Remote Signature Job Aid



Remote Signature lets your clients sign anywhere and anytime.

You can add Remote Signature capabilities to your CrossLink software by following the steps below:



1. Sign up to use Remote Signature on CrossLinkTax.com

- 1. Log in to your account on CrossLinkTax.com
- 2. Go to Your Account > Agreements
- 3. Click **Remote Signature Service Fee** and **agree to the terms** of Remote Signature service after reviewing the agreement.

2. Enter your desired markup fee (optional)

EROs are charged \$5 per completed Remote Signature request. However, the Remote Signature fee can be charged to the taxpayer's invoice, and a markup fee of up to \$5 can also be used.

- 1. Log in to your account on CrossLinkTax.com
- 2. Go to Support > Manage Remote Sig Markup fee
- 3. Select your office, enter the desired markup amount (max of \$5.00), and then click **Update Selected Offices...** .

3. Set up your Wallet to pay for Remote Signature fees

EROs are required to add a credit card to the Wallet in order to use Remote Signature.

CrossLink Desktop:

- 1. Open CrossLink Desktop
- 2. Go to Setup menu > Wallet Setup

CrossLink Online:

- 1. Log into CrossLinkOnline.com
- 2. Go to Profile menu > Office Wallet

Need additional help? Contact us. 800.345.4337 Support@CrossLinkTax.com