

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

Criteria for ProForm Files to Export/Import to Pro1099

<u>NOTE</u>: The following factors will affect the creation of a 1099 record in Pro1099 which Softpro will utilize to produce the electronic submission file to the IRS.

Export/Import a ProForm File to Pro1099:

Export a ProForm file to Pro1099 by selecting **File > Export** in <u>ProForm</u>. Choose **Export to Pro1099**.



Import a ProForm file to Pro1099 by selecting File > Import a ProForm data file in Pro1099.



The following criteria must exist in the ProForm file to successfully export or import the file to Pro1099:

1. Transaction Type is marked as **Purchase**.

Firm File Number: 2017090007	9KC.	RealEC	
Transaction Type: Purchase	Refinance Equity	Prior File Number:	
Cash Sale: 🗌 Constructio	n: Reverse Mortgage:	Refinance Purpose:	\sim
Settlement Date: 01/11/2018	ProScheduler		
Include Saturday	in Rescission Period:	Right to Cancel Date: / /	
Disbursement Date: 01/11/2018	Proration Date: 01/11/2018	Recording Date: 01/11/2018	
TH 5	C		

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2. File contains at least one Seller Name.

Name	Relationship	Address		
) Kenneth Hutchinson	h		Туре: Ма	le 📄
			Proceeds: 10	0.00000 % More
Vesting:		Interest %:		
2)			Type:	`
			Proceeds:	% More
			Proceeds:	% M

<u>NOTE</u>: If the Seller Type is marked as **Corporation** or as **Exempt from 1099 Reporting** in the Division of Proceeds & 1099-S Data screen, the ProForm file will export/import to Pro1099. It will export/import as an exempt record.

Name	Relationship	Address		
Hutchinson Homes, Inc.	88 E		Type: Corporation	~
			Proceeds: 100.00000 %	More
Vesting:		Interest %:		
)			Туре:	~
			Proceeds: %	More

link	DS: V To:	r(a)				Total Cash to	o Buyer/Borro	wer:				
nsu	Divert Proceeds	(5)		Tota	Buyer's Part of Rea	Estate Taxes:	550.	25				
	Line: 🗸	Total Cash to	Sel	ler(s)	72,527.43	10000	Buyer's Part	Property		1099-S Given		Exempt from
		Percentage of Total	Dis Sta	b. tus	Cash to Seller	1099-S Proceeds	of Real Estate Tax	Services Received	Foreign Person	to Seller	1099-S Signed	1099 Reporting
) Ke	nneth Hutchinson	100.00000	S	~	72,527.43	195,000.00	550.2	25		\checkmark		
)				~								
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3. Seller Proceeds must be greater than \$0.00.

Pro 1099	(P1WIN-017)	×
1	None of the seller(s) in this export sale. No seller records were export	data file had any proceeds from the ed.

NOTE: A Pro1099 record with \$0.00 seller proceeds can be manually created in Pro1099 or created when importing multiple ProForm files as referenced below.

Import Multiple ProForm Files to Pro1099:

Import multiple ProForm files to Pro1099 by selecting **File > Import Multiple ProForm data files** in <u>Pro1099</u>.



The **Import Multiple ProForm Data Files** window displays. Enter the **Settlement Date Range** for the files you wish to import.

		on
	From: 01/01/2017 Through: 12/31/2017	
(Optional) Enter a fil	e server and directory path within which to limit the import	
		Browse
Include files with \$	U.UU seller proceeds	

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If desired, enter a file server and directory path within which to limit the import. Entering the server and directory path of where your ProForm files are located can make the import process faster. Click **Browse** to search for the path.

Import Multiple ProForm Data Files	×
Please provide the Settlement Date range of ProForm files that you wish to import	
(Optional) Enter a file server and directory path within which to limit the import C:\PROGRAM FILES (X86)\SOFTPRO	e
Include files with \$0.00 seller proceeds Overwrite records from files that have been previously exported to Pro 1099 OK Help Cancel	

To create records for files that include sellers with \$0.00 proceeds, click **Include files with \$0.00** seller proceeds. To overwrite any records that my already exist in Pro1099, click **Overwrite records** from files that have been previously exported to Pro1099.

mport Multiple ProForm Data Files					×
Please provide the Settlement Date	range of ProFom	n files that yo	ou wish to import		
From	01/01/2018	Through:	12/31/2018		
(Optional) Enter a file server and dir	ectory path within	which to lim	nit the import		
C:\PROGRAM FILES (X86)\SOFT	PRO			~	Browse
Include files with \$0.00 seller proc	eeds				
Overwrite records from files that ha	ve been previous	sly exported t	to Pro1099		
ОК	Н	elp	Cancel		

NOTE: If the record shows \$0.00 seller proceeds, the file will not be submitted to the IRS unless the **"Include records with \$0.00 seller proceeds"** checkbox is selected in the IRS Submission File Wizard or unless the **Property Services Received** box is selected.

2017 IRS Submission File	×
IRS SUBMISSION FILE	
If you wish to create an IRS submission file for a year prior to 2017, enter the des year at the prompt below. If you wish to create an IRS submission file for the cur 2017, leave 2017 in the field. Click OK when ready to proceed.	ired tax reporting rent tax year,
IMPORTANT NOTE!	
You may not enter a year LATER than 2017. The IRS changes the reporting file If the current tax year is 2018 or beyond, then you are still using an older version you need an update.	format every year. of Pro1099, and
Please enter the desired tax reporting year: 2017	
Note: The IFS no longer accepts submissions via 3.5" diskette. The IFS now requires electronic submission via the IFS FIRE System. Pro 1099 will guide you through OK	Cancel





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In addition to the criteria listed above, the following criteria must also exist in the ProForm files to successfully import to Pro1099:

1. Settlement Date that falls within the settlement date range entered in the Import Multiple ProForm Data Files window. <u>NOTE</u>: The Settlement Status does not affect the import (for example, a file marked as cancelled will still import as long as all required criteria exists).

Date Order Received: 09/12/2017	Order Received by: james	10 K
Settlement Date: 12/15/2017	Time: : · M	Pro Scheduler
Settlement Status: Canceled 🗸	Status Comment:	
Lock Status: Unlocked	\sim	

Review the **Import Error Log** after importing multiple files to see which files, if any, where skipped during the import process.

Import Errors	×
11 ProForm data files were imported, but there were errors. Click "View Import Error Log" below to view the error log It is recommended that you run the Exceptions Report to see if there is any invalid or missing information.	9.
PlimportErr.log - Notepad	
BoftPro Pro10999 Multiple File Import Error Log File Tuesday, March 27, 2018 13:55:46	
C:\Program Files (x86)\SoftPro\v30\Server\2018010033.PFD: (Skipped) File contains no Seller but Transaction T	ſype is "Purchase"
Tuesday, March 27, 2018 13:55:57	
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