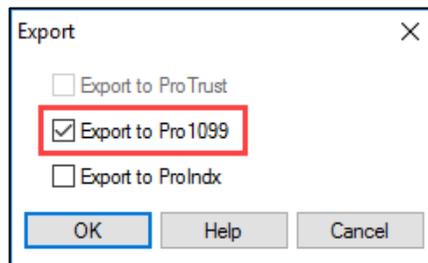


ELECTRONIC 1099 FILING WITH THE IRS

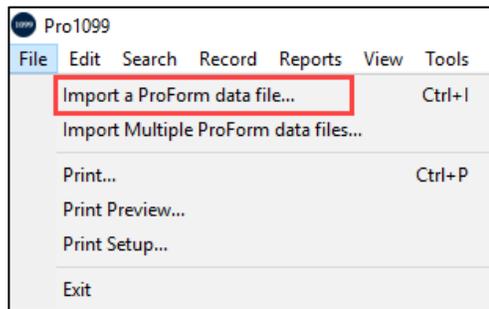
NOTE: If you have never filed electronically with the IRS you will need to obtain a Transmitter Control Code (TCC). To obtain a TCC, you will need to file Form 4419 with the IRS.

Export/Import a ProForm File to Pro1099:

Export a ProForm file to Pro1099 by selecting **File > Export** in ProForm. 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**.

3) File No., Settlement Dates, Notes (2017090007.PFD)

Firm File Number: 2017090007 RealEC

Transaction Type: **Purchase** Refinance Equity Prior File Number: _____

Cash Sale: Construction: Reverse Mortgage: Refinance Purpose: _____

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

Title Examiner: _____ Closer: _____

Escrower: _____ Escrower Title: _____ Marketing Source Info

2. File contains at least one **Seller Name**.

5) Seller, Officers & Signatures (2017090007.PFD)

Name	Relationship	Address	Type	Proceeds
1) Kenneth Hutchinson			Male	100.00000 % More...
Vesting: _____		Interest %: _____		
2)				Proceeds: _____ % More...
Vesting: _____		Interest %: _____		

NOTE: 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.

5) Seller, Officers & Signatures (2017090007.PFD)

Name	Relationship	Address	Type	Proceeds
1) Hutchinson Homes, Inc.			Corporation	100.00000 % More...
Vesting: _____		Interest %: _____		
2)				Proceeds: _____ % More...
Vesting: _____		Interest %: _____		

13) Division of Proceeds & 1099-S Data (2017090007.PFD)

Cash To Buyer/Borrower
 DS: [] To: [] Total Cash to Buyer/Borrower: []

Distribution(s) To Seller(s)
 Divert Proceeds Total Buyer's Part of Real Estate Taxes: 550.25
 Line: [] Total Cash to Seller(s): 72,527.43

	Percentage of Total	Disb. Status	Cash to Seller	1099-S Proceeds	Buyer's Part of Real Estate Tax	Property Services Received	Foreign Person	1099-S Given to Seller	1099-S Signed	Exempt from 1099 Reporting
1) Kenneth Hutchinson	100.00000	S	72,527.43	195,000.00	550.25	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2)						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3)						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4)						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5)						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6)						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7)						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8)						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9)						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

IRS 1099-S Data
 1099-S Description: 108 Serenity Drive/Cincinnati OH 45201 Note: IRS limit is 39 characters.

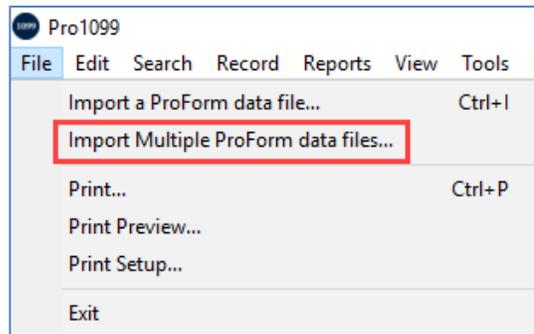
3. **Seller Proceeds** must be greater than \$0.00.



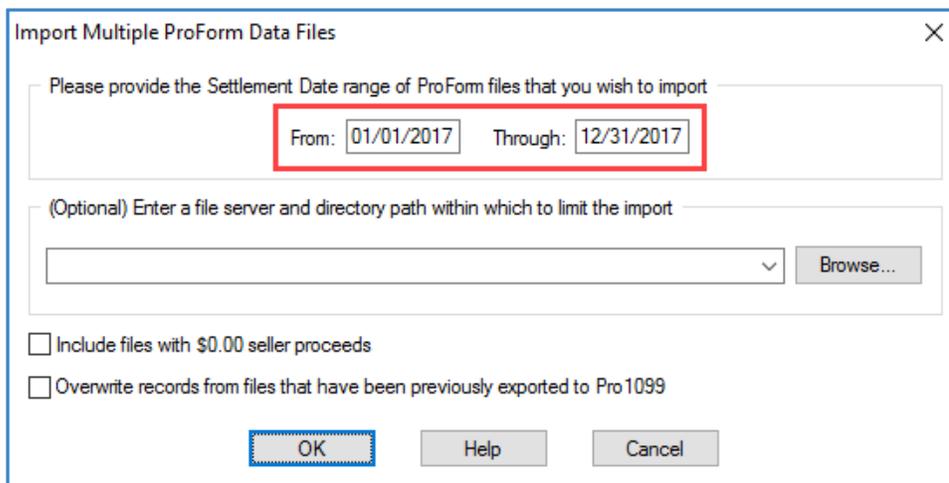
NOTE: A Pro1099 record with \$0.00 seller proceeds can be manually created in Pro1099 or created when importing multiple ProForm files as referenced below.

Import Multiple ProForm Files to Pro1099:

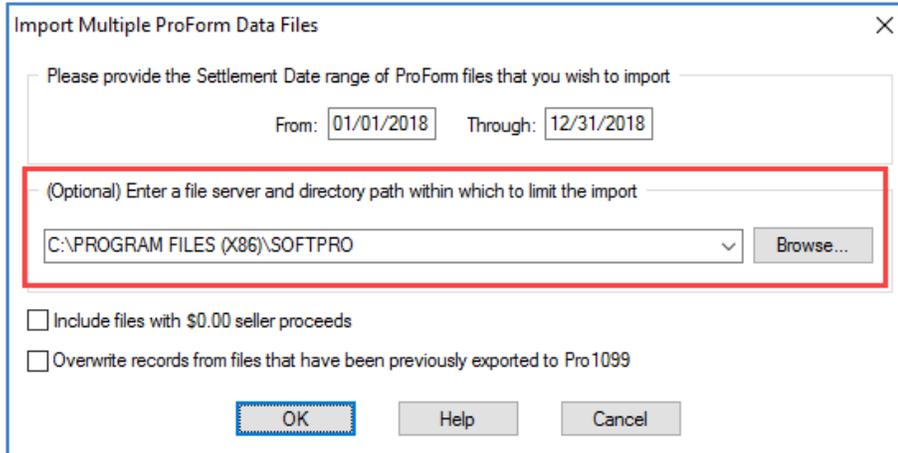
Import multiple ProForm files to Pro1099 by selecting **File > Import Multiple ProForm data files** in Pro1099.



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



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. **NOTE: this is not required.**



Import Multiple ProForm Data Files

Please provide the Settlement Date range of ProForm files that you wish to import

From: 01/01/2018 Through: 12/31/2018

(Optional) Enter a file server and directory path within which to limit the import

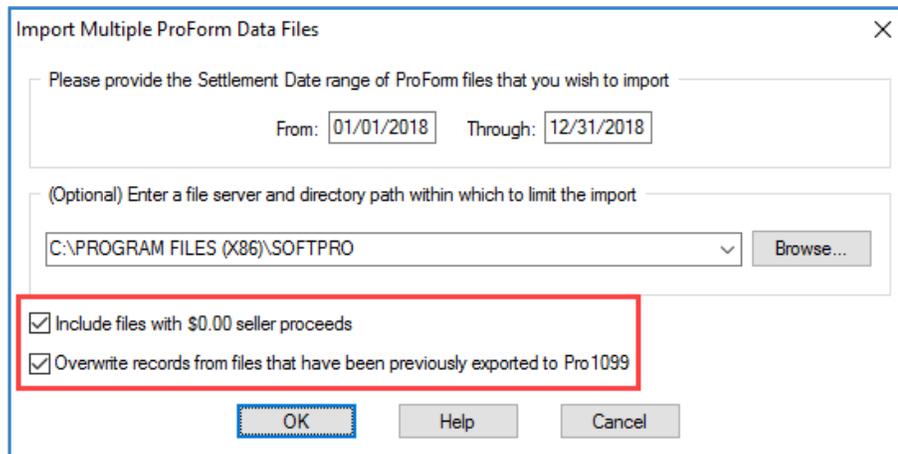
C:\PROGRAM FILES (X86)\SOFTPRO Browse...

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 may already exist in Pro1099, click **Overwrite records from files that have been previously exported to Pro1099**.



Import Multiple ProForm Data Files

Please provide the Settlement Date range of ProForm files that you wish to import

From: 01/01/2018 Through: 12/31/2018

(Optional) Enter a file server and directory path within which to limit the import

C:\PROGRAM FILES (X86)\SOFTPRO Browse...

Include files with \$0.00 seller proceeds

Overwrite records from files that have been previously exported to Pro 1099

OK Help Cancel

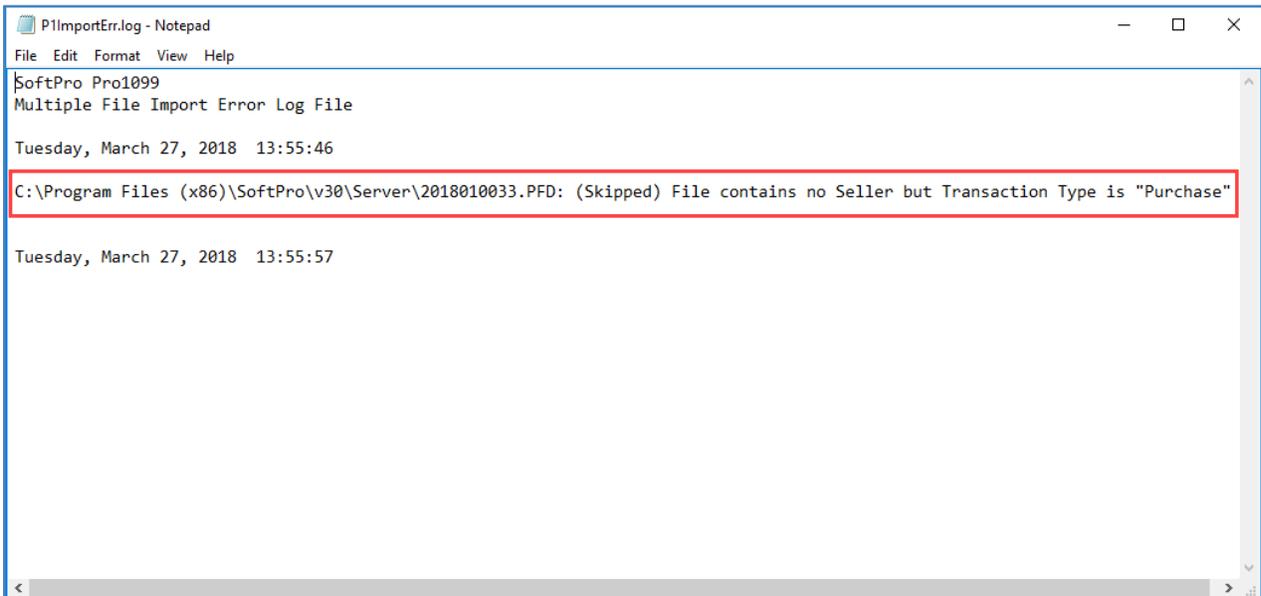
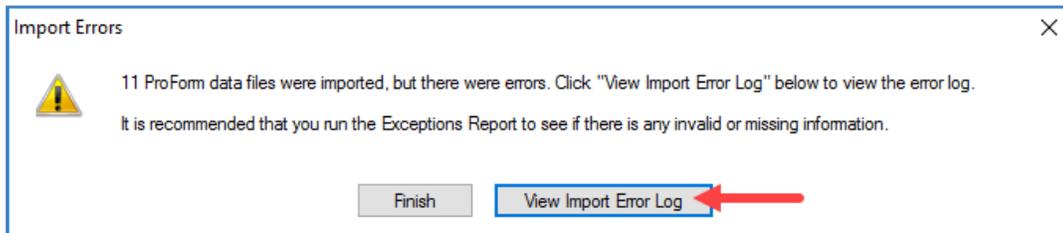
In addition to the criteria listed above, the following criteria must also exist in the ProForm files to successfully import to Pro1099:

1. **Settlement Date** that falls within the settlement date range entered in the Import Multiple ProForm Data Files window. ***NOTE: 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).***



A screenshot of the ProForm Data Files window. The 'Settlement Date' field is highlighted with a red box and contains the value '12/15/2017'. A red arrow points to the 'Settlement Status' dropdown menu, which is currently set to 'Canceled'. Other fields include 'Date Order Received' (09/12/2017), 'Order Received by' (james), 'Time' (: : M), 'ProScheduler' button, 'Status Comment' (empty), and 'Lock Status' (Unlocked).

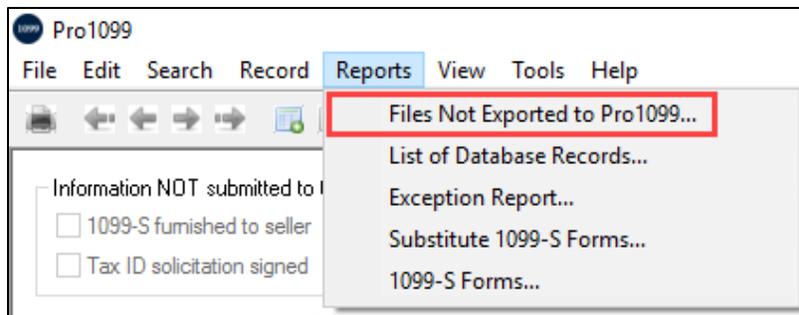
Review the **Import Error Log** after importing multiple files to see which files, if any, were skipped during the import process.



Searching for Files Not Exported/Imported to Pro1099

Use the **Search** function in ProForm to search for all files during a specific time range that have not been exported or imported in to Pro1099.

Or generate the **Files not Exported to Pro1099** report available in Pro1099.



NOTE: This report is only available in Standard version 21.2 or higher and Enterprise versions 31.2 or higher.



- 4800 Falls of Neuse Road, Suite 600
- Raleigh, NC 27609
- Sales & Service: 800-848-0143
- Email: sales@softprocorp.com
- Web: www.softprocorp.com

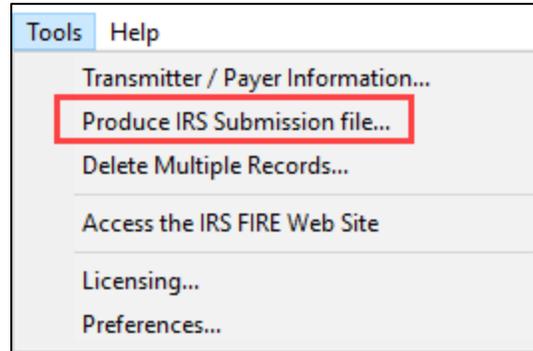
Correcting Name Exceptions:

Name on 1099 Record	How to Correct	Correct in ProForm	Correct in Pro1099	Re-Export to Pro1099
Bank of America	Mark as a Corporation in the Seller screen in ProForm	X		X
Branson Construction, Inc.	Mark as a Corporation in the Seller screen in ProForm	X		X
LLC, ABC Builders	Mark as LLC or Other in the Seller screen in ProForm	X		X
Estate, John Smith	Mark as Estate or Other in the Seller screen in ProForm	X		X
Trust, Jones Family	Mark as Trust or Other in the Seller screen in ProForm	X		X
John James Smith	Mark as Male in the Seller screen in ProForm	X		X
Halen, Eddie Van	Move "Van" to the beginning of the Seller name in the Pro1099 Record		X	
Cruz, John De La	Move "De La" to the beginning of the Seller name in the Pro1099 Record		X	
Jones, Jr David M.	No correction needed			
Mary Higgins Estate	No correction needed			
Estate of Mary Higgins	No correction needed			
Holt Family Revocable Trust	No correction needed			
We Sell Homes, LLC	No correction needed			

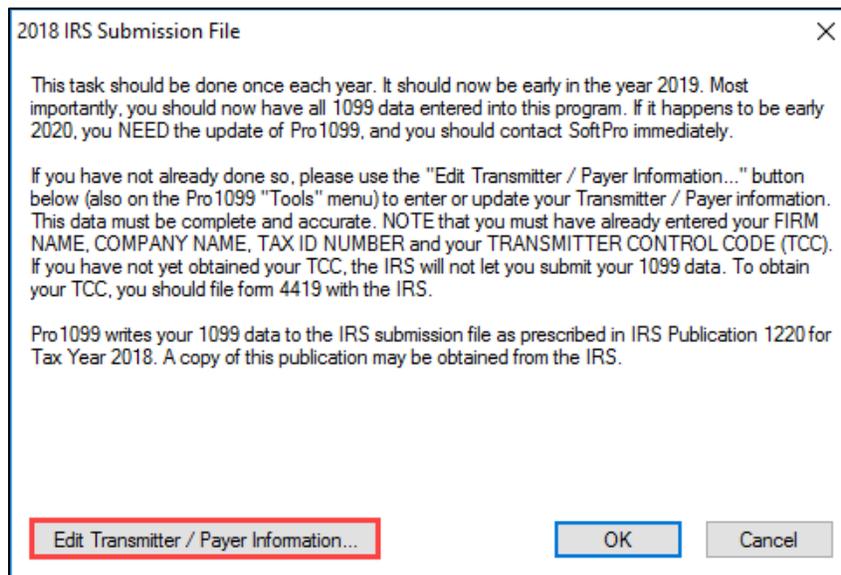
Once all exceptions have been corrected and the report is clear, the electronic submission file can be produced. ***NOTE: most name exceptions will remain on the exceptions report even after they are corrected.***

Producing the Electronic Submission File:

Select **Tools > Produce IRS Submission File**.



The **Produce IRS Submission File** dialog box appears. Click the **Edit Transmitter/Payer Information** button to enter or update this information. The **Transmitter/Payer Information** must be complete and accurate.



Transmitter / Payer Information (for IRS "T" and "A" Records)

Payer Information

Payer Name: Softpro Settlement Services, Inc.

Name Line 2:

Tax ID Number: 55-5555555 Name Control: SPSS TCC: 56HT1

Warn me at startup if the TCC (Transmitter Control Code) is blank

Contact Name: Sally Softpro

Phone Number: (800)848-0143 Phone Extension: 945

Email Address: sally@softpro.com

Company Name: Softpro Settlement Services, Inc.

Name Line 2:

Mailing Address: 4000 Falls of Neuse, Suite 400

City: Raleigh

State: NC Zip: 27609

Transmitter Information

The above payer also functions as the transmitter

Edit Transmitter Information...

Special Indicators

Service Bureau

Test File Only

Last Time Filing

Foreign Corporation

OK Help Cancel

Click **OK** to continue. Next you will need to verify the correct tax reporting year is displayed.

2018 IRS Submission File

IRS SUBMISSION FILE

If you wish to create an IRS submission file for a year prior to 2018, enter the desired tax reporting year at the prompt below. If you wish to create an IRS submission file for the current tax year, 2018, leave 2018 in the field. Click OK when ready to proceed.

IMPORTANT NOTE!

You may not enter a year LATER than 2018. The IRS changes the reporting file format every year. If the current tax year is 2019 or beyond, then you are still using an older version of Pro1099, and you need an update.

Please enter the desired tax reporting year: 2018

Include records with \$0.00 seller proceeds

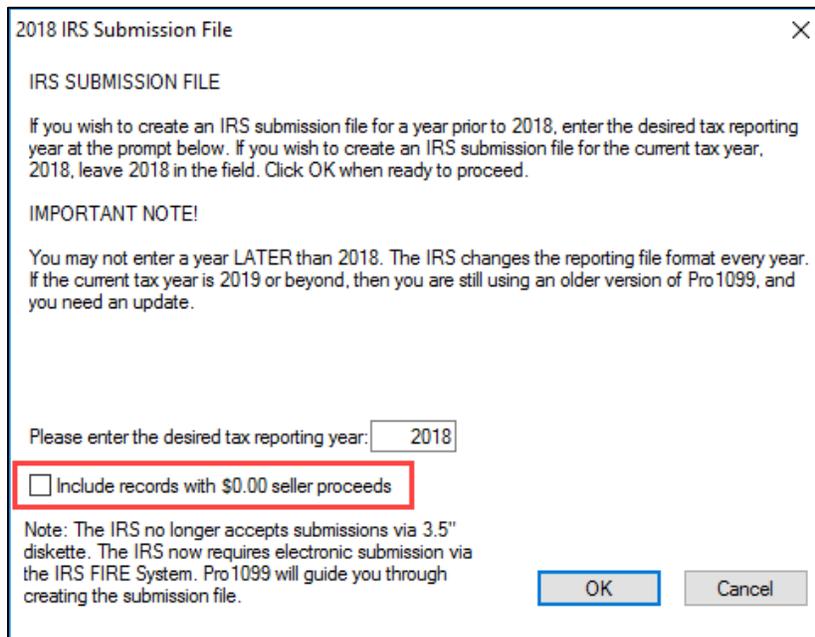
Note: The IRS no longer accepts submissions via 3.5" diskette. The IRS now requires electronic submission via the IRS FIRE System. Pro1099 will guide you through creating the submission file.

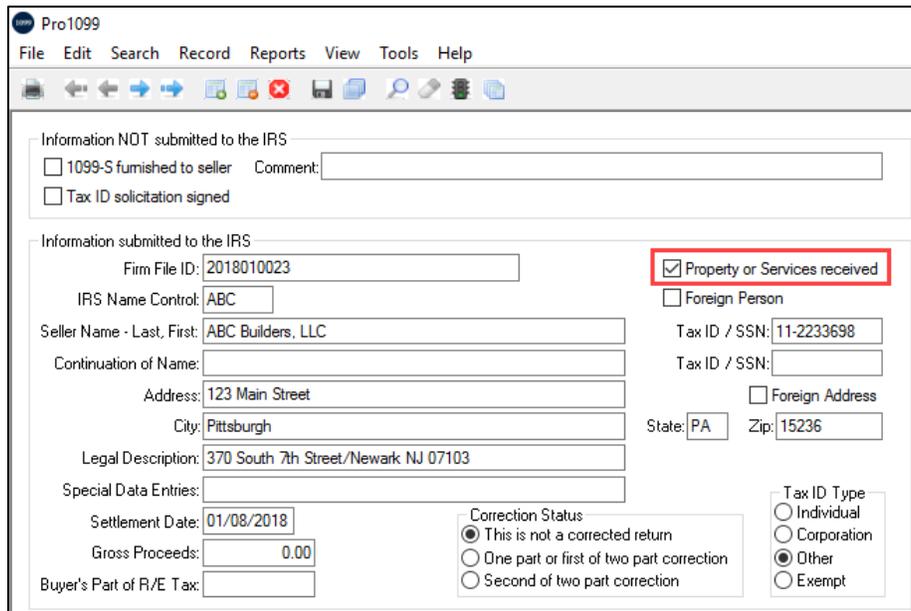
OK Cancel

If it is not the correct tax year, you will need to click **Cancel** and run the **Pro1099 Updater**. The **Pro1099 Updater** can be found in **Softpro 360**.



Click the **Include records with \$0.00 seller proceeds** if you wish to submit those records to the IRS. If the record shows \$0.00 seller proceeds, the file will not be submitted to the IRS unless this checkbox is selected or unless the **Property Services Received** box is selected.





Pro1099

File Edit Search Record Reports View Tools Help

Information NOT submitted to the IRS

1099-S furnished to seller Comment:

Tax ID solicitation signed

Information submitted to the IRS

Firm File ID: Property or Services received

IRS Name Control: Foreign Person

Seller Name - Last, First: Tax ID / SSN:

Continuation of Name: Tax ID / SSN:

Address: Foreign Address

City: State: Zip:

Legal Description:

Special Data Entries:

Settlement Date:

Gross Proceeds:

Buyer's Part of R/E Tax:

Correction Status

This is not a corrected return

One part or first of two part correction

Second of two part correction

Tax ID Type

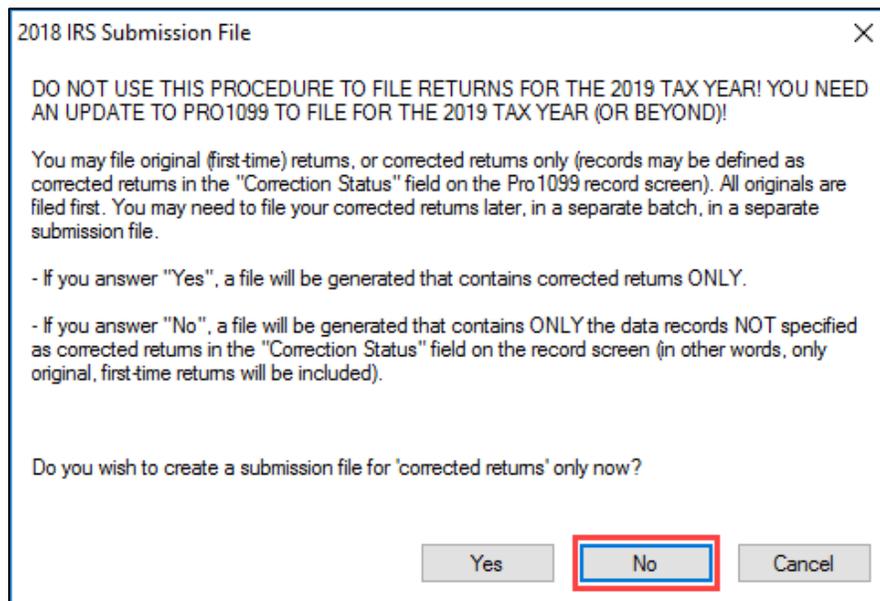
Individual

Corporation

Other

Exempt

Click **OK** to continue. Next, you will be given the option to create an original submission file or a file containing corrected returns. Click **No** to create an original submission file.



2018 IRS Submission File

DO NOT USE THIS PROCEDURE TO FILE RETURNS FOR THE 2019 TAX YEAR! YOU NEED AN UPDATE TO PRO1099 TO FILE FOR THE 2019 TAX YEAR (OR BEYOND)!

You may file original (first-time) returns, or corrected returns only (records may be defined as corrected returns in the "Correction Status" field on the Pro 1099 record screen). All originals are filed first. You may need to file your corrected returns later, in a separate batch, in a separate submission file.

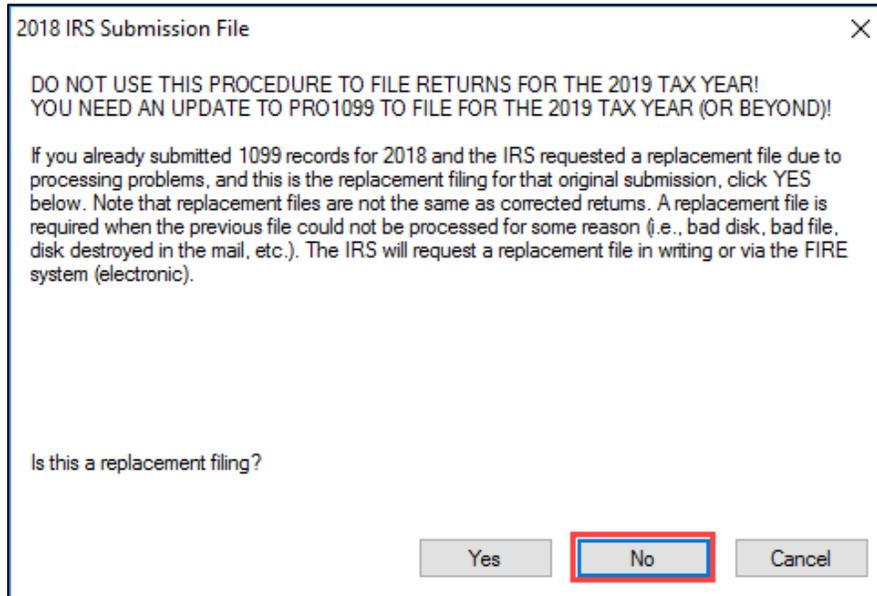
- If you answer "Yes", a file will be generated that contains corrected returns ONLY.

- If you answer "No", a file will be generated that contains ONLY the data records NOT specified as corrected returns in the "Correction Status" field on the record screen (in other words, only original, first-time returns will be included).

Do you wish to create a submission file for 'corrected returns' only now?

Yes No Cancel

Next, you will be asked if this is a replacement filing. Click **No**.



2018 IRS Submission File

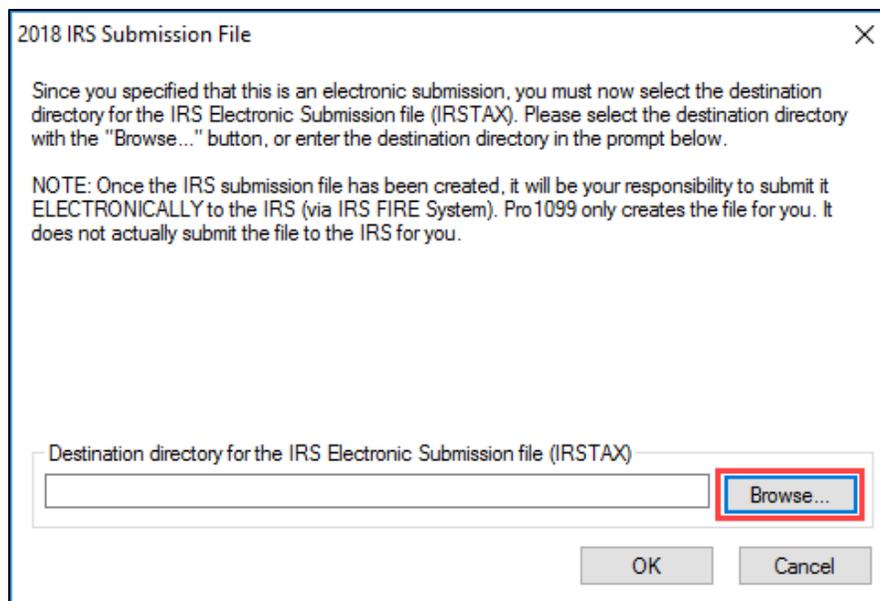
DO NOT USE THIS PROCEDURE TO FILE RETURNS FOR THE 2019 TAX YEAR!
YOU NEED AN UPDATE TO PRO1099 TO FILE FOR THE 2019 TAX YEAR (OR BEYOND)!

If you already submitted 1099 records for 2018 and the IRS requested a replacement file due to processing problems, and this is the replacement filing for that original submission, click YES below. Note that replacement files are not the same as corrected returns. A replacement file is required when the previous file could not be processed for some reason (i.e., bad disk, bad file, disk destroyed in the mail, etc.). The IRS will request a replacement file in writing or via the FIRE system (electronic).

Is this a replacement filing?

Yes No Cancel

Next, select the **Destination Directory for the IRS Electronic Submission File**. This is the location on your computer where the **IRSTAX** file will be saved. Click **Browse** to select the destination.



2018 IRS Submission File

Since you specified that this is an electronic submission, you must now select the destination directory for the IRS Electronic Submission file (IRSTAX). Please select the destination directory with the "Browse..." button, or enter the destination directory in the prompt below.

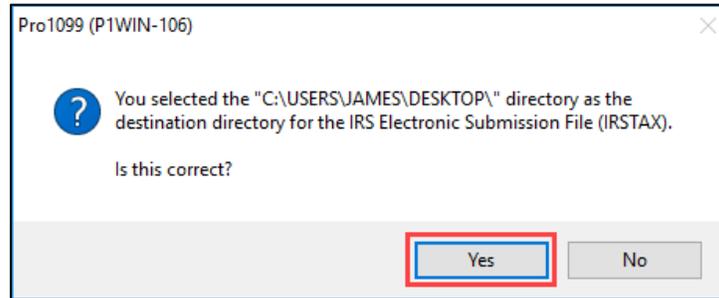
NOTE: Once the IRS submission file has been created, it will be your responsibility to submit it ELECTRONICALLY to the IRS (via IRS FIRE System). Pro1099 only creates the file for you. It does not actually submit the file to the IRS for you.

Destination directory for the IRS Electronic Submission file (IRSTAX)

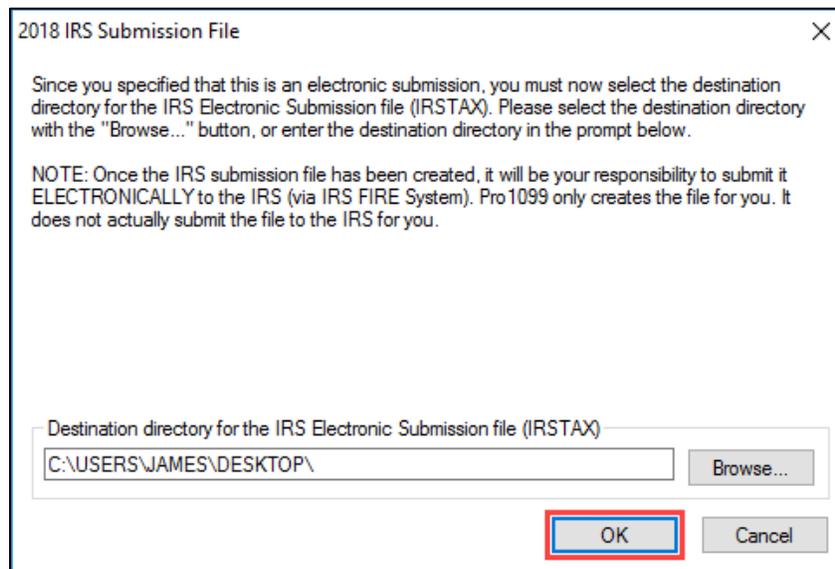
Browse...

OK Cancel

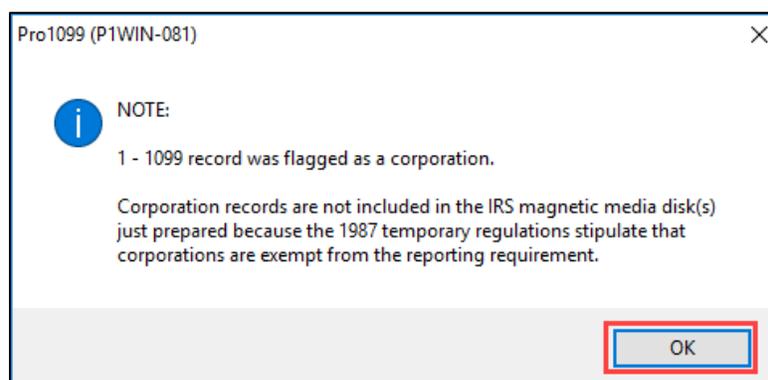
Verify the destination chosen by clicking **Yes**.



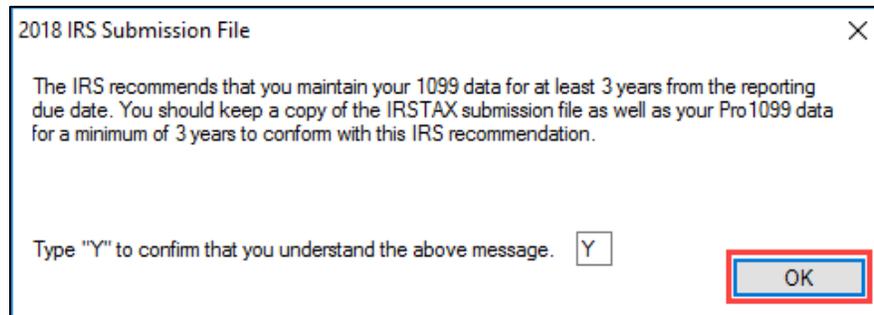
Click **OK** to continue.



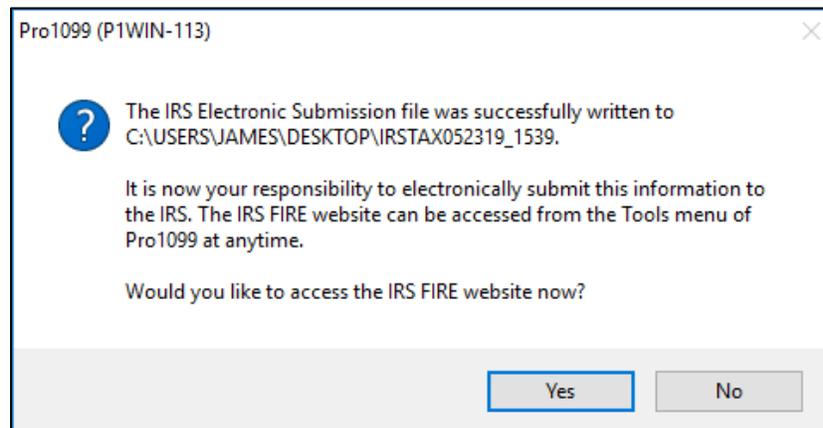
If there are any records marked as a **Corporation**, they are excluded from the submission file. A note will appear indicating the number of records marked as **Corporations**. Click **OK**.



Next, you will be notified of IRS regulations for maintaining records. Enter **Y** for Yes to confirm you acknowledge this information. Then click **OK**.



A confirmation dialog box appears showing that the IRS Electronic Submission File was successfully written to your directory. You will see the IRSTAX file location. ***It is your responsibility to electronically submit the file to the IRS via the IRS FIRE website.*** Click **Yes** to access the website now. Click **No** to access the website at a later time.



Access the IRS FIRE website from Pro1099 anytime by selecting **Tools > Access the IRS FIRE Web Site** or follow this link: <https://fire.irs.gov>.

