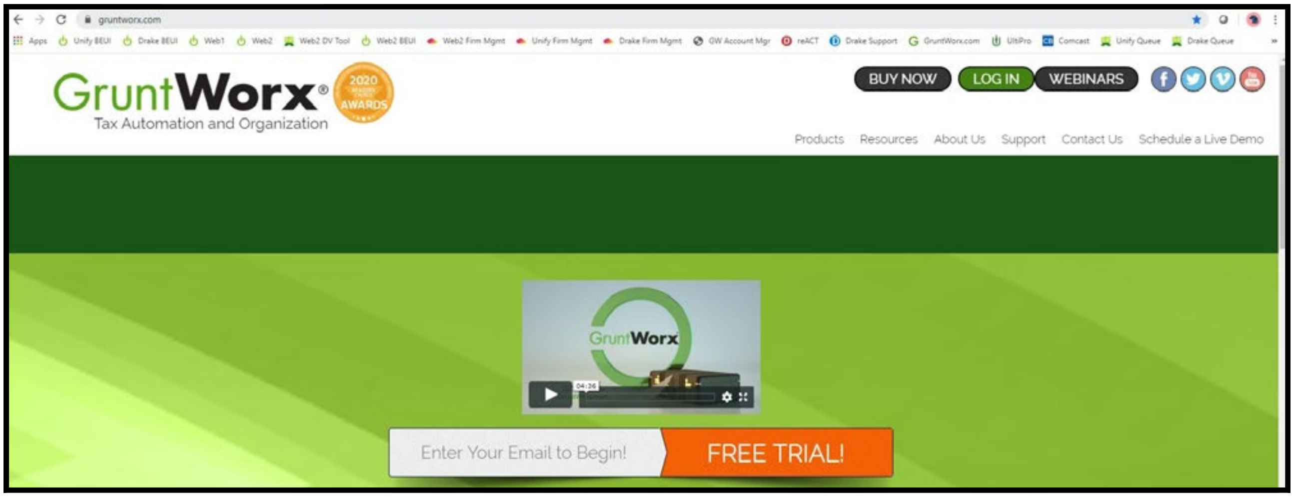
Here are instructions to help GoSystem users sign up for a Free Trial of GruntWorx and instructions for how to use GruntWorx with Thomson GoSystem tax software. **Please note that GoSystem users must contact GruntWorx prior to the submission of the firm's first Populate job. Access to web services at Thomson Reuters must first be enabled.** Call 877-830-6059 X2 for Sales X3 for Support

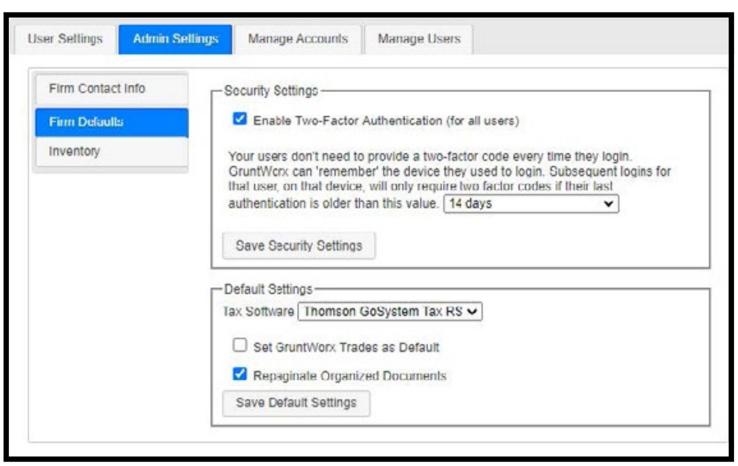


How to Set up a GruntWorx Account

- ➔ From the GruntWorx.com homepage, enter email address and click **FREE TRIAL!**
- ➔ Complete the Registration
- ➔ Look for the sign-up email including the temporary password
- ➔ Log in to the GruntWorx Portal and set up new password
- ➔ Read and accept the master agreement and EULA
- ➔ In the top right-hand corner of the GruntWorx Dashboard, click on **Settings**

- ➔ Select the **Admin Settings** tab, then **Firm Defaults**

⚠ **TIP:** Only users with Administrator rights have access to Admin Settings.



Security Settings

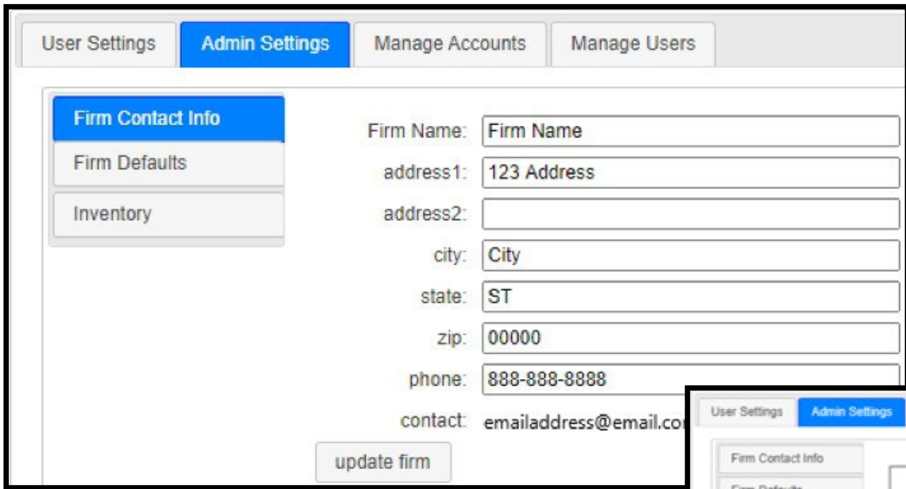
- Set firm-wide **Two-Factor Authentication** settings here

Default Settings

- Select **Thomson GoSystem Tax RS** as **Tax Software**
- Set firm-wide job preferences:
  - ☑ Option to have Trades Add-On as default
  - ☑ Option for Repagination as default
- Click **Save Settings** after making any changes

⚠ **TIP:** Repagination is where GruntWorx Organize sorts the pages submitted in the order of the 1040.

➔ **Admin Settings** also provides **Firm Contact Info** and **Inventory** settings

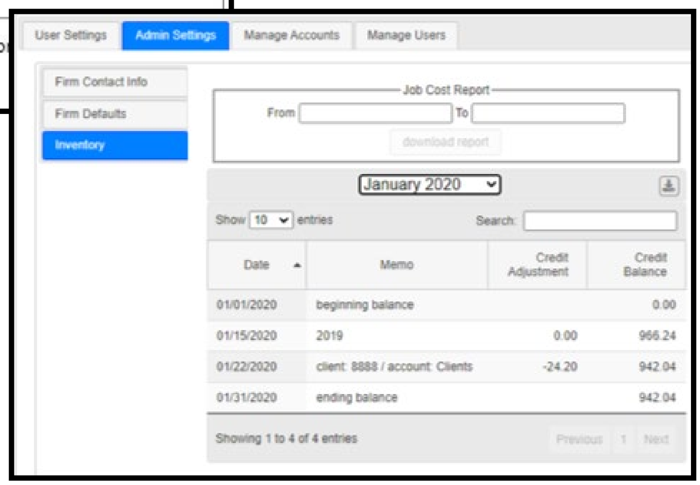


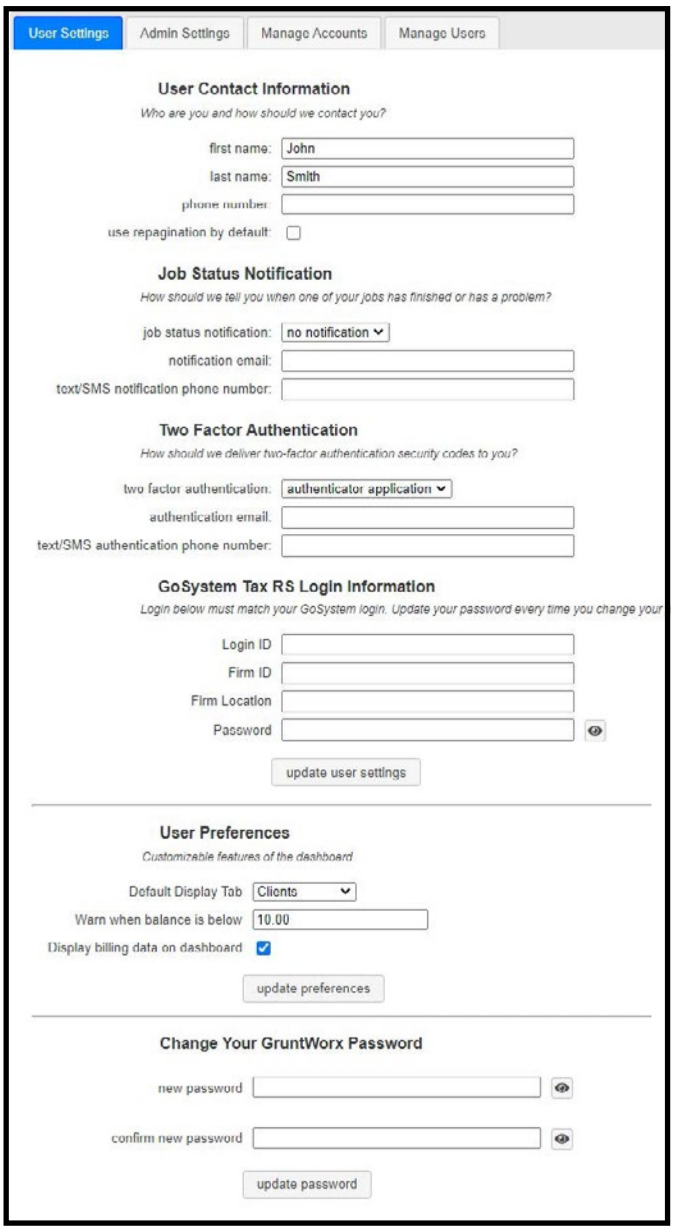
Firm Contact Info

- Update any firm details
- Click **update firm** to save changes

Inventory

- Provides detailed job history and the account's current balance
- Run a Job Cost Report by selecting start and end dates and clicking **download report**





➔ Other Settings are **User Settings, Manage Accounts,** and **Manage Users**

⚠ **IMPORTANT:** Admins must add users and give account permissions in order for others in the firm to have access.

User Settings

- Update **User Contact Information** at any time**.** This is used for GruntWorx to report any issues with job submissions**.**
- **Job Status Notification** preferences can be changed to text, email or no notifications
- Set the user's **Two Factor Authentication** settings
- Enter Login ID, Firm ID, Firm Location and Password, **identical to GoSystem Tax RS**
- Click **Update User Settings** after making any changes
- Under User Preferences, the user can change the **Default Display Tab**
- A **Warn when balance is below** field allowing the user to be alerted when the account balance reaches the selected amount**.**
- Admin users will have a check box to have the **billing data displayed on the dashboard**

⚠ **TIP:** This is a great way to see individual costs at a glance

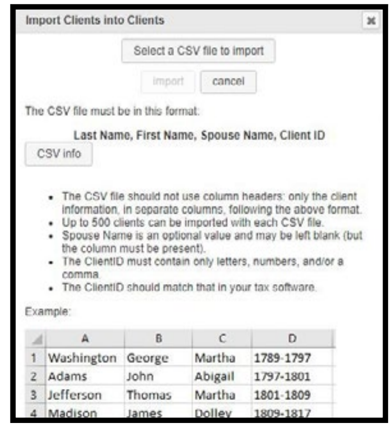
- **Change Your GruntWorx Password** here

⚠ **TIP:** Passwords expire every 90 days

How to Add Clients

- ➔ From the **GruntWorx Dashboard**, click on an icon to add client(s)

- ➔ To add a **single** client:
  - Click on the icon and fill out all required fields
- ➔ To add **multiple** clients:
  - Click on the icon to upload a .csv file
  - Follow the instructions and template to create the .csv import file



⚠ **TIP:** Trial users should have a **fresh client return rolled** from the prior tax year to current or make a new client in the GoSystem Tax RS tax software.

⚠ **IMPORTANT:** Each Client ID and Account number **must be identical** to the GoSystem Locator and Account number in the GoSystem Tax RS tax software.

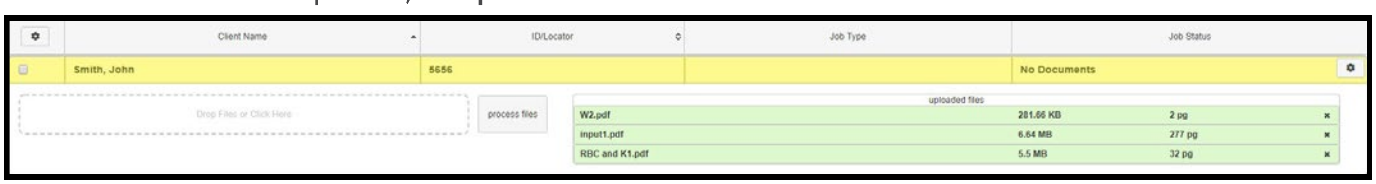
⚠ **TIP:** When adding clients, make sure they are being added under the appropriate account tab.

How to Submit Jobs to GruntWorx

- ➔ From the **GruntWorx Dashboard**, click the client's name to open the client details pane
- ➔ To upload the client's source documents: either drag-and-drop PDF files, or click in the field with the dotted lines to browse the computer for files

⚠ **IMPORTANT:** Add up to 15 PDFs per client, 150MB per PDF.

- ➔ Once all the files are uploaded, click **process files**



- ➔ Two boxes will appear
  - Choose either **Populate**, to have all the data extracted and imported into GoSystem and have it Organized into a bookmarked PDF or **Organize**, to only receive a bookmarked PDF, labeled with Payer Names.

  - Then choose to either **Extract Trades**, or have **No Trades** extracted.
- ➔ Once selections are made, click **Submit**
- ➔ When the job is complete, a job completion **text message or email notification** is sent to the user

⚠ **TIP:** If a client provides their Capital Gains transactions or trades in excel format, do not submit to GruntWorx. Import the transactions directly into the return from within the tax software.

When a Job is Complete

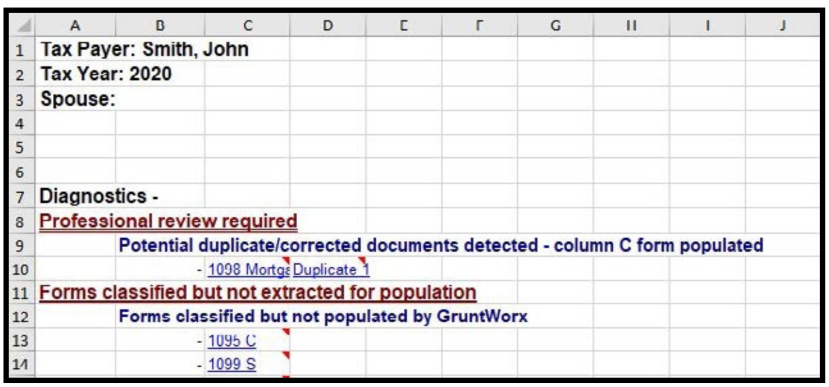
- ➔ After receiving a Job Completion notification, log back in to the GruntWorx Dashboard
  - If the site stayed open in the browser, the page will need to be refreshed, and sign in again
- ➔ Click on the client's name—notice the Job Status is **Completed**

⚠ **TIP:** When the status is **Completed**, it means the extracted data has been imported into the client's return within the GoSystem tax software. If **Trades** was selected during submission, the user will populate the transactions into the client's tax file utilizing **GoSystem's Capital Gains Import** tool.

- If Organize was selected, there will be a PDF named **bookmarked.pdf**
- If Trades was added to Organize, there will also be a **Pointsheet.xls**
- If Populate or Populate with Trades was selected, there will be a **bookmarked.pdf** and a **Pointsheet.xls**

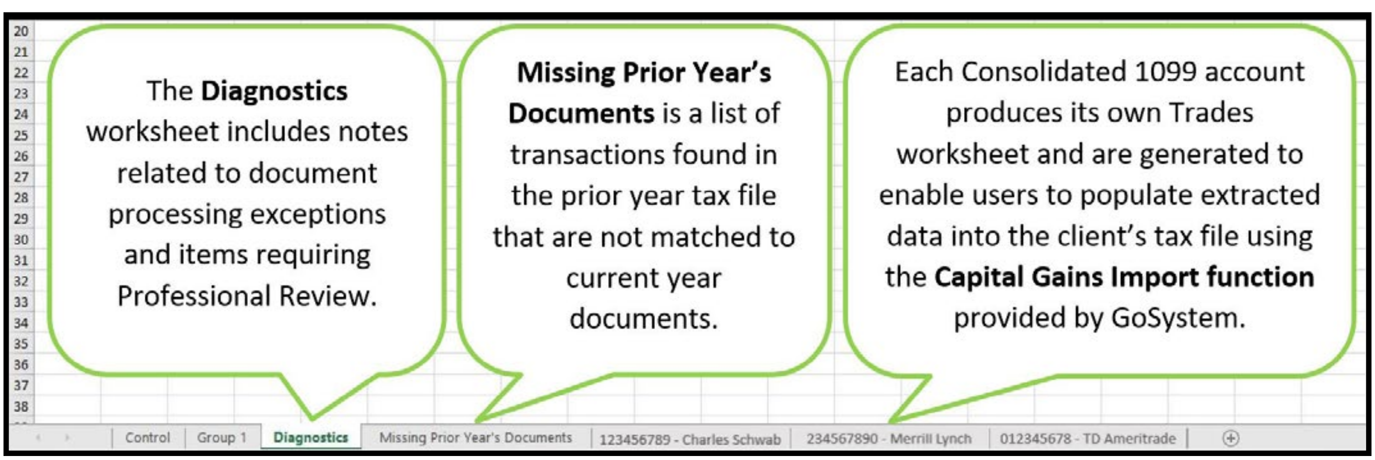
➔ Simply click on either file name to download and open

- ➔ The user should review the **Diagnostics sheet** in the Pointsheet.xls file.
  - There may be comments or flags on certain pages added by GruntWorx validators. If the job has any Customer Diagnostic Notes, it is recommended that the user check those pages thoroughly and make any necessary changes in the client tax file within GoSystem tax software.



⚠ **TIP:** Blue hyperlinks are provided with each Diagnostic and, when clicked, will bring the user directly to the corresponding page in the opened Bookmarked PDF.

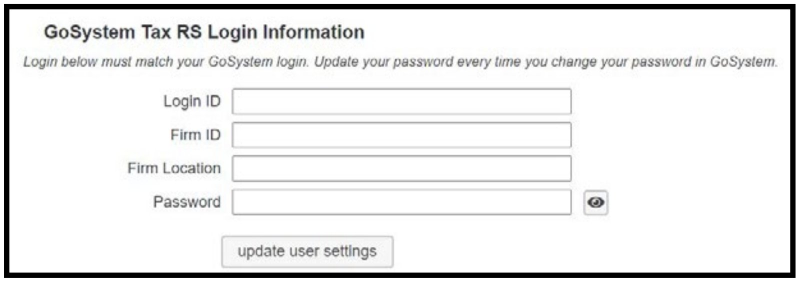
⚠ **IMPORTANT:** The Diagnostics Sheet is purely for user review, as the extracted data in the Pointsheet has already been imported into the client's return.



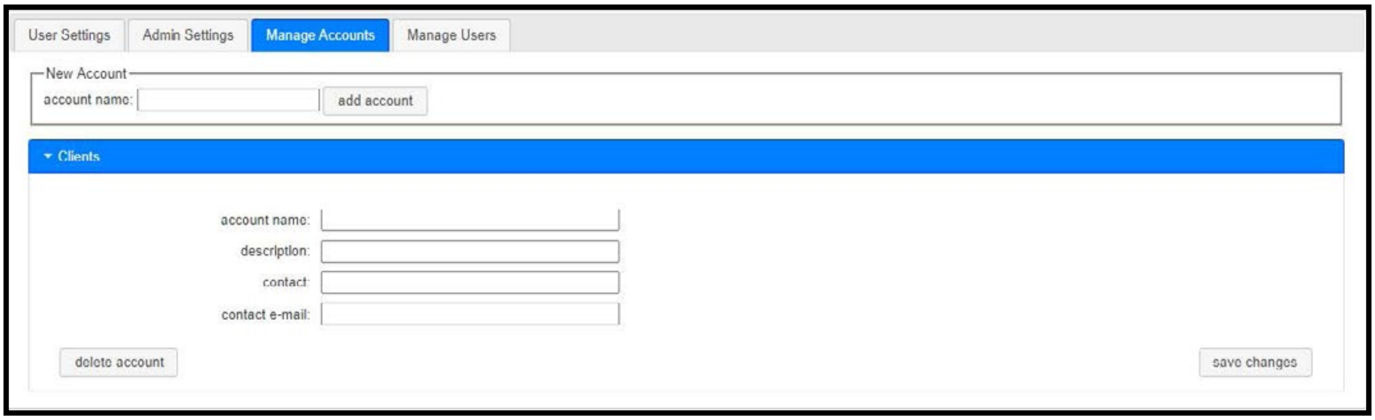
Considerations for Thomson GoSystem Tax RS Users

- At the **User Settings** tab of the GruntWorx Dashboard **Settings**, users will add their GoSystem Tax RS login credentials.

⚠ **IMPORTANT:** When a user's login or password for GoSystem is updated, the GoSystem Login Information in **GruntWorx User Settings** must also be updated.



- Under the **Manage Accounts** tab in Settings, users begin with a default account named **Clients.** During set-up and before the user's first submission, the default account should be **re-named to match** one of the firm's GoSystem Tax RS accounts.



⚠ **TIP:** All Account names must match the specific GoSystem Tax RS accounts associated with the firm's client tax files.

⚠ **IMPORTANT: Minimum required fields in the client tax file:** Taxpayer and spouse name/s, SSN/s and filing status located on the Taxpayer Information screen in the General Information section of the Client Organizer.

⚠ **TIP:** The user must be **logged out** of the GoSystem Client tax file during job submission.

Tips for best scanning practices can be found here in this video.
For system requirements click here.

For any support questions, call **877-830-6059 X3**
or send an email to Support@GruntWorx.com

For any sales questions, call **877-830-6059 X2**
or send an email to Sales@GruntWorx.com

Here is a list of all the supported forms for the GruntWorx Organize and Thomson GoSystem Tax RS Populate services.

Organize LITE & Organize

- W-2
- W-2G
- W2C
- 1042S
- 1095-A
- 1095-B
- 1095-C
- 1098
- 1098-C
- 1098-E
- 1098-T
- 1099-A
- 1099-B
- 1099-C
- 1099-CAP
- 1099-G
- 1099-DIV
- 1099-INT
- 1099-H
- 1099-K
- 1099-LTC
- 1099-MISC
- 1099-NEC
- 1099-PATR
- 1099-Q
- 1099-R
- RRB-1099
- RRB-1099-R
- 1099-S
- 1099-SA
- SSA-1099
- Consolidated 1099
- 2439
- 5498-SA
- 5498-ESA
- Grantor Letter as 1041 K-1
- Supporting Tax Documents
- Receipts

Populate

- W-2
- W-2G
- 1095-A
- 1098
- 1098-E
- 1098-T
- 1099-MISC
- 1099-B
- 1099-G
- 1099-DIV
- 1099-INT
- 1099-R
- RRB-1099
- SSA-1099
- 1099-OID
- Consolidated 1099
- 1120S K-1
- 1065 K-1
- 1041 K-1
- 5498
    - 1099-MISCs and 1099-NECs are extracted to the Pointsheet but not imported into Thomson GoSystem