DRAKE TAX® QUICK START GUIDE



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Daily Wait Time Status

Add Files

Scan

☐ Duplex Scanning

Remove

Submit

Exit

Follow these Quick Steps to try out GruntWorx with Drake Tax Software®!

Log in to your Drake Support account and under the GruntWorx page, click **Activate Your Account** to sign up for the free trial.

Open GruntWorx and select the client you want to process.



- 3 Choose the Job Type: GruntWorxLITE or VERIFIED Organize, Populate, Trade Details or Trade Summary.
- 4 Upload client's source documents.
 - Add up to 10 PDFs, PNGs, JPEGs or JPGs per client, 50 MB per file.
- 5 Enter email address and click **Submit**.
- 6 After receiving Job Completion Email, open GruntWorx to the **Job Status** tab.

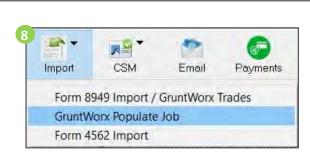


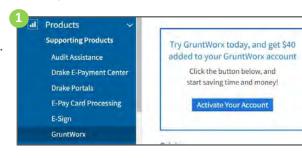
- A GruntWorx Populate job was located for this client. Click the 'Import' button to complete the populate process.

 Click the 'Review' button to review GruntWorx diagnostics file(s) before importing. Click the 'Browse' button to select an alternate GruntWorx Populate file.

 Diagnostics: Click 'Review' to view Populate: DRK1 40475_05895470.xml

 Trades: DRK1 40475_05895470_Tradesheet.xls
- 7 Check box to left of client name and click Download in bottom of window.
 - When it is finished, click **Close** and exit GruntWorx.
- 8 Open client's **Data Entry Screen**. You are prompted to import a GruntWorx job.
 - Alternatively, click Import > GruntWorx Populate Job.
- 9 Users can easily review or adjust any fields within the client's file in Drake Tax Software[®].





No Review Organized PDF Only Edit in Review Tool Organize Included Populate & Trades Opt

8949 Trades Add-On

No Trades

GruntWork

Select client:

Submit Jobs Joh Sta

LITE Service - No Human Review

VERIFIED Service - Includes Hur

Populate

Product Help

Email Address

Load DDM

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