

INDUSTRY LEADING INNOVATION

**For your high-volume
retail tax business**



We take the success of your tax business personally

At CrossLink, we work directly with our customers to find out what they need in order to have a successful and profitable tax season. These face-to-face meetings have led to the introduction of hundreds of customer-inspired innovations that make our industry leading tax software even more powerful and profitable for CrossLink customers.

Management Dashboard

A single management interface for office reporting that puts user and group summaries, financial totals, acknowledgements, daily activity, bank information, and more at your fingertips so that you can manage your business the way you want.

Electronic Signature Pads

Meet government disclosure requirements, minimize errors and save money by reducing the amount of paper used and stored each tax season. With Electronic Signature Pads, the tax payer's digital signature is securely bound to the document for which it was intended. (Paperless Office Solution)

Scan & Store

Improve efficiency and accuracy while saving time with each tax return. With built-in support for approved hand-held scanners, you are able to capture the taxpayer's source documents and information and associate them with the appropriate return in CrossLink – eliminating the need to photocopy and physically store documents. (Paperless Office Solution)

TextLink™

A simple, integrated way to send text messages to your clients' cell phones - directly through the CrossLink interface. With TextLink, exclusively from CrossLink, you can communicate with one or many clients with a single click.

Scan 2D Barcodes

Start a tax return and capture all of the data on the W2 and K1 by simply scanning the barcode with a CrossLink certified hand-held scanner. All of the captured information is automatically added to the return and the Client Data page – speeding the processing of returns and shortening the client interview process.

Secure Offsite Storage (S.O.S.)

Automatically backup tax returns and associated documents to a fully redundant, carrier-grade co-location data center with state-of-the-art security and backup technologies to ensure the quality and integrity of the stored data. (Paperless Office Solution)

“For 35 years, we have built long-term personal relationships with our customers by meeting with them at every opportunity, listening to their needs and delivering the solutions they require.”

Charles Petz, CPA

V.P. of Product Development



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