# CRS PRO

Industry Leading Common Reporting Standard (CRS) Software & Compliance.

1099 Pro's CRS Pro software combines nearly 30 years of information reporting experience and software development to produce a standalone software product that ensures speed, security, and scalability.

CRS Pro streamlines the reporting process by breaking the CRS reporting process into five easy to follow steps of 1) Importing Account Data, 2) Generating Summary Balancing Reports, 3) Individual Account Lookup & Editing, 4) Applying Jurisdictional Thresholds, and 5) XML File Generation.  CRS Pro further simplifies the reporting process by allowing segmentation of account data by year, Financial Institution (FI), department, and other customizable criteria – all of which provides granularity when balancing/reporting for a single jurisdiction or for multiple jurisdictions simultaneously.

## STANDALONE SOFTWARE

Software can be accessed via a desktop application within your company's environment. CRS Pro supports multiple users simultaneously and allows for data to be stored & backed up to a secure network location.

## IMPORT & ENTER DATA

## ACCOUNT LOOKUP

Search for individual accounts by Account Holder First Name, Last Name, Account Number, Taxpayer Identification Number (TIN), or other customized criteria.  An uncomplicated user interface allows for quick viewing and/or updating of account information, if desired.

## XML FILE GENERATION & CRS REPORTING

Create individual tax jurisdiction XML files (the CRS reporting format), select multiple tax jurisdictions, and/or multiple Financial Institutions simultaneously for granular CRS reporting.

## STANDARD & CUSTOM REPORTS

Standard balancing reports are available along with custom queries, data views, and reports via Excel or PDF.  CRS Pro also supports exporting account data to Excel for easy review.

## SECURITY

Setup individual user software login credentials and mandatory minimum password requirements.  CRS Pro supports profile-based security to manage users & access groups.  Canned security reports, access logs, audit trail, and change log reports can be generated & filtered by user and/or date.

**Import Account Data:** Supports importing from Excel, .tab, .csv, or pipe files. Also supports manually keying in, and updating, account records.

**Summary Balancing Reports:** Use preset summary reports to total number of accounts & account balances. Filter reports by Financial Institution, Department, and account types.

**Account Lookup:** Use the desktop application to quickly lookup, edit, & save account information using customizable search criteria.

**Jurisdictional Thresholds:** Customize reporting threshold by tax jurisdiction.

**XML File Generation:** Generate CRS XML Files, per the XML Schema, by single jurisdictions, groups of jurisdictions, or all jurisdictions.