guideline

ADP Integration Setup

A step-by-step guide to connect your ADP Run-Guideline integration.

Let's get started

Guideline

Start the "Connect your payroll account" task on your dashboard →

⊘ This step must be completed to progress through the setup

ADP marketplace

1. Download the Guideline 401(k) app →

Guideline

2. Copy the Connection Token →

ADP marketplace

3. Review and accept terms of services →

ADP marketplace

4. Allow consent requests →

Guideline

5. Complete the setup →

Finish

Start the setup

From your Plan Sponsor dashboard, start the "Connect your payroll account" task.

ℹ

Already completed this step?
Skip to the next step.

Connect your payroll account.

Due Sep 8, 2022

Start

Step 1a

Follow the link in step 1 to download the Guideline 401(k) App from the ADP Marketplace.

ℹ

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

Connect your ADP Run account to Guideline

Log in to your ADP 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

1a

Step 2

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

🔒 Connection Token

22H31001.2n.4224641be4e40a8e7710ea1d1f5b247a

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.
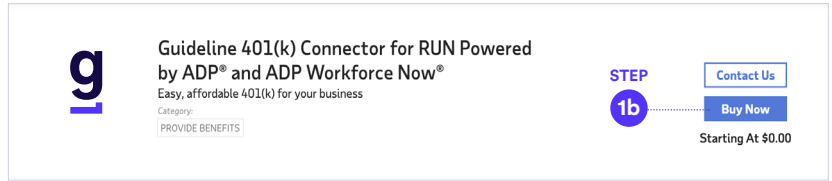
◀ Back

I have connected ADP Run

Step 1b

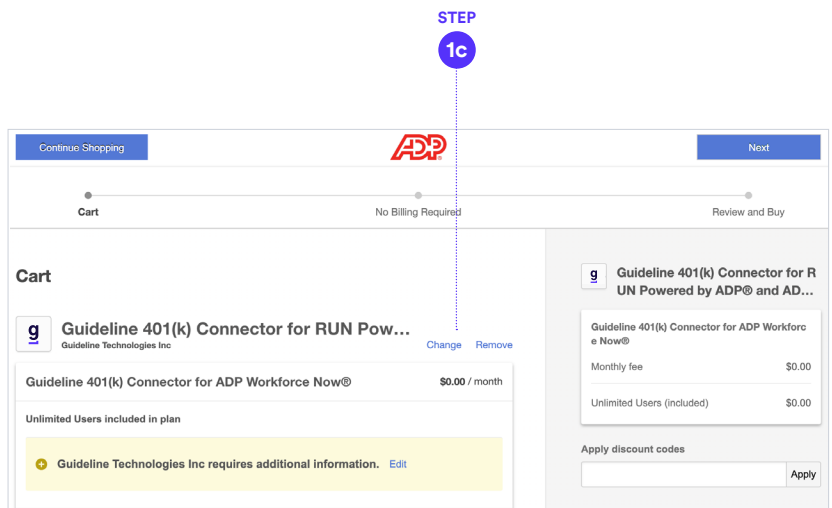Select "Buy Now" on the Guideline app to start the integration connection flow

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

g Guideline 401(k) Connector for RUN Powered by ADP® and ADP Workforce Now®
Easy, affordable 401(k) for your business
Category:
PROVIDE BENEFITS

STEP **1b**

Contact Us

Buy Now

Starting At $0.00

STEP **1c**

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 Workforce Now®

Monthly fee $0.00

Unlimited Users (included) $0.00

Apply discount codes

Apply

Step 1c

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

◁ 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

STEP **1d**

Step 1d

Click on "Select" to specify the connector for ADP RUN, and then click on save changes.
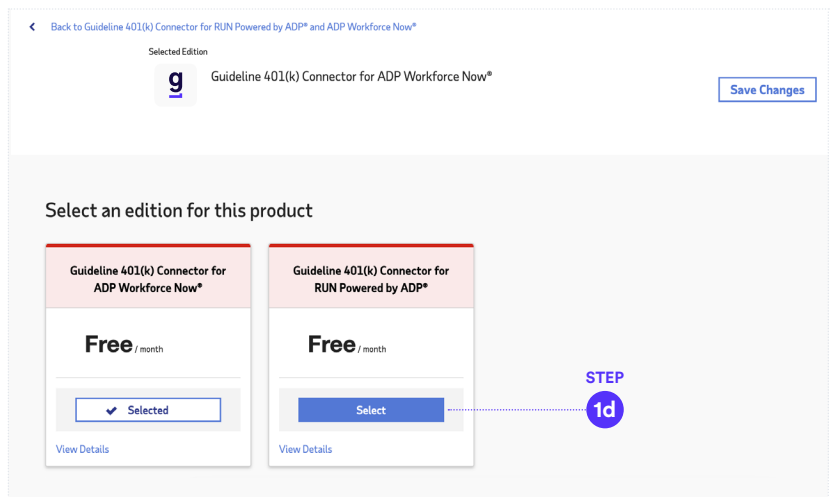
Step 2a

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 important to ensure that the integration successfully connects.

Connect your ADP Run account to Guideline

Log in to your ADP 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

22H31001.2n.4224641be4e40a8e7710ea1d1f5b247a   Copy

STEP
2a

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 ADP Run**

Step 2b

In the ADP Marketplace cart click on "Edit" to provide the connection token copied from Guideline

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 RUN Powered by ADP® $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 RUN Powered by ADP®

Monthly fee $0.00

Unlimited Users (included) $0.00

Apply discount codes

[   ] Apply

Due now $0.00

STEP
2b

Step 2c

In the modal 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

[   ]

STEP **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.

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

STEP **3a**

Step 3a

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

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 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

Products

Change

g	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

Step 3b

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

ⓘ

Reminder that this app is free to use

STEP
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

STEP
4a

Step 4b

Accept the consents.

ℹ️

There are two consents that give
(1) our integration the ability to read employees status, make contribution rate changes, and
(2) collect any 401(k) contributions from payroll.

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

Consent 1

Consent 2

Step 5

Return to Guideline and complete the setup by pressing the "I have connected ADP Run" button.

Finish 🎉

You've successfully set up your ADP-Guideline integration.

Connect your ADP Run account to Guideline

Log in to your ADP Run account and follow these instructions to connect your account to Guideline. Download instructions

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Step 2

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| 22H31001.2n.4224641be4e40a8e7710ea1d1f5b247a | 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 ADP Run**

STEP

5

Having trouble?

Check out this <u>Article on the Help Center</u>.

Still need help?

✉ <u>clients@guideline.com</u>

📞 (888) 228-3491