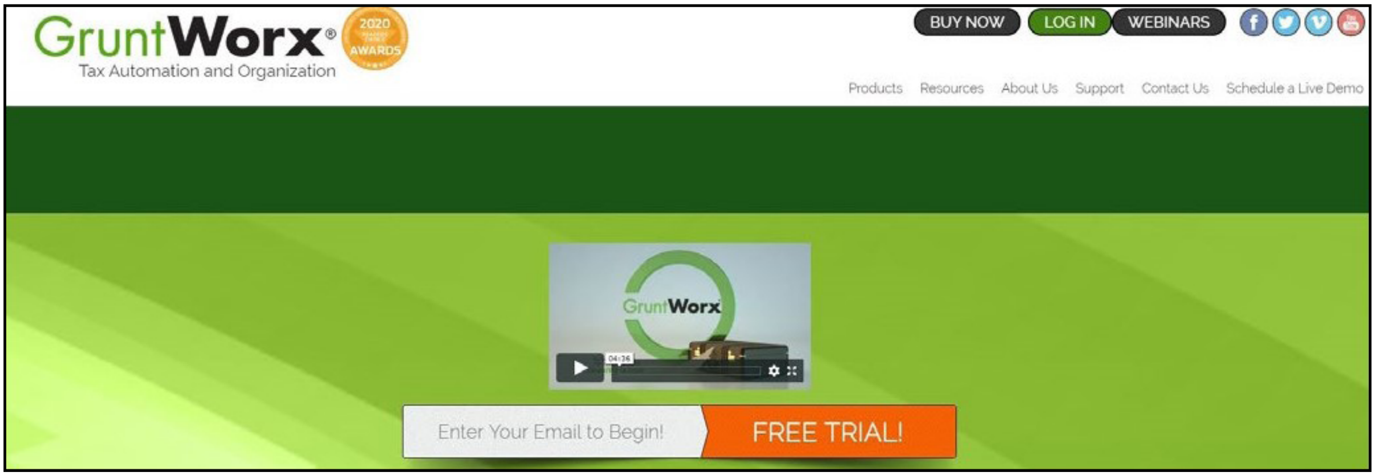
GOSYSTEM TAX RS QUICK START

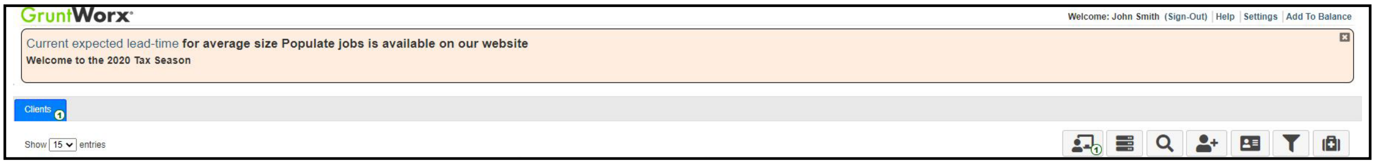
Follow these instructions to sign up for the GruntWorx Free Trial and use Organize LITE, Populate LITE, Organize, Populate, and Trades products with Thomson GoSystem Tax RS tax software. **Please note that GoSystem users must contact GruntWorx prior to the submission of the firm's first Populate job. Access to web services at Thomson Reuters must first be enabled.**



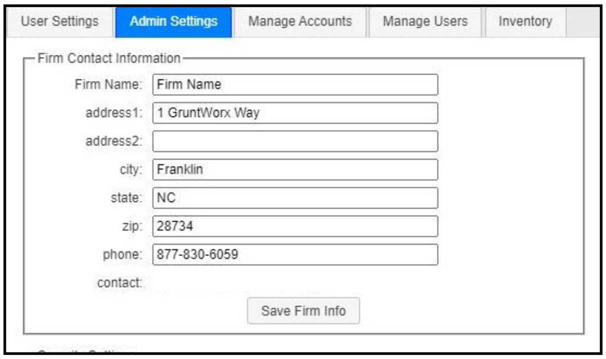
How to Set up a GruntWorx Account

- 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

GruntWorx Dashboard Navigation



- Each time a user logs in, a notification displays information about the current tax year, news or updates.
- The logo in the top left corner takes user to GruntWorx Homepage.
- Welcome corner displays user's name, option to Sign-Out, Download Agent link, a Help link which will turn on **?** icons, Settings and Add To Balance.
  - Hovering over Add To Balance displays account's current balance.
- The Info Banner provides information relating to using GruntWorx and the Current Expected Lead-Time. New notifications are displayed on the Info Banner when posted until the user dismisses the post.
- Below the Peach Info Banner are buttons - Awaiting Populate Lite Jobs, Show Only Open Clients, Search/Find a Client, Add a Client, Import Multiple Clients, Filter Client Table and Tutorials.
- In the top right-hand corner of the GruntWorx Dashboard, click **Settings**



Admin Settings

Firm Contact Information

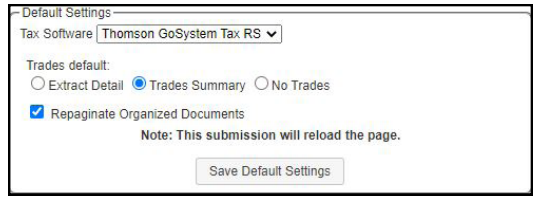
- Update any firm details
- Click **Save Firm Info** to save any changes

Security Settings

- Set firm-wide **Two-Factor Authentication** settings here
- Adjust code sending protocol under User Settings
  - New users must select 2FA code protocol at first login
- Click **Save Security Settings** after making any changes

Default Settings

- Select **Thomson GoSystem Tax RS** as Tax Software
- Set firm-wide job preferences:
  - Option for default Trades product (User can select alternate trades on a per job basis)
  - Repaginate Organized Documents default option
- Click **Save Default Settings** after making any changes

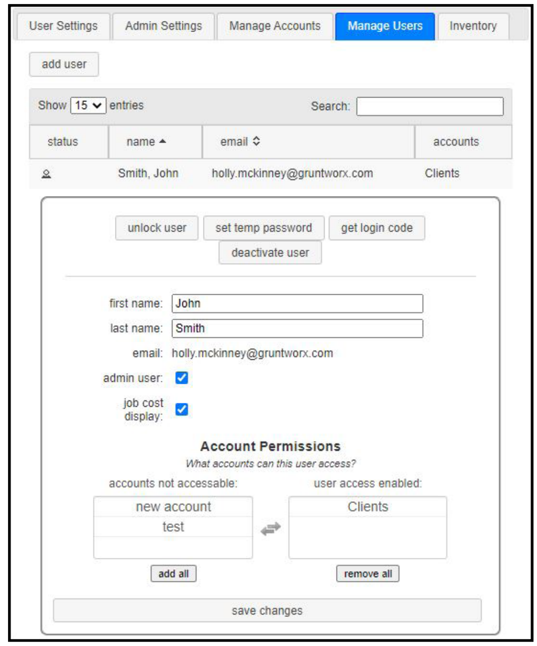


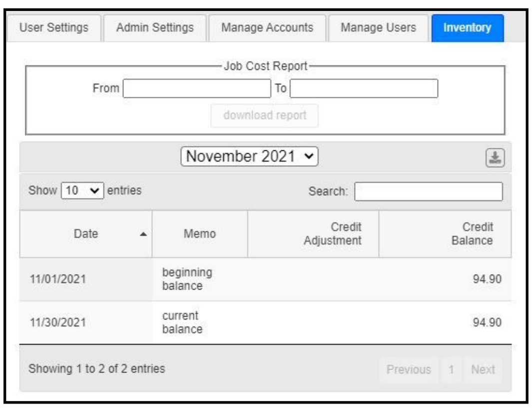
Manage Accounts

- Add or edit accounts as needed to the **Manage Accounts** tab. Most often this is used for firms that have multiple locations. A default account is provided – Clients – but the name can be edited anytime under Manage Accounts.

Manage Users

- Add or edit users in the **Manage Users** tab. Make any user an Admin on the account, option to enable job cost display on Dashboard, get two-factor authentication code if needed and adjust account access permissions.
- If a user's account gets Locked, under Manage Users, click **unlock user.**





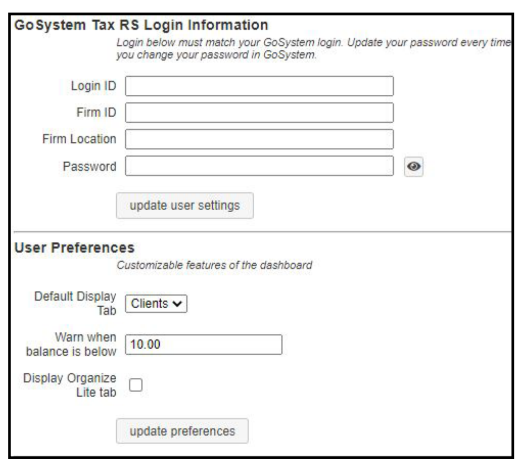
Inventory

- Provides detailed job history and the account's current balance which can be exported to a CSV.
- Run a Job Cost Report by selecting start and end dates and clicking **download report.**

⚠ IMPORTANT: Admins must add users and give account permissions to allow user access.

User Settings

- Update **User Contact Information** at any time. This is used for GruntWorx to report any issues with jobs.
- **Job Status Notification** preferences can be changed to text, email or no notifications.
- If enabled by the Firm Admin, **Two Factor Authentication** settings can be adjusted here.
- Enter Login ID, Firm ID, Firm Location and Password, **identical to GoSystem Tax RS.**
- Click **Update User Settings** after making changes
- Change the **Default Display Tab** in User Preferences
- A **Warn when balance is below** field allowing the user to be alerted when the account balance reaches the selected amount.
- Option to hide or display the **Organize Lite** tab. Organize Lite jobs can now be submitted from any tab or account.
- **Change Your GruntWorx Password** here



⚠ TIP: Passwords expire every 90 days and must contain at least eight characters, mixed case and one number.

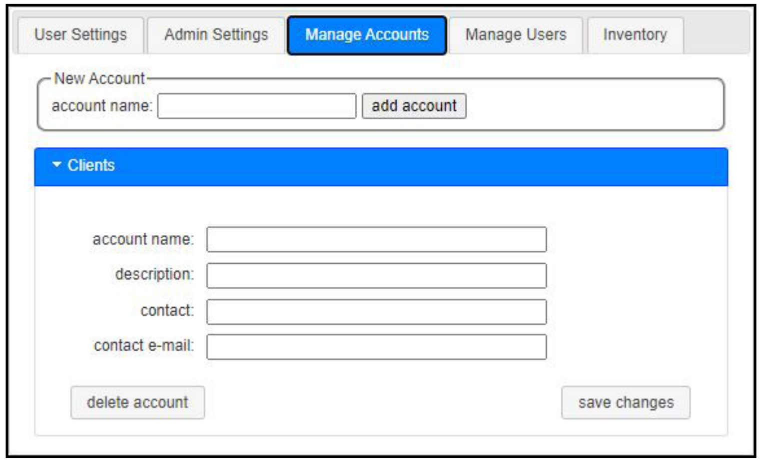
Considerations for Thomson GoSystem Tax RS Users

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

⚠ TIP: When the user's login or password for GoSystem is updated, the user **must also update** the GruntWorx login and password to match.

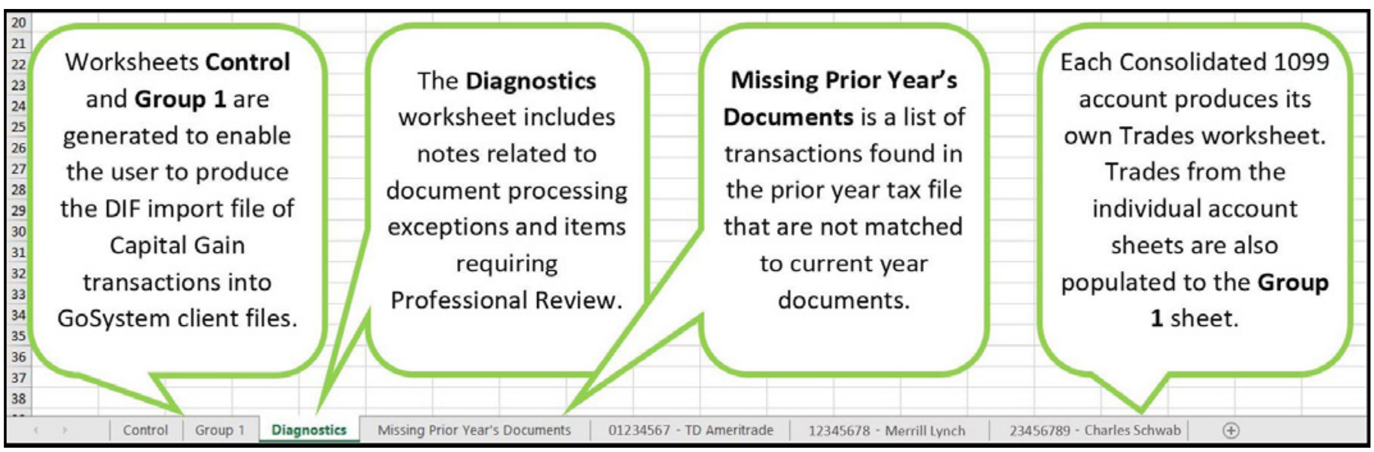
- Under the **Manage Accounts** tab in Settings, users begin with a default account named Clients. During set-up and before the user's first submission, the default account should be **re-named to match** one of the firm's GoSystem Tax RS accounts.

⚠ 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.

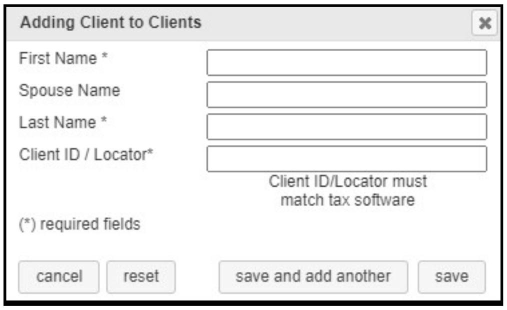
⚠ IMPORTANT: The user **MUST be logged out** of the GoSystem Client tax file during job submission and population.



How to Submit Jobs

> Add Clients

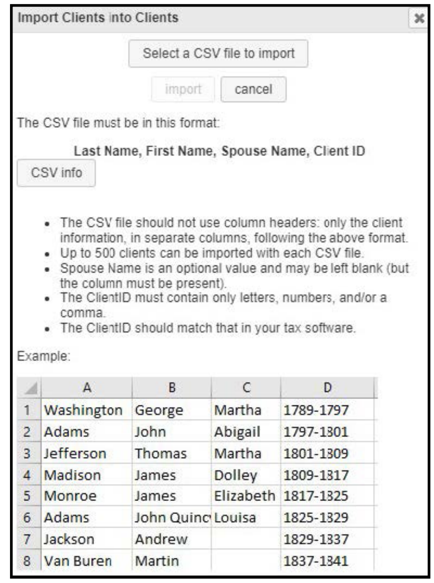
- From the **GruntWorx Dashboard**, click on an icon to add client/s



> Add a Single Client

- Click on the icon and fill out all required fields

⚠ IMPORTANT: Client ID and Account number must be identical to the GoSystem Locator and Account number.

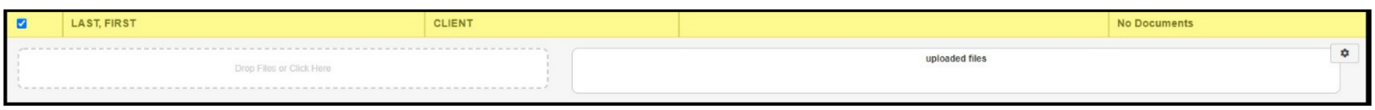


> Add Multiple Clients

- Click on the icon to upload a .csv file.
- Follow the instructions and template to create and import the file

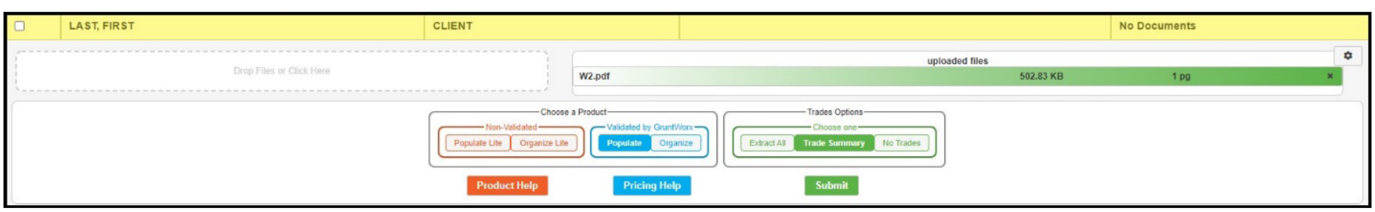
⚠ TIP: When adding clients, make sure they are being added under the appropriate account tab on the GruntWorx Dashboard.

> To submit client's source documents: Click on the client's name, then either drag and drop PDF files into the dotted box or click in the box to browse computer for PDF files.



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

> Once all files are uploaded, make product selections



- Choose either **Non-Validated** or **Validated by GruntWorx**
- Non-Validated products are **not** reviewed by GruntWorx for accuracy. The documents are processed with OCR and Business Intelligence technology only.
- Validated products process through OCR and Business Intelligence as well as human review by GruntWorx Validators. Make the choice of Organize Lite, Populate Lite, Organize or Populate.
- Make **Trades** selections
- Non-Validated products do not have the option to add a Trades product. However, Populate Lite has an option for Trades Summary within the self-validation tool. There is no need to add Trades Summary to Populate Lite during Product selections.
- Validated products can have Extract All Trades or Trades Summary added. Or have **No Trades** extracted.

> Once selections are made, click **Submit**

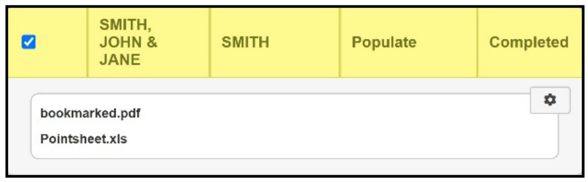
⚠ TIP: For Product and Pricing information, click a Help button.

When a Job is Complete

- When a job is complete, a job completion **text message or email notification** is sent to the user if set up in User Settings. Log back in to the GruntWorx Dashboard and locate client.
- If the site stayed open in the browser, the page will need to be refreshed, and sign in again
- When Job Status is **Completed**, click on the client's name

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 Organize Lite or Organize was selected, there will be a PDF named **bookmarked.pdf**. If a Trades product was added to Organize, there will also be a **Pointsheet.xls.**
- If Populate Lite or Populate, with or without a Trades product 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 then review the **Diagnostics sheet**
- There may be comments or flags on certain pages added by GruntWorx Validators. 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 form extraction and, when clicked, will bring the user directly to the corresponding page in the opened 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.

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

If you have any problems or need additional help you can reach us at:
Support@GruntWorx.com • 877.830.6059

Supported Forms

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

Organize LITE & Organize

- W-2
- W-2G
- W2C
- 1041 K-1
- 1042S
- 1065 K-1
- 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
- 1120S K-1
- 2439
- 5498-SA
- 5498-ESA
- Grantor Letter as 1041 K-1
- Supporting Tax Documents
- Receipts

Populate LITE & Populate

- W-2
- W-2G
- 1095-A
- 1098
- 1099-MISC
- 1099-NEC
- 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