CROSSLINK
Professional Tax Solutions

Getting started with CrossLink Online

Welcome onboard

Use this guide to learn how to use CrossLink Online

2023 Edition

Contents

We recommend that you use Google Chrome as your internet browser when using CrossLink Online.

Download Google Chrome.

Welcome

Thank you for choosing CrossLink Online as your preferred tax preparation solution.

CrossLink Online is a powerful online professional tax solution that scales with your business and is designed to support tax offices of all types and sizes.

This guide introduces the CrossLink Online tax software and will help you learn to use CrossLink Online to its fullest. Let's get started!

What type of CrossLink Online user are you?

Single / Multi-office
You own an EFIN and prepare tax returns yourself, or you have multiple EFINs with a team of tax preparers.

Service Bureau / Reseller
You support and service other tax businesses and franchises, and may have a tax business yourself.

As you use this guide, you'll find information that only pertains to certain types of users.

Please note the information that may apply to your particular type of setup.

Quick steps to get started with CrossLink Online:

- ☐ **Open account creation email**
  You'll receive an email confirming the account has been created. This email will also display your username to log in to CrossLinkOnline.com and an activation link to set your password.

- ☐ **Add EFIN on CrossLinkTax.com**
  Log into your account CrossLinkTax.com and go to Office Management > Bank enrollment. Add your EFIN and, if desired, you can also submit the EFIN to an approved financial institution (SBPTG, Republic, Refund Advantage or Refundo) in order to offer bank products to your customers.

- ☐ **Log in to CrossLinkOnline.com**
  Log in to CrossLinkOnline.com and start setting up your tax business for the tax season.

- ☐ **Create your office and assign a license**
  Click Create an Office to add your office for use with CrossLink Online. Once created, go to Manage Account > Manage Licensing and assign the office a license.

- ☐ **Complete the setup for the office**
  Click View to access the office dashboard and complete the required setup. You can also add a payment method in the Wallet to cover certain software-related fees.

We'll cover each of these steps in detail next.

Steps to get started

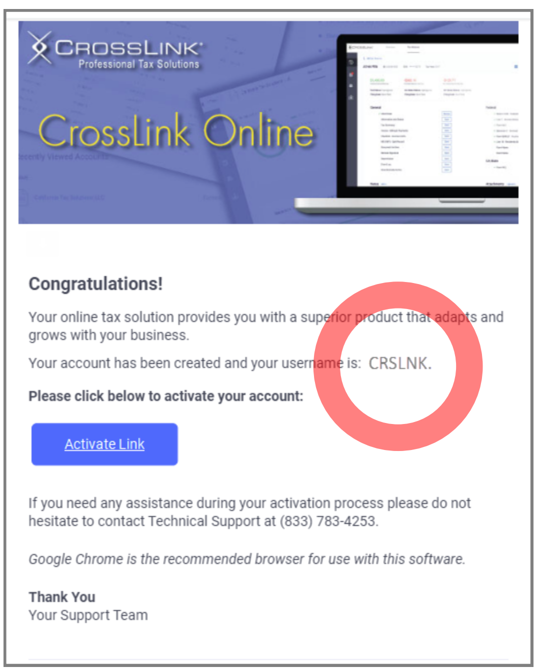
Complete the following steps in order to start using CrossLink Online.

Step 1: Open account creation email

1. Look for an activation email from CrossLink Support with the subject line “New Account Email”.

2. Note the **username** in the email.

   You will use this username to log in to CrossLink Online.



3. Click the blue **Activate Link** button in the activation email.
4. You will be prompted to create a password for your

Steps to get started

Step 2: Add EFIN(s) on CrossLinkTax.com

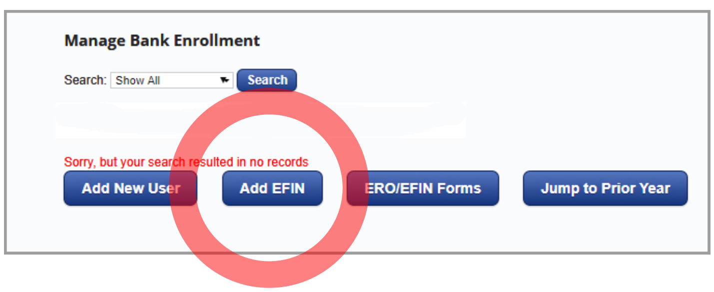
1. Log in to your account on CrossLinkTax.com

   Learn more about logging in to CrossLinkTax.com in Additional Info and Help.

2. Go to **Office Management** > **Bank Enrollment**

3. If this is the first time you are using the EFIN, click **Add EFIN** to begin

   If you added the EFIN last tax year, click the **Unsubmitted** EFIN record below the desired bank column instead.



Once you click to add or edit your EFIN, you may choose to continue with bank enrollment if you plan on providing bank products at your tax office.

Learn more about bank products in Enrolling EFINs with a bank.

Once you click to add or edit your EFIN, you may choose to continue with bank enrollment if you plan on providing bank products at your tax office.

Learn more about bank products in Enrolling EFINs with a bank.

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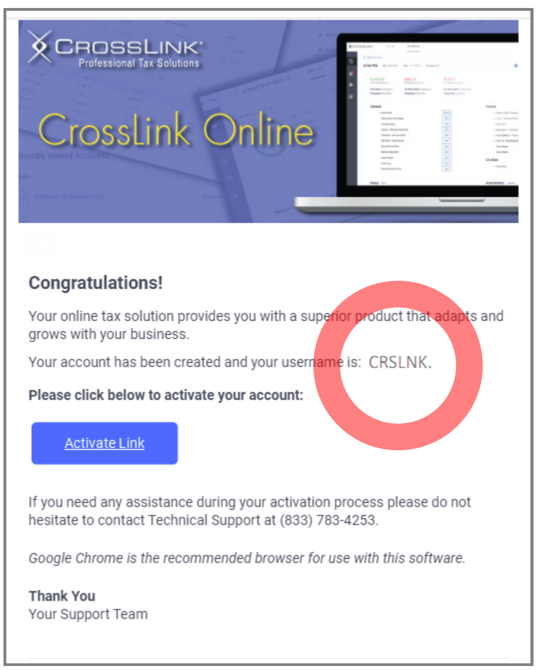


3. Click the blue **Activate Link** button in the activation email.

4. You will be prompted to create a password for your username.

Step 3: Log in to CrossLinkOnline.com

1. Open your Google Chrome browser and go to CrossLinkOnline.com.

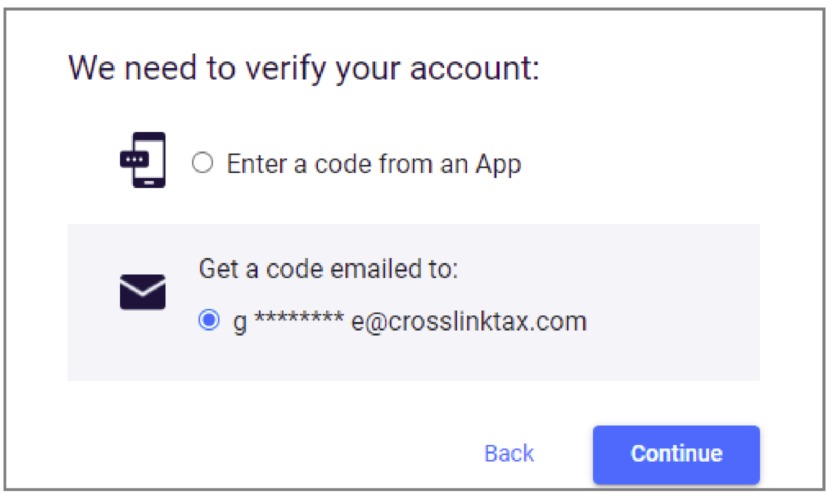
2. Type your username and password.

   Your username is sent to you by email. Look for an email from CrossLink Support with the subject "New Account Email".

   Your password is created using the Activate Link button found in the email referenced above.

3. Verify your account with multifactor authentication.

   You can choose to enter a code using an App (Google Authenticator) or receive a code via your email address.



Learn more about logging in to CrossLink Online and multifactor authentication in Additional Info and Help.

Step 4: Create your office

1. Click the **Create New Office** button to get started.

2. Enter the Administrator Credentials

   The first step to creating an office is entering the office's administrator information. In most cases, the person that owns the EFIN for the office will also be the administrator and will receive an email to login with their username as soon as of the new office is created.

Single / Multi-office
If you are the owner of the EFIN, you may enter yourself as the office administrator as well. Doing so will mean that you have more than one username to log in to CrossLinkOnline.com (the Franchise Main username for creating offices, and an Office Owner username for administration of the office you are adding).

3. Enter the Office Info

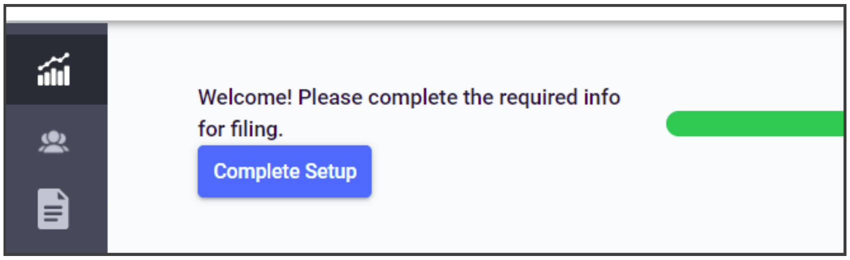
   Enter the office's name, address and EFIN information. Click **Create** (top-right) when finished.

4. Click **View** next to the new office to access and complete the office's setup.

   You may need to activate the office's license before you can view the office. Go to **Account Settings** > **Manage Licenses** to activate the office's license. Additional can information found in Office Setup.

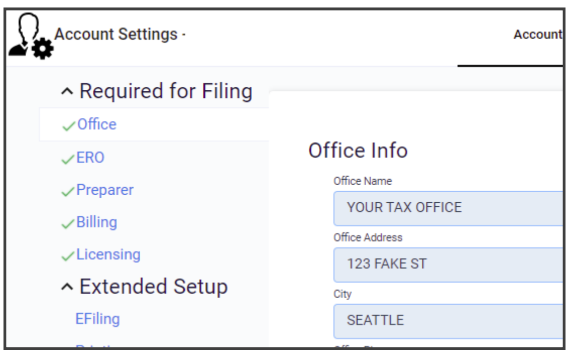
Step 5: Complete the setup for the office

1. While viewing the new office's Dashboard, click the **Complete Setup** button



   You can also click **Office Settings** in the navigation menu to access these setup options.

2. Complete the Required for Filing setup areas



   Use the menu on the left to complete all the Required for Filing setup areas. If desired, you can also review the Extended Setup areas for additional program options.

   Click **Close** (top-right) or **Finish** (on last page) to close Office Settings.

3. Click the **Profile menu** and the click **Wallet setup**

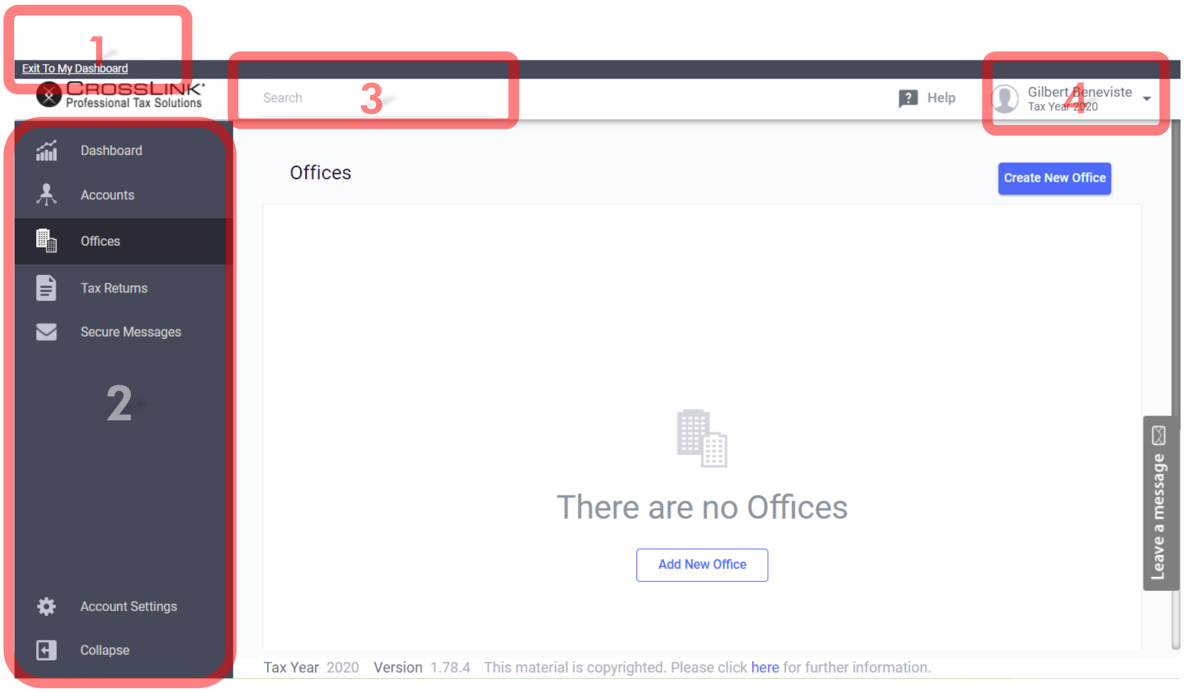
   Use the wallet to save a payment method that will be used to cover certain software-related fees.

Service Bureau / Reseller
Completing office setup is typically left to the Office Owner. These steps may not apply to you.

Navigating CrossLink Online

Learn about the different areas of CrossLink Online and how you can navigate your way around the software.

CrossLink Online dashboard



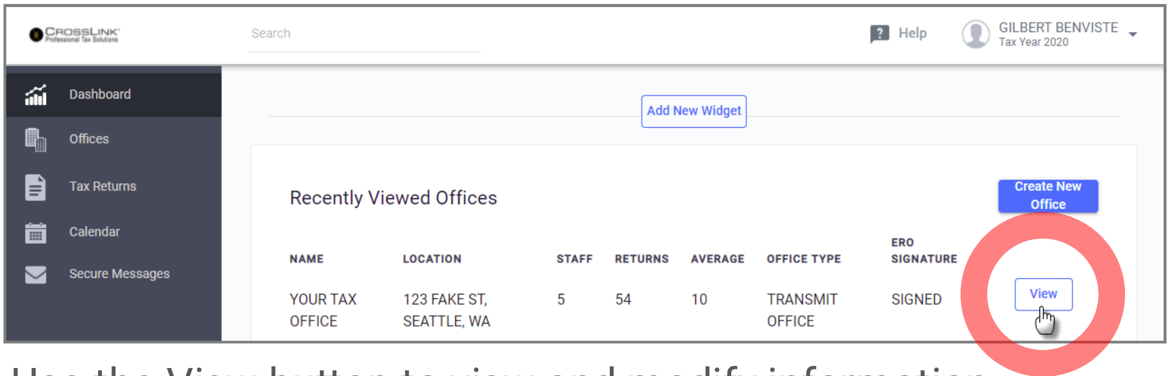
The dashboard acts as your home page to CrossLink Online and provides access to different areas and functions depending on your access level.

Important areas of the dashboard

1. Navigation trail
2. Navigation menu
3. Search
4. Profile menu

Learn how to view the dashboard of a sub-user next.

View other dashboards



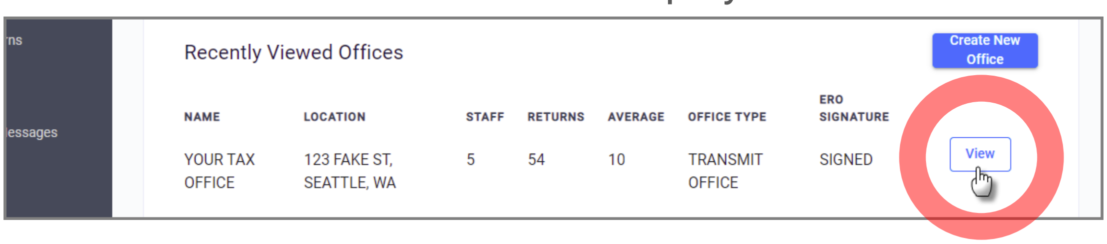
Use the View button to view and modify information for sub-accounts, offices, preparers and even tax returns.

Keep in mind that your access level plays a critical role in determining the dashboards that you can view/access.

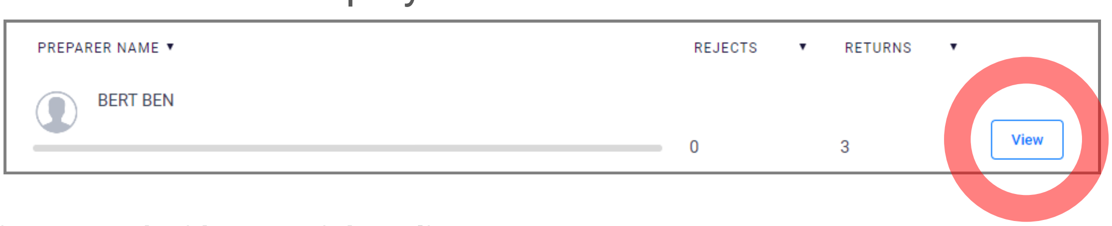
For example...

Let's say a multi-office owner wants to view the tax returns created by a tax preparer. Here's how the View button can be used to navigate to a preparer's tax returns:

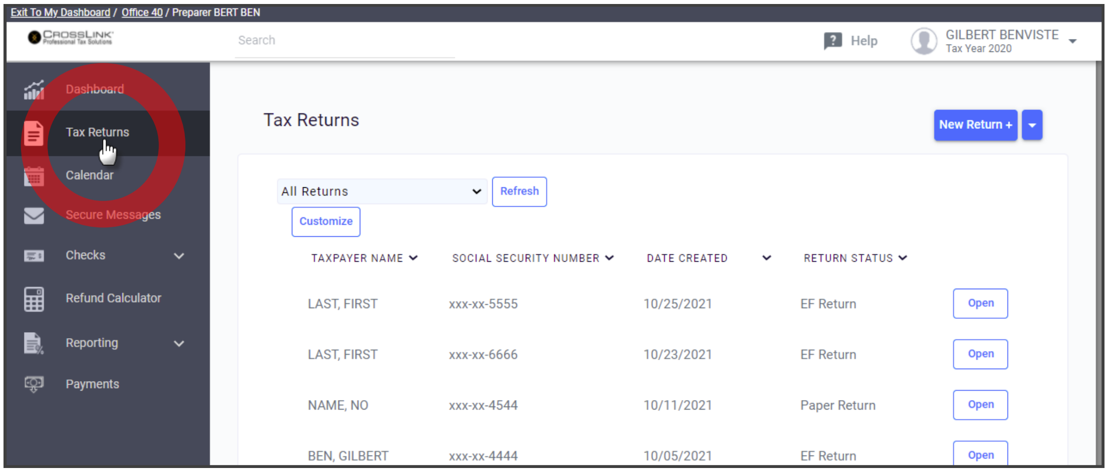
1. While viewing your **Offices**, click the **View** button next to the office to which the tax preparer is assigned. The selected office's dashboard will display on screen.



2. Click **Preparers**, and then click the **View** button next to desired tax preparer. The selected tax preparer's dashboard will display.

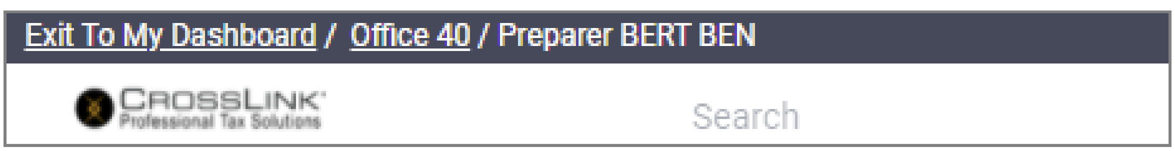


3. Click **Tax Returns** to list the tax returns created by the selected tax preparer.



In the example above, the owner used the View buttons to navigate from their dashboard --> to the office's dashboard --> to the preparer's dashboard.

Keep track of which dashboard you are viewing



As you use the View button to access sub-user data, a navigation trail will appear on the top-left of CrossLink Online to help you keep track of which dashboard you are currently viewing. You can also click this navigation trail to go back and return to your dashboard.

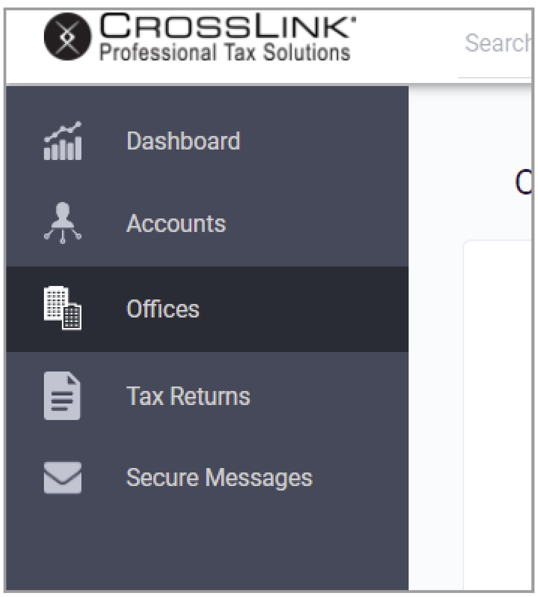
Navigation menu

The navigation menu provides access to helpful areas and tools, and is used by office managers and tax preparers alike. The options that are visible in the navigation menu will depend on the dashboard you are viewing and your access level (based off how the username was created).

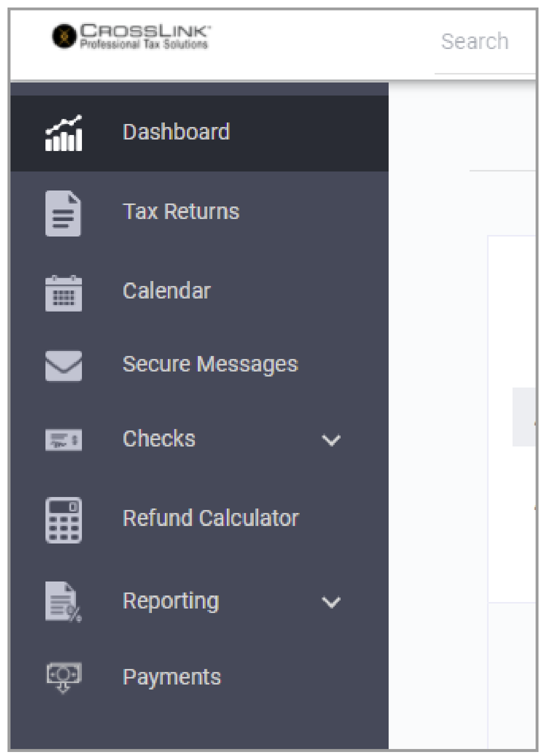
For example...

Note the different navigation menus when logging in with a 'Franchise main' username vs a 'Tax preparer' username.

Franchise main



Tax preparer



In the example above, the franchise main username has access to create accounts and offices. Alternatively, the tax preparer is taken directly to their office dashboard and will only have access to tax return-related information.

Dashboard provides you with a variety of different options and important information. The information on the dashboard can be customized to each user.

You can modify the information that appears on your dashboard by adding helpful widgets. Click **Add New Widget** on the dashboard to get started.

Accounts is only available for Service Bureaus / Resellers. Accounts lists all the different sub-accounts that you have been added under your main account.

Click **Create New Account** whenever you need to add an account.

Service Bureau / Reseller
Use Accounts to add and view the independent tax businesses that are under your main account.

You should only use Accounts for businesses that are not directly managed by you (you do not own the EFIN).

Unlike offices, adding accounts does not require that the EFIN be added on CrossLinkTax.com first. Account EFINs can be added on CrossLinkTax.com later.

Offices is available for Single-office, Multi-offices and Service Bureaus / Resellers. Offices lists all that tax offices that you added to your account.

Click **Create New Office** to add your main and sub-office(s).

Single-office / Multi-office
You can add a new office in the Offices area for every EFIN entered on CrossLinkTax.com.
We recommend starting with your Master EFIN and then add any Sub-EFINs.

Service Bureau / Reseller
Use the Offices option to add tax offices that are directly managed by your organization. In short, if you own the EFIN, add the office using the Offices option.

Preparers displays the different tax preparers that have been added during the setup of a tax office. This area is only visible when logged in using the appropriate access level or when you click to view an office's dashboard.

Click **Create New Preparer** to set up a new tax return preparer for the tax office.

Tax Returns displays the tax returns created by the tax office or account. In order to see return data for a specific office, you must be logged in using the appropriate access level or by viewing a office's dashboard.

Learn more about access levels in Log in to CrossLink Online.

Calendar is an easy-to-use calendar to keep track of your important appointments.

Refund Calculator is a quick and simple estimation tool that can be used be estimate the taxpayer's tax refund.

Secure Messages allow you to send messages / notifications to a specific tax preparer or an entire office.

Checks is used to print checks for bank product-funded tax returns and manage check inventory.

Please note that this area is only used when enrolled with SBTPG or Republic Bank.

Single-Office / Multi-office
The Checks and Refund Calculator tools are only visible when logged in with the appropriate access level or after clicking the **View** button next to the desired office.

Service Bureau / Reseller
Similar to multi-offices, you must be logged in to CrossLink Online using the appropriate access level or click the **View** button next to an office in order to display the Checks and Refund Calculator tools.

You will not have access to use these tools for tax offices added in your Accounts area.

Reporting allows you to view or create custom reports for the office you are viewing. This option is only visible when logged in using the appropriate access level or when you click to view an office's dashboard.

Payments is used to register a payment made by the taxpayer to the office and can help you keep track of pending payments.

Click **Account Settings** or **Office Settings** to view/edit the settings of the account or office you are currently viewing. The settings options that display will change depending on the dashboard you are currently viewing.

Single-office / Multi-office

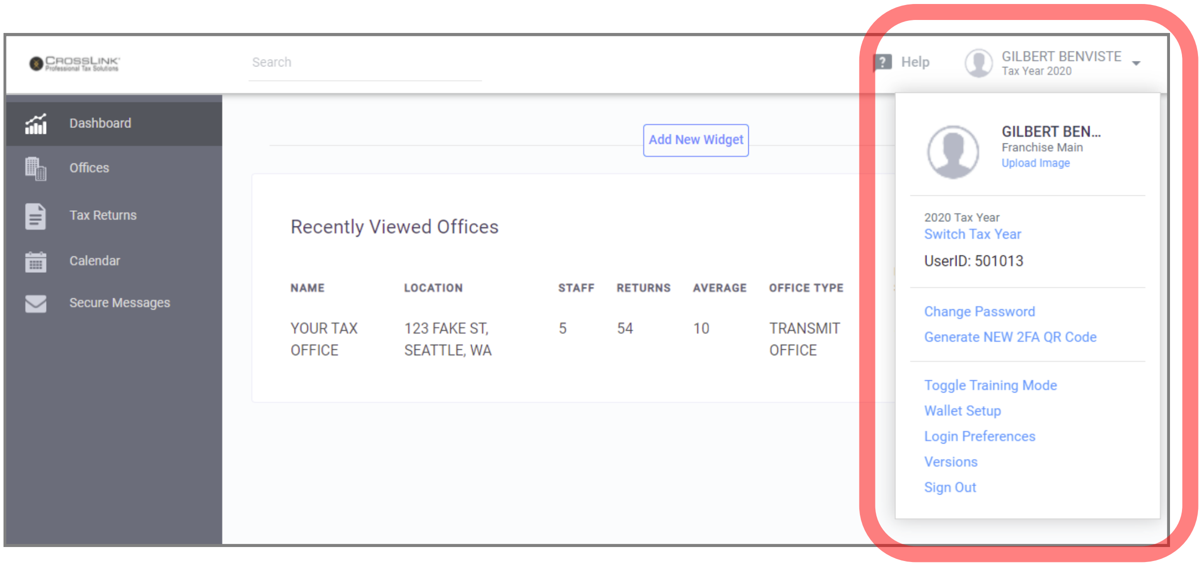
To view/edit the settings for a specific office, make sure to click the **View** button next to the desired office (after clicking Offices on the navigation menu) and then click **Office Settings** in the navigation menu.

Service Bureau / Reseller

Similar to a multi-office, the Settings option in the navigation menu will change depending on the account or office you a currently viewing. To view/edit the settings for a specific account or office, click the **View** button next to the desired account or office and then click **Account Settings** or **Office Settings** in the navigation menu.

Click **Collapse** to collapse and expand the navigation menu.

Profile Menu



The profile menu displays your name and the tax year of the software you are currently using. Click the profile menu to get quick access to a variety of different user-related options.

Note:
It is required to log in using a username with Office/Admin access level (established when you create a new office) to access additional office-related tools in the profile menu.

Users with Office/Admin access level have additional Profile menu options like **Generate QR Code** for use with the TaxPass app, **Capture ERO signature** and access to the office **Database**.

Your **name** and **access level** appear at the top of the profile menu. You can also choose to change your profile image by clicking **Upload Image**.

If you plan to use TaxPass with CrossLink Online, click **Generate QR Code** to create a **Mobile App ID**. The QR Code / Mobile App is used in conjunction with the TaxPass app. If your customer wants to use TaxPass to send you their tax-related data, they'll need to enter your Mobile App ID or scan your QR code when using the app. You'll find a link to **Download QR Code** here as well.

Switch Tax Year allows you to change to a different tax year and to switch to view a different office dashboard (if your login is assigned to more than one office).

Click **Change Password** if you want to change the password you use when logging in to CrossLink Online.

Generate New 2FA QR Code allows you to generate a new QR code that is used in conjunction with the Google Authenticator app.

Learn more about the Google Authenticator app in Multifactor Authentication.

Toggle Training Mode can be selected if you want to use the software for training purposes. While in training mode, you'll have limited access to certain functionality and will only be able to view and prepare training tax returns. You can toggle in and out of training mode by clicking this option.

Database allows you quickly access the databases used by an office to import information directly into their tax returns. You can also access the database by clicking Office Settings while viewing the office (navigation menu) and then Database tab (top of page).

Wallet Setup provides access to the wallet that will be used to pay for certain CrossLink-related fees. Each office has their own Wallet and requires configuration in order to use CrossLink Online to its fullest.

Login Preferences allows you to change a number of options associated with your login, such as starting tax returns in **Interview mode**, your preferred **signature capture method** and **drivers** for electronic signature pads.

Versions lists data about the program and forms being using in CrossLink Online.

Click **Sign Out** when you are finished using CrossLink Online.

CrossLink Online Setup

Find answers to common setup-related questions. You can also use the Help button in CrossLink Online for additional assistance.

Please note that certain setup functions are only available when logging in with the appropriate access level.

Set up a new tax office

Log in to CrossLink Online using your Franchise Main username.

Click **Offices** in the navigation menu.

Click **Create New Office**.

You will be prompted to create username information for the person that will be administrating this office and select whether the office is going to be a feeder office. Enter the required info and click **Create.**

Once you have created the office, click **View** next to the recently created office to access the office dashboard.

Click to **Office Settings** in the navigation menu to access the office's setup options.

Complete the setup for the office and click **Close** when finished.

Feeder office

When creating a new office, select the **Feeder office** checkbox if you want the office to 'feed' tax returns to the main office for review. Tax returns created by feeder offices will not be able transmit directly to the IRS. Instead, the main office will act as the intermediary between the feeder office and the IRS.

Manage Licensing

Assigning a license to a tax office will enable the office the ability to start preparing tax returns. If an office's 'View' button is inactive, it most likely means that you need to assign a license to the office.

To manage and assign licenses:

Log in to CrossLink Online using your [Franchise Main username](#).

Click **Account Settings** in the navigation menu.

Click **Manage Licenses** and make sure each office is assigned a license. You can click **Add A License** if an office is missing a license.

Click **Close** when finished.

Once completing the steps above, click **View** next to the office to access the office dashboard.

Click **Office Settings** in the navigation menu to access the office's setup options.

Click **Licensing** and make sure to license is assigned.

Create a new account

Click **Accounts** in the navigation menu.

Click **Create New Account**.

You will be prompted to enter username information for the person that will be administrating this account. Enter the required info and then click **Create.**

Difference between office and account

Office is used for tax offices that have a unique EFIN. In most cases, the EFIN is owned by the owner of the CrossLink Online account.

Accounts is used for independent tax businesses that are under a larger CrossLink Online account. In most cases, the owner of the CrossLink Online account does not own the EFINs for these tax businesses.

Add a new preparer

When viewing the office dashboard, click **Office Settings** in the navigation menu.

Click the **Preparers** option on the left and then click **Create New Preparer**.

Add a new login

Click **Office Settings** in the navigation menu.

Click the **Logins** option on left and then click **Create New Login**.

Difference between preparer and login

When you add a new preparer, you are entering the information for a tax return preparer that will be used to populate tax returns.

When you add a new login, you are entering login information for a new CrossLink Online user.

In most cases, every preparer will also need a login. However, not every login will need preparer information (office receptionist, for example).

Edit a user's access level

While viewing the office dashboard, click **Office Settings** in the navigation menu.

Click the **Logins** option on the left and then click **Edit** next to the desired login.

Use the **Access Level** option to select the desired access level.

Also, use the **Login Type** options to select if this user will be able to access all returns for the office (**Manager**) or they are only able to access their own tax returns (**Preparer**).

How to view, edit and add new access levels

While viewing the office dashboard, click **Office Settings** in the navigation menu.

Click the **Logins** option on the left and use the **Access Levels** area to view and add new access levels.

Click **View** next to an access level to review the areas and functions that are provided to that access level.

Click **Add New** If you want to create a new, custom access level.

Access levels descriptions

Franchise Main	Access to all areas and functions. This is the only type of access level that can create new accounts and offices.
Office Owner	Access to all areas and functions for an office or account. This is the default access level for the administrative login that you establish when you create a new office or account.
Office Manager	Access to most areas for an office or account. Limited access to reporting tools compared to Office Owner.
Office Support	Access to all setup areas, but cannot open tax returns.
Preparer	Limited setup access. Includes access to functions needed for tax preparation and return transmission.
Non Transmitting Preparer	Access to most tax preparation options. Does not have the capability to transmit (e-file) tax returns.
Reception	Access is limited to searching tax return data. No tax prep and setup options provided.

Select which tax forms are printed (or archived) for an office

When viewing an office's dashboard, click **Office Settings** in the navigation menu.

Click the **Printing** option on left.

Under **1040 Return Printing**, select the tax return forms you want to print (or archive) when you click Print on the tax return toolbar.

Choose whether to print and/or archive tax returns

When viewing an office's dashboard, click **Office Settings** in the navigation menu.

Click the **Printing** option on left.

Under **1040 Return Printing**, use the **Send to**... options to choose what will occur when you click to print the final copy of the tax return.

Select **Send to Printer/PDF** if you want to print and generate a PDF on screen of the selected tax forms.

Select **Send to Archive** if you want to automatically save a PDF of the selected tax forms to the tax return's Document Archive.

You can choose to print/generate a PDF, archive or both.

Sent to Email

Under 1040 Return Printing, select **Sent to Email** to activate the Email button for use (found after you click to Print a tax return). If you plan on emailing tax returns, make sure to select this option.

Please note that selecting this option does not automatically email a copy of the tax form when you click Print. Instead, it simply activates the **Email** button's functionality found when you click to Print.

Edit your tax preparation fees

When viewing an office's dashboard, click **Office Settings** in the navigation menu.

Click the **Billing** option on left.

Under Form Billing, click **Add Form +** to select the tax form and enter the fee for the form.

You can also use Worksheets Billing and Line Items Billing to enter fees for worksheets and line items, respectively.

In Billing, what does Base QTY, Base Price and Per Item do?

Base QTY (quantity) and **Base Price** work together to calculate the fee depending on the amount of times that form (or worksheet or line item) is used in the tax return.

For example, a Base QTY of 2 and a Base Price of $20 for the W-2, will charge the taxpayer $20 as soon as the 2nd W-2 is added to the tax return.

Per Item will simply charge the fee for every instance the form is used in the tax return.

For example, a Per Item fee of $10 for the W-2, will charge the taxpayer $10 per each W-2.

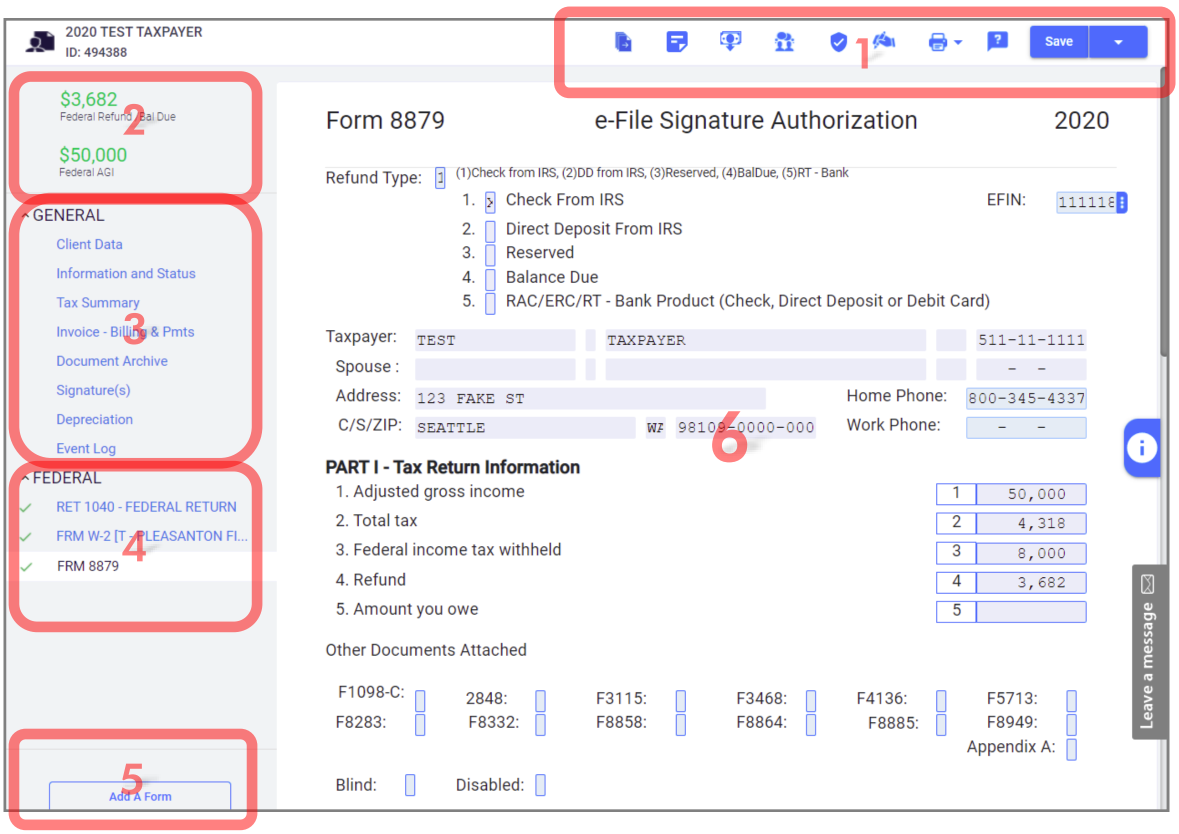
If desired, you can also use all three billing options to combine these methods.

For example, a Base QTY of 2, Base Price of $20, and Per Item of $10 for the W-2, will charge the taxpayer $20 as soon as two W-2s are added and $10 for every additional W-2 added thereafter.

Preparing tax returns

Learn about the different areas in a CrossLink Online tax return and the basic steps to complete a 1040 return.

CrossLink Online tax return



Important areas in a tax return

1. Tax return toolbar
2. Tax refund indicator
3. General forms and other tax return tools
4. Federal forms attached to tax return
5. Add A Form button
6. Current form being edited

Tax return toolbar

The tax return toolbar provides quick access to functions you'll be using frequently when preparing tax returns.

Click **Transmit Return** when the tax return is ready to be transmitted or e-filed. You'll be prompted to fix any errors present in the tax return before you can transmit.

Use **Notes** to add an important note about the tax return. Notes are only visible by the office (not e-filed to IRS).

Payments is used to register a payment made by the taxpayer to the office and can help you keep track of pending payments.

Click **Interview** to complete the tax return using an interview-based method. The interview method is useful for tax preparers that need assistance determining which forms need to be added to the tax return.

Verify Return is used to check the tax return for errors. The program will also display any additional Due Diligence options that have been selected for the office in Setup.

Click **Signatures** to capture electronic signatures for the final tax return. You can capture signatures using your preferred capture method or Remote Signature (if enrolled).

Click **Print** to view the different print options for the tax return. Printing settings can also be configured for the office in Setup.

Click **Save** to save the tax return. You can also click ▼ (below Save) to view additional tax return options.

Quick steps to complete a tax return

The steps below are for a fast, forms-based approach to tax preparation. If you prefer a more guided experience, click **Interview** on the tax return toolbar.

- ☐ **Complete Client Data**
  Complete the Client Data worksheet with all of the necessary taxpayer, spouse and dependent information.

- ☐ **Add forms**
  Click **Add A Form** (lower-left of tax return) to add the tax forms required to complete the tax return.

- ☐ **Select refund disbursement method**
  Go to the **top of Form 8879** to select how the taxpayer will receive their refund (if applicable). Select option **5** for taxpayers that prefer to use a bank product.

- ☐ **Verify for errors**
  Click **Verify Return** and correct any errors that may be present in the tax return.

- ☐ **Print (or archive)**
  Click **Print** and then click **Final Tax Return**. Depending on your tax office setup, you will be prompted to capture signatures, email, preview and print (or archive) the tax return at this point.

- ☐ **Transmit the tax return**
  Click **Transmit Return** on the tax return toolbar when ready to transmit or e-file.

Start a new tax return	Click **Tax Returns** in the navigation menu. Click **New Return +**, type the taxpayer's SSN and click **Add** to start the new tax return.
Receive tax return data from TaxPass users	Click **Tax Returns** in the navigation menu. Click ▼ (next to New Return +) and then click **Import Mobile Returns**.
Start a practice tax return	Click your profile menu and then click **Toggle Training Mode**. With training mode toggled on, start a new return using the normal steps (Tax Returns > New Return +).
Add documents to a tax return's Document Archive	Open the desired tax return and then click **Document Archive** under General. Click **Add New Documents**.
Delete a tax return	Open the tax return you want to delete and then click ▼ (next to Save). Click **Delete Return**.

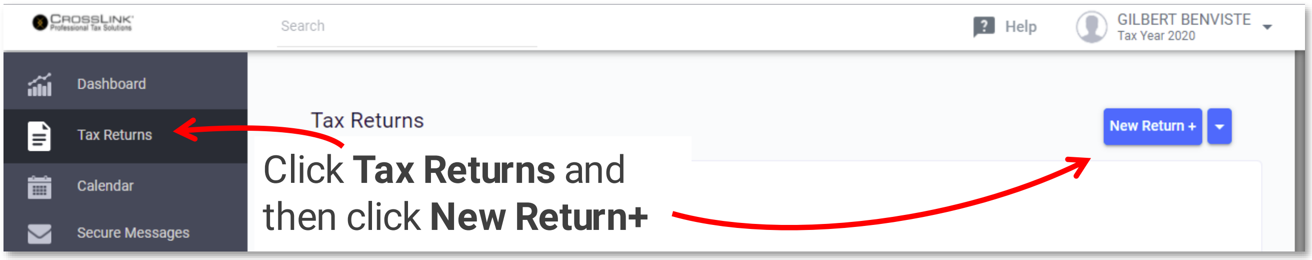
CrossLink Online

Prepare a Tax Return Job Aid

CROSSLINK® Professional Tax Solutions

1 Start a new tax return

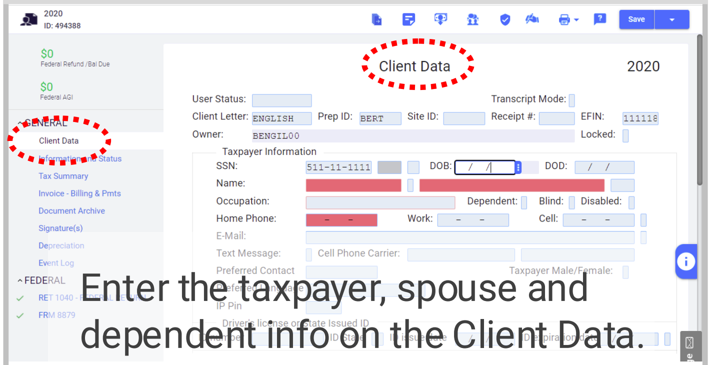
www.CrossLinkOnline.com



Click **Tax Returns** and then click **New Return+**

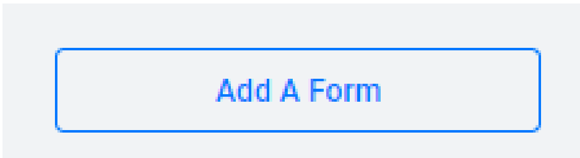
Tip: If logging in using your Franchise Main username, make sure to click **View** next to the office to access the office's Dashboard.

2 Complete the Client Data



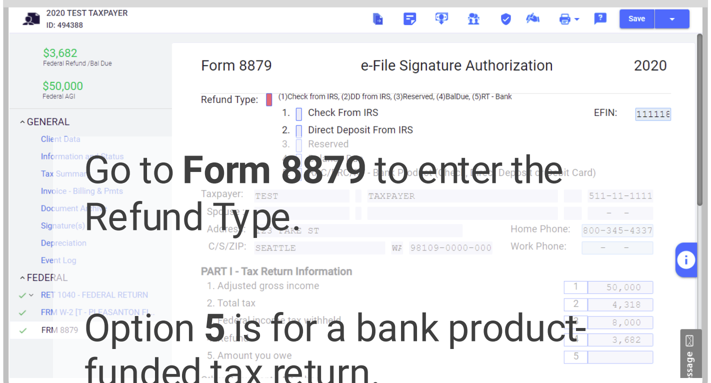
Enter the taxpayer, spouse and dependent info on the Client Data.

3 Add the forms you need



Click **Add A Form** (bottom-left) to add tax forms as you need them.

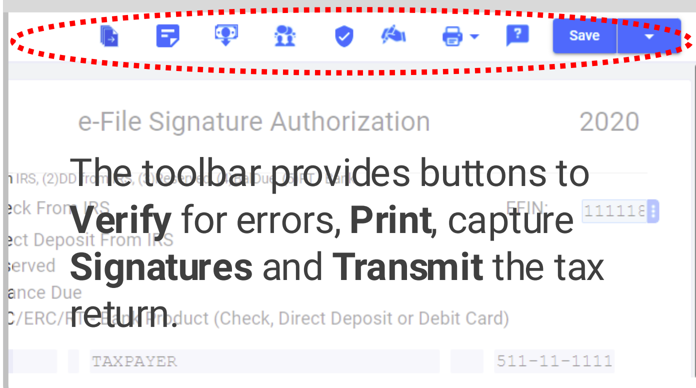
4 Review refund options



Go to **Form 8879** to enter the Refund Type.

Option **5** is for a bank product-funded tax return.

5 Use the toolbar to finish up



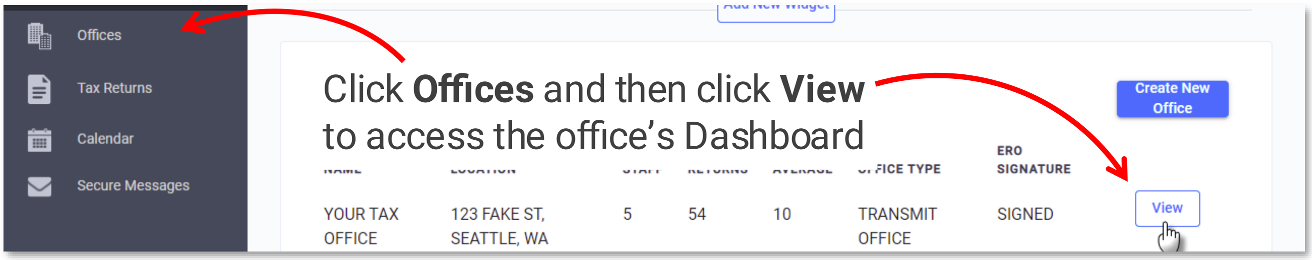
The toolbar provides buttons to **Verify** for errors, **Print**, capture **Signatures** and **Transmit** the tax return.

CrossLink Online
Add a New Preparer/Login Job Aid

CROSSLINK® Professional Tax Solutions

1 Go to the office's Dashboard

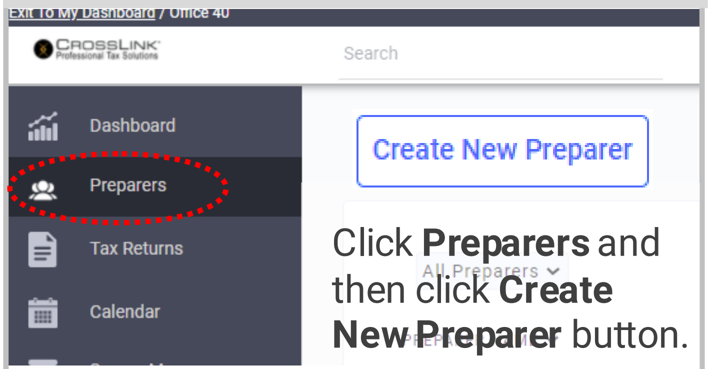
www.CrossLinkOnline.com



Click **Offices** and then click **View** to access the office's Dashboard

Tip: If logging in using your Franchise Main username, make sure to click **View** next to the office to access the office's Dashboard. Ignore this step if logging in directly to the office.

2 Click Create New Preparer



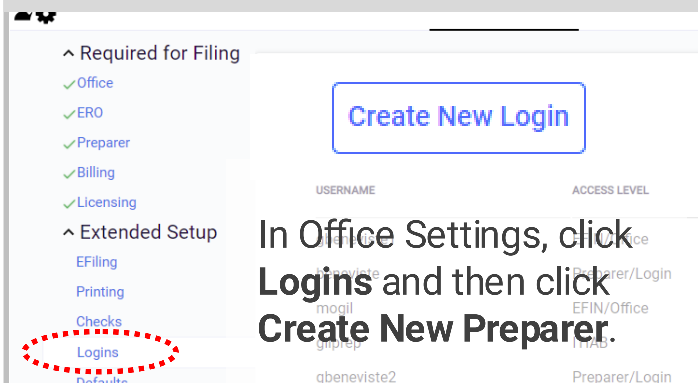
Click **Preparers** and then click **Create New Preparer** button.

3 Complete Preparer's Info

Complete the required fields (in red) for the preparer and then click **Save**.

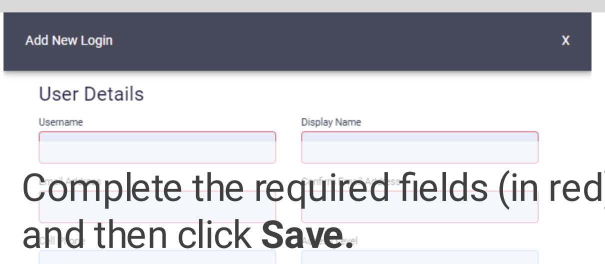
Tip: **Preparer's ID/Shortcut** is essentially

4 Click Logins (Office Settings)



In Office Settings, click **Logins** and then click **Create New Preparer**.

5 Complete the new Login



Complete the required fields (in red) and then click **Save**.

The user will receive an email to log into CrossLink Online using their username once you save their Login.

Additional info and help

Account Code / Username

Your administrative username to CrossLinkTax.com and CrossLinkOnline.com

Your Account Code is emailed to you by your CrossLink account manager.

User ID

A six digit number that identifies your CrossLink Online account. You'll use the User ID when enrolling an EFIN for bank products and when calling Support.

Your User ID can be found on CrossLinkTax.com. Just log in and go to Support > Manage Offices.

Logging in to CrosLinkTax.com

Your **Account Code / User ID** also serves as your username to log in to CrossLinkTax.com.

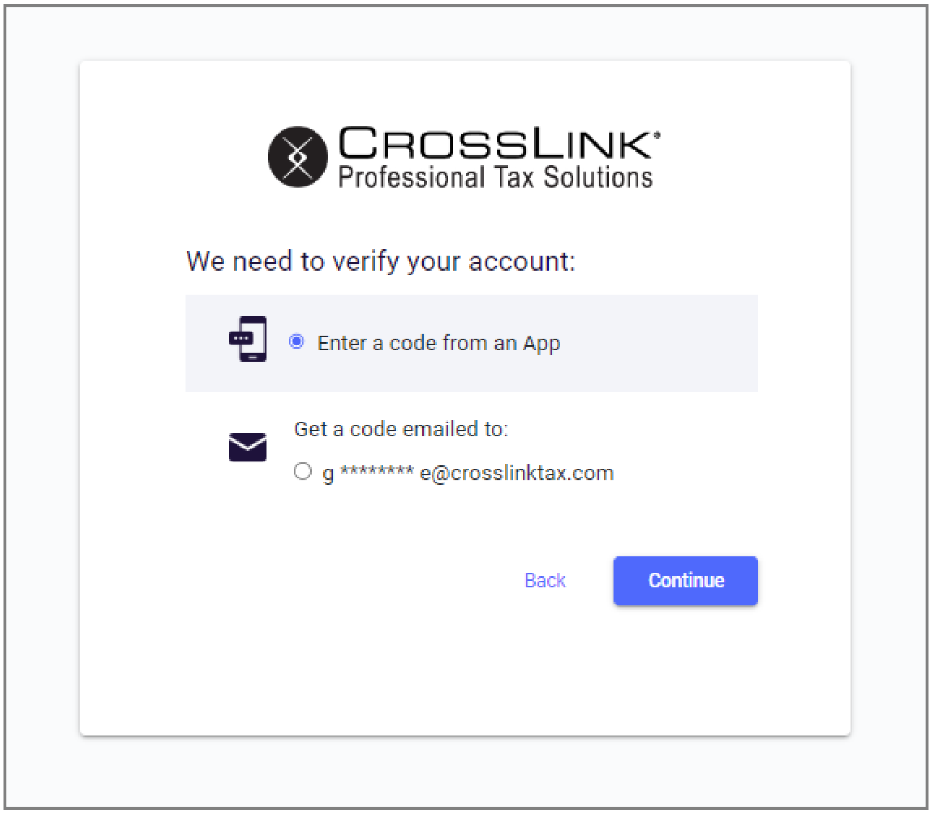
First time logging in? Click **Register your account** on the CrossLinkTax.com login page.

Were you using our desktop software last year?

If you made the switch to CrossLink Online, we'll help you transfer your data over. Just call us 800.345.4337.

Multifactor Authentication

CrossLink Online requires multifactor (2-step) authentication when you log in. This helps keep your account secure and complies with IRS regulatory requirements.



What is multifactor authentication?

Multifactor authentication requires that you use two different authentication methods in order to log in to CrossLink Online:

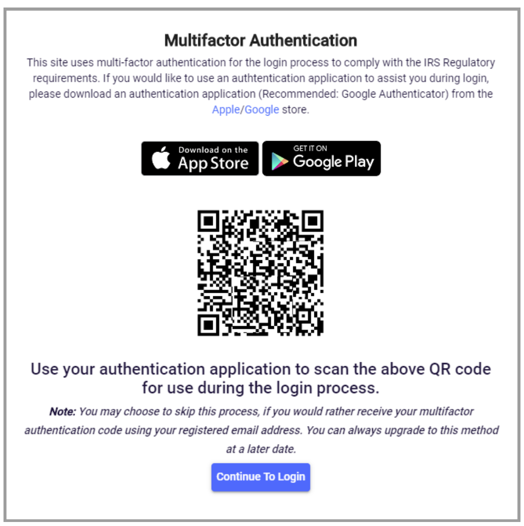
1. The first method requires you to enter your username and password.
2. The second method requires you to enter a security code (or confirmation key) using the Google Authenticator app or sent to your email.

   Please note that a new security code is used every time you log in to CrossLink Online.

How can I use my smartphone for multifactor authentication?

1. Download the Google Authenticator App to your smartphone.
2. Launch the Google Authenticator app and tap + to add a new account.
3. Tap **Scan a QR Code** on the app and align your phone's camera to scan the QR code that appears during your initial login process.
4. Type the 6-digit code that is generated on the Google Authenticator app whenever you want to log in to CrossLink Online.

Please note that the app will generate a new 6-digit code every 30 seconds. Make sure to use the 6-digit code before it expires.



Where can I find my QR code if I skipped that step?

Click **Generate New QR Code** in the profile menu after logging in.

Learn more about the profile menu in Navigating CrossLink Online.

Why use the Authenticator app instead of email?

Using the app is usually a faster and more convenient way to obtain new security codes. You'll have constant access to a new security code instead of waiting to receive an email.

Username Access Levels

The way in which your username is created will determine the areas you can view and access once you log in to CrossLink Online.

Access Level	Username created by	Access includes
Franchise Main	**CrossLink Support** after purchasing CrossLink Online. This login is the administrative login for all accounts and offices.	All areas and menus in CrossLink Online. Includes access to create new accounts and offices. Tax preparation functionality is limited.
Office Owner	**Franchise Main** when a new account or office is created. This login is the administrative login for a specific account or office.	All areas and menus for a specific account or office. Also includes extra ERO-related tools in the profile menu.
Additional logins	**Franchise Main** or **Office Owner** during the setup of an account or office.	Access can be customized with access levels.

Your access level will determine the areas and information you can access and view while using CrossLink Online. Access can be restricted even further with the use of Login Types.

Learn more about access levels in Crosslink Online Setup.

Enrolling for bank products

Why offer bank products?

- Taxpayers that opt for bank products can pay tax prep fees with their tax refund
- Tax prep fees are automatically deposited to your bank account
- Earn additional revenue through add-on fees and other additional services
- Differentiate your tax business from competitors by offering tax refund advances

Choose from one of these trusted financial institutions:

TPG REPUBLIC BANK refundo Refund Advantage!

Enroll your EFIN today by logging in to CrossLinkTax.com and browsing to Office Management > Bank Enrollment

Visit the CrossLink Banking Center to learn more.

Earn additional revenue with the eFile Fee:

Sign up to use our new eFile Fee when enrolling your EFIN for bank products and gain extra revenue for every electronically transmitted tax return.

Contact your CrossLink account manager to learn more.

Contact us

Need additional assistance?

We’re here to help.

CrossLink Online Support - 833.783.4253

CrossLink Sales and Support - 800.345.4337

Email us at support@CrossLinkTax.com