# GruntWorx Populate for ProSystem *fx*™

### **Topics in this Quick Start Guide**

- Key steps for using GruntWorx in your tax practice
- How to submit jobs
- How to Populate ProSystem fx<sup>™</sup> client tax files with GruntWorx
- How to purchase credits and run usage reports

# GruntWorx Populate for ProSystem *fx*™

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## GruntWorx Populate for ProSystem *fx*™

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## Overview

The purpose of this document is to assist tax firms with initial GruntWorx set-up and to provide a quick reference for the ongoing use of GruntWorx to populate 1040 client tax forms into ProSystem  $fx^{\text{TM}}$  1040 tax software client files.

#### What you get:

- Your client's tax forms identified, labeled and organized in the order of a 1040 and returned in a bookmarked PDF
- A Pointsheet (spreadsheet) with all data extracted from the client source tax documents, including Trades, if selected, which with the use of macros, populates into the client tax file

For the purpose of this guide, references to "**jobs**" are references to submissions to GruntWorx of client source documents (PDF format) associated with a single taxpayer/spouse tax return.

**Scanning Note:** The quality of the scanned documents submitted to GruntWorx is vitally important to your firm's successful use of GruntWorx products.

This guide assumes the client's tax forms have already been scanned to PDF format **using the black and white or monochrome setting, at a minimum quality setting of 300dpi.** For best results, please read the <u>Best Practices for Scanning Tax Documents Guide</u>, available by calling 877-830-6059 and selecting either Sales (X2) or Support (X3).

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### New Firm Set-up

- 1. Set-up Firm, Add Accounts, Add Users
- Click Free Trial Link
- At Registration screen complete registration
- Accept master agreement
- Accept EULA
- At dashboard, select "Admin Settings" link at top right
- Click "Show" Preferences link
- Select ProSystem *fx*<sup>™</sup> tax software and firm-wide preferences

GruntWorx <sup>•</sup>	Welcome: Janice Oneil (Sign-Out)   Dashboard   User Settings   Admin Settings
Admin Settings Click to Show Preferences Select firm-wide settings for tax software and OCR overlay Admin Settings Tax System Thomson UltraTax CS CCH ProSystem FX Other	Select firm-wide setting for Trades and Repagination Default User Settings Set Gruntworx Trades as Default V Repaginate Organized Documents
Accounts Users Inventory Management C Account Name A75N	ADD NEW ACCOUNT ADD NEW ACCOUNT IRST (PREVIOUS) 1 (NEXT) (LAST) Contact Name Contact Email Contact Email

- At "Accounts" tab on the Admin screen, add Account/s (optional)
  - A "Default" account is supplied but can be re-named as required.
- At "Users" tab on the Admin screen, add users and assign passwords and account access
  - $\circ~$  Add, Edit, Delete, Activate and Deactivate Users in individual and batch actions.



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### Firm Set-up (continued)

- 2. Check Inventory; Purchase Credits (Administrator only)
- At dashboard, select "Admin Settings" link
- Select "Inventory Management" tab to see token and/or credit balances
- Select "Purchase GruntWorx" button to purchase credits with a credit card.

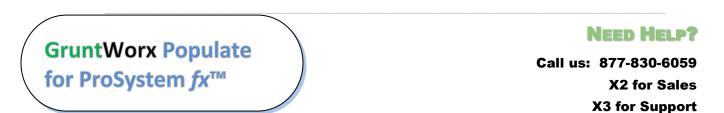
Grunt <b>W</b> a	orx <sup>.</sup>	Welcome: Chase Newell (Sign-Out)   Da	shboard   Org		Ad	lmin Setting
Admin Se	ettings					
Preferences	S shawibida				-	7
Fieleience		-	_			
Accounts	Users Inventory Management		G	et report	PURCHASE GF	RUNTWORX
		May 2017 •				
Date	RE		Credit Adjustment	Credit Balance	Token Adjustment	Token Balance
05-01-2017	beginning balance			4586.10		0
		no transactions				
aquantly Asked Out	estions Contact Support Help	© 2017 GruntWorx, LLC. All Rights Reserved			Privacy Pol	icy About U

**Note:** The Purchase GruntWorx button is also enabled on the Dashboard of users with Admin privileges. Users without Admin rights will see the button but will not be able to purchase.

GruntWorx <sup>•</sup>	Welcome: Chase Newell (Sign-Out)   Dashboard   Org LITE   User Settings   Admin Settings
lf you are an Orga	nize LITE customer please use the Org LITE link above.
Dashboard Client List	PURCHASE GRUNTWORX         BROWSING:           ADD/IMPORT CLIENTS
Search Name and ID SELECTORS REFRESH	AGE DOWNLOAD GRUNTWORX AGENT BATCH ACTIONS

**Tokens** – GruntWorx tokens are in the process of being retired. You may use your tokens until they expire but you may also convert your tokens to dollar credits. Please call Sales for details.

**Credits** - GruntWorx Credits are debited on a per page/per form/per trade basis giving the user more flexibility to control cost. Please call Sales for details, or you can use the PURCHASE GRUNTWORX button to access tools to help you estimate your needs.



## Configure ProSystem*fx*<sup>™</sup> Software

### 1. Proforma Settings in ProSystem $fx^{\mathsf{M}}$

**Note:** If a Trial will be conducted on a current client, a fresh version of that client should be rolled from the prior year <u>only after</u> Proforma settings are configured.

- In ProSystem *fx*<sup>™</sup> Office Manager, click "Configure Applications" tile
- Click "Tax Preparation" and "Configure" button
- click "Proforma and Organizer" and "Setup" button

Configure Tax Prepara	tion (1) 🛛 🔀
Signature Block Letters/Filing Instructions Print Options Pro Forma and Organizer Client Invoice Options Alternative Filing Options Miscellaneous Options 1040 Options 1041 Options 1041 Options 1065 Options 1120/11205 Options Configure Pennsylvania U History/Backup Options	Setup Jose Choose Proforma and Organizer and Click on Setup.
Copy From Another Of	fice Group

 Assure Proforma Interview destination option for Passthrough income is set as depicted below

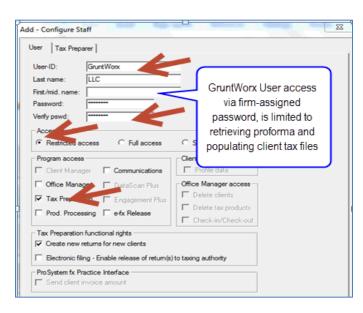
Pro Forma and Organizer Options	2 I
Pro Forma Organizer	1
Individual Pro Formation	Pro Forma
Select IRS	Pro Forma input forms for 2848
Miscella Schedule K-1	Pro Forma input forms for 8821
Social Secult	Pro Forma current year depr. for forced assets     Pro Forma tax preparation fee
Depreciable assets:	hed/Fid: Pro Forma federal and state estimates amounts
	C75 Pro Forma federal and state estimate amounts Passthrough income:
Pro Forma and Organizer	IRS Schedule K-1
Do not alphabetize charitable contributions	Default return options:
Resequence depreciation asset numbers	Override default return data with Pro Forma data (default)
	OK Cancel Help

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### Configure ProSystem fx<sup>™</sup> Software(continued)

- 2. Create GruntWorx ProSystem *fx*<sup>™</sup> User Account
- At ProSystem *fx*<sup>™</sup> Office Manager, click "Configure Staff" tile; click "Add" button
- New IRS password requirements have necessitated login changes. See below.
- Add User name and password; check restricted access; and Program Access for Tax
- The password will need to be changed and security answers added on first use
- We suggest setting first and last names as GruntWorx for an office with a single user. If each user will maintain their own password, Users should be created that are specific to those users, e.g.: GRUNTWORX SUZIE; GRUNTWORX A etc.



**Note:** If tax software is not on installed on a network, Proforma Settings and the GruntWorx user account should be established on individual users' desktops.

# GruntWorx Populate for ProSystem *fx*™

### **NEED HELP?**

### New User Set-up

Set Preferences, Download and Install GruntWorx Agent

- Login using credentials supplied by the Administrator
- Accept EULA
- From the Dashboard, select "User Settings" link at top right
- At "User Settings" screen, set user preferences

GruntWorx <sup>•</sup>		Welcome: Janice Oneil (Sign-Out) Dashboard User Settings Admin Settings
User Settings	Add email address for job completion and error notification. Set repagination preferences.	Preferences
Repaginate Organized DownLoad GRUNTWORX A		

- Download the GruntWorx Agent
- Once the download is complete, the user must click on the agent to install
- Select the radio button for the ProSystem *fx*<sup>™</sup> Agent
- Follow the prompts to complete the installation

**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 antivirus software should be temporarily disabled to allow a complete installation of the GruntWorx Agent software.

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

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## **Job Submission**

- 1. Add Client/s
- At Dashboard Click Add/Import Clients

Grunt <b>Worx</b> <sup>.</sup>		Welcon	e: Janice Oneil (Sigr	n-Out) Dashb	oard   Us	ser Settings   Admin	Setting
Dashboard Client List		PURCHASE TOK	EN S BROWSIN	G: ALL ACCOUNTS		ADD/IMPORT CLIENTS	•
Search Name and ID SELECTORS	REFRESH PAGE		DOWNLOA	D GRUNTWORX A		Add New Client Import Clients	
Total Records: 144	FIRST PREVIOU	s 1 2 3	4 5 NEXT	LAST		Show 20 Per Pag	ge 👻
Client Name	•	ID 🛟	Account	🗘 🛛 Joi	о Туре	Job Status	¢
ABT, HARRY		123765	TEST	-		Not Started	
Alexander, Charlie		CHARLIE	default	01	anize	Downloaded	•

Important: Client ID must be identical to the ProSystem fx Client ID used in the tax software.

**To add a single client -** on the "Add/Import Clients" dropdown menu click "Add New Client"; fill all required fields

**To upload multiple clients -** on dropdown menu click "Import Clients", follow instructions and template to create the csv import file

- 2. Job Submission Considerations
- A GruntWorx Populate Trial should be conducted on a fresh client return rolled from the prior to current tax year, or a newly added client

**Important:** If you intend to Trial with a current client, you should roll that return from the prior year <u>only after</u> you've configured the Proforma settings required in the previous section **Configure ProSystem***fx*<sup>™</sup> **Software**. This will insure the new documents are matched to prior year records without creating new ones.

- Minimum required fields in the client tax file: Taxpayer and Spouse name/s and SSN/s, Filing Status and Home State
- The User <u>must</u> be logged-out of the Client tax file during job submission and population

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### Job Submission (continued)

### 3. Upload Documents

The user may upload files in two places. From the GruntWorx Dashboard, click on the client name to access the Client Details Screen, or the user can upload files as each client is added.

GruntWorx	Welcome: Janice Oneil (Sign-Out)   Dashboard   User Settings   Admin Settings
Client Details JOHN TEST	MANAGE CLIENT ACCOUNT V CHANGE CLIENT
ID: TEST1234 Account: NewEngland	Or browse for files using the "UPLOAD FILES"
2014 Documents   Job Status: No Documents Source Files Processed Files	button REFRESH PAGE + UPLOAD FILES
Document Name	
There are	e no files available for processing.
Drag and	emments using the UPLOAD FILES button
drop PDFs	NO DOCUMENTS
Lii here <sup>b</sup> upload button!	NO DOLOMENTS
Frequently Asked Questions   Contact Support   Help © 2015 G	runtWorx, LLC. All Rights Reserved Privacy Policy   About Us

- On the Client Details Page, Drag and drop client's PDF files to the Source Files tab, or
- Click "Upload Files" button
- Browse and add files (as many as 15; maximum of 150MG per file)
- Click "Upload Documents" button

### 4. Submit Job

- Once documents are uploaded, at the "Client Details" screen click "PROCESS FILES" (green button, lower right)
- Select processing options (Organize or Populate; with or without Trades) and click "PROCESS FILES"

The GruntWorx Agent will then find the tax software and prompt for the GruntWorx login.

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### Job Submission (continued)

### 5. Get Proforma

Once the user clicks "PROCESS", the GruntWorx Agent will then access the client tax file to automatically retrieve the client Proforma information and submit the job to GruntWorx.

#### • GruntWorx Agent log in

IRS security requirements will require the user to log in every time the program is used, for both the submission and Population steps. **Do not log in as yourself.** You must log in using the GruntWorx user name and password you established during set-up. At first use, security questions will be presented and the user will be required to change the GruntWorx password.

User ID:	GRUNTWORX	
Password:	•••••	

#### • Multiple versions of the Client

Before the GruntWorx Agent retrieves the Proforma, if multiple versions of the client tax file exist in your tax software, you will be given the opportunity to select the version you want to process.

#### **Job Completion Notification**

If the user wants to be notified by email once the job is ready to be downloaded they should check that option on the User screen of the Dashboard.

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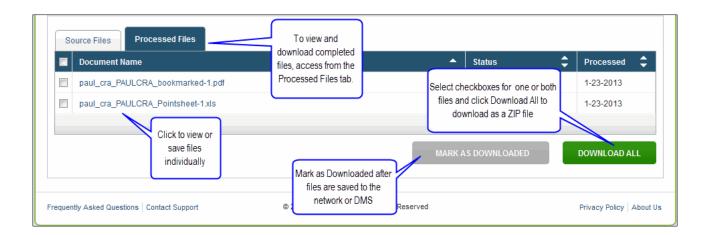
**NEED HELP?** 

### Job Submission (continued)

6. Download and Save Output Files

At the Dashboard, click the Client name associated with the "completed" job. The User is directed to the Client Details page.

- Under the "Processed" tab, the first file listed is the organized and bookmarked PDF
- The second file is an Excel workbook called the Pointsheet, used to populate the tax file



**Note:** Output files can be viewed from the GruntWorx "Processed File" tab but, to take advantage of the links between the Pointsheet and the Bookmarked PDF, the user must save the documents, either to their desktop or firm-designated file system.

To review the documents, it's easiest to use two monitors: opening the PDF image in one monitor and the Pointsheet in the other.

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## **Client Tax File Population**

#### 1. Enable Macros

Population by Pointsheet utilizes the Excel<sup>™</sup> macro feature. In some cases, the user's Security settings will require the enabling of macros, as indicated by the "Security Warning" at the top of the Pointsheet.

0	Security War	<b>ning</b> Automati	c update of links h	as been disable	d Opti	ons	
	P19	- (*	$f_{\mathbf{x}}$			N	
	А	В	С	D	E	F	G
1	1 Tax Payer: JOHN Q CLIENT						
2	Tax Year	: 2012					1

- Click "Options" on the Security Alert
- On the "Security Alert Macro" pop-up, select "Enable this Content" and "OK"

### 2. Review the Pointsheet with the Bookmarked PDF

• Review the Diagnostics sheet (first worksheet) for comments related to the job. Click on hyperlinks to go to the page in the Bookmarked PDF.

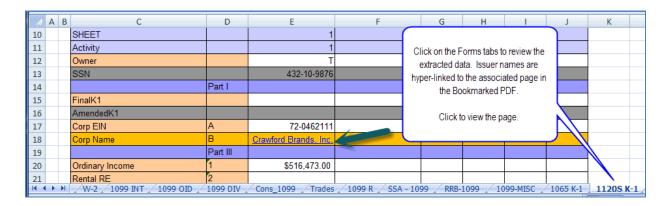
Diagnostics -				
-	ad but wat autra at ad far warne	lation		
	ed but not extracted for popu			
Forms	classified but not populated by	y GruntWorx		
	- <u>1099 SA -</u>			
	- <u>1099 PATR</u> -			
Incon	sistent Tax Year - does not pop	ulate		
	- <u>1099 INT - page 6</u>			
	-			
Poor	Quality - No data extracted			
	<u>1041 K1 - page 32</u>			
	eview required			
Missi	ng owner/SSN - correct and unc	heck prior to po	pulation	
	- 1099 INT - FEDERAL NATIONAL	L MTG. ASSOC.		
Incon	sistent SSN - correct, add Owne	er (TSJ) and un-	check to populate	
	765-44-1234 1099 INT - page 8			
Poten	tial duplicate/corrected docume	ents detected - r	nake edits, verify match	prior to population
	<u>1099 DIV - r 1099 DIV - page 10</u>			
Custo	mer Diagnostic Notes			
	- <u>1099 INT - F</u> More than one for	m/record on this p	age - Only one form/record	extracted
Form	/Field Level Check Data Error	rs - Resolve pri	or to Population	
	Invalid data types detected	d - correct prior	to population	
	- Sheet[10! Link			

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### **Population** (continued)

- Click on each form tab to review/edit the extracted data. As the user becomes more familiar with the output, he/she may opt to skip this step.
- Click the blue hyperlinks to see the page in the opened Bookmarked PDF
- Use "X" to set "Do not Populate" for worksheets, records and individual trades not required for population

Note: Edit, add, delete or ignore records, but a new field cannot be added for population.



### 3. Populate the Client Tax File

When the edit/review step is complete, from the Diagnostics tab

- Click on "Check Data" button to verify field formatting is OK
- Errors, if any, noted at the bottom of the Diagnostics sheet, should be fixed .
- Click on the "Populate" button to populate the tax data into the client file
- The Agent will find the tax software and prompt for the GruntWorx login . Do not log in as yourself. You must log in using the GruntWorx user name and password you established during set-up. If more than one version of your client exists in the tax software, you will be prompted to select the version you wish to populate.
- The Agent will then populate the data into the client file

Tax Payer: JOHN Q CLIENT	
Tax Year: 2012	
Client Id: CLIENTJ	Check Data Populate

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## Reset Failed Job

Occasionally the user will receive notification of a failed job. To try again, using the same ClientID, a **Reset Client** function is available for both Populate and Organize jobs.

lient Details test rest		DELETE-RESET-RESUM	GO TO CLIE
TEST count: default		Edit Client Delete Client Reset Client	
2015 Documents   Job Status: Failed   Job Type: Organ	nize	DOWNLOAD GRUNTWORX AGE	NT REFRESH PAGE
Source Files Processed Files Document Name	≜ Status		
			- Processeu -
Added by Firm			
Added by Firm PasswordProtected.pdf	Failed	1-27-2016	-
	Failed	1-27-2016	JOB CONCLUDED

- The user should access the Client Details Page and click the DELETE/EDIT/RESUBMIT button at upper right.
- Select "Reset Client" to remove the document/s
- Confirm Reset to set the job as a "new job"

Res	et Client
	Are you sure you want to reset this client?
	All documents will be deleted!
	CANCEL

- Fix the error, e.g.: Print and scan for password protected documents
- Upload documents and "Process".



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## Job Resubmission

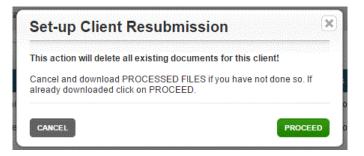
To accommodate client's missing documents and/or extensions, GruntWorx allows resubmission for **Populate** jobs. Resubmission is not available for Organize jobs.

A new Pointsheet and Bookmarked PDF will be returned.

• The user should access the Client Details Page and click the **DELETE/EDIT/RESUBMIT** button at upper right.

GruntWorx <sup>•</sup>	Welcome: Janice O'Neil (Sign-O	ut)   Dashboard   U	ser Sett	tings   Admin Set
Client Details John Smith		DELETE-RESET-RES	SUBMIT	GO TO CLIE
		Edit Client		
: SMIULTRA		Delete Client		
ccount: default		Prepare for Resub	mission	
2015 Documents   Job Status: Completed-2 Source Files Processed Files				
	•	Status	\$	Processed
Source Files Processed Files	•	Status Completed	\$	Processed
Source Files Processed Files Document Name	•		\$	
Source Files  Processed Files  Document Name John_Smith_SMIULTRA_bookmarked-2.pdf		✓ Completed	-	1-26-2016

- Select "Prepare for Resubmission" to remove the document/s
- Confirm Resubmission to delete the output of the client's original job

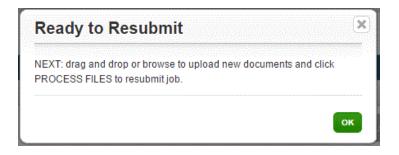


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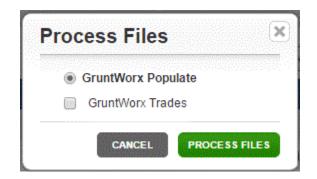
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• The user is instructed to upload or drag and drop documents to the screen and to click on the process button as he did for the original job



• Resubmission options are limited to Populate or Populate with Trades.



• When the job is complete, download the documents, review and populate as you would a new job.

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## Reports

### Admin reports

Available only to users with Admin rights, access a usage snapshot from the Dashboard, selecting the Admin Settings tab, then the Inventory Management tab.

GruntWc	DLX.	Welcome: Chase Newell (Sign-Out)   Da	ashboard   Org	LITE   Use	r Settings   Ac	lmin Setting:
Admin Se	ettings					
Preferences	3 show/hide					
Accounts	Users Inventory Management			GET REPORT	PURCHASE GI	RUNTWORX
		May 2017 •				
Date	RE		Credit Adjustment	Credit Balance	Token Adjustment	Token Balance
05-01-2017	beginning balance			4586.10		0
		no transactions				
requently Asked Que	estions Contact Support Help	© 2017 GruntWorx, LLC. All Rights Reserved			Privacy Po	licy About U

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### **Reports (continued)**

Select "GET REPORT" to download a spreadsheet with all details of GruntWorx activity to date.

• Sample Admin Report

A	L	• : :	× 🗸	<i>f<sub>x</sub></i> firm	n_id											
	А	В	С	D	E	F	G	н	1	J	к	L	м	N	0	Ρ
1	firm_id	job_id	job_date	clientid	taxpayer_	page_nun	r page_cost	extracted	trades_nu	trades_co	job_cost	tokens_us	ed			
2	310	231445	4/10/2017	3669IT	<b>Bug Patro</b>	15	2.25	4	0	0	6.25	0				
3	310	233030	4/14/2017		Dateless	55	2.75	0	0	0	2.75	0				
4	310	233156	4/17/2017	TEST1	John Doe	56	8.4	7	18	2.7	18.1	0				
5	310	233158	4/14/2017	SMIULTRA	JOHN Doe	56	8.4	7	18	2.7	18.1	0				
6	310	233159	4/14/2017	SMI123	john Doe	56	8.4	7	18	2.7	18.1	0				
7																
8																
9																
10																
11																
12																
13																

#### User reports

User-based reporting on both Job and Trades Usage is available on the lower half of the User Settings page. Select one or both Report Types, by date range to download spreadsheets with detail on trades usage and/or detail and status on all jobs submitted.

GruntWorx <sup>•</sup>	Welcome	(Sign-Out)   Dashboard   User Settings   Admin Settings					
User Settings	User Settings						
	Preferences						
Send Email Notification of Job Completion to:							
Repaginate Organized Documents							
DOWNLOAD GRUNTWORX AGENT							
		UPDATE					
	7						
	Reports						
Report Type:							
Trades Usage ending: 10/02/2013							
		GET REPORT					
Frequently Asked Questions   Contact Support   Help @201	13 GruntWorx, LLC. All Rights Reserv	ved Privacy Policy   About Us					

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### Reports (continued)

• Sample Trades Report

A	Α	В	С	D	E
1	Client #	Client name	Completed	# Trades	Pro or Org
2	5066EG	John Smith	3/6/2014 7:39	0	Populate
З	CRAPAUL	Paul Crawford	3/5/2014 13:57	25	Populate
4	03158Z	test ignorejob	3/14/2014 20:55	14	Populate
5	FRACAS	Mary Fracas	6/3/2014 15:54	200	Populate
6	GALINA2	TEST Another	6/4/2014 12:06	40	Populate
7	KEEG7291	Tax Payer	6/4/2014 15:52	0	Populate
8					
9					
10		Reporting from	1/1/2014		
11		Reporting to	8/6/2014		
12		Report generated	8/6/2014 17:11		

• Sample Jobs Report

			6	D	F
	А	В	С	D	E
1	Client #	John and J	Submitted	Completed	Status
2	CHARLIE	Charlie Al	1/1/2013 10:34	1/1/2013 10:53	Completed
3	DAVE	Dave Alex	1/1/2013 10:37	1/1/2013 11:16	Completed
4	BEL9953	Bob and S	1/1/2013 10:38	1/1/2013 11:19	Completed
5	ABC	Harry and	1/1/2013 10:39	1/1/2013 11:24	Completed
6	0975EB	Mary and	1/19/2013 11:10	1/19/2013 11:17	Completed
7	3866BJ	John Smit	1/22/2013 11:25	1/22/2013 11:45	Completed
8	1035EB	John Smit	2/1/2013 21:46	2/1/2013 21:59	Completed
9	40221X	Dave Alex	3/13/2013 7:11	n/a	Failed
10	1939DW	Bob and S	3/13/2013 7:15	3/13/2013 7:18	Completed
11	01025X	Harry and	3/16/2013 8:24	3/16/2013 8:33	Completed
12	0975EB	Mary and	3/21/2013 6:55	3/21/2013 7:06	Completed
13	0975EB	John Smit	4/4/2013 7:47	n/a	Failed
14	0975EB	Mary and	4/4/2013 7:54	n/a	Failed
15	0975EB	John Smit	4/4/2013 8:06	4/4/2013 8:38	Completed
16	6644BD	John and J	6/7/2013 16:14	6/7/2013 16:34	Completed
17	AUNT	Mary Barro	8/26/2013 11:16	n/a	Failed
18					
19					
20		Reporting	1/1/2013		
21		Reporting	10/2/2013		
22		Report ge	10/2/2013 10:33		

GruntWorx Populate for ProSystem *fx*™

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

**NEED HELP?** 

## Appendix

#### **Chrome User Instructions:**

At first submission, users of Chrome must tell the browser what to do with the Proforma file collected from the tax software. Once set, the user should not have to set the action again.

After you select "Process", look for the download button in the lower left of your Client Details page.

- 1. Click on the arrow at the right of the button to reveal a dropdown
- 2. Select "Always open files of this type"
- 3. Double-click the button itself to upload the proforma

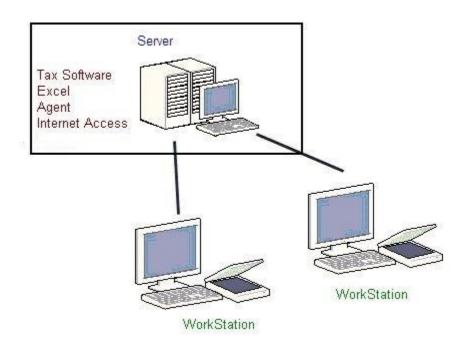
	ID: GALINA2 Account: A75N
	2014 Documents   Job Status: Not Started-2
	Source Files DOWNLOAD GRUNTWORX AGENT REFRESH PAGE + UPLOAD FILES
	Document Name     \$ Status     Uploaded     Processed     \$
	Added by Firm
	Input1.pdf     Not Submitted     9-15-2015     -
3	Like Drag & Drop? Right click th 1 d button! UPLOAD BOOKMARK FILE PROCESS FILES
	Erequiently Contact Support   Help @ 2015 GruntWork, LLC, All Rights Reserved Policy   About Us
BIST Another GAUM	Lpc
Sec.5	Open Always open files of this type
	Show in folder
	Cancel 2

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## Appendix (cont)

#### GruntWorx Remote Desktop/Citrix Server Installation Guide



Workstations connect to a server via Citrix OR Remote Desktop.

Each user workspace on the server requires access to:

- Tax software
- Microsoft Excel to view and populate the Pointsheet
- GruntWorx Agent to interact with the tax software both job submission and population
- Internet Access to submit to GruntWorx, and download the bookmarked PDFand Pointsheet

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