ADDING AND FILING FOR MULTIPLE CLIENTS

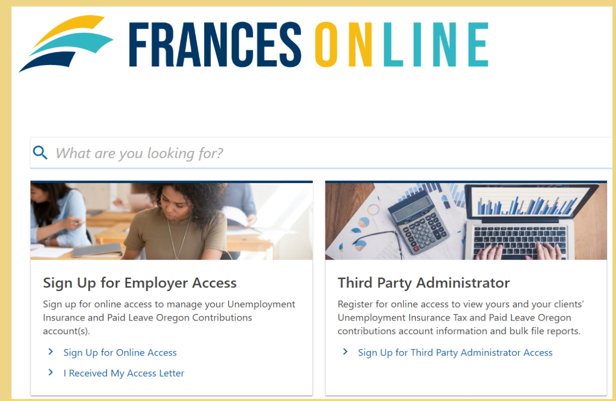
Get ready to Add New Clients (previously called affiliating) using the bulk method

Gather information for your clients:

- Log in with your credentials.
- From the More tab, navigate to the Multi-BIN Filing panel.
- Select "Add new client accounts to my business."
- Review the client validation information.
- Click the Template Specifications link.
- Download the Example Template by selecting Downloadable Template link.
- Click the "Bulk_New_Clients_Template" excel in the downloads pop-up window.
- Enter your clients' information in the template.
- Save the file.
- Follow the steps on the right to associate your clients' information and file their payroll reports.

Validating Programs: Unemployment Insurance, State Income Tax Withholding, Worker's Benefit Fund, TriMet Transit District Tax, or Lane Transit District Tax

Note: Client access may be manually added.



1

Associate Client Information

Beginning **September 6, 2022,** go to Frances Online.
Log in with your credentials.
Select "Add New Client Accounts To My Business" from the More tab.

2

Adding New Clients

Bulk Option

- Review the client validation information and select Next.
- Select the "Upload Spreadsheet" button.
- Select the "Choose File" button from the import window and navigate to your spreadsheet.
- Click "OK."
- The New Clients panel should populate with your clients' information.
- Select "Next", review the summary, and complete the process.

3

File Payroll Reports for your clients

In addition to filing original reports, you can also search by BIN to amend an individual clients' reports, and review current and historic rates.