Using GruntWorx Organize

Topics in this Quick Start Guide

- Key steps to configuring GruntWorx
- How to submit jobs
- How to Review GruntWorx output files
- How to purchase tokens and run usage reports

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Overview

The purpose of this document is to assist tax firms with the set-up and use of GruntWorx Organize and Organize with Trades.

Set-up and submission steps are divided into two sections to detail tasks for holders of either Admin or User access rights.

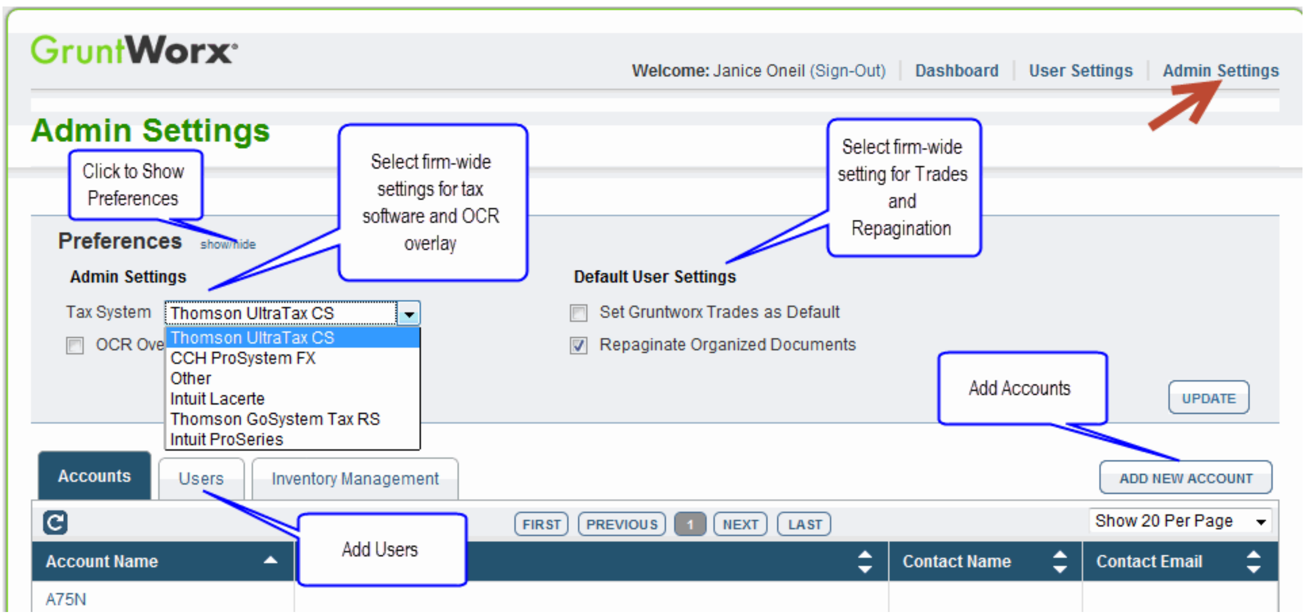
If your firm tax software is UltraTax CS™, ProSystem *fx*™ or GoSystem Tax RS™ tax software, tokens purchased for Organize jobs can also be used for the Populate product. Please consult the appropriate Quick Start Guide for Populate set-up and job review instructions.

Note: This guide assumes client's tax forms have already been scanned to PDF at **300dpi with the black and white setting.** The quality of the scanned documents submitted to GruntWorx is vitally important to your firm's success with GruntWorx products.
For best results, please read the Best Practices for Scanning Tax Documents Guide.

Administrator Functions - for Organize

1. Set-up firm, Add Accounts, Add Users

- Click Free Trial Link
- At Registration screen - complete registration
- Accept master agreement
- Accept EULA
- At dashboard, select “Admin Settings” link - at top right
- click “Show” Preferences link
- Select firm-wide global preferences and tax software



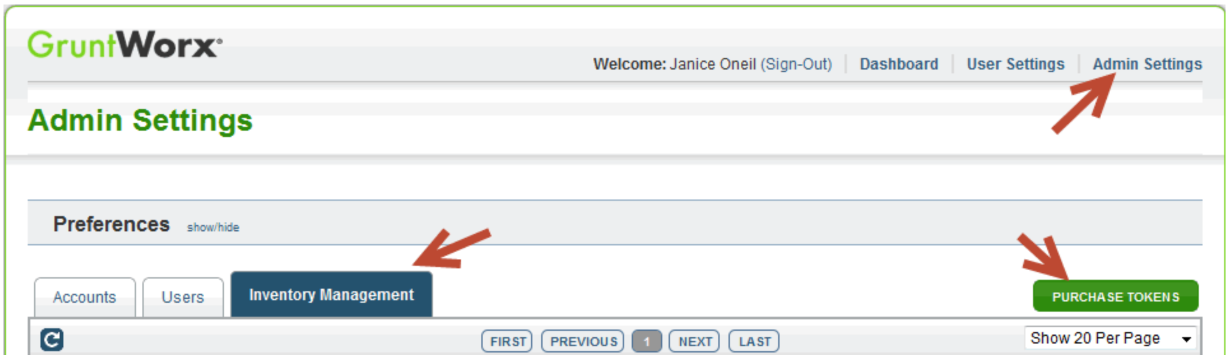
- At “Accounts” tab on the Admin screen, add Account/s (optional), a default account is supplied. The default account can be re-named as required.

- At “Users” tab on the Admin screen, add users and assign passwords and account access. Add, Edit, Delete, Activate and Deactivate Users in individual and batch actions.

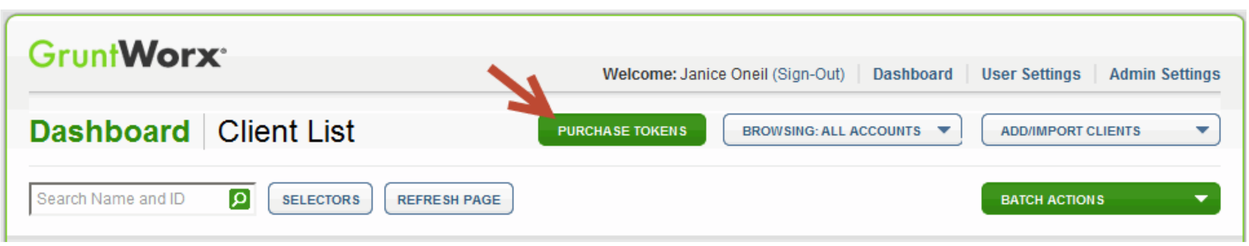
Administrator Functions (continued)

2. Check Inventory, Purchase Tokens

- At dashboard, select “Admin Settings” Link
- Select “Inventory Management” tab to see token balance
- Select “Purchase Tokens” button to purchase tokens with a credit card.



- The Purchase Tokens button is also available on the Dashboard of users with Admin privileges. Users without Admin rights will see the button but will not be able to purchase.



Token Usage - Universal tokens can be used for Organize jobs, Populate jobs and Trades.

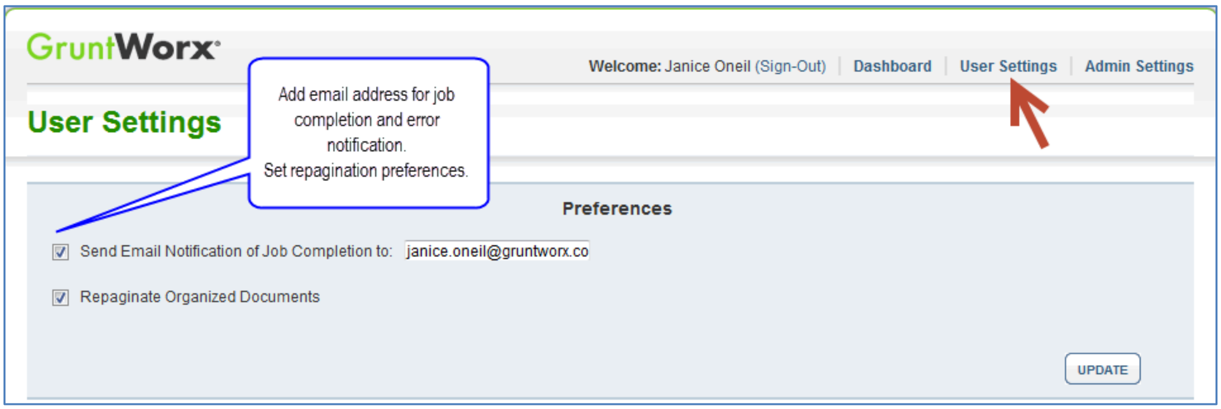
	TOKEN USE	USER RECEIVES
Organize Return	**1**	**Bookmarked PDF**
Populate Return*	**5**	**Bookmarked PDF + Tax Population**
Trades Option(add)	**1 for up to 25 trades**	**Trades Worksheet**

*Populate Returns are available only to users of the following tax software: UltraTax CS™, ProSystem *fx*™ or GoSystem Tax RS™.

User Functions

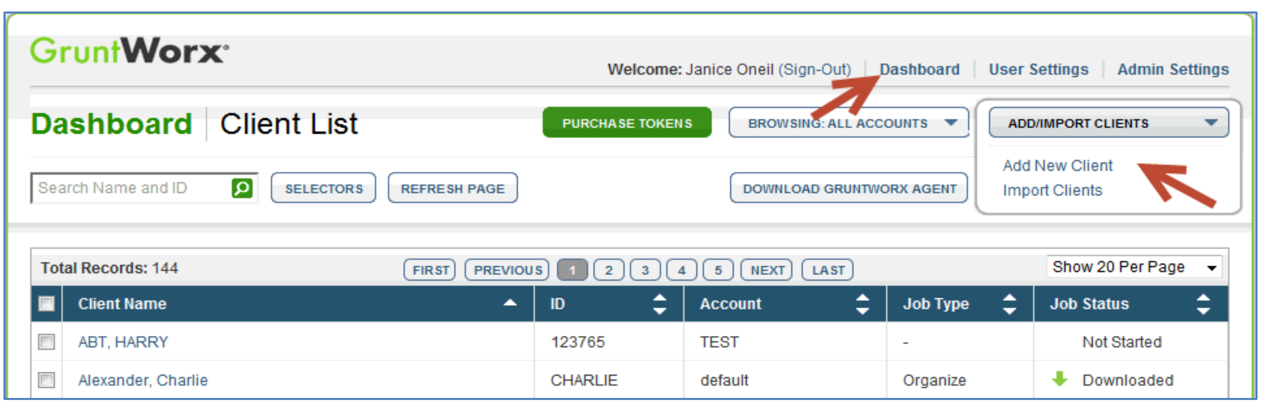
3. Set preferences

- From GruntWorx.com, login using credentials supplied by the Administrator
- Accept EULA
- From the Dashboard, select “User Settings” link - at top right
- At “User Settings” screen, set user preferences



4. Add Client/s

- At Dashboard – Click Add/Import Clients



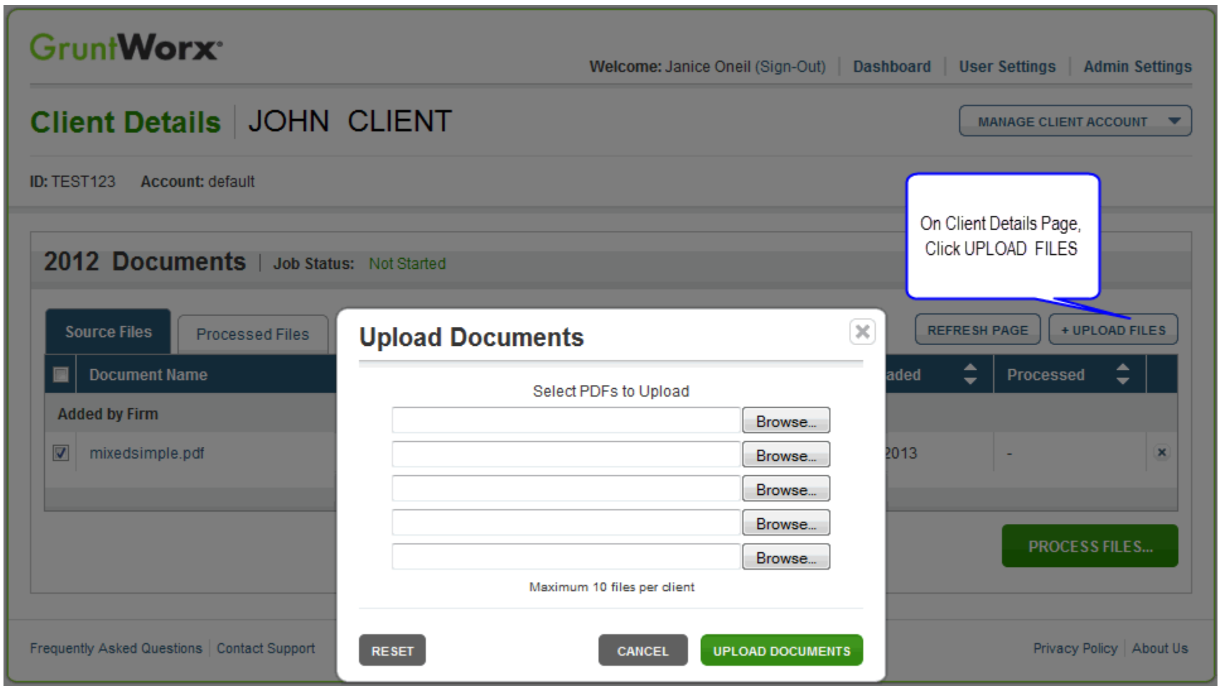
To add a single client - on the “Add/Import Clients” dropdown menu click “Add New Client”; fill all required fields

To upload multiple clients - on dropdown menu click “Import Clients”, follow instructions and template to create the csv file.

User Functions (continued)

5. Submit Trial Job

- The user may upload files after saving a new client, or at the GruntWorx Dashboard, click on the client name to access the Client Details Screen



- Click “Upload Files” button
- Browse and add files (as many as 10; maximum of 50MG per file)
- click “Upload Documents” button
- At the “Client Details” screen click “Process Files”
- Select Organize processing and Trades option if required and click “Process Files”

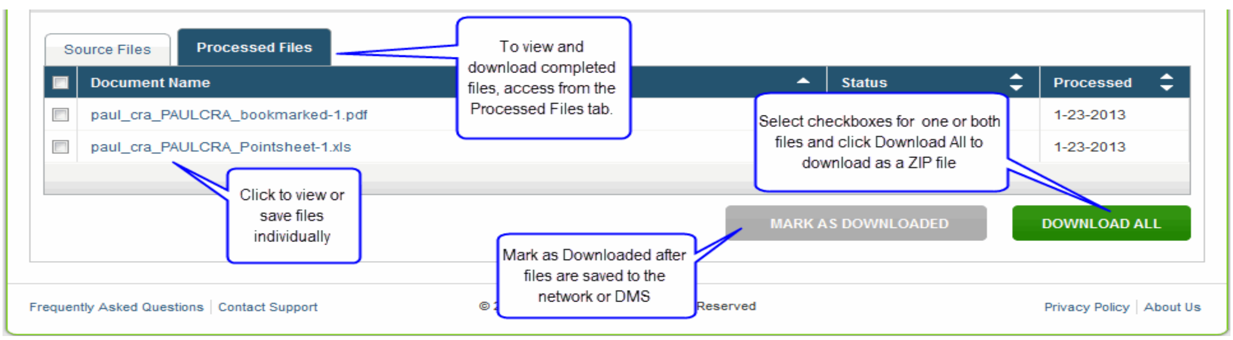
User Functions (continued)

6. Review Output files

Email notification, if selected in User preferences, alerts the User that the job is ready for download and review.

To download and review output files –

- At the Dashboard, click the Client name associated with the “completed” job to be directed to the Client Details page.
- Under the “Processed” tab, the first file listed is the organized and bookmarked PDF.
- The second file is an Excel™ workbook called the Pointsheet, provided only if the Trades option is selected.



Note: Files can be viewed from the GruntWorx “Processed File” tab; however, the user should save the documents, either to their desktop or firm-designated file system.
To review the documents, it’s easiest to use two monitors: opening the PDF image in one monitor and the Pointsheet in the other.