GruntWorx

Organize and Organize LITE

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

NEED HELP?

Call us: 877-830-6059
X2 for Sales
X3 for Support

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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. ote 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 and Organize LITE

Organize

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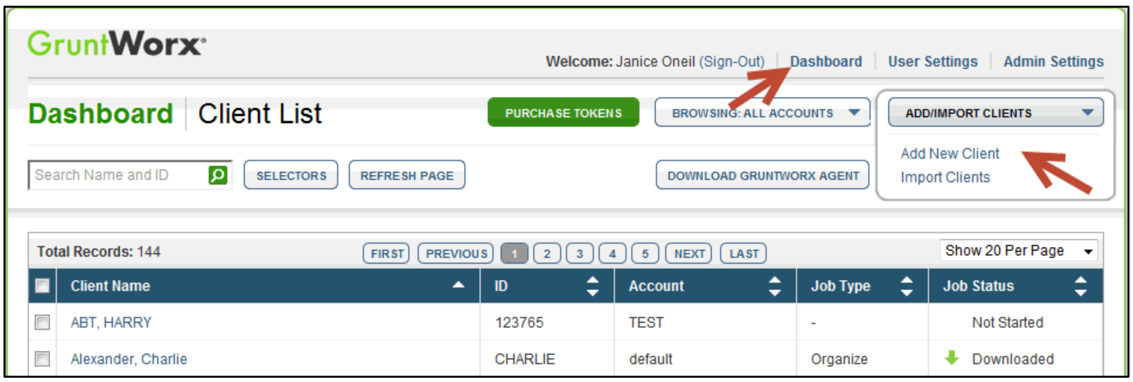
Job Submission

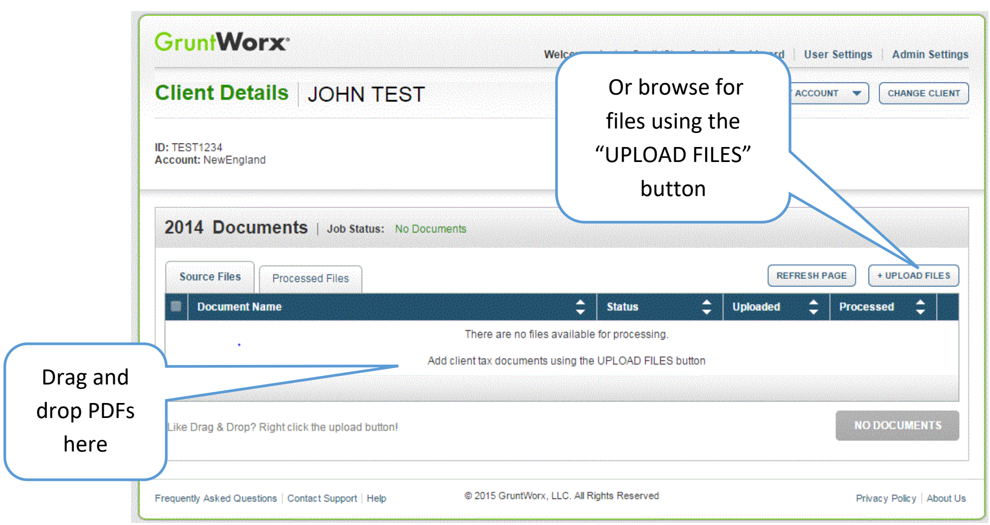
1. Add Client/s

- 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

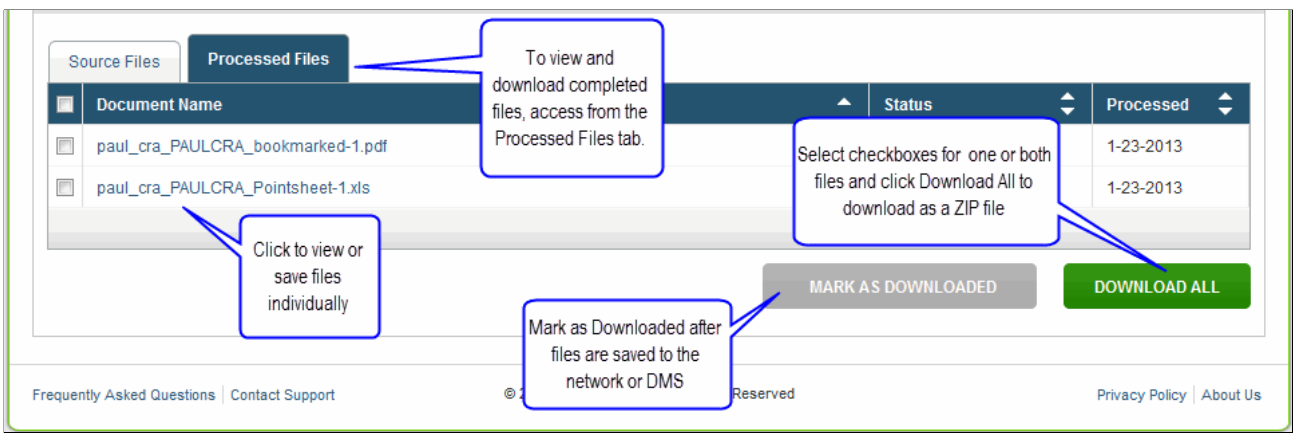
Job Completion Notification

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.

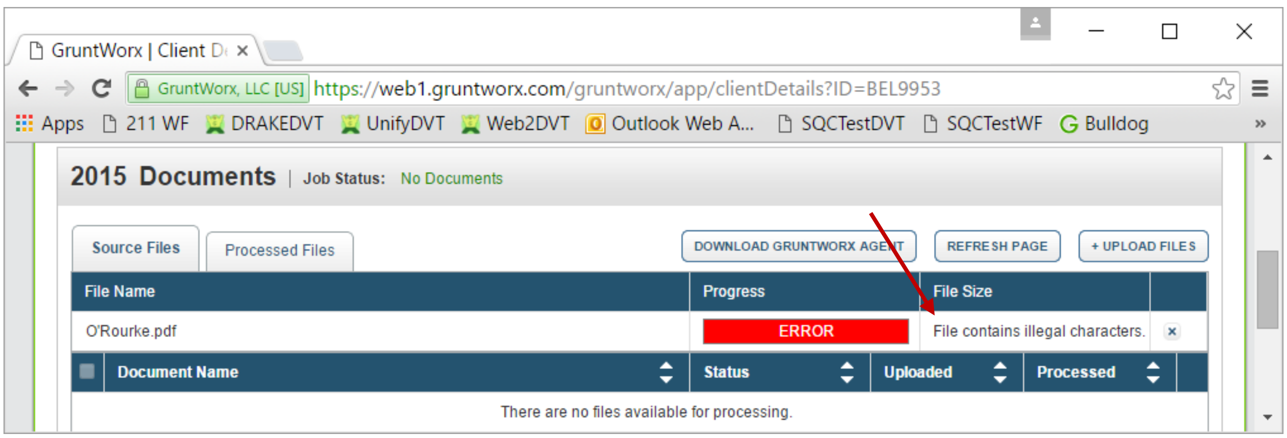


Troubleshooting

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.

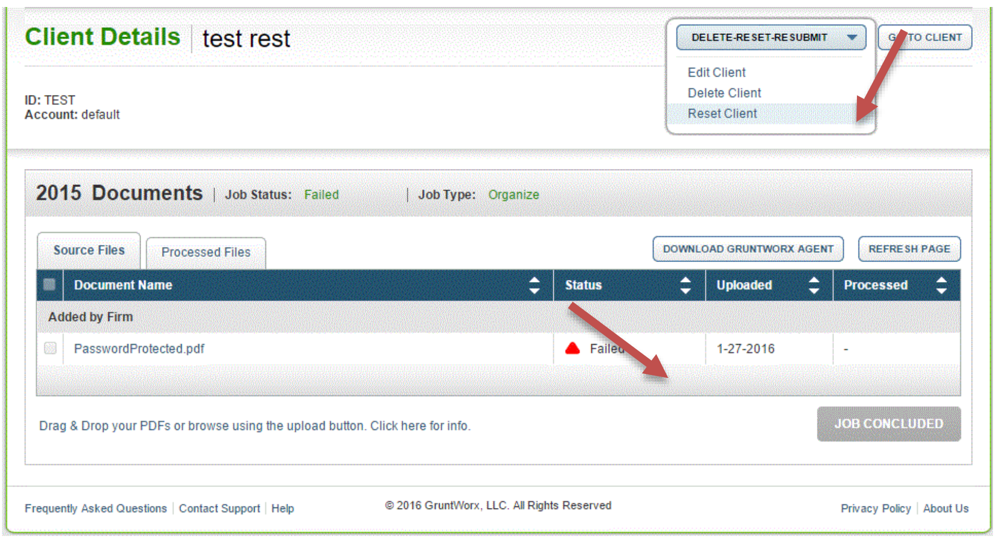
Upload Error – A pdf file name that includes an apostrophe, a semi-colon or an equals sign will fail when uploaded. Delete by clicking the "X" at far right and rename the file to allow for upload.



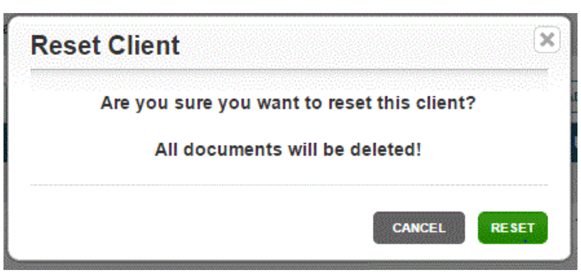
Troubleshooting (cont)

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 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

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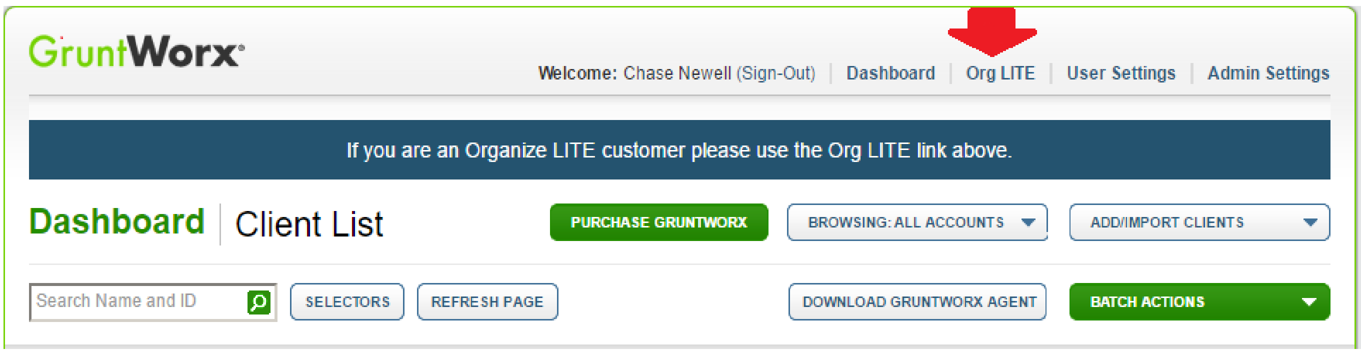
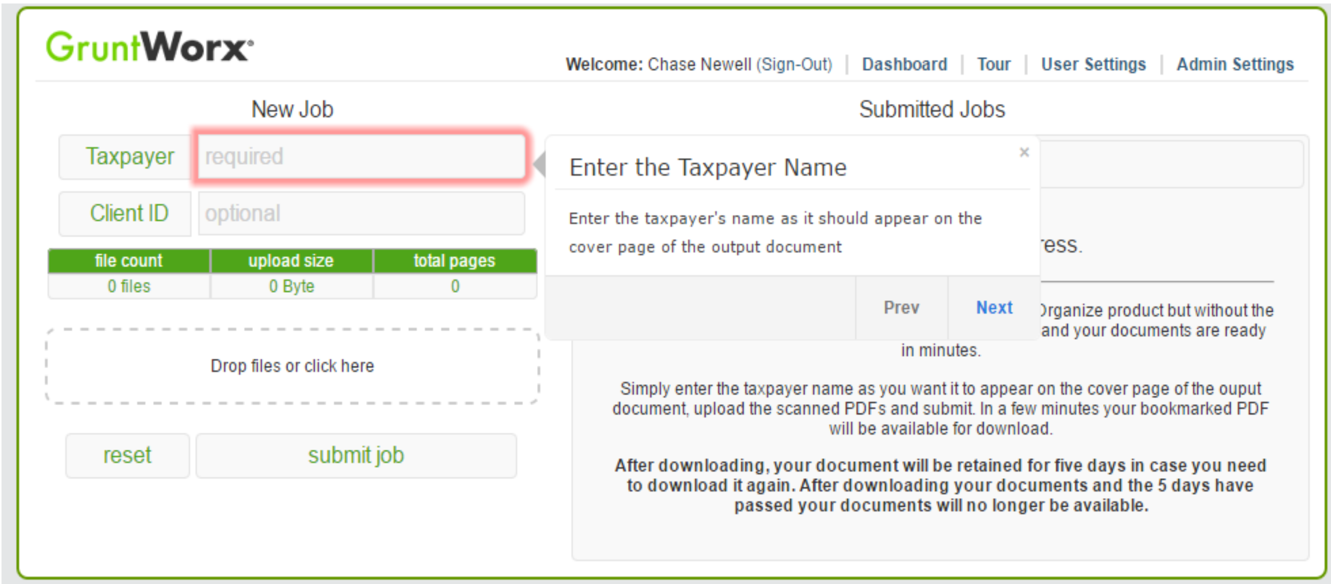


Refer to the “Tour” link for a walk-through of the Organize LITE process,

GruntWorx

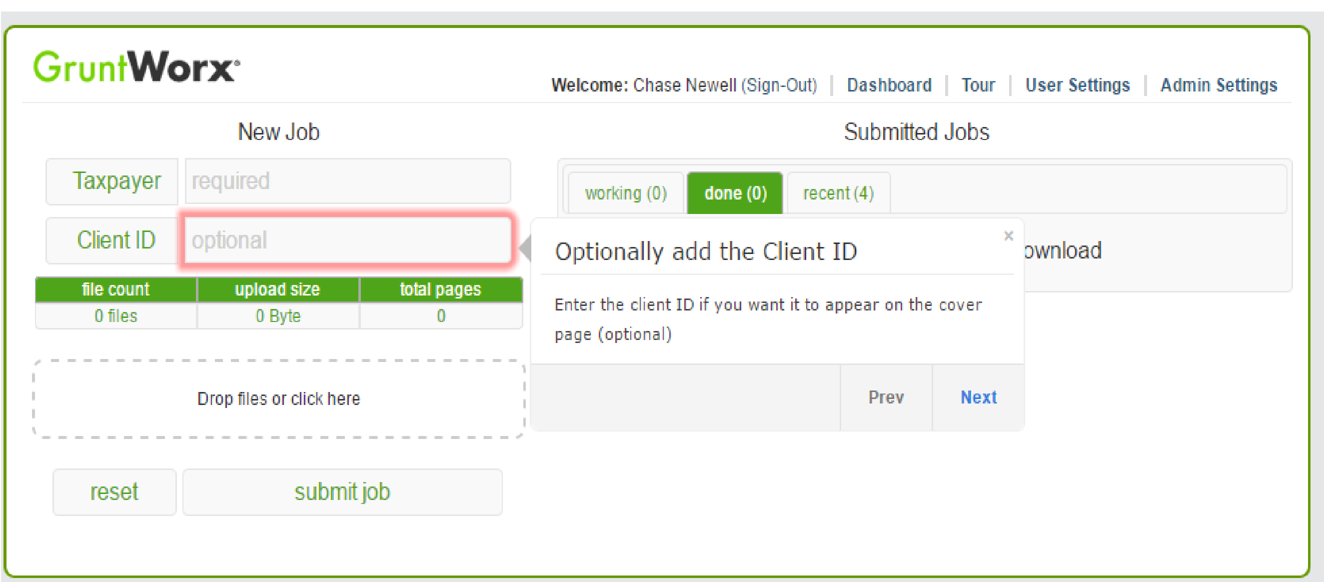
Organize and Organize LITE

1. Add the Client Name

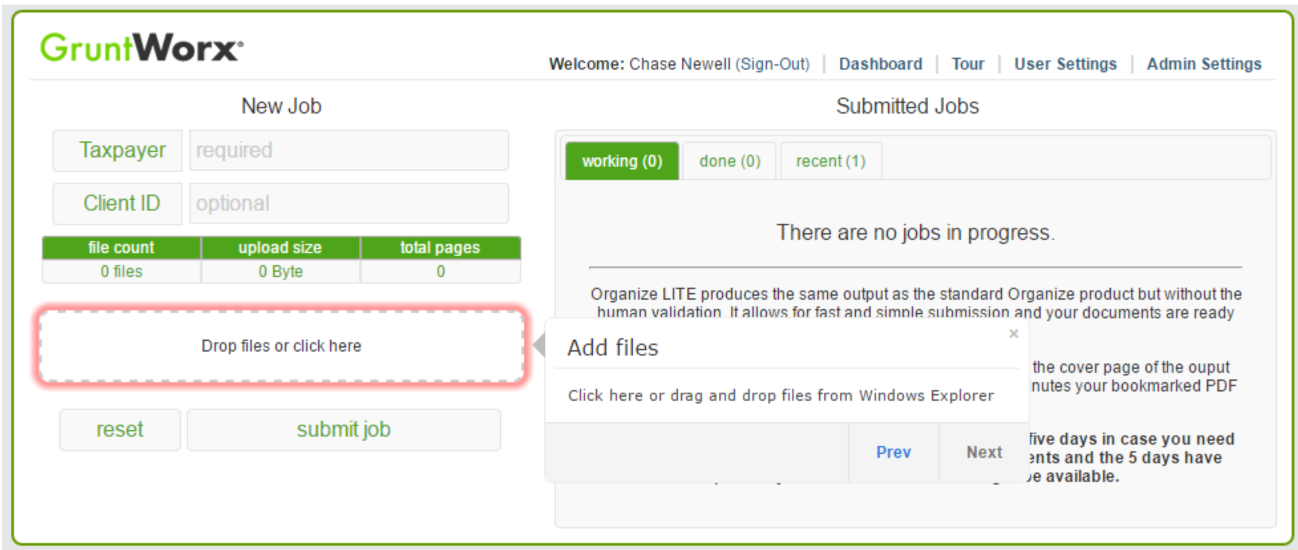


2. (Optional) Add the ClientID

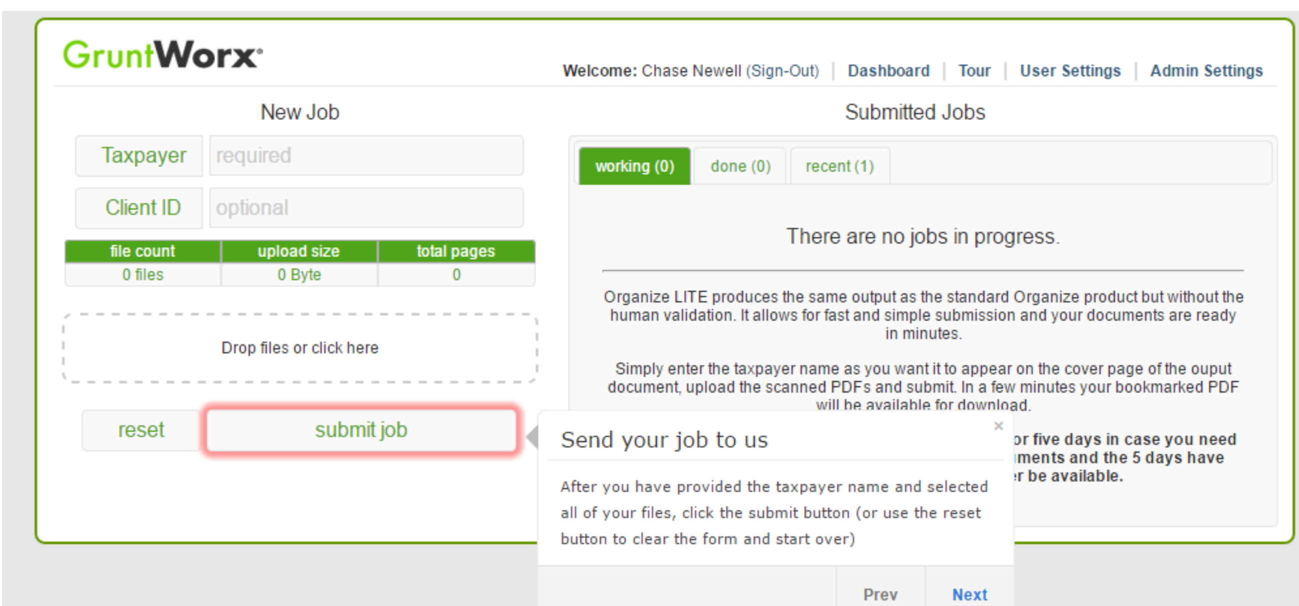
The ClientID will appear on the cover sheet of the bookmarked PDF but is not required to submit an Organize LITE job



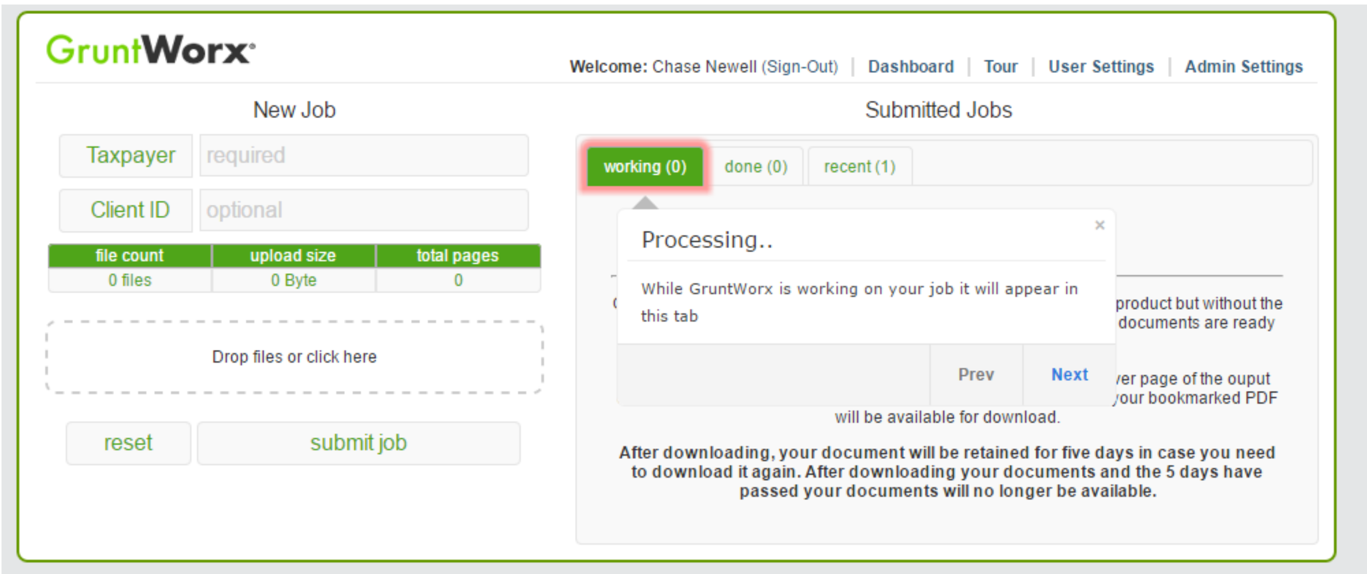
3. Upload scanned documents



4. Submit job



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



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.