filename. Select **File/Save As...** from the menu bar of the word processor you use to create it and enter the filename in quotes (for instance, **"SAMPLE.PXT"**.)

### Error Messages

Your text file will be checked for formatting errors before it is overlaid. If a line in your text file is formatted incorrectly, or if a wrong field name, date format, or checkbox value is found, an error message will appear when you attempt to overlay it. You must correct any errors in the file before it can be used with ProForm.