

## 1099 Pro Corporate Suite Case Study: Global Processes

### The Situation

Big Four Accounting had long been plagued with the difficulties associated with global operations. Global operations required Big Four Accounting to coordinate functions across time zones, languages, and systems that would then need to be synchronized by a central tax management team and system. The central tax management team soon identified that their major concerns for tax software stemmed from two key functions: global access and automated processes. Furthermore, any future solution would need to be intuitive, allowing for new users to move along the learning curve quickly, and would also need to be able to process high volumes of file transfers quickly and securely.

### Company Background

Big Four Accounting is a multinational service firm that offers a plethora of professional services. Since inception, in the mid-1800's, Big Four Accounting has grown its empire to include offices in 159 countries, across in 776 cities, and employment of over 180,000 people. Big Four Accounting is recognized as the leading provider of tax services worldwide - both in terms of size and scope of its tax practice and reputation. Furthermore, Big Four Accounting is also acknowledged as the leader in the debate for tax policy reform with tax authorities and governments around the world. As such, Big Four Accounting's tax processing obligation has grown to a volume of 100,000 records over seven form types of: 1099-B, 1099-DIV, 1099-INT, 1099-MISC, 1099-OID, & 1042-S.

### Worldwide Access

Big Four Accounting opted to use 1099 Pro in an externally hosted environment in which users are able to securely access 1099 Pro Corporate Suite from anywhere in the world. 1099 Pro's ability to provide SSL-VPN connections for terminal sessions to the Corporate Suite software and secure HTTPS connections through 1099Pro.NET allowed for distinction between administrative (terminal) and lower-level (1099Pro.NET web portal) access while also providing global access required by Big Four Accounting. Secondly, 1099Pro.NET's web portal accessibility through a wide variety of browsers such as Internet Explorer, Google Chrome, Mozilla Firefox, and Apple Safari further supported Big Four Accounting's global structure as different offices operate with different browsers.

Interestingly, Big Four Accounting realized a second, unexpected, benefit from the Corporate Suite software. The Corporate Suite software provided for generalized access groups to be pre-configured, with specified access and security settings, to which new user profiles could simply be added without management have to individually set up tens of thousands of employees.

### Process Automation

The second key feature required by Big Four Accounting was the ability to automate processes. Rather than coordinate functions across 159 countries, Big Four Accounting preferred to set up standard protocols that would allow Corporate Suite software functions to run without repeat coordination by the central tax management team. Corporate Suite's Scheduler served this purpose exactly. As an example, the Scheduler feature allowed management to designate specific directories to import files from - directories that are then scanned every five minutes by Scheduler. This process also insured that Big Four Accounting's information was continuously up to date.

Furthermore, management was able to schedule certain directories, with extremely large files, to only be scanned and imported during off-business hours. This proved to decrease the server load and increase productivity during business hours in major offices. As the benefit of this process gained traction, Big Four Accounting began applying the scheduler timing feature regionally in order to further realize the related benefits. As an additional advantage, the Scheduler feature allowed management to configure it so that email reports were sent in the case of any import files that contained errors or warnings.

Most recently, Big Four Accounting has applied the Scheduler feature to other responsibilities, such as report generation, in order to further decrease manual activity in favor of automation.

## Additional Services: Printing, Mailing, & E-Filing

In an effort to further streamline the information reporting function, Big Four Accounting chose to use 1099 Pro's Service Bureau for printing, mailing, and e-filing services. This effort served the two key purposes of standardizing the methodology and format for the printing, mailing, and e-filing processes as well as to provide a uniform job tracking mechanism (as the Corporate Suite software automatically tracks all printing, mailing, and e-filing jobs sent through the Service Bureau).

In the case of single print jobs, management opted for Corporate Suite's 1099Pro.NET web interface to email encrypted PDF's to the recipient. Management, no doubt, recognized the cost-savings and time-savings involved with handling the single jobs immediately and benefitted from quick service levels in tandem with the built-in security of the encrypted PDF mailer.

## Process Specialization

One year from the initial software rollout had passed and Big Four Accounting felt confident that they had mastered the many value-added features of the software. However, Big Four Accounting felt that there could be vast internal efficiency improvements if certain new features could be added to accommodate them.

One such feature was to introduce a specific filter for searching through the thousands of filing entities when selecting just a small number to submit data from. Shortly after, 1099 Pro setup a conference call to discuss the aspects of the new feature as well as the possible implementation and timeframe. To management's surprise, 1099 Pro quickly introduced a beta version of the concept and further refined the concept around Big Four Accounting's feedback.

## Reflection

The overall relationship between Big Four Accounting and 1099 Pro continues to prove beneficial on both ends. While not every new feature or request is integrated into the software, the central tax management team feels that their opinion is taken very seriously and have voiced support of 1099 Pro's Corporate Suite software by continuously renewing their contract as well as expanding the software into the furthest countries of Big Four Accounting's operations.

## Exhibit 1: Managing Scheduled Jobs through Scheduler

The screenshot shows the '1099 Pro for 2013 Corporate Suite - [Scheduler Information]' window. The main area is titled 'Manage Scheduled Jobs' and contains a table of scheduled tasks. The table has columns for Job Name, Tax Year / Session ID, Status / Outcome Result, Process Type, Start Date / Run Date, Time, Next Date / Scheduled Date, and Time. The jobs listed include various reports and exports, such as '1099 Pro Daily Totals Report by UserID test' and 'COPY of David Test year reporting'.

Scheduled Jobs	Tax Year / Session ID	Status / Outcome Result	Process Type	Start Date / Run Date	Time	Next Date / Scheduled Date	Time
1099 Pro Daily Totals Report by UserID test	2012	Enabled	Report	9/28/2012	13:12		
1099 Pro Daily Totals Report by UserID test	N/A	Completed	Report	9/28/2012	13:12	9/28/2012	13:12
1099 Pro Daily Totals Report by UserID test	N/A	Completed	Report	9/28/2012	12:52	9/28/2012	12:51
1099 Pro Daily Totals Report by UserID test	N/A	Completed	Report	9/28/2012	12:41	9/28/2012	12:41
1099 Pro Daily Totals Report by UserID test	N/A	Completed	Report	9/28/2012	12:30	9/28/2012	12:30
1099 Pro Daily Totals Report by UserID test	N/A	Completed	Report	9/28/2012	12:31	9/28/2012	12:31
COPY of 1099 Pro Daily Totals Report by UserID te	2012	Enabled	Report	9/28/2012	13:12		
COPY of David Test year reporting	2012	Enabled	Report	6/04/2012	15:45		
david daily	2012	Enabled	Report	4/26/2012	13:26		
David export 1099R test	2012	Enabled	Export	5/01/2012	8:30		
David Test year reporting	2012	Enabled	Report	6/04/2012	15:45		
JP TEST	2012	Enabled	Report	11/27/2012	15:35		
Reprint Test	2012	Enabled	Form Reprint	3/05/2013	8:54		
test	2012	Enabled	Export	12/18/2012	11:17		
test ray	2012	Enabled	Export	8/07/2013	17:45		
Test Reprint	2012	Enabled	Form Reprint	3/06/2013	14:47		

## Exhibit 2: Filing 1042-S by Paper from 1099Pro.NET

The screenshot shows the 'Form 1042-S: Enter, Update and View' interface in a web browser. It features a search bar for Recipient TIN, a table of recipient records, and a 'File By Paper' button highlighted with a red box. The table contains columns for Recipient TIN, Name/Company, First Name, RS Status, State Status, State, Account, Pro-rata, Amended, Country Name, Dept, Category, Date Created, Date Last Edit, Date Printed, Date Corrected, and Has Form Notes.

Recipient TIN	Name/Company	First Name	RS Status	State Status	State	Account	Pro-rata	Amended	Country Name	Dept	Category	Date Created	Date Last Edit	Date Printed	Date Corrected	Has Form Notes
123-22-1000	ACKLIN	EVERETT A	Pending	Orig/Pending	OR	AC# 040	No	No	Canada	TEST	Sample	3/11/2014				No
123-22-1002	ADAM	LLLLIAN	Pending	N/A/N/A	AB	AC# 005	Yes	No	Canada	TEST	Sample	3/11/2014				No
123-22-1051	FOX	EDWARD E	*Pending	N/A/N/A	N/A/N/A	AC# 561	No	No	Wales	TEST	Sample	3/11/2014				No
455-21-7888	TRUDEAU	SAMUEL	Pending	N/A/N/A	AB	AC# 005	Yes	No	Canada	TEST	Sample	3/11/2014				No
555-12-1244	GAUTHER	DENIS	Pending	Orig/Pending	CA	AC# 972	No	No		TEST	Sample	3/11/2014				No
555-23-1234	Tuna	Charlie	Pending	Orig/Pending	CA	AC# 008	No	No		TEST	Sample	3/11/2014				No
688-44-1280	Smith	Junichiro	*Pending	N/A/N/A	N/A/N/A	AC# 038	No	No	England	TEST	Sample	3/11/2014				No
688-55-1281	Shiokawa	Junichiro	*Pending	N/A/N/A	N/A/N/A	AC# 002	No	No	Japan	TEST	Sample	3/11/2014				No
77-7441234	Royal Bank of Canada		Pending	N/A/N/A	QC	AC# 456	Yes	No	Canada	TEST	Sample	3/11/2014				No
77-7574124	Royal Bank of Canada		Pending	N/A/N/A	QC	AC# 456	Yes	No	Canada	TEST	Sample	3/11/2014				No
840549221	ACME KEY SERVICE		*SB Filing	Orig/Pending	CO		No	No		TEST	Sample	3/11/2014	3/11/2014			No
88-1122657	CAMPBELL ENTERPRISES		*Pending	N/A/N/A	N/A/N/A	AC# 025	No	No	Philippines	TEST	Sample	3/11/2014				No
88-1234567	Bank of Toyo		*Pending	N/A/N/A	N/A/N/A	AC# 002	No	No	Japan	TEST	Sample	3/11/2014				No

### Exhibit 3: Browse the Filers File During Service Bureau Filing Wizard

#### Browse the Filers File

**Select (Tag) the Filers to Use In This Process: Upload File Generation**  
 Use the tag buttons or your mouse to select as many Filers as you need, then press the Proceed button to continue

Current View: By Payer Code (PTIN) ▾

Tag view Mode:  Show All  Tagged  Untagged

Search PCode:

**Total Tagged\***

**0**

\*If using a query, all of the tagged Filers may not be visible.

Current Query: All Records ▾

Limit to the highlighted TIN

Tag	Payer Code	TIN	Location	Name	Name 2	Address Line 1
	UJON	34-2342342		UJON	Filename2	23901 CALABASAS
	UJON2	95-8888888		UJON2	1099 Pro	23901 Calabasas Ro
	UJON3	95-8888888	UJON3	UJON3		123 d st
	" SP5 DAVID	51-2658435	" LOC"	David Filer first	David Filer last	123 main st
	"A DAVID TE	12-5121212	"A DAVID TESTX	DavidFileNameTestABC	FileName2ABCDEFGHIJKLMN	1234 Test Dr ABCDE
	"A DAVID"	00-1000000	"A DAVID"	David Test Filer A	testemailfiler2@email.com	123 Main St
	"AA DAVID"	55-4564567	"AA DAVID"	David Test Filer	David Test Filer 2	123 Test Dr
	"B DAVID"	00-1000000	"B DAVID"	David Test Filer B		123 Main St
	"C DAVID"	12-5121212	"C DAVID"	David Test Filer C		123 Test Dr
	"CSSTARS T	55-5645645	CSSTARS	David	Shall	123 Test Dr
	"D DAVID"	12-5121200	"D DAVID"	David Test Filer & Et. Al.		123 Test Dr & 123
	"DAVID BULK	00-9876543	"LOCATION"	David BulkTIN		123 Test Dr
	"DAVID W2"	00-1234567	LOC	David First W2 Filer	David Last W2 Filer	David Address W2 F
	"DEMO"	94-1234567	"DEMO"	David Demo	Demo Mode	23901 Calabasas Rd
	"JGC"	55-1022010	JGCLOC123	jpgctestfilename1234567	jpgctestfilename21234567890123456789	jpgctestaddress12345
	"JPF1	34-3453434	"JPF1	"JPF1	"JPF1	"JPF1
	"JPF2	32-3243243	"JPF2	1099 Pro Inc		23901 Calabasas
	"1JP-#1	01-0000123	"JP-#1	"JP-#1	"JP-#1	ADD1
	*123	32-3243243	123	Name		Add1
	*JP	32-3243243	*JP	10000000000000000000	2000000000000000000000000000000000000000	30000000000000000000
	*JON	55-1234567	*JON	1099 pro	Filename2	23901 calabasas roa

Tag
 Tag All
 Untag
 Untag All
 Flip
 Flip All
 Prev Tag
 Next Tag

Proceed to Next Step ➔
Cancel ✕
Help ?