

MANAGEMENT DASHBOARD

Manage all aspects of your multi-office tax business from a single location



Manage All Aspects of Your Multi-Office Tax Business From a Single Location

The CrossLink Management Dashboard allows CrossLink customers complete control over, and visibility into, each sub-site within their organization. With the CrossLink Management Dashboard, the ability to setup sub-sites, review returns, and obtain valuable management reports is right at your fingertips.

Streamline Your Multi-Office Tax Operation

- ✓ Setup transmit and feeder sites
- ✓ Review both paper and e-File returns from each sub-site
- ✓ View and manage each return and source documents for quality assurance

Manage and View Status of Returns for Your Offices

Management Dashboard 1040 Reports:

- ✓ Group and User Summaries allow visibility into group structure and returns by user
- ✓ Financial Totals Report that shows returns by fee and refund type
- ✓ Bank Information Reports include total bank product counts and return status
- ✓ Daily Activity Reports show the number of returns that are Paper Filed, e-Filed, Acknowledged, and Completed

We take the success of your tax business personally.

As the owner of a high-volume retail tax business, your success is dependent upon speed, accuracy, and improved office efficiency. At CrossLink, we understand this challenge and make it our personal commitment to provide you with an on-time, stable, high-speed, and accurate solution – year after year.

Isn't it time you worked with a tax software company that takes your success personally?

 **CROSSLINK**[®]
Professional Tax Software

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