The Owner Access Manual

Dashboard: You'll see a snapshot of the real-time status of all of you offices here

You'll see how many returns, advances, and referrals that have been processed through your umbrella, as well as the exact dollar amount, year-to-date, per office.

You'll have the total amount of ACK's, Advances Processed & the Total Fee Deposits for your operations.

On the right side-panel, you'll see the Payout by Advance Type, Retention Ratio and the # of Return Customers processed so far this year. The panel also shows percentages of the returns in your umbrella that have Education Credit claimed, SCH C form attached, and the 'paid-out' ratio of your referrals.

Lastly there is a pie chart that displays the ratio of your marketing campaigns so it is easier to visually distinguish the best ROI to move forward.

Customers: A detailed list of the customers that you have served, along with their relevant information. You can also see their advance status and holiday status.

If you need to pull up a specific Customer's profile, we've included two action buttons on the right to assist

1. Clicking on the Magnifying Glass opens up the Customer Profile

2. Clicking on the Cancel button will void the Customer's profile and application

Call Log: Your Virtual Call Center! This module tracks every incoming call and provides an audio playback of the duration of the phone call so it can be reviewed for quality assurance or training purposes.

1. Lists are ordered by Office; and can be sorted by: Store Name, Source, Phone Number, or Label.

2. You can also click on the magnifying glass to listen to a Customer's Phone Call Log. This is especially handy if there are multiple phone calls under one Customer Profile

Phone Settings: How to Purchase Phone #'s and Configure Geo-Routing

Purchased Phone Numbers

1. To purchase phone numbers and begin a robust marketing campaign; click the green "+" sign to open up the new channel panel
2. Here, you will Label your Channel Name & Media Type for the Phone Number that is going to be purchased.

➢ Note: [The first # purchased will automatically be labeled "Default Campaigning Number"]

3. In the Search Number box, you can search by local area code by placing the local area code in the field. Searches can also be made by: Toll-Free Search or a Keyword Search such as (1-800-TAX-1040)
4. Under the Prompts section, this is where a greeting prompt can be configured that will play when the purchased phone # is dialed.
   a. You can either Type the message out manually that would be read mechanically to the caller, or an audio file (.mp3) can be uploaded so that would play instead.
5. Lastly, you can decide how you want the call to be routed
   a. Geo-Router
   b. Store Number
   c. Direct Phone Number
   d. Call Center
6. You can also turn off/on purchased phone numbers whenever convenient, by clicking the "II" (Pause) button; which will suspend the phone number.

➢ Note: [The purchased phone number will still be owned, this will not be affected by suspending the phone number.]

Geo-Routing

1. Once you have purchased a phone number, you can configure how the phone call is routed when it is called by a customer
2. To add a new Geo-Router configuration, click the green "+" sign in the bottom-right portion of the screen.
3. The new Geo-Router configuration will need to be labeled as well as a brief description of the configuration

4. Choose one of the two options under the Prompt menu:
   a. You can silently route calls to the default receiving number, which you then enter
   b. Or "Always prompt the caller, even if the call cannot be Geo-Routed" which can be selected if it would be preferred to have the called input their Zip-Code
   c. If the call is being routed by Zip-Code, it will then be asked to define how far in miles would the Geo-Router match caller locations to the closes store based on the Zip-Code they input
   d. Based on the previous parameters set, a direct phone number can be entered so that the call will be routed to it, in the case that the store is unable to pick up the call. Or the Geo-Router can be programmed to hang up the call
   e. Lastly, if two or more offices are in the same Zip-Code, how that particular call is routed can be further defined:
      i. Simultaneous: All phones from both offices will receive the call at the same time
      ii. Round Robin: Will rotate between phones in both offices until the call is answered
      iii. Sequential: The call will be assigned in a specific order that will cascade through until the call is answered
      iv. Not Selected: Will route the call to the originally programmed destination of the phone number

Account Settings: The menu is where Offices, and Employees that are assigned to those Offices are located. Permission settings; as well as the portal to upload Customer History and Retention records!

You can also Archive any offices or employees to later access in case they take a season off and come back at a future day, without the need to re-enter the information all over again

Offices

Offices can be added to the umbrella by clicking the green "+" button on the bottom-right portion of the page.

1. Enter the Cross-Link ID for this office, as well as the Office Name; EFIN; Call Routing Type for calls directed to this specific office; Phone Number for this office, and lastly, the Address and Zip-Code information

2. The Zip-Codes that this Office will be covering will need to be uploaded to the Application. A sample file displaying the format type (.csv Excel file) that will need to be followed
3. Select if this is the Main Office for this operation
4. Upload Documents that may need to be retrieved for quick access
5. Any Office's Zip-Code list can be viewed by selecting the Office using the magnifying glass
6. View, Edit, Delete, or Archive any Office by using the appropriate action buttons located to the right of the office

Employees

Before an Employee can be assigned to an Office, the Office that the Employee will be placed in will need to be created first.

The permissions of an employee can be established once the Employee's profile has been created. This is where certain permissions such as Printing/Re-Printing Checks, Access to Reports and Logs, etc. can be defined

1. To add an Employee, click the green "+" sign on the bottom-right portion of the page.
2. The Employee's PTIN, Name, Last 4 of SSN, etc. information will need to be entered.
3. Certain Permissions will need to be configured for each individual employee next such as: Print Checks, Re-Print Checks, Void Checks, can they see Reports such as Marketing and Email Reports, Call Log and Text Log Access and Customer Lead Menu Access
4. Important documents such as Driver's License, W-4, ID etc. can also be uploaded to the application for quick and easy retrieval at a moment's notice.
5. Lastly, the Employee's Role and and Office will need to be assigned to determine Employee access capabilities.

- Note: If an Employee is assigned to (Office #1), this employee will be unable to print checks from any other Office, until their Employee profile has been updated to the appropriate Office.

Referrals: This module is where the Referrer List is maintained and monitored.

- Note: It's important to note that the Referrer: is the person bringing the customer (Referred person) to the store and does not necessarily have to be a Customer in order to be a Referrer in the system!

1. To add a new Referrer (This cannot be done from an Owner Account) click the green "+" sign at the bottom-right portion of the page.
2. Enter Personal Information of the Referrer to be added, in the fields provided. Once done, click "Save"
3. In order for a Referred Customer to be added to a Referrer's Profile, the Referred Customer's return **MUST** have already been entered into TaxShield Software (TSS) from Cross-Link; or else the Referred Customer will **NOT** be able to be added to the Referrer's List.

- Note: This is because the system must verify that a return **MUST** have already been completed, submitted through the application and also meets the Criteria set by the Owner, in order to be added and have a Referral Check Released

4. To add a Referred Customer to a Referrer's List, click the green "+" sign at the bottom-right of the page which will pull up the Referrer's Profile List
5. Scroll to the bottom and click the "ADD REFERRAL" button, which will then ask for the SSN of the Referred Customer for verification that a return was processed for this specific customer and matches the records in your database.
6. Once the correct SSN has been entered, that particular customer will be added to the Referrer's Profile and will be unable to be added to any other Referrer's Profile moving forward.
7. A Referral Check in the name of the Referrer will then be made available in the "Checks Queue" menu for printing

- Note: Duplicate Referrer's with the same SSN will be rejected, as all of the accrued Referrals will be displayed in the profile of all Referrer's.

Checks Queue: This menu will give a real-time, updated list of the checks that have either been: Printed, Pending, Re-Printed, or Voided by **ANY** of the Offices within the Umbrella.

1. This can be sorted by; CHK#, Last Name, SSN, Amount, & Check Type
2. Printed Status: Check has been printed from one of the Offices
3. Pending Status: This check is awaiting verification and confirmation on the back-end of the Application and will be released once this process has been completed.
4. Re-Printed Status: This check has been re-printed
5. Voided: This check has been voided and cannot be cashed or re-printed

6. Print: When a check has been Released and is made available to print, this button will appear next to the check that is ready! (Cannot be printed from Owner Account!)
7. Test Print: Launches a test print page of a default check to the designated printer to ensure proper ink, checks, and other parameters are met before printing a real check