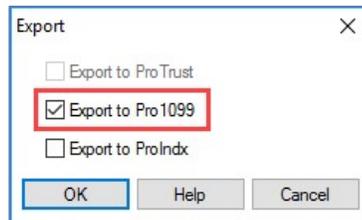


Criteria for ProForm Files to Export/Import to Pro1099

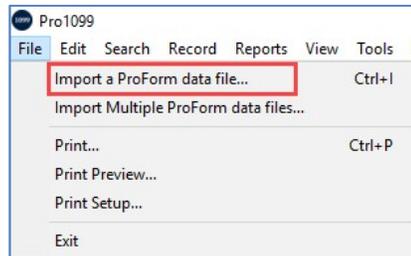
NOTE: The following factors will affect the creation of a 1099 record in Pro1099 which Softpro will utilize to produce the electronic submission file to the IRS.

Export/Import a ProForm File to Pro1099:

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

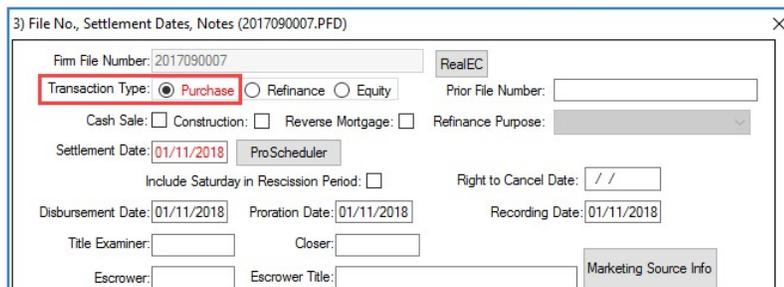


Import a ProForm file to Pro1099 by selecting **File > Import a ProForm data file** in Pro1099.



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**.



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

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

Name	Relationship	Address	Type	Proceeds	Interest %
1) Kenneth Hutchinson			Male	100.00000 %	
2)					

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	Interest %
1) Hutchinson Homes, Inc.			Corporation	100.00000 %	
2)					

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

Line	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.

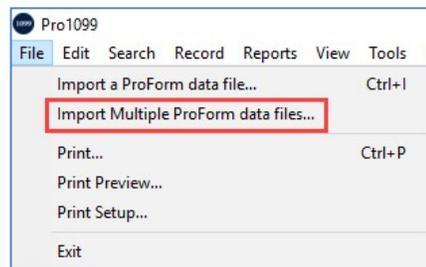
3. **Seller Proceeds** must be greater than \$0.00.



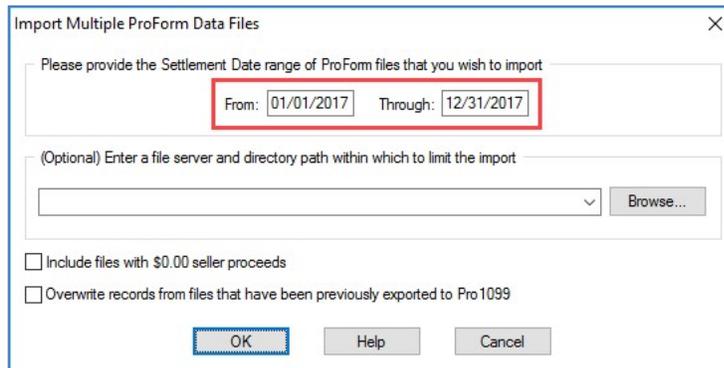
NOTE: A Pro1099 record with \$0.00 seller proceeds can be manually created in Pro1099 or created when importing multiple ProForm files as referenced below.

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.

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**.

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.

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

Cash To Buyer/Borrower
 DS: [v] 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)	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	72,527.43	100.00000	S	72,527.43	195,000.00	550.25	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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).**

Date Order Received: 09/12/2017 Order Received by: james

Settlement Date: 12/15/2017 Time: : - M ProScheduler

Settlement Status: Canceled Status Comment: []

Lock Status: Unlocked

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

Finish View Import Error Log

P:\ImportErr.log - Notepad

File Edit Format View Help

SoftPro Pro1099
 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 Type is "Purchase"

Tuesday, March 27, 2018 13:55:57