

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 with an MS SQL Server backend 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.

CRS PRO.NET WEB MODULE

Software can be accessed via a desktop application or via a secure internet/intranet portal with TLS 256 bit security. No software installation is required and the web module supports IE, Chrome, Firefox, & Safari.

REPORTS & AUTOMATION

Standard balancing reports are available along with custom queries, data views, and reports via Excel or PDF. CRS Pro supports automation of imports, reports, and exports via CRS Pro's Scheduler utility.

HOSTING

Install CRS Pro on your premises with a MS SQL Server backend or connect to our SSAE 16 SOC I Type II certified hosting facility for automatic updates, maintenance, and hosting services. Test and Production environments are available upon request.

XML FILE GENERATION & CRS REPORTING

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

JURISDICTIONAL THRESHOLDS

Individual tax jurisdictions have distinct reporting requirements, de minimis thresholds, and reportable account classifications. Customizable thresholds in CRS Pro allow for immediate reaction to policy changes.

SECURITY

Windows Domain Authentication via Active Directory integration or individual user software login credentials. 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, pipe, or fixed-width 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 or secure web-component 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.