Download and Install the GruntWorx Agent

The GruntWorx Agent is a utility that must be installed on the user's computer at the beginning of each new tax year. This is required only for users of ProSystem *fx* and UltraTax CS tax software who intend to use the Populate features of GruntWorx.

The Agent makes it possible for GruntWorx to retrieve the client data needed to match prior year records, reconstruct masked SSNs and determine whether the owner of each document is either taxpayer or spouse.
Once the submitted documents are processed, the Agent also enables GruntWorx to populate the extracted data from the Pointsheet, into the client tax file.

The GruntWorx Agent can be downloaded from any one of four locations – the Trial Registration page, the User Settings screen, the Dashboard or the Client Details Screen.

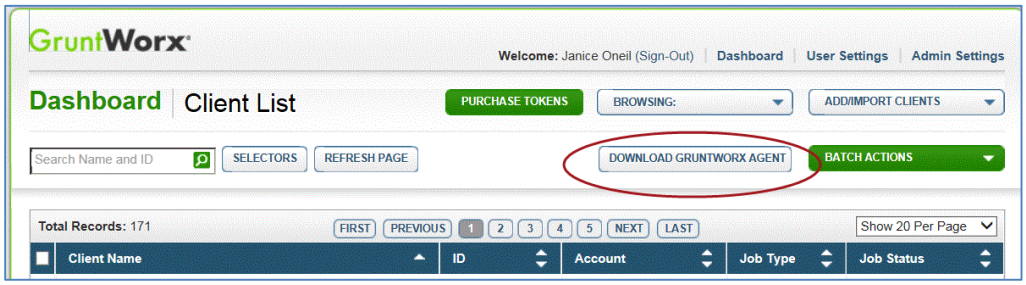
Important Note: Depending on your firm's IT policies, installation of the GruntWorx Agent may require administrator rights and/or the assistance of firm IT personnel. In some cases the User's anti-virus software should be temporarily disabled to allow a complete installation of the GruntWorx Agent software.

If you did not download the Agent when registering, you can download from the following locations:

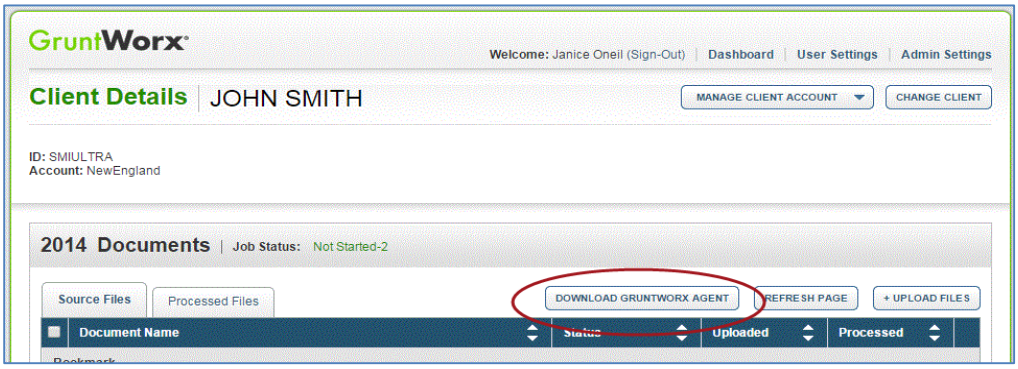
- The User Settings Screen

- OR the Dashboard

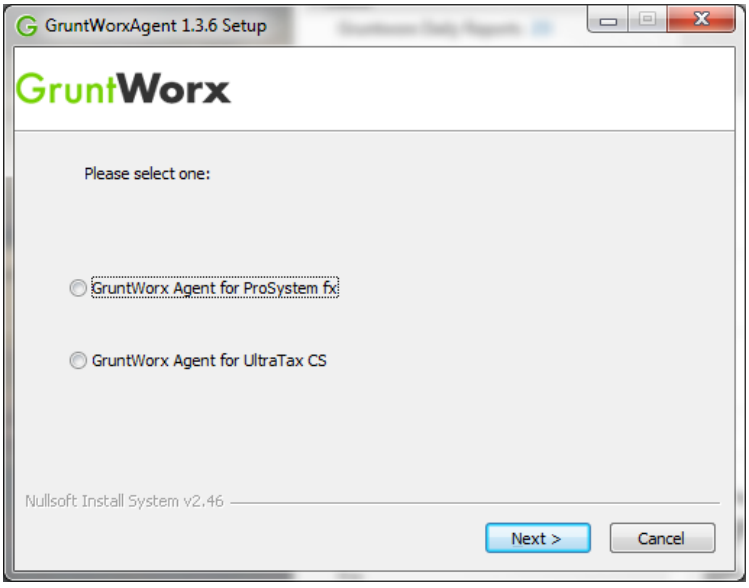
NEED HELP?
Call us: 877-830-6059
X2 for Sales
X3 for Support



- OR the Client Details Screen



Once downloaded, allow the program to make changes to your computer. Select the tax software you use (see below), then follow the prompts to finish the installation.



NEED HELP?
Call us: 877-830-6059
X2 for Sales
X3 for Support