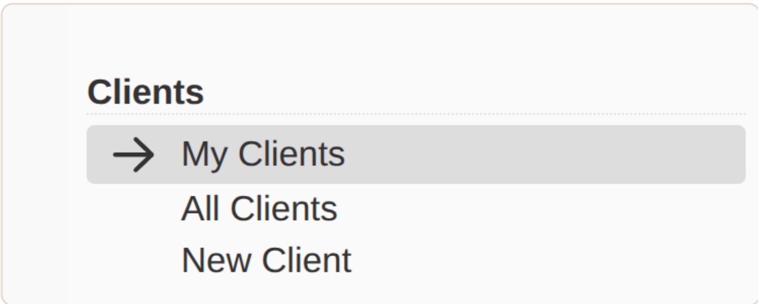
Clients

Create, find, and open client records — the starting point for every return.

The first screen in most products is your client list. The page is divided into a left-hand menu and a main content area.

THE LEFT MENU

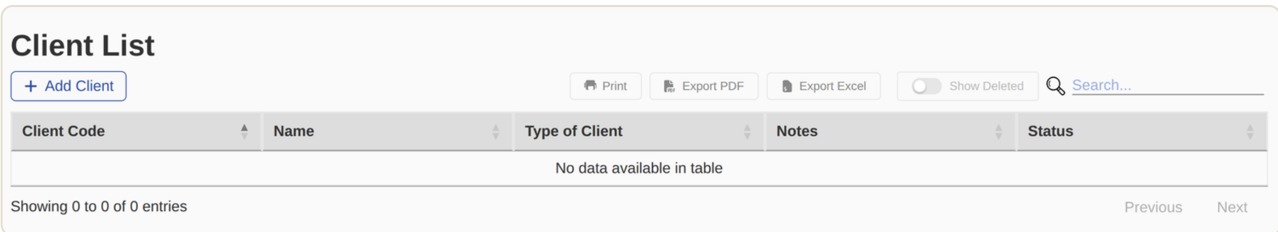


CLIENT OPTIONS IN THE LEFT MENU.

The Client section of the left menu offers three views:

- **My Clients** — clients associated with your user account.
- **All Clients** — every client on the customer account.
- **New Client** — create a new client record.

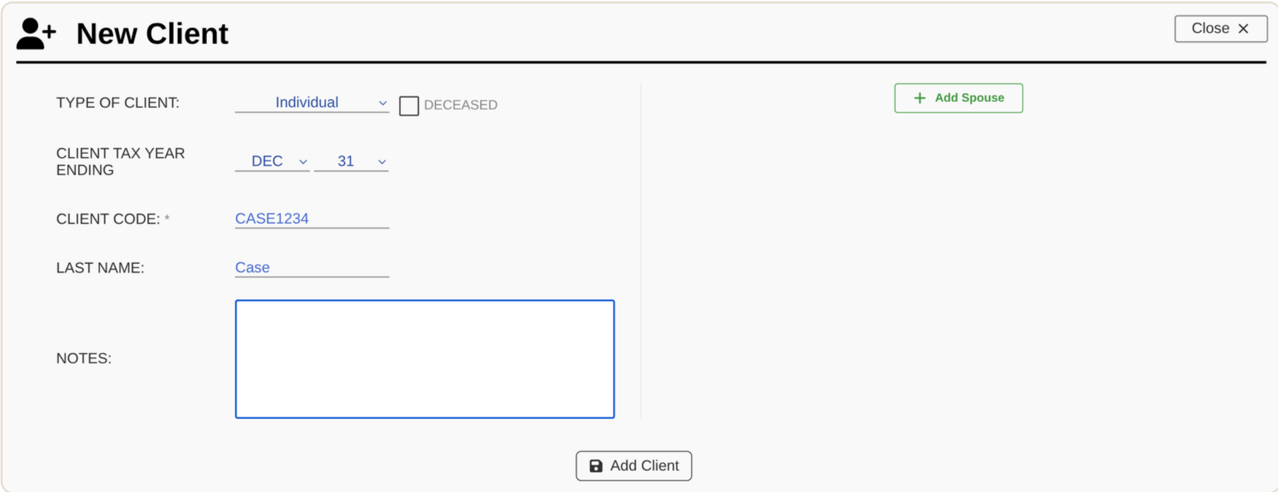
THE CLIENT LIST



THE MAIN CONTENT AREA SHOWS THE CLIENT LIST.

CREATE A CLIENT

Click **Add Client**, or choose **New Client** from the left menu, to open the new-client form.

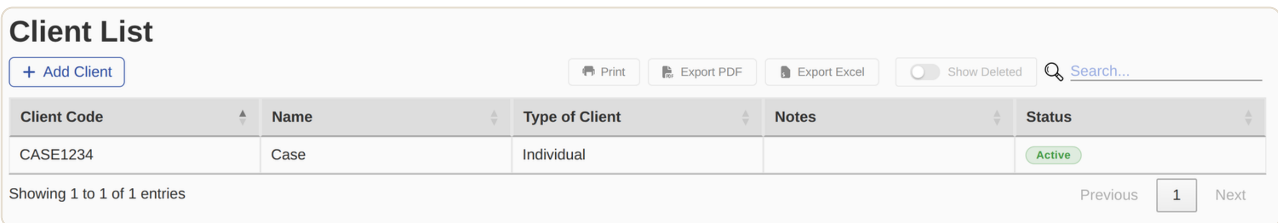


THE NEW CLIENT FORM.

Complete the form:

- **Type of client** — Individual, Corporation, Partnership, S Corporation, Non-grantor trust, or Estate.
- **Tax year ending** — the month and day the client's tax year ends.
- **Client code** — an internal code to identify the client. We recommend the first four letters of the last name plus the last four digits of the ID (SIN, SSN, EIN, etc.).
- **Last name / Company name** — for security, avoid entering full names.
- **Notes** — internal notes only; these never appear on any statement.

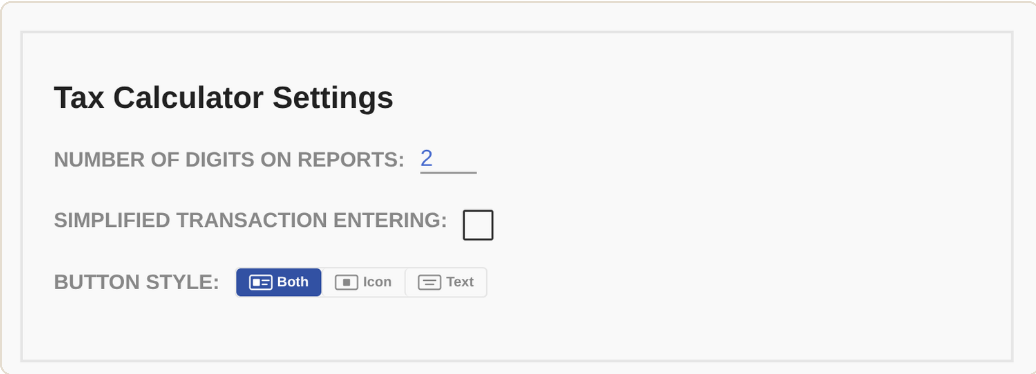
For individuals, click **Add Spouse** on this screen to create both accounts at once. When you're done, click **Save**.



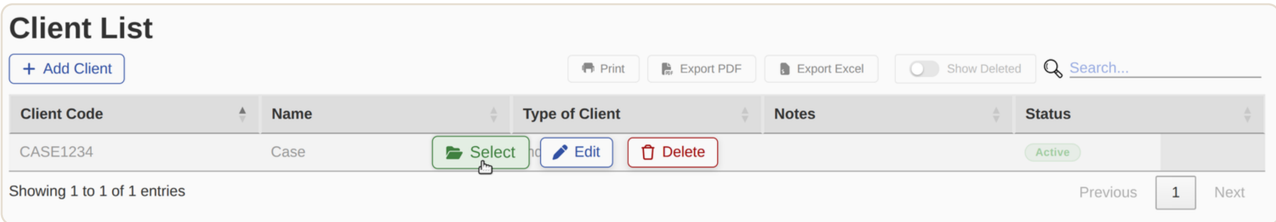
THE CLIENT LIST WITH THE NEW CLIENT ADDED.

SELECTING A CLIENT

How the per-row actions appear depends on your dashboard settings. Under **Tax Calculator Settings → Button Style** you can choose icons only, text only, or icon and text. With icons only, an edit icon appears at the right of each row; with the other styles, the actions appear when you hover over the row.



BUTTON STYLE IS SET IN TAX CALCULATOR SETTINGS.



HOVERING A ROW REVEALS ITS ACTIONS.

Each client row offers three actions:

- **Select** — open and work on the client account.
- **Edit** — modify the client information.
- **Delete** — mark the client as deleted and remove it from the list.

WORKING ON A CLIENT ACCOUNT

When a client account is selected, the left menu gains additional options — **Edit & Transfer Client** plus the options specific to the software you're using. In the 962 Election Assistant, those are **Investment**, **View Election**, and **New Election**.

> **ONE CLIENT, EVERY TOOL**

Tools in the Expat Tax Tools family share information. A client added in the 962 Election module is automatically available in our other tools, such as PFIC Pro and Gains Pro. The investment list is shared in the same way.