

Using GruntWorx to Organize Your Client Tax Documents

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/or Organize LITE.

Specific set-up and submission steps are described for each of the Organize and the Organize LITE products.

GruntWorx Organize classifies, organizes and labels your client's source documents and provides you with a bookmarked PDF, arranged in the order of a 1040. The Organize product also offers the option of selecting Trades (extraction capital gains transactions to a spreadsheet) easily imported from within most tax preparation software.

GruntWorx Organize Lite is an economical and quick turn-around (just minutes) option providing the same bookmarked PDF as the Organize product but without benefit of human validation. Returns are submitted and retrieved from a screen, specifically designed for Organize LITE, accessed by clicking on the OrgLITE link. Unlike the Organize and Populate products, downloaded files are removed within just a few days. Note also, that Trades are not available as an option with the LITE product.

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.

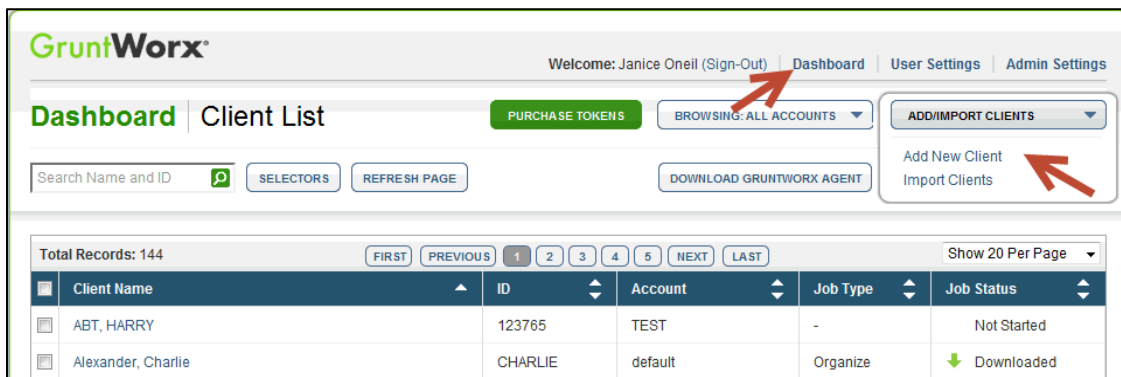
For best results, please read the [Best Practices for Scanning Tax Documents Guide](#).

Organize

GruntWorx Organize classifies, organizes and labels your client’s source documents and provides you with a bookmarked PDF, arranged in the order of a 1040. The Organize product also offers the option of selecting Trades (extraction capital gains transactions to a spreadsheet) easily imported from within most tax preparation software.

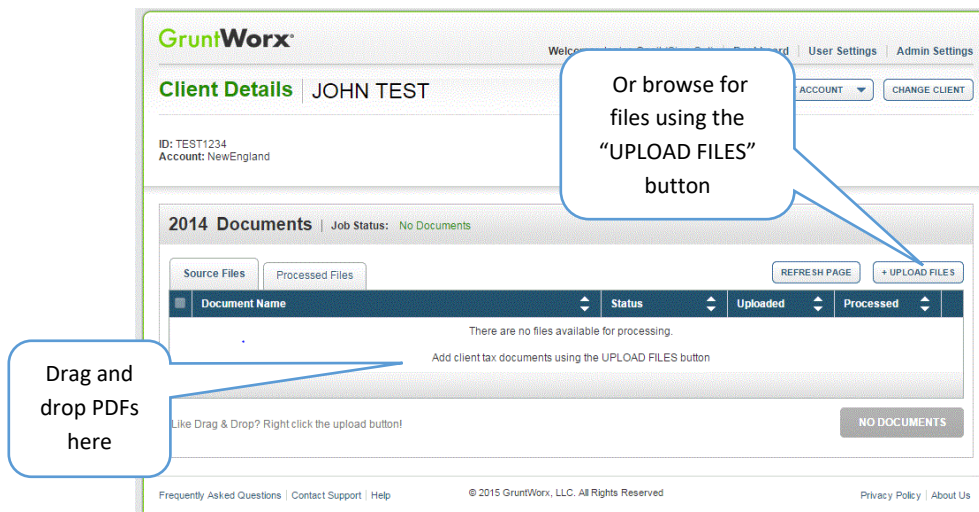
Job Submission

1. 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 displayed on the screen to create the csv import file

2. Upload Documents



- On the Client Details Page, Drag and drop client's PDF files to the Source Files tab,
- Or Click "Upload Files" button
- Browse and add files (as many as 15; maximum of 150MG per file)

3. Submit Job

- At the "Client Details" screen click "PROCESS FILES" (green button, lower right)
- Select processing options (Organize with, or without Trades) and click "PROCESS FILES"

Job Completion

Job Completion Notification

If selected in "User Settings" the user is notified by email once the job is ready to be downloaded.

1. Download and save Output File/s

At the Dashboard, click the Client name associated with the completed job.

- Under the "Processed Files" tab, the first file listed is the organized and bookmarked PDF
- If Trades option was selected, an excel workbook is provided with capital gains transactions extracted from 1099-B and Consolidated 1099 forms ready for import from within your tax program.

The screenshot shows the 'Processed Files' tab in the GruntWorx interface. It features a table with columns for 'Document Name', 'Status', and 'Processed'. Two files are listed: 'paul_cra_PAULCRA_bookmarked-1.pdf' and 'paul_cra_PAULCRA_Pointsheet-1.xls'. Below the table are two buttons: 'MARK AS DOWNLOADED' and 'DOWNLOAD ALL'. Callouts provide the following instructions:

- To view and download completed files, access from the Processed Files tab.** (Points to the 'Processed Files' tab)
- Select checkboxes for one or both files and click Download All to download as a ZIP file** (Points to the checkboxes in the table)
- Click to view or save files individually** (Points to the first file in the table)
- Mark as Downloaded after files are saved to the network or DMS** (Points to the 'MARK AS DOWNLOADED' button)

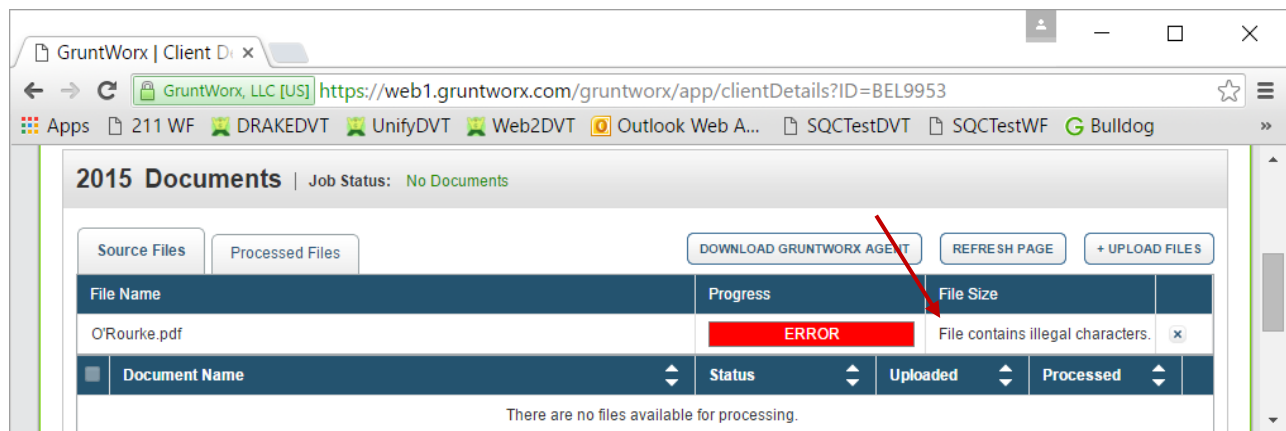
At the bottom of the interface, there are links for 'Frequently Asked Questions | Contact Support', a copyright notice, and 'Privacy Policy | About Us'.

Troubleshooting

Job Failure – If the PDF you submit is either corrupted or password protected, the job will fail and you will receive an email describing the problem and how to fix it.

Error 200 – After a period of inactivity, GruntWorx will time you out. This is a security feature intended to protect sensitive client information. Log out, then log back in to resolve the issue.

Upload Error – A pdf file name that includes an apostrophe, a semi-colon or an equals sign will fail when uploaded. Delete by clicking the “X” at far right and rename the file to allow for upload.



The screenshot shows a web browser window with the URL <https://web1.gruntworx.com/gruntworx/app/clientDetails?ID=BEL9953>. The page title is "2015 Documents" and the job status is "No Documents". There are three buttons at the top: "DOWNLOAD GRUNTWORX AGENT", "REFRESH PAGE", and "+ UPLOAD FILES". Below these is a table with the following data:

File Name	Progress	File Size
O'Rourke.pdf	ERROR	File contains illegal characters. X

Below the table is another table with columns: Document Name, Status, Uploaded, and Processed. At the bottom of the page, it says "There are no files available for processing."

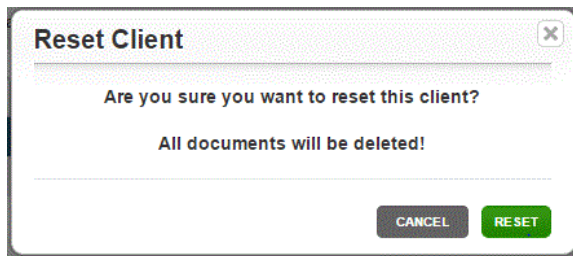
Troubleshooting (cont)

Reset Failed Job

Occasionally the user will receive notification of a failed job. To try again, using the same ClientID, a **Reset Client** function is available for Organize jobs.

The screenshot displays the 'Client Details' page for 'test rest'. At the top right, there is a dropdown menu labeled 'DELETE-RESET-RESUBMIT' with a red arrow pointing to the 'RESET CLIENT' option. Below this, the client ID is 'TEST' and the account is 'default'. The main section is titled '2015 Documents' with a job status of 'Failed' and a job type of 'Organize'. There are tabs for 'Source Files' and 'Processed Files', along with buttons for 'DOWNLOAD GRUNTWORX AGENT' and 'REFRESH PAGE'. A table lists documents, with one entry 'PasswordProtected.pdf' having a status of 'Failed' (marked with a red triangle) and an upload date of '1-27-2016'. A red arrow points to the 'Failed' status. At the bottom right of the table area is a 'JOB CONCLUDED' button. The footer contains links for 'Frequently Asked Questions', 'Contact Support', 'Help', 'Privacy Policy', and 'About Us', along with the copyright notice '© 2016 GruntWorx, LLC. All Rights Reserved'.

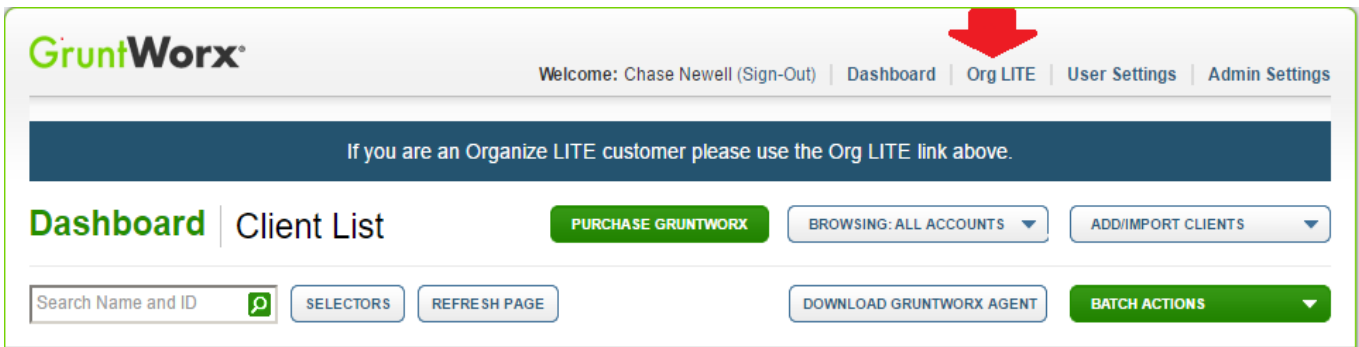
- The user should access the Client Details Page and click the **DELETE/EDIT/RESUBMIT** button at upper right.
- Select “Reset Client” to remove the document/s
- Confirm Reset to set the job as a “new job”



- Fix the error, e.g.: Print and scan for password protected or corrupted input documents
- Upload documents and “Process”.

Organize LITE

GruntWorx Organize Lite is an economical and quick turn-around (just minutes) option providing the same bookmarked PDF as the Organize product but without benefit of human validation. Returns are submitted and retrieved from a screen, specifically designed for Organize LITE, accessed by clicking on the OrgLITE link. Unlike the Organize and Populate products, downloaded files are removed within just a few days. Note also, that Trades are not available as an option with the LITE product.



The screenshot shows the GruntWorx dashboard. At the top left is the GruntWorx logo. To the right, the user is logged in as 'Chase Newell (Sign-Out)'. The navigation menu includes 'Dashboard', 'Org LITE', 'User Settings', and 'Admin Settings'. A red arrow points to the 'Org LITE' link. Below the navigation is a blue banner with the text: 'If you are an Organize LITE customer please use the Org LITE link above.' The main content area has a 'Dashboard' tab selected, followed by 'Client List'. There are several buttons: 'PURCHASE GRUNTWORX', 'BROWSING: ALL ACCOUNTS' (dropdown), 'ADD/IMPORT CLIENTS' (dropdown), 'Search Name and ID' (input field with a magnifying glass icon), 'SELECTORS', 'REFRESH PAGE', 'DOWNLOAD GRUNTWORX AGENT', and 'BATCH ACTIONS' (dropdown).

Refer to the "Tour" link for a walk-through of the Organize LITE process,



The screenshot shows the 'Submitted Jobs' page in GruntWorx. At the top left is the GruntWorx logo. To the right, the user is logged in as 'Chase Newell (Sign-Out)'. The navigation menu includes 'Dashboard', 'Tour', 'User Settings', and 'Admin Settings'. A red arrow points to the 'Tour' link. The page is divided into two sections: 'New Job' and 'Submitted Jobs'. The 'New Job' section has two input fields: 'Taxpayer' (required) and 'Client ID' (optional). Below these are three columns: 'file count', 'upload size', and 'total pages'. The 'Submitted Jobs' section shows a status bar with 'working (0)' and 'done (3)'. Below this is a message: 'Processing has completed for these jobs. (click to download)'. At the bottom, there is a table header with columns: 'Taxpayer Name', 'Client Id', 'Pages', and 'Finish Time'.

1. Add the Client Name

The screenshot shows the GruntWorx interface for creating a new job. The 'New Job' section has two input fields: 'Taxpayer' (required) and 'Client ID' (optional). The 'Taxpayer' field is highlighted with a red box. Below these fields is a table showing job statistics:

file count	upload size	total pages
0 files	0 Byte	0

Below the table is a dashed box labeled 'Drop files or click here' and two buttons: 'reset' and 'submit job'. On the right, the 'Submitted Jobs' section shows a modal dialog titled 'Enter the Taxpayer Name' with instructions: 'Enter the taxpayer's name as it should appear on the cover page of the output document'. Below the dialog are 'Prev' and 'Next' buttons and a 'Download' button. A warning message states: 'After downloading, your document will be retained for five days in case you need to download it again. After downloading your documents and the 5 days have passed your documents will no longer be available.'

2. (Optional) Add the ClientID

The ClientID will appear on the cover sheet of the bookmarked PDF but is not required to submit an Organize LITE job

The screenshot shows the GruntWorx interface for creating a new job. The 'New Job' section has two input fields: 'Taxpayer' (required) and 'Client ID' (optional). The 'Client ID' field is highlighted with a red box. Below these fields is a table showing job statistics:

file count	upload size	total pages
0 files	0 Byte	0

Below the table is a dashed box labeled 'Drop files or click here' and two buttons: 'reset' and 'submit job'. On the right, the 'Submitted Jobs' section shows a modal dialog titled 'Optionally add the Client ID' with instructions: 'Enter the client ID if you want it to appear on the cover page (optional)'. Below the dialog are 'Prev' and 'Next' buttons and a 'Download' button.

3. Upload scanned documents

GruntWorx® Welcome: Chase Newell (Sign-Out) | Dashboard | Tour | User Settings | Admin Settings

New Job

Taxpayer required

Client ID optional

file count	upload size	total pages
0 files	0 Byte	0

Drop files or click here

reset submit job

Submitted Jobs

working (0) done (0) recent (1)

There are no jobs in progress.

Organize LITE produces the same output as the standard Organize product but without the human validation. It allows for fast and simple submission and your documents are ready

Add files

Click here or drag and drop files from Windows Explorer

the cover page of the output notes your bookmarked PDF

five days in case you need documents and the 5 days have been available.

Prev Next

4. Submit job

GruntWorx® Welcome: Chase Newell (Sign-Out) | Dashboard | Tour | User Settings | Admin Settings

New Job

Taxpayer required

Client ID optional

file count	upload size	total pages
0 files	0 Byte	0

Drop files or click here

reset submit job

Submitted Jobs

working (0) done (0) recent (1)

There are no jobs in progress.

Organize LITE produces the same output as the standard Organize product but without the human validation. It allows for fast and simple submission and your documents are ready in minutes.

Simply enter the taxpayer name as you want it to appear on the cover page of the output document, upload the scanned PDFs and submit. In a few minutes your bookmarked PDF will be available for download.

Send your job to us

After you have provided the taxpayer name and selected all of your files, click the submit button (or use the reset button to clear the form and start over)

or five days in case you need documents and the 5 days have been available.

Prev Next

We'll take it from here! Your job will appear under the working tab while it's processing.

The screenshot shows the GruntWorx dashboard. On the left, the 'New Job' section has input fields for 'Taxpayer' (required) and 'Client ID' (optional). Below these is a table with columns 'file count', 'upload size', and 'total pages', all showing '0'. A dashed box indicates where to drop files, and there are 'reset' and 'submit job' buttons. On the right, the 'Submitted Jobs' section has three tabs: 'working (0)', 'done (0)', and 'recent (1)'. The 'working (0)' tab is highlighted with a red box. A modal window titled 'Processing..' is open, displaying instructions: 'While GruntWorx is working on your job it will appear in this tab... product but without the documents are ready...'. The modal also contains 'Prev' and 'Next' navigation buttons and a warning: 'After downloading, your document will be retained for five days in case you need to download it again. After downloading your documents and the 5 days have passed your documents will no longer be available.'

5. Download the completed job: Once your job is complete, find it under the “done” tab, ready for download. Remember, access to the client record and the downloaded PDF will expire after just a few days.

This screenshot is similar to the previous one, but the 'done (0)' tab in the 'Submitted Jobs' section is highlighted with a red box. The modal window is now titled 'Done!' and contains the following text: 'When your job is complete it will appear in this tab. Simply click a job to download your organized documents! After downloading, the document will remain available for 5 days in another tab after which it will be removed.' The modal also features 'Prev', 'Done', and 'Next' navigation buttons and the same 5-day retention warning as the previous modal.