

1099 Pro, Inc. presents

CORPORATE SUITE



The
Ultimate
information reporting solution by



The better way to go.

Tax Year 2004 - Current

Real client testimonial:

“The software exceeds my expectations.”

1099 Pro, Inc.

Founded in 1988, 1099 Pro, Inc. is a market-leading provider of information-reporting solutions & services for 1094, 1095, 1099, W-2, 1042-S, and Puerto Rico filers that files more than 10% of all information returns in the US. 1099 Pro develops and markets a comprehensive range of products that enable any size business or institution to effectively manage and comply with all information reporting requirements.

1099 Pro products range from Client Server-ASP applications capable of filing over 100 million records utilizing a Microsoft® SQL backend with multi-year presentation of forms via an internet browser, to desktop software products for filing from 20 to 100,000 forms, to www.eFileMyForms.com for internet filing of under 20 forms. Adjunct products include secure hosting and services for information processing, printing, filing and penalty abatement.

Our Service Bureau department is a SSAE SOC I Type II certified facility; we print and mail physical forms, offer web presentment, e-delivery, and electronically file millions of 1094, 1095, 1099, W-2, and 1042-S forms for thousands of clients. In 2010, our Service Bureau added Bulk TIN Matching, a service created for checking TIN and Name combinations against the IRS database, where results are returned within 24 hours.

The 1099 Pro Managed Services team can maintain your payee and payment database in our secure environment, or on your secure servers. This service includes regulatory support and compliance training. Users can access the 1099 Pro Corporate Suite software to securely view and print their payee and payment information and perform data queries, either online or through a secure network.

With the ever-changing IRS laws and regulations, 1099 Pro remains ahead of the curve of the industry by developing new services, solutions, and software enhancements every year. 1099 Pro is a Microsoft Certified Partner, MBE certified, and has received SSAE SOC I Type II certification.

Corporate Suite Software: Simplify the Tax Season.

The 1099 Pro Corporate Suite is the easiest and most advanced software for all your paper and electronic filing needs. It produces all forms in the 1094, 1095, 1097, 1098, 1099, 392x, 5498, W-2, W-2G, and 1042-S series, as well as Puerto Rico form 499R-2 and form series 480.

The Corporate Suite provides all of the power of our Professional and Enterprise solutions with the speed, power, and security afforded by Microsoft's SQL Server technology. It is the true enterprise solution for businesses requiring the ultimate in performance and scalability.

Additionally, 1099 Pro Corporate Suite provides a feature to upload your data to our Service Bureau for Printing, Mailing and/or IRS (SSA) E-Filing of original and/or corrected forms.



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Real client testimonial:

“True champion customer service, 5 star!”

Corporate Suite Features

TRAINING & SETUP

Live one-on-one training using screen sharing software is free with the Corporate Suite software. A designated Account Manager oversees the implementation, conversion, and training process and provides demonstrations for users. Basic tutorials for new users are available on our website, and custom tutorials can be created, based on specific client needs. Onsite technical training is also available.

IMPORTING

Corporate Suite provides customizable import maps and supports delimited, Excel, and fixed-length imports. Multi-filer and transactional imports are included, as well as automatic imports via scheduler. Extensive business rules based on IRS regulations are built-in to the software to validate recipient data upon import. Error or warning messages are triggered based on the severity of the IRS rule/regulation, to ensure accurate reporting. Corrections and reprints may also be imported.

PRINTING & MAILING

For high volume printing, Corporate Suite supports the R.R. Donnelly Blue Book print format. Supports Postal IMB, 2D Data Matrix, and other barcode prints. When printing forms internally, you can print based on business areas or form types. Alternatively, the SSAE SOC I Type II Service Bureau can print and mail your recipient forms through a secure HTTPS upload. The Quick Print feature offers the ability to print or re-print originals and corrections, or save them as PDF documents.

TIN MANAGEMENT & VALIDATION

Generate bulk TIN matching files for upload to the IRS e-services site, or have the Service Bureau send your files on your behalf. Import or key-in paper IRS CP2100, 972CG Notices, and bulk TIN responses into the Corporate Suite software. Manually or automatically attach returned W-9s via barcode. The 1099Pro.NET web module enables users to instantly check TIN and Name combinations in real time.

FILING

Electronically file IRS/SSA originals, corrections, replacements, tests, and state files. Corporate Suite also includes W-2 SUTA files, Puerto Rico, quarterly files, and Massachusetts 1099-HC XML files. Our Service Bureau can also file with the IRS or SSA on your behalf.

REPORTS

With Corporate Suite, you can create Federal and state balancing reports of withheld taxes (945/941), form count reports by filer/status/form type, and schedule automatic reports. Extensive canned reports are included in the 1099 Pro software. Custom reports based on ad-hoc queries are also available using our query building system.

1099PRO.NET WEB MODULE

100% web-based, with immediate usage via SSL internet or intranet. Access is through Internet Explorer; no software installation is required.

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Real client testimonial:

"It doesn't get any better than this."

Corporate Suite Features *(continued)*

SECURITY

Corporate Suite security can be set up for users, user groups, user profiles, and can be linked to active directory. Security levels of access are: tax year/years, FEIN, business area, department, form type, and tax fields. Security also controls rights to system functions such as print, reports, filing, imports, security, etc. Administrators can restrict specific access and customize user passwords.

THE SERVICE BUREAU

The 1099 Pro Service Bureau was established to assist companies throughout the tax season. The Service Bureau features a highly secure SSAE SOC I Type II and PCI Compliant environment, configured to process an unlimited amount of records and form types. Using a simple upload wizard and secure FTP agent programmed into the Corporate Suite software, you can easily transmit records for printing, mailing, filing, or web presentment.

STATE DIRECT REPORTING

Corporate Suite offers the ability to perform state direct reporting (outside of the IRS Combined Federal State Filing (CFSF) Program). The Corporate Suite software creates state files in each the state's unique file format & naming schema. Additionally, the software comes built-in with state specific thresholds for each state/form.

WEB PRESENTMENT & ELECTRONIC DELIVERY

1099 Pro hosted or built-in API & web service. The web service allows your recipients to access their forms online through your own web portal. Each recipient may login to their account and view their form hosted on our server. With electronic delivery, you can give your recipients the option to access their forms from a secure internet site instead of receiving a mailed form.

HOSTING

Our hosted environment provides optimum uptime, security, and bandwidth, ensuring peace of mind. Our hosting environment has passed stringent security certifications including a SSAE SOC I Type II audit - the highest level of certification and security. Nothing needs to be installed on user computers, saving your company time and money.

TECHNICAL SUPPORT & REMOTE ASSISTANCE

1099 Pro offers free technical support to all current and potential customers; for any question, we'll always find a solution. For Corporate Suite users, remote training and assistance is available.

TECHNICAL SUPPORT HOURS

Monday-Friday: 7am-5pm PST

EXTENDED SUPPORT HOURS IN JANUARY

Monday-Friday: 6am-5pm PST

Saturdays: 8am-3pm PST

Sundays: 8am-12pm PST

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Real client testimonial:

"I've always had great customer service whenever I've needed help."

Managed Services

The 1099 Pro Managed Services team can maintain your payee and payment database in our secure SSAE SOC I Type II environment, or on your secure servers. Managed Services can support current and prior years of tax data for forms 1094, 1095, 1098, 1099, 5498, W-2G, W-2, 1042-S, 3921, 3922, as well as Puerto Rico payment information. This service includes regulatory support, compliance training, quarterly reporting, and year-end reporting. Users can access the 1099 Pro Corporate Suite software to securely view and print their payee and payment information and perform data queries, either online or through a secure network.

With more than 25 years of experience, the 1099 Pro Managed Services team has real world knowledge in a variety of industries, and as a result, are experts in federal law, state tax, local tax, and payment types that are subject to reporting. Our expertise and efficiency will improve your compliance and minimize financial risk to your company.

CUSTOM AND SCALABLE FEATURES

- User and Security Setup
- Filing Entity and Aggregation Setup
- Import Map Creation & Maintenance
- Automated Import Configuration with Error & Warning Reports in Excel
- Control Totals Reports
- Transaction Detail History & User Audit Trails
- Quarterly Reporting
- State & Federal Year-End Reporting (Corrections Too!)

OPTIONAL SERVICES

- Printing & Mailing Recipient Statements
- Customized Print Statements
- Bulk TIN File, CP2100 & 972CG File Importing
- W-8, W-9, & B-Notice Generation & Management
- State Quarterly File Submissions
- State Year-End File Submissions
- IRS Original & Corrections Reporting
- Web API for Web-Presentation or Web-Delivery
- Software Hosting Services

