Setup FA Remittance Report – Process in Classic (Standard/Enterprise)

Learn how to set up the First American Remittance Report in SoftPro Classic Editions.

Set Up the First American Remittance Report in ProForm

NOTE: Consider sending this information to a system administrator or other technical person who is familiar with the SoftPro folder structure.

The steps to set up the Remittance Report will differ slightly depending on the version of ProForm.

Determine ProForm Version

With ProForm open:

1. Click **Help** in the menu bar at the top of the screen
2. Select **About SoftPro ProForm**
   NOTE: The **About** screen displays. If it displays **Enterprise Edition**, skip to the **Add the Report to ProForm** section below. If it displays **Standard** edition, refer to the following section.

Data Collector

To run the report in the **Standard Edition** version of ProForm, you must add three required fields to the database called **POLDESC**, **PROPUSE** and **UNDCODE**. To add these fields to the database (specifically **UserTable01**) you'll use a utility called **Data Collector**. Then you can install the report itself in the ProForm application.

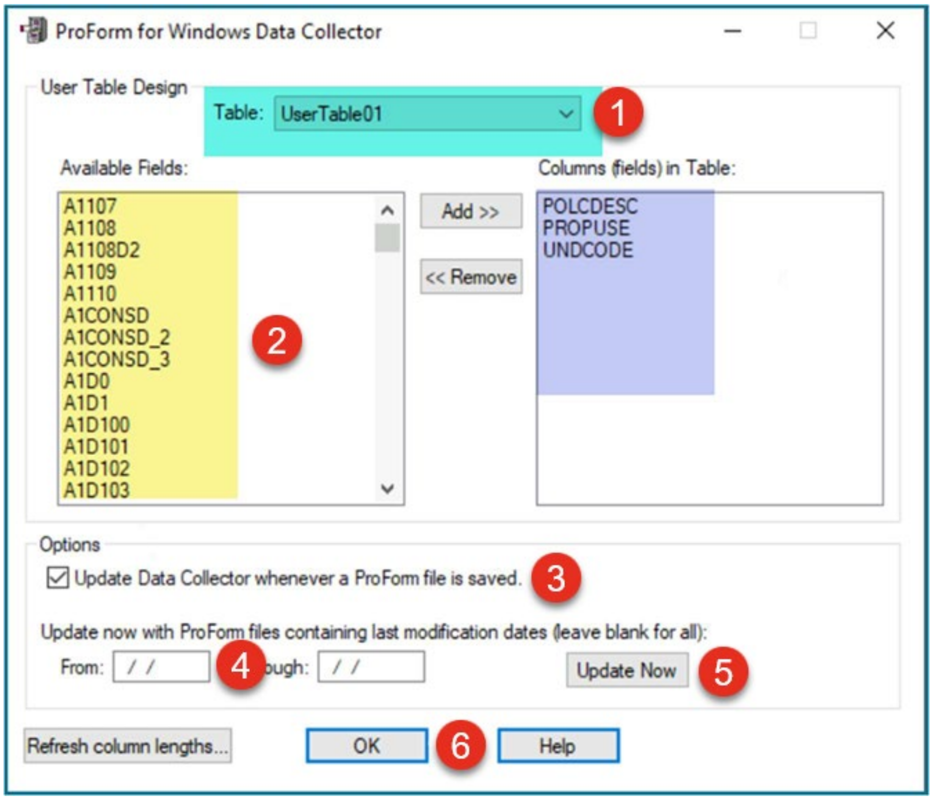
Launch Data Collector

1. In the SoftPro folder navigate to the **PFDatCol** subfolder
2. Double-click the **PDFatCol.exe** app
   NOTE: If the app fails to launch from within this sub-folder, copy the executable into the root of the SoftPro folder. Required support files are often not available from within the subfolder so the Data Collector app must be run from the SoftPro folder itself.

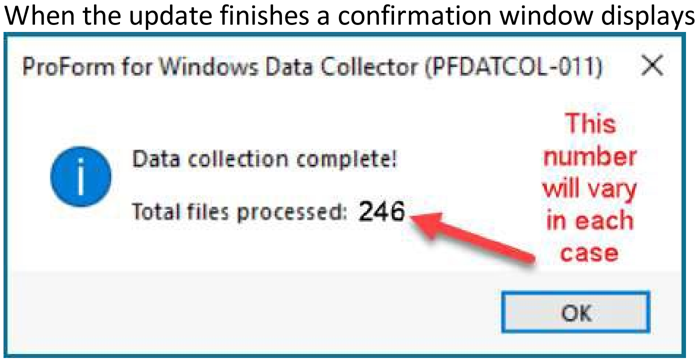
Use Data Collector

1. In the **Table** field, select **UserTable01**
2. In the **Available Fields** list, double-click to select **POLDESC, PROPUSE** and **UNDCODE**
   NOTE: Selected fields display in the **Columns (fields) in Table** list. You can also click to select each field and then click **Add**.

3. Click the **Update Data Collector whenever a ProForm file is saved** checkbox
4. Optionally, enter a date in the **From** field to limit adding selected fields to only those files created on or after that date
5. Click **Update Now** to start the process of copying the relevant data from the ProForm data files into the selected UserTable



When the update finishes a confirmation window displays:



6. Click **OK**
7. Close the Data Collector app

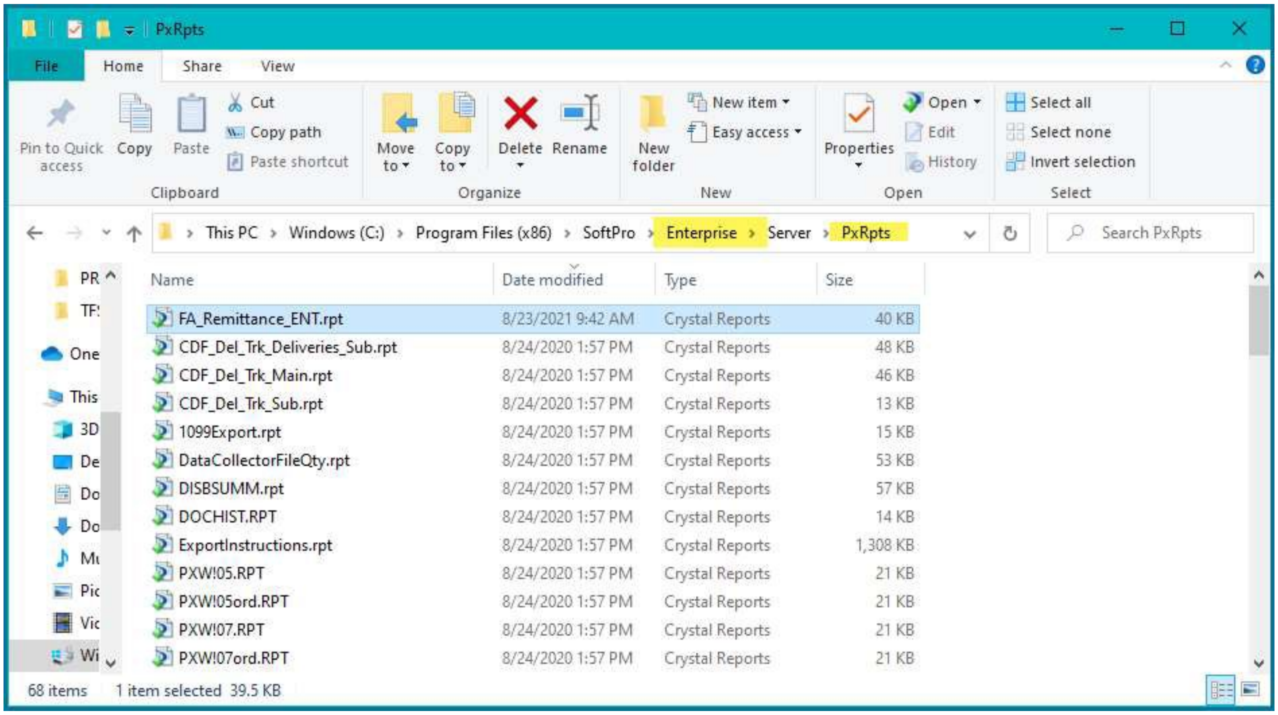
Add the Report to ProForm

There are three high-level steps to installing a report:

1. Add the report file to the ProForm reports folder
2. Register the report for use in ProForm
3. Install the report

Add the Report to the Reports Folder

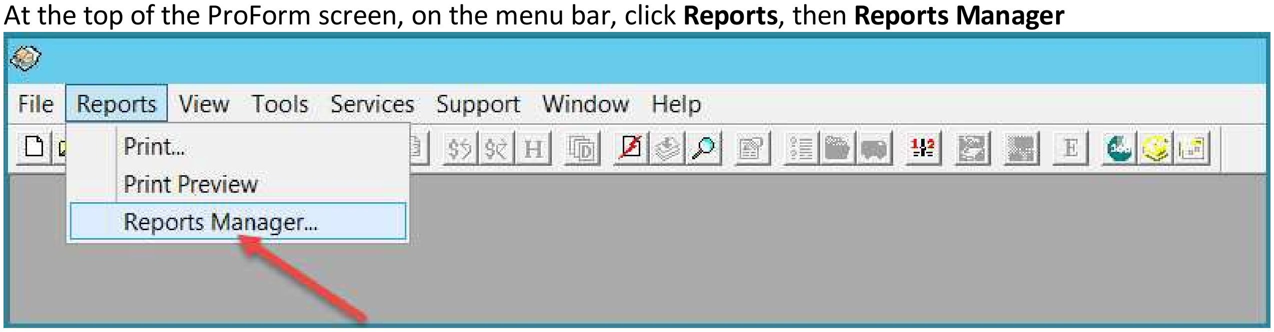
1. Copy the report file into the **PxRpts** sub-folder inside the **SoftPro** folder on the SoftPro server
NOTE: Enterprise Edition sample:



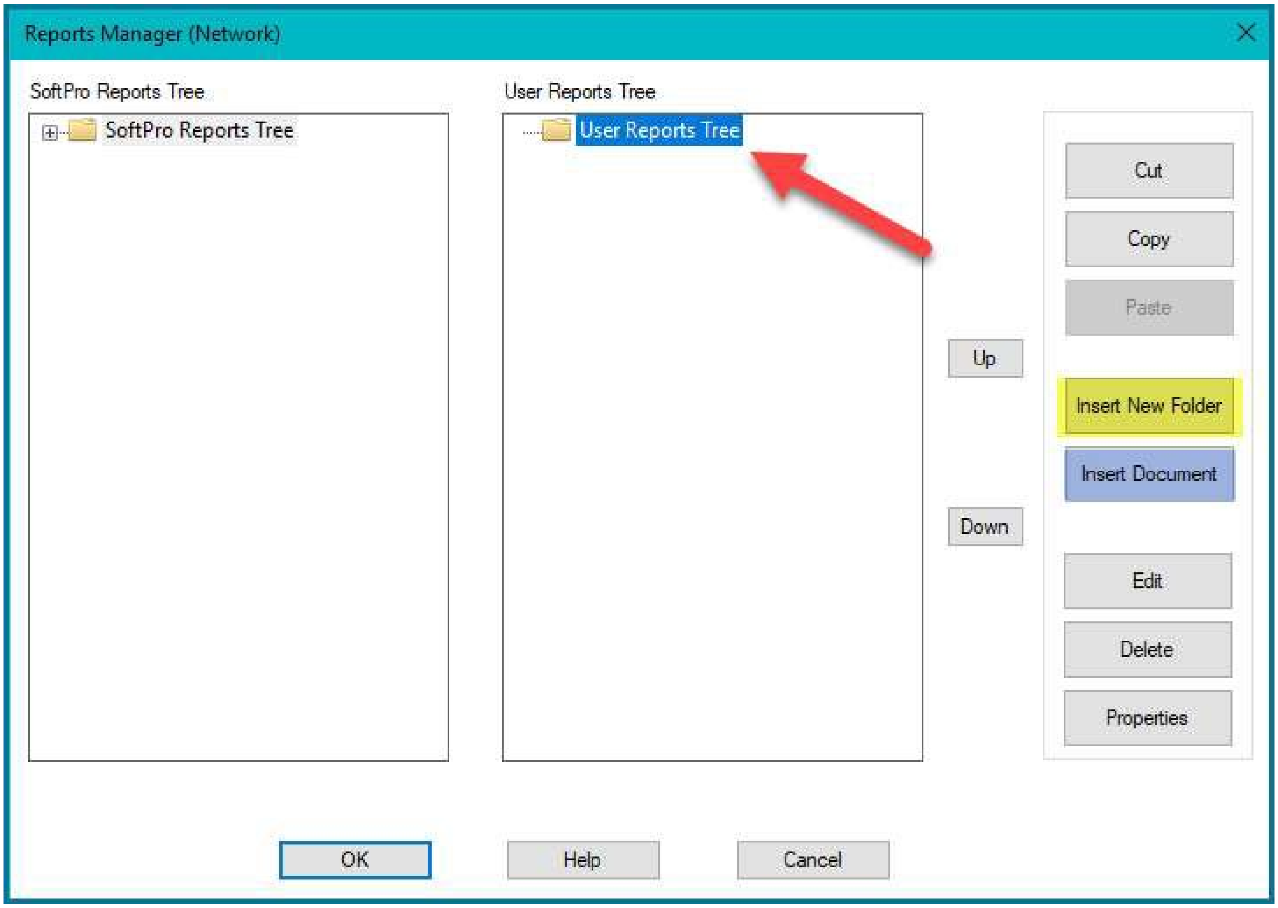
Register the Report in SoftPro

Launch the **Reports Manager**:

1. At the top of the ProForm screen, on the menu bar, click **Reports**, then **Reports Manager**



NOTE: The Reports Manager has two "Trees", referring to the two folder structures in which the reports are stored. One is the **SoftPro Reports Tree**, which can't be changed. Since you are adding a new report, you will use the **User Reports Tree**:



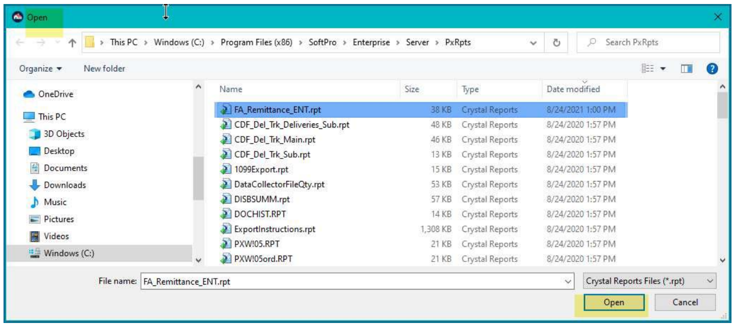
2. If you will be storing the Remittance Report in a separate folder, click the **Insert New Folder** button
NOTE: A folder is created inside the currently selected folder. Its default name is "**New Folder**", which you can change. In the example above, the new folder will be created in the **User Reports Tree** folder.

Install the Report

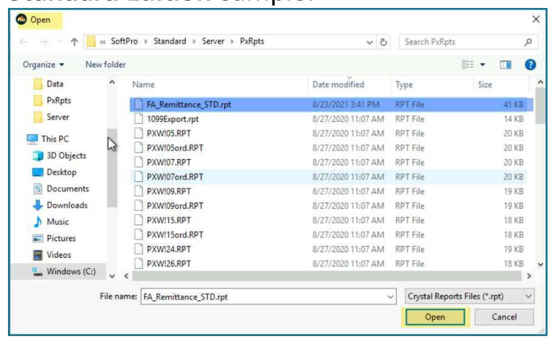
1. Click the **Insert Document** button
   NOTE: Another file selection window displays.

2. Navigate to the "**PxRpts**" folder where the report file was saved
   NOTE: The window prompts to "Open", meaning to select for use.

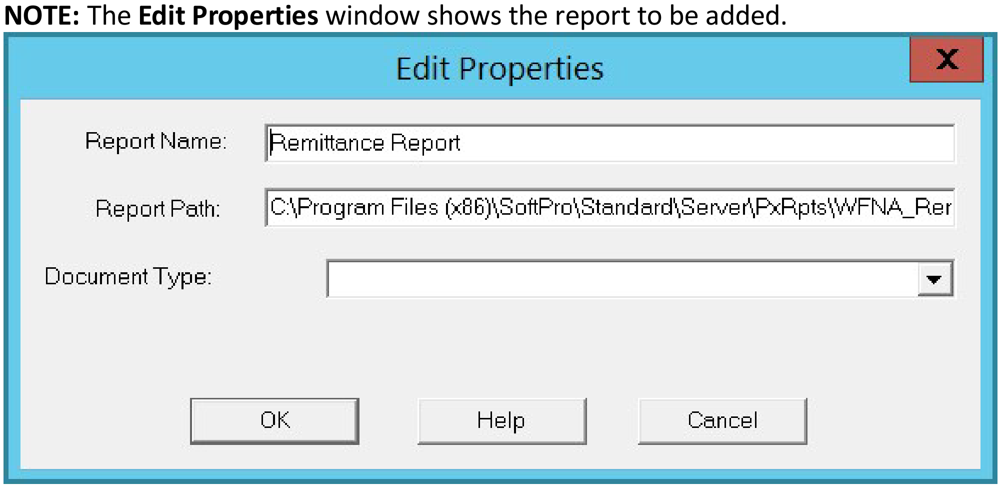
Enterprise Edition Sample:



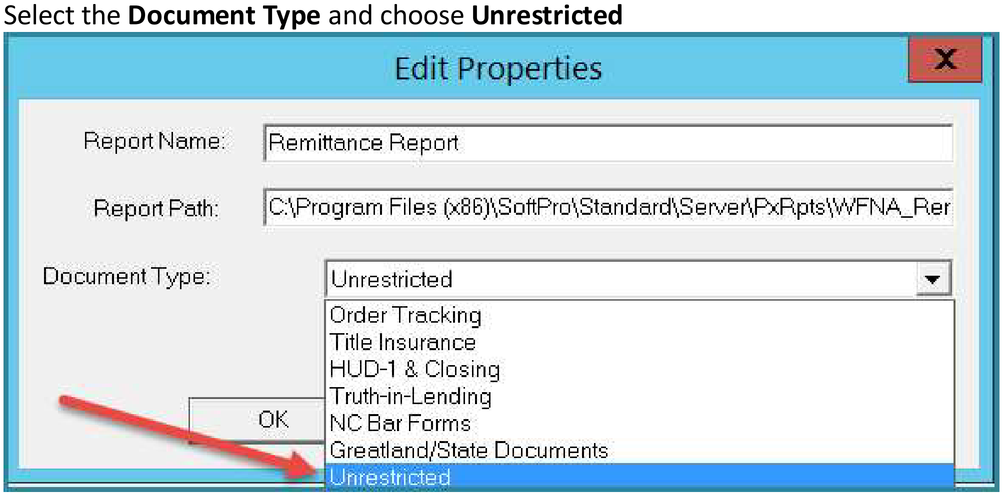
Standard Edition Sample:



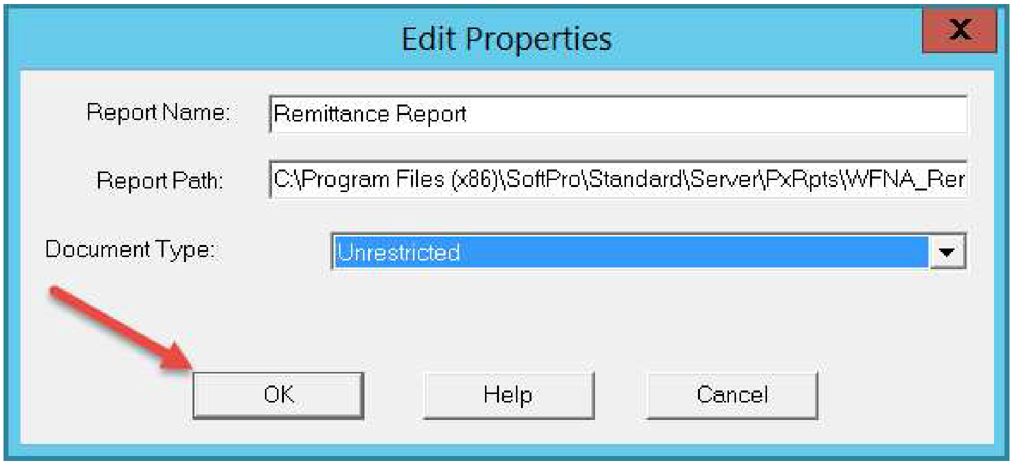
3. Either double-click on the file or highlight the correct file and click **Open**
   NOTE: The **Edit Properties** window shows the report to be added.



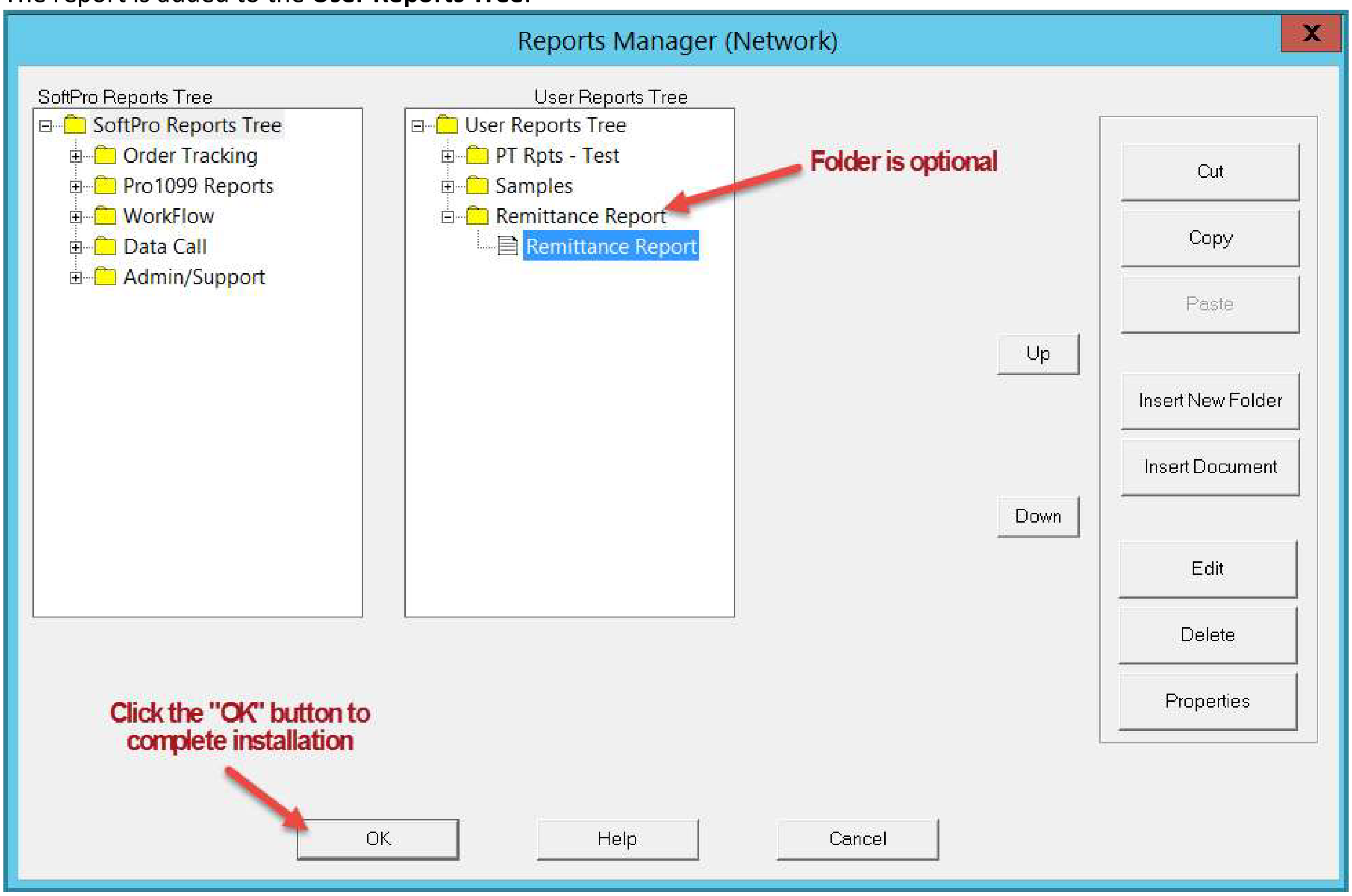
4. Select the **Document Type** and choose **Unrestricted**



5. Click **OK**



The report is added to the **User Reports Tree**.



The report is now available to run from the **Reports** menu.