Add a Client

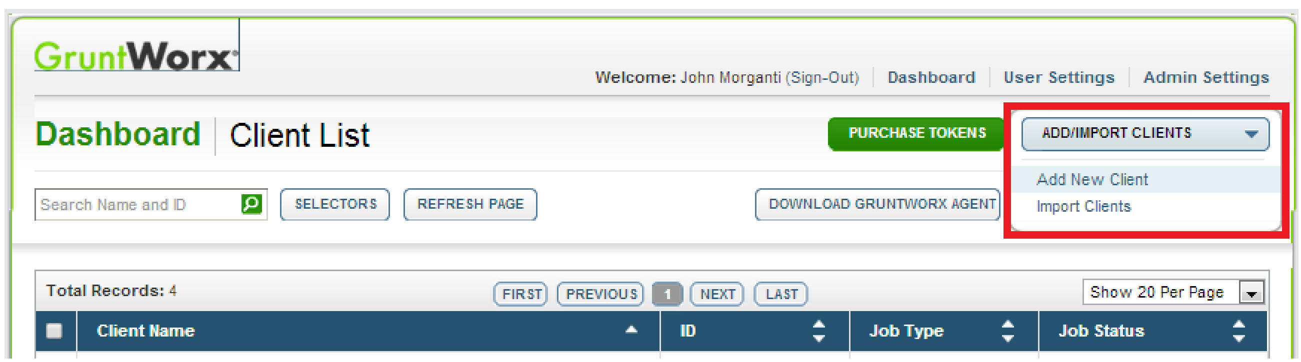
Before you upload a job into Gruntworx, you need to provide the name and Id of your customer. Adding client's is a four step process:

- **Step 1:** Move the mouse over the 'Add/Import Clients' drop-down
- **Step 2:** Use the mouse to highlight the 'Add New Client' option and click the left mouse button
- **Step 3:** Enter the required (*) information.
- **Step 4:** Click 'Save'

Add a Client (Illustrated)

Step 1: Move the mouse over the 'Add/Import Clients' drop-down

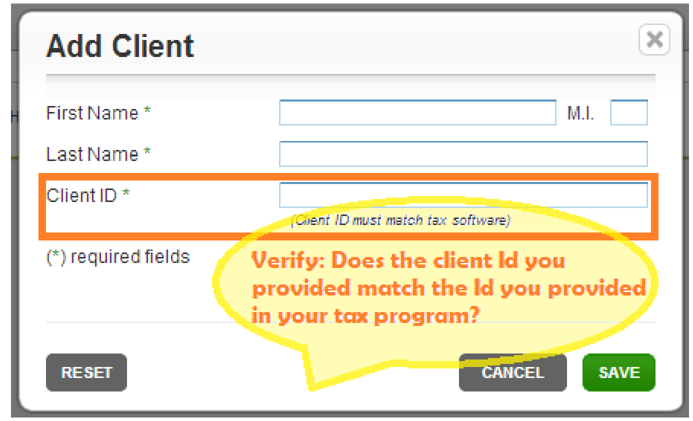
Step 2: Use the mouse to highlight the 'Add New Client' option and click the left mouse button



Step 3: Enter the required (*) information.

Step 4: Click 'Save'

Important For Populate Users:
You must make sure the Client ID you use in GruntWorx matches the ID assigned to the Client in the tax program



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Add more than one Client

GruntWorx will allow you to upload all of your client's at once through a spreadsheet. To do that, follow this process:

- **Step 1:** Create a spreadsheet (using Microsoft Excel) with all of your clients (Maximum 100) with the first name, middle initial (optional), last name, Client Id, email address, and account number for each client (one row per client). When finished, save the file in .csv format
- **Step 2:** Using GruntWorx, click the Add/Import Clients Drop-Down and select 'Import Clients'
- **Step 3:** Click the 'Add' button to send your Client to GruntWorx

Adding more than one Client to Gruntworx (Illustrated)

1. Create a spreadsheet (using Microsoft Excel) with the first name, middle initial (optional), last name, Client Id, email address, and account number for each client (one row per client). When finished, save the file in .csv format

2. Using GruntWorx, click the Add/Import Clients Drop-Down and select 'Import Clients'

3. Click the 'Add' button to send your Client to GruntWorx