

Add a New Preparer/Login Job Aid

1 View the Office Dashboard

www.CrossLinkOnline.com

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

| NAME | ADDRESS | SIGNATURE | RETURN | OFFICE | OFFICE TYPE | ERO SIGNATURE |
|-----------------|--------------------------|-----------|--------|--------|-----------------|---------------|
| YOUR TAX OFFICE | 123 FAKE ST, SEATTLE, WA | 5 | 54 | 10 | TRANSMIT OFFICE | SIGNED |

Create New Office button and **View** button are also visible.

Tip: If using your Franchise Main username, make sure to click **View** next to the office to access the Office 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 a nickname for the preparer

4 Click Logins (Office Settings)

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

5 Complete the new Login

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

An email will automatically be sent to the new user in order to activate their login and create their password.