

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.

Important Note: *Make sure the client id your provide matches the Id you provided in your tax program*

Step 4: Click 'Save'

The screenshot shows a web form titled "Add Client" with a close button (X) in the top right corner. The form contains three input fields: "First Name *", "Last Name *", and "Client ID *". The "Client ID *" field is highlighted with a red rectangular border. Below this field, there is a small note in parentheses: "(Client ID must match tax software)". A yellow callout bubble with a red border points to the "Client ID *" field and contains the text: "Verify: Does the client Id you provided match the Id you provided in your tax program?". At the bottom of the form, there are three buttons: "RESET" (grey), "CANCEL" (grey), and "SAVE" (green). Below the form, there is a line of asterisks: "*****".

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

Import Client

Select a CSV file to upload

No file chosen

The CSV must be in this format: *First Name, Middle Initial, Last Name, ClientID, Email Address, Account*

- The CSV file should not use column headers: only the client information, in separate columns, following the above format.
- Up to 100 clients can be imported with each CSV file.
- Email address and middle initial are optional columns and may be left blank.
- Account is required for GoSystem users, but optional for other tax software users.

Example:

	A	B	C	D	E	F
1	John	E	Smith	12345A	jsmith@gruntworx.com	Account1
2	Rowenus		Wagner	67891Z		