



Filing Electronically With the IRS FIRE System and Pro1099

SoftPro Standard & Enterprise | Tax Year 2015 | January 20, 2016

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About The IRS FIRE System

The FIRE System is a website maintained by the Internal Revenue Service (IRS) that you can use to electronically file your IRSTAX file directly with the IRS.

IRS Resources

The IRS maintains documentation for their FIRE system. SoftPro advises that you reference their procedures directly for the most accurate information. Although the SoftPro Solution Center is ready to assist you with questions regarding any aspect of using Pro1099, including creating your IRSTAX files, you need to address your technical questions about using the FIRE System to the Internal Revenue Service, Enterprise Computing Center - Martinsburg (IRS/ECC-MTB). IRS technical assistance is available Mon- Fri, 8:30 A.M.-4:30 P.M. EST, (866) 455-7438. You may request publications related to the 1099-S filing by calling the IRS at (800) TAX-FORM or (800) 829-3676. Additionally, you may visit the IRS [forms and publications page](#) to download various documents.

Publication 3609

This publication, previously produced by the IRS and available [here](#), provides a walkthrough of the following processes in detail:

- Submitting test files
- Submitting extension of time requests (described in detail in this guide [below](#))
- File status e-mail notifications
- First time connections to the FIRE system
- Subsequent connections to the FIRE system
- Uploading files to the FIRE system, including original, replacement, and correction files
- Checking file status

Publication 1220

This document, found on the IRS website [here](#), outlines the specifications for electronically filing a variety of forms. Some of the most important sections of this document are:

1. **What's New for Tax Year 2015** - Page 10, Sec. 3
2. **Communicating With The IRS** - Page 11, Sec. 4
3. **Additional Resources** - Page 11, Sec. 5
 - **Form 4419** is referenced here. You'll have to complete this form to use the FIRE system.
4. **Filing Requirements, Retention Requirements, and Due Dates** - Page 13, Sec. 6
5. **Extensions** - Page 14, Sec. 7
6. **Corrected Returns** - Page 15, Sec. 10

7. **Application for Filing Information Returns Electronically & User ID, Password and PIN Requirements** - Page 25-26, Sec. 1 & 2
8. **Connecting To FIRE** - Page 26, Sec. 3
9. **Electronic Specifications** - Page 29, Sec. 4
10. **Electronic Submissions** - Page 29, Sec. 5
11. **Test Files & Common Problems** - Page 30-31, Sec. 6 & 7
12. **Common Formatting Errors** - Page 32, Sec. 8

Preparing To Use the FIRE System

Getting a Transmitter Control Code (TCC)

Before you submit your IRSTAX file to the FIRE System, you must associate it with a Transmitter Control Code. If you have not acquired a TCC from the IRS yet, you need to submit **Form 4419, Application For Filing Information Returns Electronically (FIRE)** to IRS/ECC-MTB no later than 45 days before the due date of your information returns.

- The 4419 form is accessible from the IRS [FIRE Requirements](#) webpage or through [mySoftPro](#).

After the IRS receives your application, the IRS/ECC-MTB will issue a TCC. The TCC is required on all files and correspondence. After you receive your TCC from the IRS, you need to type it in Pro1099.

Adding the TCC to Pro1099

For information about adding the TCC to Pro1099, see [Application Configuration](#) below.

File Compression and Browser Settings

The time required to transmit a file can be reduced up to 95 percent by using compression:

- When sending electronic files larger than 10,000 records, data compression is encouraged.
- WinZip and PKZIP are the only acceptable compression packages. The IRS cannot accept self-extracting zip files containing multiple files.

Additionally, your web browser must:

- Have pop-up blocking software disabled before attempting to transmit files.
- Be capable of file uploads.
- Support SSL 128-bit encryption.
- Enabled to receive cookies, which are used to preserve your User ID status.

Note to Existing IRS FIRE System Users

If you have already configured your computer to connect to the IRS FIRE system, and submitted using the FIRE system last year, see the **Subsequent Connections to the FIRE System** section of the **IRS P3609** when it is made available to get started quickly.

Using SoftPro to Prepare Your 1099

Introduction

The 1099 preparation process can be time consuming. Start now and avoid the last minute rush!

Standard 12.0 Users

Please [contact SoftPro support](#) to receive additional instructions regarding your Pro1099 update.

Submission Deadlines

- **February 15, 2016:** The Recipient copy of the Substitute 1099-S must be postmarked by this date.
- **March 31, 2016:** The date by which files must be electronically submitted to the IRS.
- **February 19, 2016:** Submit test files to <https://fire.test.irs.gov/> on or before this date.
 - The FIRE system will be available from November 2, 2015—February 19, 2016.
- **Extensions:** File as soon as you know an extension is necessary; [Form 8809](#) must be filed by the due date of the returns.

Fines and Penalties

Per Public Law 111-240 (signed into law September 23, 2010), penalties have **doubled** effective January 1, 2011 and will affect customers who are late with their submissions. The amount of the penalty is based on when you file your information return. The penalty could be:

- **\$30** per information return if you correctly file within 30 days of the due date of the return
- **\$60** per information return if you correctly file more than 30 days after the due date but by August 1st, 2016
- **\$100** per information return if you correctly file after August 1, 2016, or you do not file required information returns

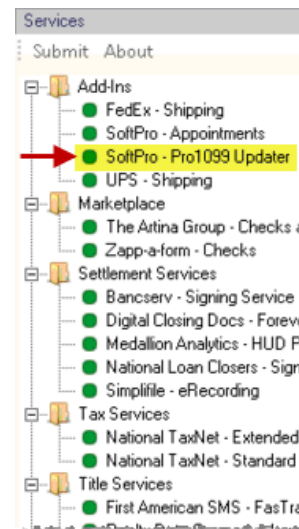
Please review [Public Law 111-240](#) for additional information on assessed penalties.

Verify Pro1099 Version (2015 Tax Year)

Every year, the IRS updates documentation, which requires a 1099 software update to Pro1099. For the submission process, it is necessary to ensure you have the correct version of Pro1099.

The update is available for download via SoftPro 360. Just go the **SoftPro 360 Products** menu under the **SoftPro 360 Console** or go to **Services > Add-ins > SoftPro - Pro1099 Updater**, and follow the installation instructions as provided in the wizard. See screenshot at right:

- If you are unsure of how to install SoftPro 360, please call the SoftPro Solution Center at (800) 848-0143.



Application Configuration

Once you have obtained your TCC Code (see [Preparing to Use The FIRE System](#)), you can enter it into Pro1099 by following these steps:

1. Select Tools/Transmitter/Payer Information.
2. Enter Payer information in the fields provided. All fields are required by IRS regulation except for **Name Control**, **Email Address**, **Name Line 2**, and **Phone Extension**.
3. Click **OK**.

Make Sure the Preparation Process Is Complete

The preparation process consists of two primary steps:

1. Ensuring all files are accurately exported to Pro1099 (from ProForm).
2. Verifying that there are no outstanding Exceptions in those records prior to submission.

Filtering Files That Will Not Need To Be Submitted

Review all 2015 ProForm files for cancelled and test files prior to exporting to Pro1099. This can be accomplished by using the **Orders by Settlement Status** report in Order Tracking and/or by using the basic search feature in ProForm. Multiple files cannot be successfully imported to Pro1099 without including the Settlement Date; single files can. It is recommended to ensure these files do not have a Settlement Date, thereby accidentally importing and submitting them to the IRS.

If records are in Pro1099 which should not be filed:

1. They must be manually deleted from Pro1099.
2. The corresponding settlement dates must be removed in ProForm.

This will prevent the ProForm record from being imported with future **Multiple Imports**.

If you have Order Tracking and use the settlement status of “Cancelled”, these files can still be unintentionally exported/imported to Pro1099 (a hint for finding these files in Pro1099: if they have already been exported or mass imported, they are likely to contain many exceptions). Identify these files ahead of time and remove the settlement dates to prevent the export. Otherwise, each unwanted 1099 record must be manually deleted from Pro1099.

Review The 2015 Records In Pro1099:

- Search for settlement dates between 01/01/2015 and 12/31/2015.
- Scan each record (as necessary) to be sure they are marked accordingly.
- Run a search for 2015 settlement dates again and mark the “Part one of a two part correction” and “Part two of a two part correction. No correction indicators should exist at this point.
- Check for duplicate records, keeping in mind that some sellers may have sold multiple properties and some ProForm files have multiple sellers

Exporting Files to Pro1099

Exporting From ProForm To Pro1099

Before submitting an IRSTAX file, export all applicable ProForm data files to Pro1099.

- Open **ProForm** for Windows.
- If a startup dialog box displays, click **Search**. If not, select **File > Search** from the ProForm menu bar. The **Search** dialog box displays.
- Enter a range of settlement dates and an asterisk * in the **Seller** field. Select **Pro1099** in the **Not Exported To** field.
- Click **Search**. The Search Results dialog displays all of the files in your ProForm database not yet exported to Pro1099.
- Click the first file on the list and click **Open** and modify any Seller or file information as needed.
- Select **File > Export**. The **Export dialog** box displays.
- Select **Export to Pro1099 for Windows** and click **OK**. Pro1099 opens and a new record will be created using data from the exported ProForm file.
- Select **Record > Save Record Changes** from the Pro1099 menu bar or press **Ctrl+S** to save the new record. A message will alert you that the export process is done. Select **Yes** to exit Pro1099.
- Repeat steps 2 through 8 to search for and export the remaining ProForm files.

NOTE: An **Edit Test Failure!** message after a new record is saved means that there is an error or incomplete information that must be completed or corrected before the IRSTAX file can be created. The error message lists missing or incorrect information.

Mass Importing Files From ProForm INTO Pro1099

The Mass Import option should be used *with CAUTION!* It cannot be undone, so please make sure you have a good backup of your database in advance!

1. Select **File/Import Multiple ProForm data files**. The **Import Multiple ProForm Data Files** dialog appears.
2. Enter the range of ProForm settlement dates that you want to import.
3. (Optional) Enter a file server or click **Browse** to select a file server to search for ProForm files.
4. (Optional) Click **Include files with \$0.00 seller proceeds** to include such files.
5. (Optional) If desired, click **Overwrite records from files that have been previously exported to Pro1099**. It is highly recommended to back up your Pro1099 database prior to performing this procedure.
6. Click **OK**. A message appears letting you know how many files fit the criteria. Click **Yes** to continue.
7. Once the import has completed, a message appears letting you know how many files were imported. Click **OK**.

NOTE: If one or more files could not be imported due to errors, a message appears stating that errors were found. Click **View Error Import Log** to open the log file to read about which files caused errors during the import.

Additional Details about Getting 1099 Records Into Pro1099

- The “overwrite” option with **Multiple File Import** should be carefully evaluated before being used. It may overwrite existing data which cannot be restored unless you have a backup. Backing up your database prior to multiple file import will ensure you can restore your data if necessary.
- If a startup dialog box displays, click **Search**. If not, select **File > Search** from the ProForm menu bar. The **Search** dialog box displays.
- Enter a range of settlement dates and an asterisk * in the Seller field. Select **Pro1099** in the **Not Exported To** field.
- If you do not have Order Tracking, run the “**Not Exported to 1099**” report from the available reports tree in ProForm.

Identifying and Resolving Exceptions

There are two types of Exceptions that may exist in Pro1099 records that need resolved prior to submitting the IRSTAX file to the IRS:

- **Exception:** These exceptions are an indication that something is missing or incorrect about the record such as a missing Social Security Number, partial address, legal description, gross

proceeds, etc. Warnings will be displayed for failure to check boxes “1099-S furnished to Seller” and “Tax ID solicitation signed”. The report will specify the exception(s).

- **Name Exception:** These exceptions are an indication that the format of the name is possibly incorrect due to the Tax ID type within the record. For example, the record is marked as an individual but the seller is an LLC. Another exception is an indication that the Seller’s last name could be inaccurate and should be confirmed to prevent invalid name and SSN combination being sent to the IRS. For example, the seller’s last name is two names (St. John, Van Eyes, De La Cruz, etc.) and when the Seller’s name is exported to Pro1099 the last name is truncated.

The process for resolving exceptions is a cyclical process:

- Identify exceptions (Run the Exceptions Report)
- Resolve exceptions in ProForm and re-export
- Identify any remaining Exceptions (Re-run the Exceptions Report)
- Repeat until all exceptions are resolved; excluding name exceptions

This process will likely be the most time consuming part of the 1099 Submission process. Success in accurately identifying and resolving exceptions will reduce the risk of needing to file a corrected return.

To begin this cycle, run the Exceptions Report in Pro1099. *Go back to ProForm and correct all errors.* Export the corrected files back into Pro1099. Run the Exception Report again and make sure all exceptions have been resolved. Repeat as necessary.

To avoid potential fines, be sure to review the “Name Exceptions” portion of the report. It is a listing of names that may have *incorrect Seller Type* in ProForm and/or *Inaccurate Seller’s last name in Pro1099* and require corrections. **The Name Exceptions report will usually never be blank.** After making corrections to these “*incorrect Seller Type*” files in ProForm and re-exporting to Pro1099, most of the names will still appear on the report. However, they will now be in the correct format the IRS expects. If an “*Inaccurate Seller’s last name*” appears on the Name Exceptions portion of the report, those correction should be made in Pro1099 only. This type of correction should be done after all corrections are cleared on the 1st part of the exceptions report. This report will never be void of names, nor is intended to be “clear”. The key to this part of the Exceptions Report is that all Names Exceptions be legitimate. Names most likely to show on this report are LLCs, Estates, Trusts & Individuals with middle names. The information below is a guide on actions to take regarding these records and what to expect.

Examples of Incorrect Entries On The Name Exceptions Report:

EXAMPLE:	HOW TO CORRECT:	WHAT CHANGES:
Bank of America	Mark as Corporation in Seller screen in ProForm and export	Taken off report
Branson Construction, Inc	Mark as Corporation in Seller screen in ProForm and export	Taken off report
Sunset Development Corporation	Mark as Corporation in Seller screen in ProForm and export	Taken off report
LLC, Davis Builders	Mark as LLC or Other in Seller Screen in ProForm and export	Will stay on the report

Estate, Mary Pickford	Mark as Estate or Other in seller screen in ProForm and export	Will stay on the report
Trust, Family Jones	Mark at Trust or Other in seller screen in ProForm and export	Will stay on the report
John Ricky Smith	Mark as individual in seller screen in ProForm and export	Will stay on the report
Halen, Eddie Van	On 1099 Record: Move "Van" to the beginning of Seller Name field	Will stay on the report
Cruz, John De La	On 1099 Record: Move "De La" to the beginning of Seller Name field	Will stay on the report

Corporations: are treated as exempt by the IRS. If a Corporation appears on this report, it indicates the Seller type was *not marked* as a Corporation in the ProForm Seller screen. Anything marked as corporation will be removed from Name Exceptions part of the Exception Report (and the main Exception Report as well). Also, files marked as EXEMPT will also not show at all.

LLC's: appear as their actual name, not as shown above. This format indicates the Seller type wasn't marked as Other, Trust, Estate, LLC, LLP or Partnership, depending on your version of SoftPro. LLC's will always show on the Name Exceptions report. If the file was marked LLC PRIOR to exporting, it will be formatted correctly. If it wasn't marked as LLC first, it may be incorrect. If you're unsure, a good rule of thumb is that if the Name Exceptions starts with something like "LLC," or "Trust," or something similar, it is formatted incorrectly. For detail, simply re-export a ProForm file to *Pro1099* after verifying that seller type is *marked* and view how the application formats this record. There is no LLC with 1099, only *other*.

LLC 's, Estates, Trusts, Partnerships: If the file falls into one of these categories, the program will not attempt to separate out the last name and will bring the name over literally, which is correct.

Estates: appear as their actual name, not as shown above. This format indicates the Seller type was not marked as Other, Trust or Estate, depending on your version of SoftPro.

Trusts: appear as their actual name, not as shown above. This format indicates the Seller type was not marked as Other, Trust or Estate, depending on your version of SoftPro.

Individuals: appear as Full last name, first name, middle name. The format in the example above indicates the Seller type was not marked as a Male or a Female. Names with Dr., Jr., Sr., I, II, III, etc. will appear on the Name Exceptions report and should be reviewed for correct format as well.

After the files have been properly marked in the Seller Type field and exported back to Pro1099, *most of the names will still be on the Name Exceptions report*; however, they will be in the format the IRS expects.

Identify Where the IRSTAX Output File Will Be Saved

You must retain the IRSTAX file you send to the IRS for three years. This file can be opened in Notepad and reviewed for research in the event of an audit or a returned submission. However, it is important to keep in mind that *Pro1099 will always output a file with the same name, IRSTAX*, which could create problems if not noted carefully. To avoid sending an incorrect version of an IRSTAX file to the IRS, there are a few steps that can be taken:

1. Identify where you want to save the IRSTAX file BEFORE creating it in Pro1099. (e.g. "Desktop")
2. Ensure that the folder or desktop location does not already contain a file called IRSTAX.
3. If there is an existing/older copy of an IRSTAX file, simply rename it appropriately. (e.g. "IRSTAX2014")
4. AFTER submitting the new file to the IRS, rename this file to something different. (e.g. "IRSTAX2016")

NOTE: You may name this output file whatever you wish, and you may likewise submit that file. For example, you may rename "IRSTAX" to "FIREsubmission2016".

Create the IRSTAX Output File

To actually create the IRSTAX file to send to the IRS, follow these simple steps:

1. Open Pro1099
2. Go to **Tools** and then **Create IRS Submission File**
3. Navigate through the Create IRS Submission File wizard (ensure the correct Tax Year Date and indicate if the filing is an original, corrected, or replacement filing) and save the IRSTAX file to the intended folder or desktop.

NOTE: The Create IRS Submission File wizard can be run multiple times if it is necessary to cancel or re-run it for any reason.

Using the FIRE System

IRS FIRE System Guide

The IRS created .pdf walkthrough guide P3609 for FIRE users. For compliance purposes, SoftPro recommends that Pro1099 users reference this guide when submitting their IRSTAX files. Please see the [IRS Resources](#) section at the beginning of this document for details on what P3609 covers.

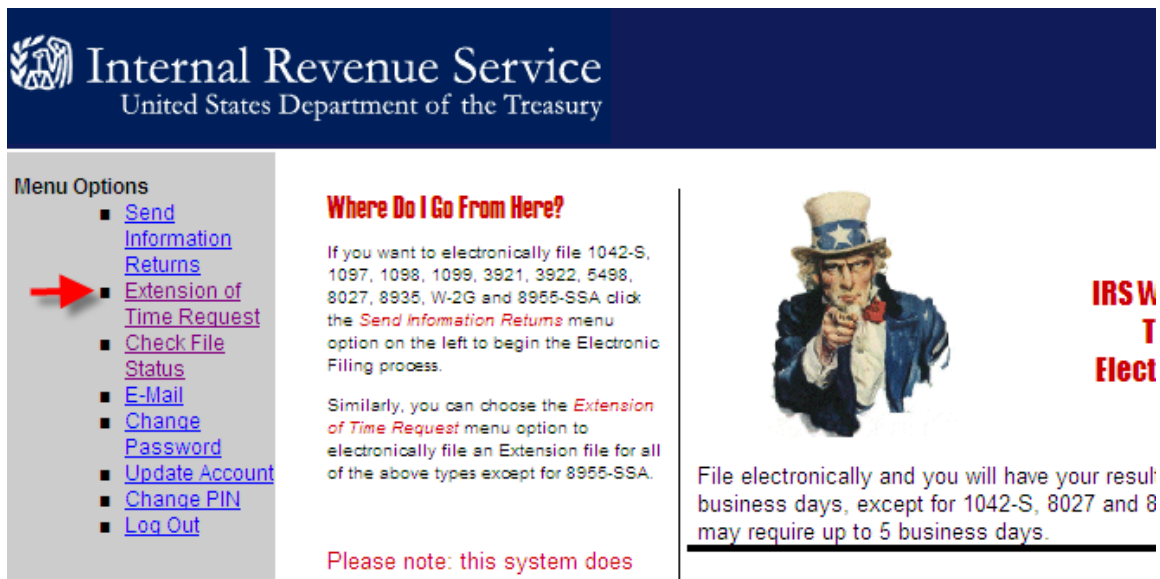
Accessing The FIRE Site

You may access the FIRE system site with two methods:

- Use your web browser to go directly to <https://fire.irs.gov/>.
- From within Pro1099, click **Access the IRS FIRE Web Site** from the **Tools** menu

Extension of Time Request for 1099-S

1. **Logon** to the <https://fire.irs.gov> site with the current FIRE userid/password. Click on **Extension of Time Request**:



Internal Revenue Service
United States Department of the Treasury

Menu Options

- [Send Information Returns](#)
- [Extension of Time Request](#)
- [Check File Status](#)
- [E-Mail](#)
- [Change Password](#)
- [Update Account](#)
- [Change PIN](#)
- [Log Out](#)

Where Do I Go From Here?

If you want to electronically file 1042-S, 1097, 1098, 1099, 3921, 3922, 5498, 8027, 8935, W-2G and 8955-SSA click the [Send Information Returns](#) menu option on the left to begin the Electronic Filing process.

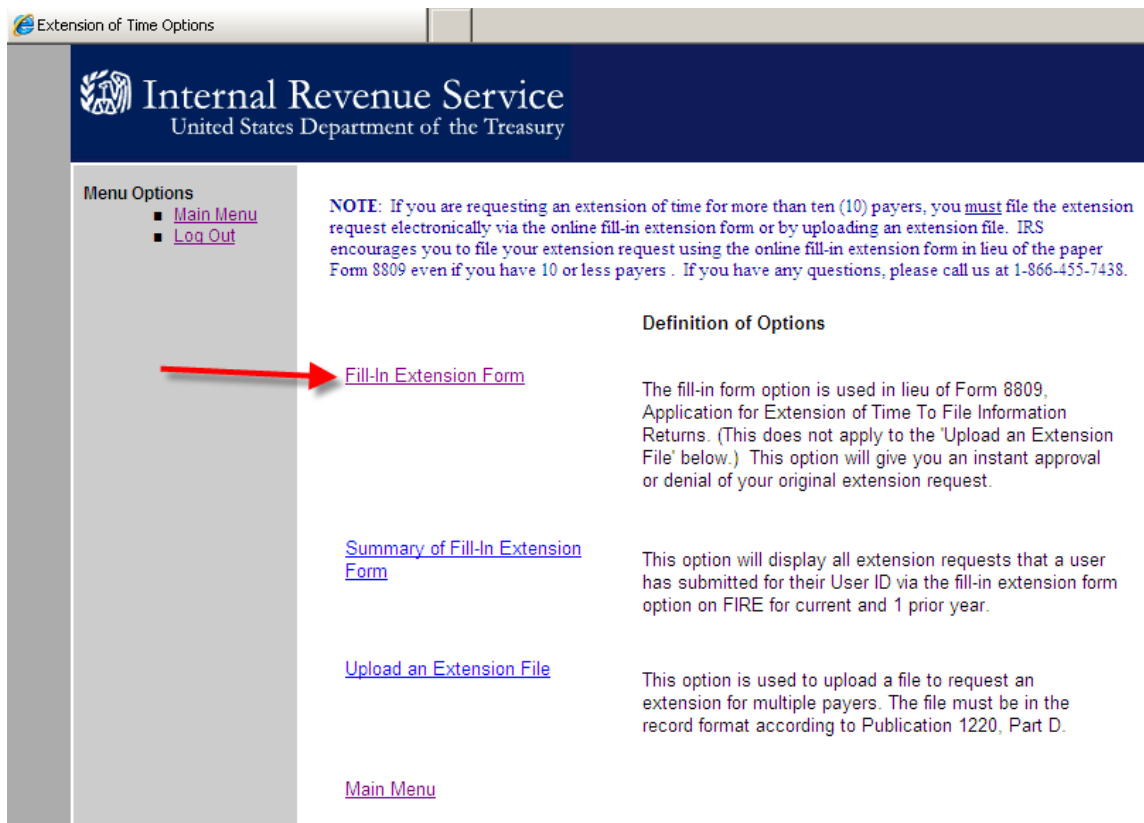
Similarly, you can choose the [Extension of Time Request](#) menu option to electronically file an Extension file for all of the above types except for 8955-SSA.

Please note: this system does

IRS W T Elect

File electronically and you will have your result business days, except for 1042-S, 8027 and 8 may require up to 5 business days.

3. Click **Fill-In Extension Form**:



Extension of Time Options

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United States Department of the Treasury

Menu Options

- [Main Menu](#)
- [Log Out](#)

NOTE: If you are requesting an extension of time for more than ten (10) payers, you must file the extension request electronically via the online fill-in extension form or by uploading an extension file. IRS encourages you to file your extension request using the online fill-in extension form in lieu of the paper Form 8809 even if you have 10 or less payers. If you have any questions, please call us at 1-866-455-7438.

Definition of Options

The fill-in form option is used in lieu of Form 8809, Application for Extension of Time To File Information Returns. (This does not apply to the 'Upload an Extension File' below.) This option will give you an instant approval or denial of your original extension request.

[Summary of Fill-In Extension Form](#)

This option will display all extension requests that a user has submitted for their User ID via the fill-in extension form option on FIRE for current and 1 prior year.

[Upload an Extension File](#)

This option is used to upload a file to request an extension for multiple payers. The file must be in the record format according to Publication 1220, Part D.

[Main Menu](#)

4. Review the information below; note that **this extension is ONLY for 30 days**:

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Menu Options

- [Main Menu](#)
- [Log Out](#)

Extension of Time Request

This option is used to request an automatic 30-day extension. This extension option **does not** give you additional time to give recipients their copies of the form and/or documents.

NOTE: If you are requesting an **additional** extension of time of not more than 30 days, you must submit a Form 8809, Application for Extension of Time To File Information Returns before the end of the first automatic extension period. These cannot be requested via the FIRE system. Requests for an additional extension of time to file information returns are not automatically granted. Generally, requests for additional time are granted only in cases of extreme hardship or catastrophic event. The IRS will send you a letter of explanation approving or denying your request of an additional extension only. If you do not have Form 8809, you can download the form from www.irs.gov.

Caution: You cannot use this system to request an extension of time to file Form 1042 (*instead use Form 7004*) or to file Form 1040 (*instead use Form 4868*).

[Continue](#) [Main Menu](#)

5. Select **Electronic** and the fields at the bottom of the screen will be enabled. Check the box labeled **1098/1099/W-2G/3921/3922**:

Menu Options

- [Main Menu](#)
- [Log Out](#)

Extension of Time for Tax Year 2015

How will the Information Returns be Filed?	Type of Returns (Check all that apply)
<input type="radio"/> Paper	<input type="checkbox"/> W-2
<input checked="" type="radio"/> Electronic	<input checked="" type="checkbox"/> 1098/1099/W-2G/3921/3922
	<input type="checkbox"/> 5498-ESA
	<input type="checkbox"/> 1042-S
	<input type="checkbox"/> 5498
	<input type="checkbox"/> 8027
	<input type="checkbox"/> 5498-SA

If an option is disabled, the form is past the due date and an extension cannot be filed for this type of return.

6. Once required fields have been entered, the **Submit** button will be enabled:

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Menu Options
■ [Main Menu](#)
■ [Log Out](#)

Extension of Time for Tax Year 2015

How will the Information Returns be Filed?

☐ Paper
☐ Electronic

Type of Returns (Check all that apply)

☐ W-2 ☐ 5498-ESA
☐ 1099/1099W-2G/3921/3922 ☐ 1042-S
☐ 5498 ☐ 8027
☐ 5498-SA

If an option is disabled, the form is past the due date and an extension cannot be filed for this type of return.

TaxID/SSN → TIN

Payer Name 1

Payer Name 2

Address

City

State ZIP

Contact Name

Phone Number / Ext

Transmitter Control Code (If Applicable)

TCC code

Foreign Country ☐ Yes ☒ No

Submit Return to Main Menu

7. Please **verify the information entered** and then click **Revise** or **Accept**. If no changes are needed, click **Accept** to proceed to the confirmation page.

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Menu Options
 ■ [Main Menu](#)
 ■ [Log Out](#)

Please verify the information entered and then click Revise or Accept

Extension of Time for Tax Year 2015

How will the Information Returns be Filed?	Type of Returns (Check all that apply)
<input type="radio"/> Paper	<input type="checkbox"/> W-2 <input type="checkbox"/> 5498-ESA
<input checked="" type="radio"/> Electronic	<input checked="" type="checkbox"/> 1098/1099/W-2G/3921/3922 <input type="checkbox"/> 1042-S
	<input type="checkbox"/> 5498 <input type="checkbox"/> 8027
	<input type="checkbox"/> 5498-SA

If an option is disabled, the form is past the due date and an extension cannot be filed for this type of return.

TIN: [REDACTED]

Payer Name 1: [REDACTED]

Payer Name 2: [REDACTED]

Address: [REDACTED]

City: [REDACTED]

State: [REDACTED] ZIP: [REDACTED]

Contact Name: [REDACTED]

Phone Number / Ext: [REDACTED]

Transmitter Control Code: [REDACTED] (If Applicable)

Foreign Country: ☒ Yes ☐ No

[Revise](#) [Accept](#)

8. Print this page for your records:

Internal Revenue Service
United States Department of the Treasury

Menu Options
 ■ [Main Menu](#)
 ■ [Log Out](#)

Extension of Time for Tax Year 2015

Payer TIN: User ID:

Payer Name1: Date:

Type of Return	Electronic Extended Due Date
1098/1099/W-2G/3921/3922	<input type="text" value="Extension due date"/>

****TBA****

Please print this screen for your records if you have not already done so.

[Print](#)

Do you have another extension of time to file?

[Yes](#) [No](#)

SoftPro 1099 Recording FAQ's

The 1099 reporting process can involve a lot of detailed editing for non-traditional reporting records (corporations, estates, multiple sellers, etc). This complexity can be compounded by the need for accuracy in working with the IRS. Below are some common questions regarding 1099 reporting.

Q: I've run my Exception Report several times and made changes. Why are there still Name Exceptions on the report?

- **A: Part 1** of the report should be clean of exceptions once any missing/incorrect data in your file has been repaired (i.e. – missing SSN, invalid address, etc). It will need to be free of errors before you submit your final file.
 - For more detail, please reference [Identifying and Resolving Exceptions](#) above.
- **A: Part 2** of the Name Exceptions report *is not expected to be free of name exceptions*.
 - The Name Exceptions report is based on expecting certain formats for names for specific file types. For example, a traditional single seller name will be "last name, first name, middle name." The name of an Estate as a Seller, however, can be listed in a variety of ways. As such, an ESTATE seller will ALWAYS show on the Name Exceptions report. A corporation should never be on the Name Exceptions report.

Q: If I choose the Import Multiple Files option in, will I lose all the work I've already done in Pro1099?

- **A:** There is an option when importing multiple files to "Overwrite records from files that have been previously exported to Pro1099". If this option is not selected, no orders should be overwritten. HOWEVER, a good backup of the Pro1099 database should be made before a multiple import is used, just in case.

Q: I have multiple entities/Tax ID's but only one Pro1099. How can I submit a separate file for each of my entities?

- **A:** Pro1099 is set up to work with one ProForm installation. If that installation of ProForm requires multiple Pro1099 setups, our Support team can help configure this in your environment for future filings. Splitting your database into multiple setups involves custom application configuration. Please contact SoftPro for pricing and scheduling.

Getting Help

The SoftPro Solution Center is available to you by telephone at **(800) 848-0143** and is open from 8:00 A.M to 5:00 P.M. Monday–Friday during your local time. Platinum level support hours are from 8:00 A.M to 10:00 P.M. EST Monday–Friday and 11:00 A.M. to 2:00 P.M. EST on Saturday.

You can extend technical support service by subscribing to SoftPro's Annual Maintenance Service program. Subscribing to Platinum Maintenance Service gives you access to technical support for longer hours Monday–Saturday. For more information, call SoftPro Sales at **(800) 848-0143**. You can email SoftPro Sales at sales@softprocorp.com.