## **1099 PRO GUIDE FOR EXPORTING DATA**

1. Select Utilities -> Export Tax Forms to ASCII File(s)

PRO	
File Reports Forms Filing	Utilities Help
Current Filer: P002	Name/Address Reconcile by TIN
State Testing - Generic/State ID #2	2 Run the Import Wizard
Tax Year: 2015	Manage Year-to-Date Import Zero Drops
Current Form: 1099-INT 🔹	Export Tax Forms to ASCII File(s)
	Export for IRS Bulk TIN Matching
Forms & Printing	Generate Account Numbers
Browse, Enter & Edit	Check/update Error Status for all tax forms
Form Totals Reports	Issue W-9 and B Notice Forms
PDF Forms & Info	Track W-9 and B Notice Requests
	1099 Pro Registration and Upgrades
Filing & Corrections	Scheduler

2. Select Mapped ASCII Export

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3. Click "Next" through the wizard until the "Select the type of data and format to use" screen appears. Select the desired form type.

1059 755		1099	Pro Wizard		<b>X</b>
Se	elect the These option	type of data and forma s let you choose the contents and	t to use format for the export	file	
	Select the f	type of information to Export:	1099-R	[	
	then sele	ct (highlight) the file format ar	1098		
	File Format	Description	1098-C		Notes for the selected layout:
	Fixed Length	1099-R - Fixed Width Export - All	1098-E		
	Delimited	1099-R 2007 Custom Export Map	1098-T		
	Delimited	1099-R delimited Export w Life of	1099-A	0	
	Delimited	1099-R Print Export - All Fields (20	1099-B		
	Delimited	1997 1099-R Custom Export Map	1099-C		
	Delimited	2005 1099-R Custom Export Map	1099-CAP		
	Delimited	2006-2008 Standard 1099-R expo	1099-DIV		
	Delimited	2007 1099-R Custom Export Map	1099.6		
	Delimited	2008 1099-R Custom Export Map	1000 HC		
	Delimited	2009 1099-R Custom Export Map	1099-IIC		
	Delimited	2010 1099-R Export all fields	1099-IN1		
	Delimited	2011 Text Export Map	1099-N		
	I	1	1099-LIC		
		Add or Lindate Export Mane	1099-MISC		
		_p Add of opdate Export maps	1099-OID		
			1099-PATR		
1	Tax 201	5 🗘 Back Next	1099-Q		X Cancel 2 Help
	rear: ZV I		1099-R		•••••••••••••••••••••••••••••••••••••••

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4. Add a new export map, if one has not been created.

Мар Туре	File Format	Process Type	Status	Description	Select Form Type	1099-R	
1099-R 1099-R 1099-R 1099-R 1099-R 1099-R 1099-R 1099-R 1099-R 1099-R	Fixed Length Delimited Delimited Delimited Delimited Delimited Delimited Delimited Delimited Delimited Delimited		OK OK OK OK OK OK OK OK OK	1099-R - Fixed Width Export - All Fields (2 1099-R 2007 Custom Export Map 1099-R delimited Export w Life of Line and 1099-R Print Export - All Fields (2014) 1997 1099-R Custom Export Map 2005 1099-R Custom Export Map 2006-2008 Standard 1099-R export map 2007 1099-R Custom Export Map 2008 1099-R Custom Export Map 2009 1099-R Custom Export Map 2010 1099-R Export all fields 2011 Text Export Map	File Format All Formats Delimited Fixed Length Excel Map Status All Status Types Default (Built-in) - User created maps - Admin Level	Formatting Details Amounts -have decimal Dates -MM/DD/YY Map Notes	ID: 694
<	1	1	1	>	Ok (valid for use)		1

5. Choose the tax form type, delimited format, the field delimiter (Tab), and Create Header Record

t the File Format			
Export Data Type			
● Tax Form 1099-R 💌	□ ○ Recipients	○ Filers	
File Format			
Delimited     O Fixed	Excel	◯ XML	
End Of Record: CR/LF -	Field Delimiter: Tab	Creat	e Header Record irst record has field
character(s) that separate	separates each Comma	name	s instead of data.
The standard value is CR/LF.		Puts of all field	s Quote quote marks around lds.

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- 6. Click 'Next" until the Select specific Fields to include in the Export process" screen is reached. Move the desired export fields to the right-hand side.
  - a. Generally, the RCP Print Lines can be skipped this is duplicated recipient information.

Select the field	s from the le	eft to be include	ed in th	e Export file and add	l them to your layou
Short Desc	Full 🔺		Seq	Field Header	Field Source/Valu
Filer Print Line 1	Filer		34	Box 8 Amount	Box 8: Other amor
Filer Print Line 2	Filer		35	Box 8 Number	Box 8: Other perc
Filer Print Line 3	Filer	Add	36	Box 9a Number	Box 9a: Your perc
Filer Print Line 4	Filer	Field >>	37	Box 9b Amount	Box 9b: Total emp
Filer Print Line 5	Filer	Field	38	Box 10 Amount	Box 10: Amount a
Rcp Print Line 1	Rcp i		39	Box 11 Roth Year	Box 11: 1st year of
Rcp Print Line 2	Rcp i		40	Box 12 Amount	Box 12: State tax
Rcp Print Line 3	Rcp i	Data Tuna:	41	Box 13 ID Number	Box 13: Payer's s
Rcp Print Line 4	Rcp i	1099-R	42	Box 13 State	Box 13: Payer's s
Rcp Print Line 5	Rcp i	File Format:	43	Box 14 Amount	Box 14: State dist
Rcp Print Line 6	Rcp i	Polimited	44	Box 15 Amount	Box 15: Local tax
Rcp Print Line 7	Rcp i	Tab. CR/LF	45	Box 16 Name	Box 16: Name of I
Accounting Date	Optic	140,01021	46	Box 17 Amount	Box 17: Local dist
Form Source	Optio 🖉		47	Corrected	Corrected copy of
Form Cotogony	Ontin	J			1

7. Label the map, click "Next", and select whether or not the map is being used as a "Print" export.

b.

a. A Print export will only export pending forms and will mark them as printed once the export is complete.

1099 Pro Export Map Wizard
Activate PRINT/MAIL rules and processing This option lets you designate the Export as a PRINT/MAIL process
Export for Print/Mail Filter Options
Check this box to designate this map as a PRINT/MAIL Export
This option is normally used if the exported Tax Forms are going to be sent to a Print/Mail facility for printing and mailing recipient copies. The following rules will be applied:
<ul> <li>Only Exports forms with a status of PENDING, Corr/Pending, Zero/Pending         This limits the forms to only those forms with a status of pending. Forms that         have already been Printed and/or Filed will not be included in the Export file.     </li> <li>Applies the Filter for skipping "Do Not Print/Mail" tax forms for this Export         If a Pending form has the "Do Not Print/Mail" restrictions, it will be excluded         from the export even though it would otherwise qualify.</li> <li>Optionally creates a Print session and updates the exported forms to PRINTED         All of the Pending records in the export will have their status updated to PRINTED     </li> </ul>
after the export file has been generated. A standard Print Log will be created.

- 8. Choose whether or not you would like the export file to be broken up into a separate filer per each PCode and if you would like Address Type Grouping.
  - a. Address Type grouping will group all foreign addresses (with foreign country indicators) for more efficient postage calculation

Select the de	stination folder and other options to control your Export
– Split and G	rouping Options
If you want the box is n	, you can keep the records for each filer separate from the others by checking this box ot checked, all Filers for the form type will be combined into one larger file.
	Export each Filer as a separate file
Forms can	be grouped within each file by Address Type (USA, then Canadian, then Other/foreign.)
	Group forms in each file by Recipient Address Type
	copied to other locations after they are created.
Destinatio	n Folder for the Export file(s):
Destinatio	In Folder for the Export file(s): Pro\Pro99CS\Exports
Destinatio C:\1099	Pro\Pro99CS\Exports Pero\Pro99CS\Exports Pero\Pro99CS\Exports Pero\Pro99CS\Exports
Destinatio	Pro\Pro99CS\Exports  The export file after it is created  TIP the export file after it is created
Destinatio C:\1099 Compress	In Folder for the Export file(s): Pro\Pro99CS\Exports  Image: Select the Destination folder  I Prove the export file after it is created  Export file. Note: The original output file will be deleted after it has been zipp

9. You may not "Finish" and use the export map as you would in the standard export process. Select the map and click "Next" to start the process. Follow the wizard options.

99 231	1099 Pro Wizard	×
Select the t These options	type of data and format to use s let you choose the contents and format for the export file	
Select the t	ype of information to Export: 1099-R	
then sele	ct (highlight) the file format and layout to use	
File Format	Description	Notes for the selected layout:
Fixed Length Delimited Delimited	1099-R - Fixed Width Export - All Fields (2014) 1099-R 2007 Custom Export Map 1099-R delimited Export w Life of Line and Pace Key into	
Delimited	1099-R Print Export - All Fields (2014)	
Delimited	1099-R Voya Sample Export Map (2015)	
Delimited	1997 1099-R Custom Export Map	
Delimited	2005 1099-R Custom Export Map	
Delimited	2006-2008 Standard 1099-R export map	
Delimited	2007 1099-R Custom Export Map	
Delimited	2008 1099-R Custom Export Map	
Delimited	2009 1099-R Custom Export Map	
Delimited	2010 1099-R Export all fields	
,	Add or Update Export Maps	
Tax Year: <b>201</b>	5 🖓 <u>B</u> ack Next 4	X Cancel ? Help

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