

# Management Dashboard: Adding a New userID & Setup

## Step 1: Request New User ID

Request a new userID by going to Support Tab> Manage offices within the CrossLink web-portal.

### Manage Offices

Search:

View Offices for Multi-Tier:

**Warning: Licenses will be locked for Offices that have filed returns**

Color Key:  
 Office disabled  
 Office enabled

## Step 2: Complete Bank Enrollment

### Manage Bank Enrollment

Search:

View Offices for Multi-Tier:

Color Key:  
 Has not been submitted since last update  
 Has been submitted since last update

#	EFIN	User ID	Company	Office Address	City	Sent Date	Bank	Status	Edit	Copy	Delete
1	313371	21906	TEST COMPANY NAME	123 FAKE ST	SEATTLE			Unsubmitted			

## Step 3: Mange Global Settings

Any configuration option that affects all the offices of the operation is labeled as a Global Setting. These options are not necessarily office specific. As an example, a single billing schedule may be configured and shared between multiple offices, or individual billing schedules may be configured for each office.

Global Settings include:

- Group Configuration; Organize similar offices into “Groups” for reporting purposes.
- Manage Billing; Create one or multiple billing schedules to share among offices.
- Manage Business Billing; Create one or multiple corporate billing schedules to share among offices.
- Manage Access Levels; Enables software permissions to be configured remotely for each installation of CrossLink 1040

**Manage Group Configuration**

Manage Group Config  [View](#)

Manage Billing Schemes  [View](#) View Groups for Multi-Tier

Manage Business Billing  [View](#)

Manage Access Levels  [View](#) [Create a new group](#) [Publish all valid groups](#)

Color Key:  
■ Has not been published since last update  
■ Has been published since last update

### Step 4: Manage ERO/Office setup

Office specific software configuration, such as contact and address information, Feeder or Transmit office type controls, and office-related program defaults are all completed in Manage ERO/Office Setup.

From the Office Management menu, select **Manage EROs/Office Setup**. The Manage Offices page displays. Each office is denoted by its UserID in the Manage Offices table. **The highlighted items are the required fields that should be completed for each UserID. The rest of the items, can be setup within the software.**

#### Manage EROs/Office Setup

Search:  [Search](#)

View Offices for Multi-Tier

Color Key:  
■ Has not been published since last update  
■ Has been published since last update

#	User ID	Password	Name	Office Type	Picked Up	Edit	Copy	Delete	Hide	All	ERO	Office	Rstr Fields	Rstr Forms	User Logins	ERO DB	Preparer DB	Referral DB	Status Codes
39	28691	B9F157C9			No														



ITEM	Web-Portal	Software
<b>CrossLink 1040 Configuration</b>		
UserID Information		
Billing/Fee Information		
Message Delivery		
Desktop Settings> Site Identifier		
Registration Settings		
Printer Settings		
Electronic Filing		
Overrides		

Defaults/General		
Auth/Audits		
Text Message		
Restricted Forms		
Restricted Fields		
User Logins		
Manage Databases: Office Management provides a way to remotely edit the EF Originators database, the Paid Preparers database, the Referral database and the User Status Codes database.		
<b>ERO Database</b>		
Preparer Database		
Referral Database		
User Status Codes		

### Step 5: Publish Data

Office Management configuration must be published in order for an office to download setup information into CrossLink 1040. Publishing tells the Central Site to make the configuration settings available the next time the office transmits

Note: Look for a Blue up arrow or a "Publish all" button.

#	User ID	Password	Name	Office Type	Picked Up	Edit	Copy	Delete	Hide All	ERO	Office	Rstr Fields	Rstr Forms	User Logins	ERO DB	Preparer DB	Referral DB	Status Codes
1	21906	JJGMXK1	CROSSLINK TRAINING	Transmit	No									6	1	3	1	1

OR

### EFINs for User ID 21906

Create a new EFIN record

Publish all valid EFINs

Color Key:

■ Has not been published since last update

■ Has been published since last update

EFIN 000091 updated for User ID 21906

#	EFIN	ERO's Name	Last Published	Last Updated				
1	<input checked="" type="checkbox"/> 000091	CROSSLINK TRAINING	06/18/20 08:41:32	06/25/20 06:05:29				

Select All

Deselect All

Copy Selected to Offices...

Cancel

Note: Copying to a user ID with existing EFINs will not overwrite duplicate EFINs.

## Step 6: Convert & Install Software

- 1) Download Prior year software
- 2) Run conversion tool for prior year, if applicable. (Pro-series, Drake, TaxWise, Tax Slayer)
- 3) Install Current Year Software (December)
- 4) Install drivers for signature pads/ scanner, if applicable