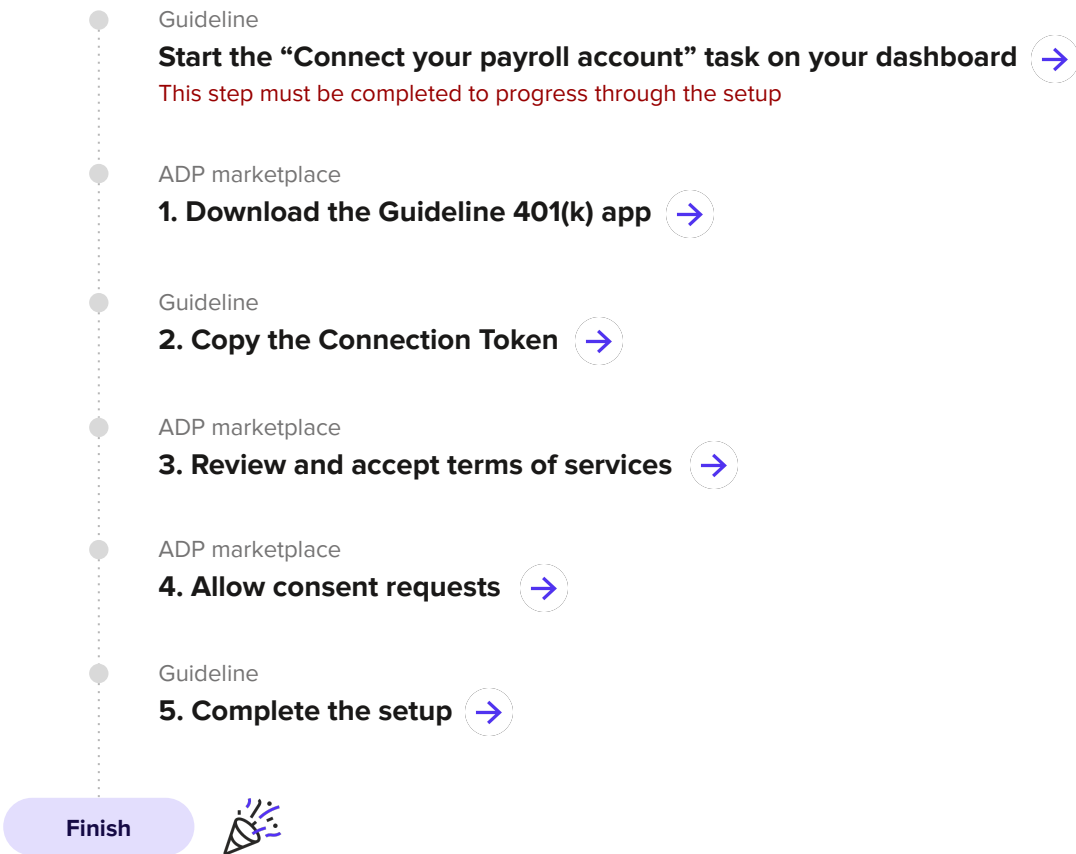


RUN Powered by ADP[®] (RUN) Integration Setup Guide


Step-by-step guide to connecting the RUN integration with Guideline

Let's get started



Start the setup

From your administrator dashboard, start the “Connect your payroll account” task.

 Already completed this step? Skip to the next step.


Connect your payroll account.

Due Sep 8, 2022

Start

Step 1a

Follow the “Guideline 401k app” link to download the Guideline 401(k) App from the ADP Marketplace.

 Note that you will return to this task screen in step 2a.

1a

Connect your RUN account to Guideline

Login to your RUN account and follow these instructions to connect your account to Guideline. [Download instructions](#)

Step 1

Download the [Guideline 401\(k\) App](#) from the ADP Marketplace (the app is free to use).

Step 2

Copy and paste the Connection Token below to the Product Settings page in the app.

 Connection Token

23L28000.5.cfad39331f3c6adddeef1d0f57dcd0e6

Copy

Step 3

Review and accept the Terms of Service, and select **Place Order**.

Step 4

Go to [Consent Manager](#) and select the Guideline 401(k) app. Select **Allow** Consent Request in the Guideline 401(k) app.

 Back

I have connected RUN

Step 1b

Select “Buy Now” on the Guideline app to start the integration connection flow.

! Ensure that you are logged into your ADP® account within the ADP Marketplace.



Guideline 401(k) Connector for RUN Powered by ADP® and ADP Workforce Now®

Easy, affordable 401(k) for your business

Category:

PROVIDE BENEFITS

Contact Us

Buy Now

Starting At \$0.00

1b

Step 1c

In the ADP® cart click change to switch the connector to RUN.

Continue Shopping

ADP

Next

Cart

No Billing Required

Review and Buy

Cart

g

Guideline 401(k) Connector for RUN Pow...

Guideline Technologies Inc

Change

Remove

Guideline 401(k) Connector for ADP Workforce Now®

\$0.00 / month

Unlimited Users included in plan

+

Guideline Technologies Inc requires additional information. [Edit](#)

g

Guideline 401(k) Connector for R
UN Powered by ADP® and AD...

Guideline 401(k) Connector for ADP Workforc
e Now®

Monthly fee

\$0.00

Unlimited Users (included)

\$0.00

Apply discount codes

Apply

1c

Step 1d

Click on “Select” to specify the connector for RUN, and then click on save changes.

The screenshot shows a web interface for selecting a connector. At the top, there is a navigation link: < Back to Guideline 401(k) Connector for RUN Powered by ADP® and ADP Workforce Now®. Below this, the 'Selected Edition' is shown with a logo 'g' and the text 'Guideline 401(k) Connector for ADP Workforce Now®'. A 'Save Changes' button is located to the right. The main section is titled 'Select an edition for this product' and contains two product cards. The first card, 'Guideline 401(k) Connector for ADP Workforce Now®', is marked 'Free / month' and has a 'Selected' button with a checkmark. The second card, 'Guideline 401(k) Connector for RUN Powered by ADP®', is also marked 'Free / month' and has a 'Select' button. A blue circle with '1d' and a line points to the 'Select' button on the second card. Both cards have a 'View Details' link at the bottom.

< Back to Guideline 401(k) Connector for RUN Powered by ADP® and ADP Workforce Now®

Selected Edition

g Guideline 401(k) Connector for ADP Workforce Now® Save Changes

Select an edition for this product

Guideline 401(k) Connector for ADP Workforce Now® Free / month ✓ Selected View Details


Guideline 401(k) Connector for RUN Powered by ADP® Free / month Select View Details

1d

Step 2a

For the next step, you'll need to return to the Guideline task screen.

Copy the Connection Token in Step 2.

 The Connection Token is used to link your Guideline account to your ADP® account. This step is critical to successfully connecting the integration.

2a

Connect your RUN account to Guideline

Log in to your RUN account and follow these instructions to connect your account to Guideline. [Download instructions](#)

Step 1

Download the [Guideline 401\(k\) App](#) from the ADP Marketplace (the app is free to use).

Step 2

Copy and paste the Connection Token below to the Product Settings page in the app.

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23L28000.5.cfad39331f3c6adddeef1d0f57dcd0e6

Copy

Step 3

Review and accept the Terms of Service, and select **Place Order**.

Step 4

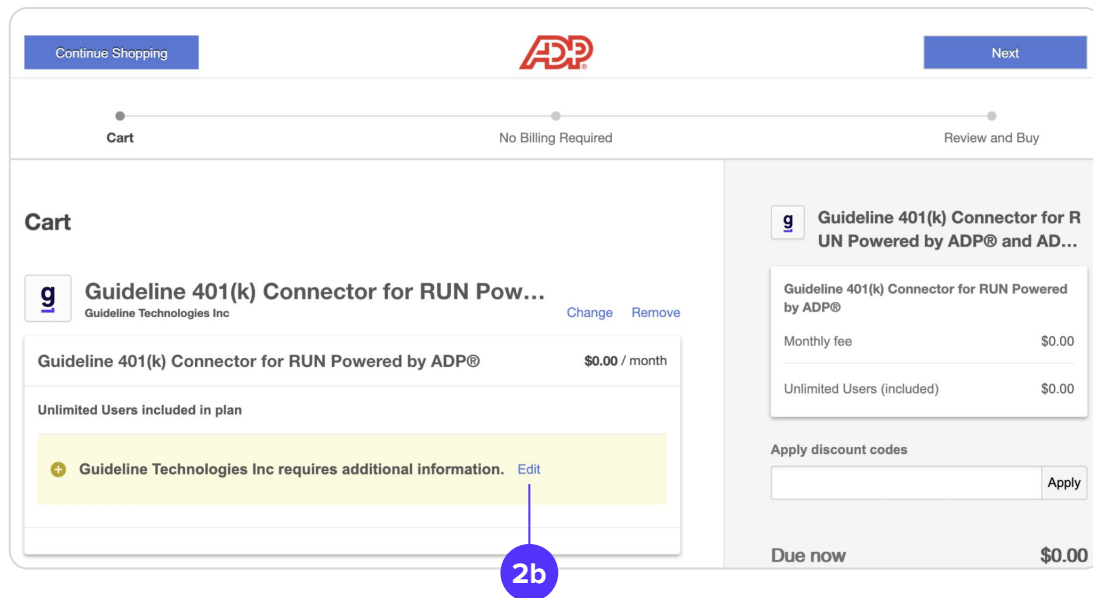
Go to [Consent Manager](#) and select the Guideline 401(k) app. Select **Allow** Consent Request in the Guideline 401(k) app.

◀ Back

I have connected RUN

Step 2b

In the ADP Marketplace cart click on “Edit” to input the connection token copied from Guideline.



Step 2c

In the text box paste the Connection Token you copied from Step 2a and click on “Save details” to continue.

Additional Information

Connect your Guideline Account

To connect your ADP Payroll Product to Guideline 401(k) please:

- 1) Sign up for a new account at <https://www.guideline.com>
- 2) Complete the following step-by-step guide, one for each integrated ADP Payroll Product (also published on the Guideline 401(k) App page in the ADP Marketplace) to get the your Connection Token: Guide to setup Guideline 401(k) for RUN
Powered by ADP Guide to setup Guideline 401(k) for ADP Workforce Now.

Connection Token

2c


The Connection Token is generated on your Guideline.com dashboard, in the “Connect your payroll account” section. If you need help, please contact a Guideline Team Member at clients@guideline.com

Save details

Cancel

Step 2d


Once the connection token has been entered you should see “The additional information is complete” displayed.

**Guideline 401(k) Connector for RUN Pow...**
Guideline Technologies Inc

[Change](#) [Remove](#)

Guideline 401(k) Connector for RUN Powered by ADP® **\$0.00 / month**

Unlimited Users included in plan

 **The additional information is complete.** [Edit](#)

Step 3a

Click on Next to proceed with the setup of the Guideline app in ADP®.

Continue Shopping

ADP

Next

3a

Cart

No Billing Required

Review and Buy

Cart

g Guideline 401(k) Connector for RUN Pow...
Guideline Technologies Inc. [Change](#) [Remove](#)

Guideline 401(k) Connector for RUN Powered by ADP® \$0.00 / month

Unlimited Users included in plan

✓ The additional information is complete. [Edit](#)

g Guideline 401(k) Connector for R
UN Powered by ADP® and AD...

Guideline 401(k) Connector for RUN Powered by ADP®

Monthly fee	\$0.00
Unlimited Users (included)	\$0.00

Apply discount codes

[Apply](#)

Due now \$0.00

Price reflects one-time and prorated recurring charges, if


Step 3b

Check the box agreeing to the Terms of Service and then complete the purchase.

 Reminder that the connector app is free to use.

Products

[Change](#)

 **Guideline 401(k) Connector for RUN Powered by ADP® and ADP Workforce Now®** [Terms of service](#)

Guideline 401(k) Connector for RUN Powered by ADP®

Monthly fee

\$0.00

Unlimited Users (included)

\$0.00

Connect your Guideline Account

Connection Token

-

Referrer Email

Referrer ID

Referrer Type

Apply discount codes

Apply

Due now

\$0.00

Price reflects one-time and prorated recurring charges, if applicable.

Subtotal

\$0.00

Estimated tax

\$0.00

Estimated recurring charges

Due monthly (excluding tax)

\$0.00

☒ I have read and agree to the [ADP Marketplace Terms of Service](#) and the [Terms of Service](#) applicable to each application I am purchasing. I also agree that the services are provided by independent third parties and are not provided by ADP. I agree that I am entering into agreements with third parties and ADP is not responsible for such third parties' products or services.

Complete Purchase

3b

Step 4a

Now that you downloaded the Guideline app to your ADP® account, you will need to approve consents for Guideline to access your account details.

From the post purchase page click on Manage Consent.

 Don't see this option? Directly access the linked [Consent Manager](#).

What's next?

Before you can use your new app(s), you must provide consent for our partners to access your company's ADP data.

Manage Consent

4a

Step 4b

Accept all the consents.




There are two consents that give our integration the ability to:

1. Read employees' Statuses
2. Update their contribution rate
3. Collect any 401(k) contributions from payroll.

You **must** accept both to ensure your account is properly synced with Guideline.

Consent 1

Client Authorization


**Guideline 401K API for WFN-RUN**
by Guideline Technologies Inc

You hereby:

- Allow read access into ADP systems to retrieve payroll output details
- Allow read access to your worker profile that includes personal demographic information, tax IDs, personal address, personal communication mechanisms, employment/contracting information and compensation
- Allow write access into ADP systems to start, change, stop worker deductions, and read access to retrieve general deductions

Consent 2

Client Authorization

**Guideline Single Sign On**
by Guideline Technologies Inc

You hereby:

- Allow read access to your basic contact information
- Allow read access to your unique identifier

By clicking 'Allow', you are authorizing ADP to provide your data to this application. You are authorizing the use of your data obtained from ADP in accordance with the application terms of service agreed to at time of purchase and with the privacy policy found on the application's web site.

You can always modify this setting and manage other account permissions at any time through the [ADP Consent Manager](#). Note that any modifications made will not affect data you have previously authorized ADP to provide to this application.

ALLOW DENY

Step 5

Return to Guideline and complete the setup by pressing the “I have connected RUN” button.

Connect your RUN account to Guideline

Log in to your RUN account and follow these instructions to connect your account to Guideline. [Download instructions](#)

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Review and accept the Terms of Service, and select **Place Order**.

Step 4

Go to [Consent Manager](#) and select the Guideline 401(k) app. Select **Allow** Consent Request in the Guideline 401(k) app.

◀ Back

5

I have connected RUN

Finish


You've successfully set up your RUN/Guideline integration.

Having trouble?

Check out this [Article on the Help Center](#).

Still need help?

 clients@guideline.com

 (888) 228-3491

guideline

A thick blue horizontal line underlines the word 'guideline'. The line starts under the 'g', extends to the right, and then has a short vertical segment at the end.