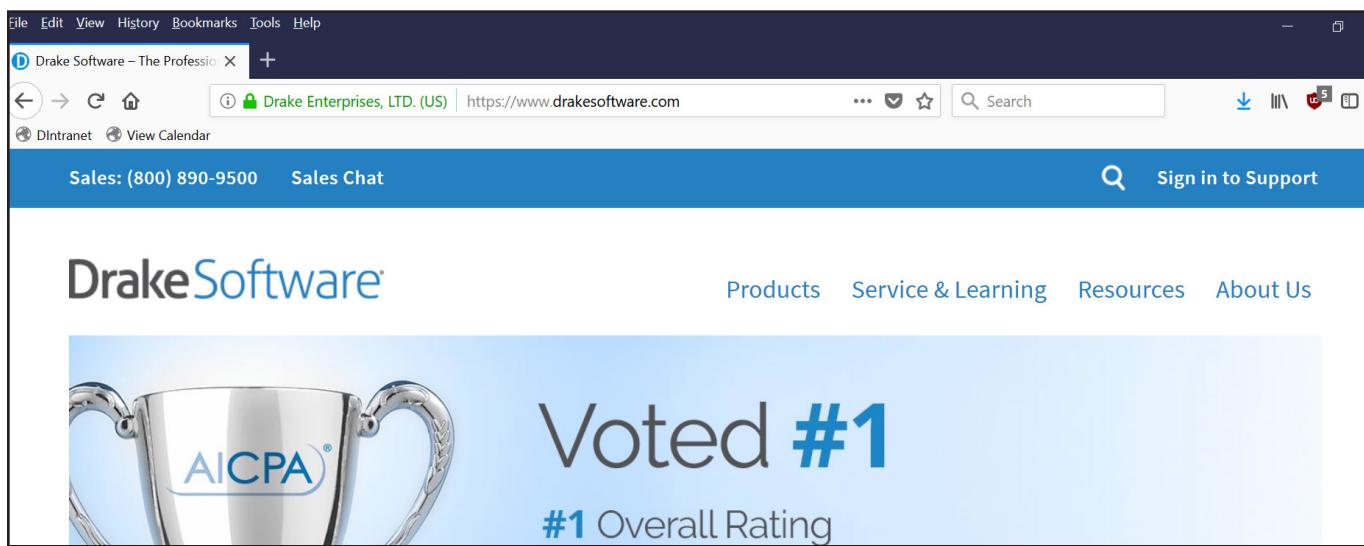


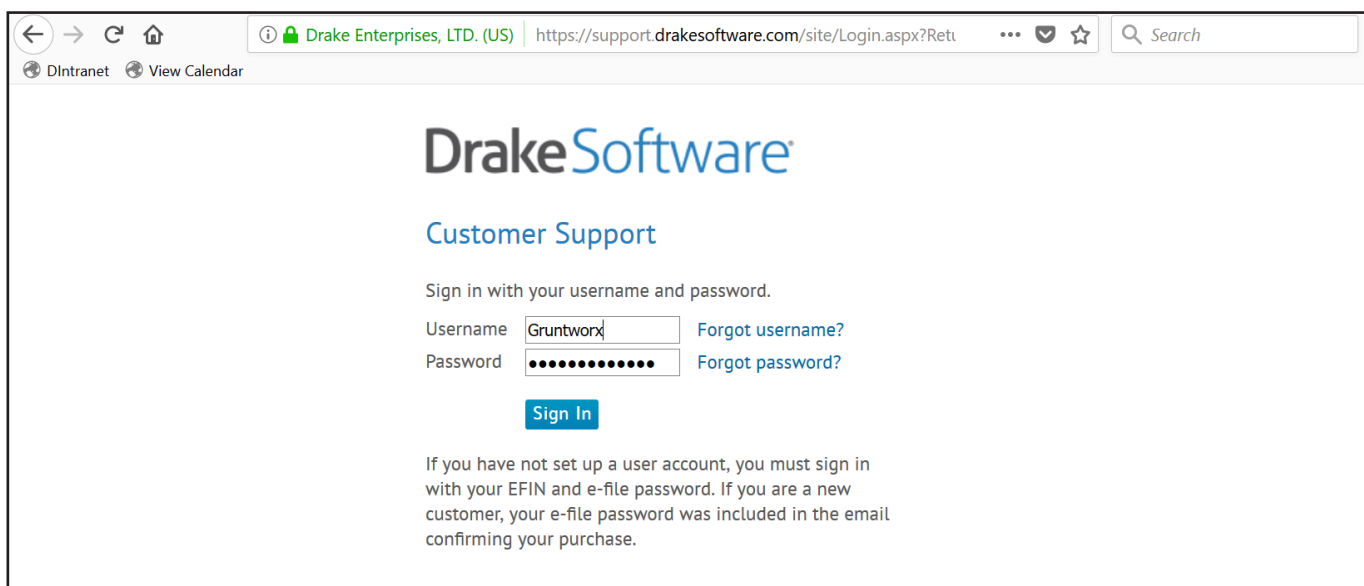
Drake Quick Start Guide

Here are the instructions to help you sign up for your free GruntWorx trial and how to activate your GruntWorx account in Drake Tax. If you have already signed up for your trial account, you can jump to the **Using GruntWorx with Drake Tax** section.

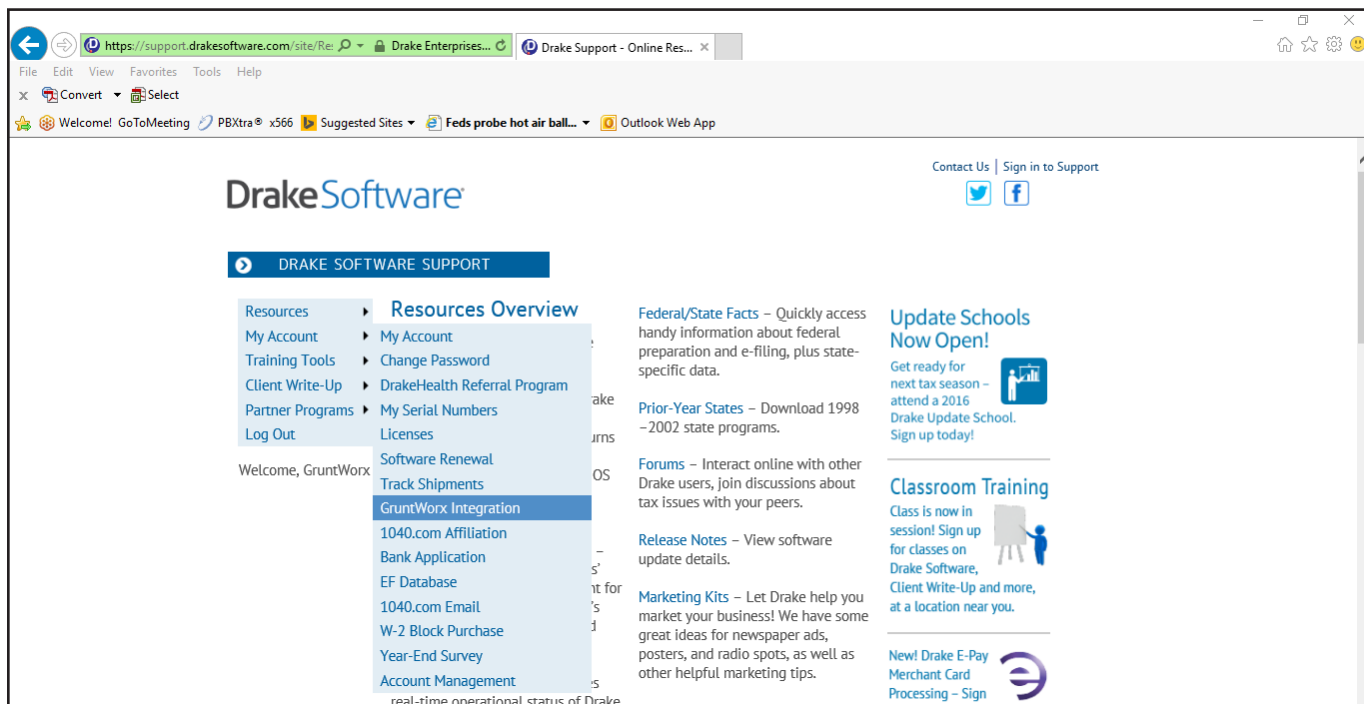
1 Go to [DrakeSoftware.com](https://www.drakesoftware.com).



2 Sign into the Drake Software Support site.

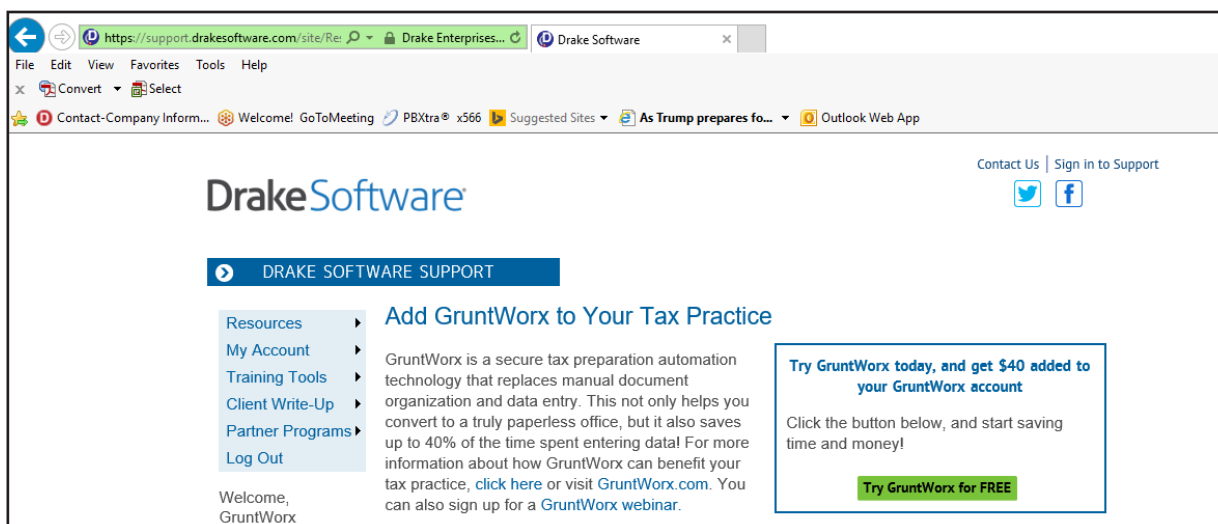


3 Select GruntWorx Integration from the My Account drop list.



4 Click Try GruntWorx for Free to sign up for the free trial.

Note: If you've already signed up for a free trial you won't see this sign up, instead proceed to the next section, **Using GruntWorx within Drake Software.**



5 Proceed to the next section, **Using GruntWorx within Drake Software.**

QUICK START GUIDE

GruntWorx®

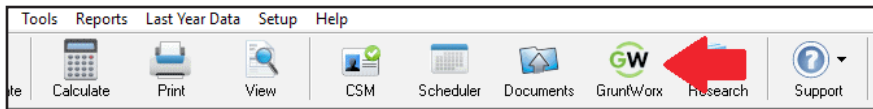
Using GruntWorx Within Drake Software

DrakeSoftware®

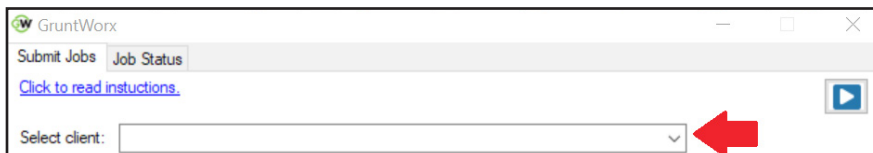
Below are the instructions to walk you through using GruntWorx within Drake Software.

1 Launch Drake Software.

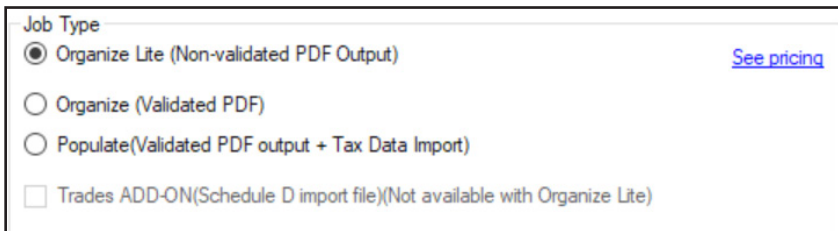
2 Select the **GruntWorx** icon in the toolbar.



3 Choose your client by clicking the **Select client** drop list.



4 Select the job type you want to use.



GruntWorx Organize LITE

Organizes, bookmarks, and labels scanned tax documents so you can easily find and review any document without human validation within minutes.

GruntWorx Organize

Organizes, bookmarks, and labels scanned tax documents so you can easily find and review any document and includes human validation.

GruntWorx Populate

Eliminates data entry with accurate data extraction and population into most tax software.

GruntWorx Trades

Transforms trade details on scanned consolidated brokerage statements into a spreadsheet file, which can be imported into most tax software.

- 5 Click the **Add Files** button to select and add your client's scanned source documents. You can add up to 10 files (maximum of 50 MB per file) for a total of 500 MB at one time. You can also scan your client files and add them here in one step.

! IMPORTANT: Make sure your files are in the PDF, JPG, or PNG file format. To use the scan feature you must use a TWAIN compatible scanner. If you don't have a TWAIN scanner, then use the **Add Files** option.



- 6 To receive an email alerting you when the job is complete, select checkbox and enter your email address.



- 7 Click **Do not re-order pages** if you do not want your pages repaginated.

! TIP: Repagination is where GruntWorx Organize sorts the pages you submitted in the order of the 1040. By clicking on **Do not re-order pages** this allows you to physically reorder the pages.



- 8 Click **Submit**.



- 9 Once the job is uploaded, click **Close**. If you selected Organize LITE, the average turnaround time is 1-5 minutes.

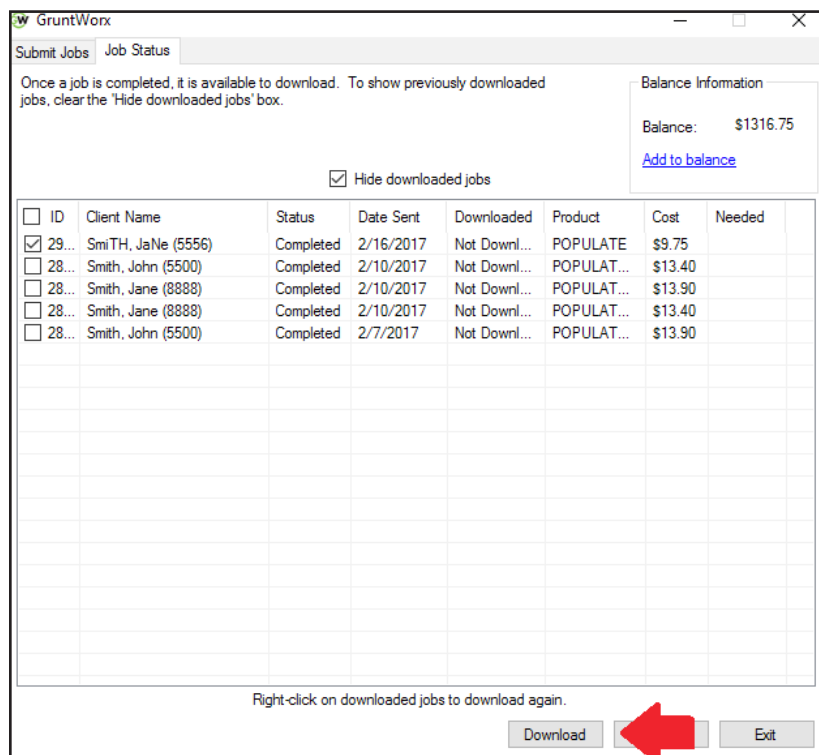
! TIP: You will receive a notification email when the job is ready to download if you selected the **Send e-mail when job is done to** option.

- 10 To download a completed GruntWorx job, you must navigate back to your **Drake Software Home Window** and click on the **GruntWorx** icon in the toolbar.

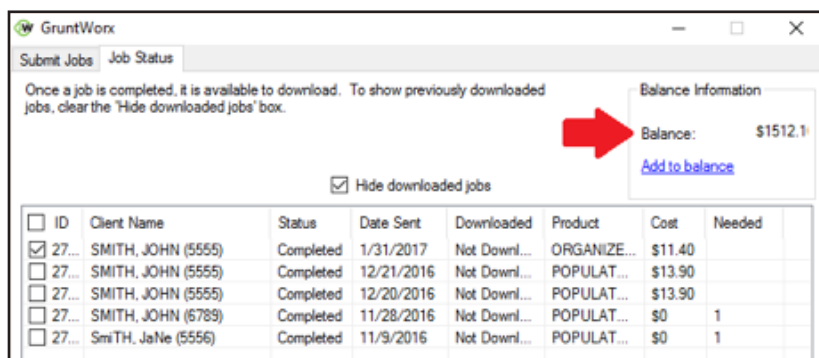
- 11 Once you are back in GruntWorx, go to the **Job Status** tab. Here you should see your client ID, client name, and completion status.



- 12 Select the job you want to use and click **Download**.

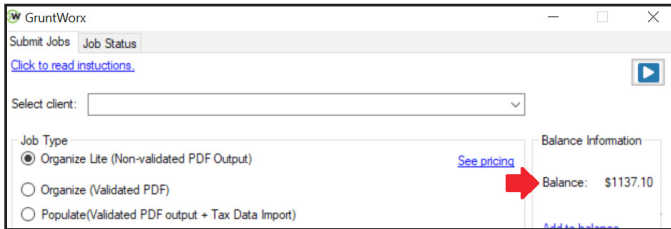


- TIP:** Under both the **Job Status** tab and **Submit Jobs** tab, you can see your balance information in the upper right-hand corner. Your balance information will be displayed down to the penny.




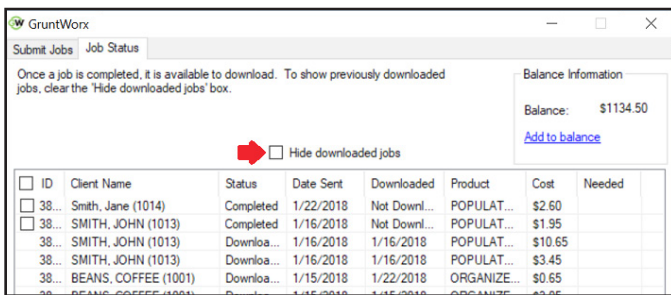
Balance Information under **Submit Jobs** tab:

 **TIP:** You can add to your GruntWorx account at any time by clicking **Add to Balance**.



The screenshot shows the 'Submit Jobs' tab in the GruntWorx application. It includes a 'Select client' dropdown, a 'Job Type' section with three radio buttons (Organize Lite, Organize, and Populate), and a 'Balance Information' section on the right showing a balance of \$1137.10. A red arrow points to the 'Add to balance' link.

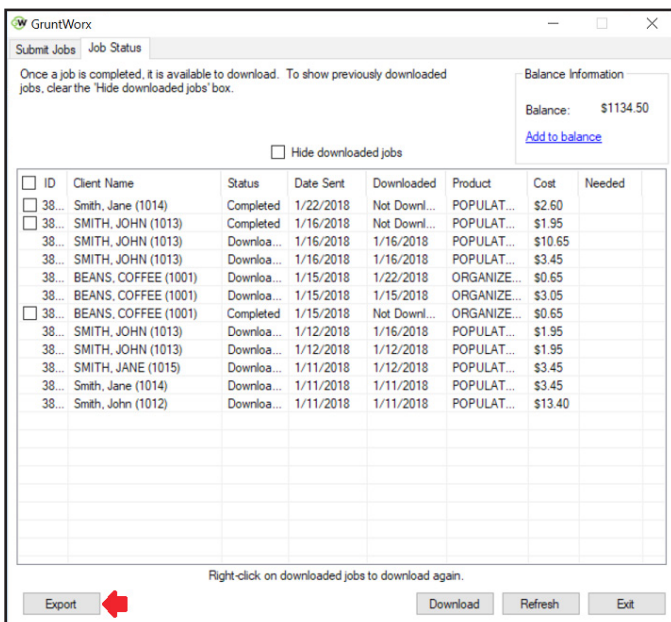
 **TIP:** To find the cost-per-client information for processing a return, click on the **Job Status** tab and uncheck the **Hide downloaded jobs** box. Every return you have submitted will be here, displaying the following information: client name, status, the date it was sent to GruntWorx, the date it was downloaded from GruntWorx, the product used, and the costs.



The screenshot shows the 'Job Status' tab in the GruntWorx application. It includes a 'Hide downloaded jobs' checkbox, a 'Balance Information' section showing a balance of \$1134.50, and a table of job status information. A red arrow points to the 'Hide downloaded jobs' checkbox.

ID	Client Name	Status	Date Sent	Downloaded	Product	Cost	Needed
38...	Smith, Jane (1014)	Completed	1/22/2018	Not Downl...	POPULAT...	\$2.60	
38...	SMITH, JOHN (1013)	Completed	1/16/2018	Not Downl...	POPULAT...	\$1.95	
38...	SMITH, JOHN (1013)	Download...	1/16/2018	1/16/2018	POPULAT...	\$10.65	
38...	SMITH, JOHN (1013)	Download...	1/16/2018	1/16/2018	POPULAT...	\$3.45	
38...	BEANS, COFFEE (1001)	Download...	1/15/2018	1/22/2018	ORGANIZE...	\$0.65	

 **TIP:** You can click on the **Export** button to extract all of this information into a CSV format.



The screenshot shows the 'Job Status' tab in the GruntWorx application, similar to the previous one, but with an 'Export' button at the bottom left. A red arrow points to the 'Export' button.

ID	Client Name	Status	Date Sent	Downloaded	Product	Cost	Needed
38...	Smith, Jane (1014)	Completed	1/22/2018	Not Downl...	POPULAT...	\$2.60	
38...	SMITH, JOHN (1013)	Completed	1/16/2018	Not Downl...	POPULAT...	\$1.95	
38...	SMITH, JOHN (1013)	Download...	1/16/2018	1/16/2018	POPULAT...	\$10.65	
38...	SMITH, JOHN (1013)	Download...	1/16/2018	1/16/2018	POPULAT...	\$3.45	
38...	BEANS, COFFEE (1001)	Download...	1/15/2018	1/22/2018	ORGANIZE...	\$0.65	
38...	BEANS, COFFEE (1001)	Download...	1/15/2018	1/15/2018	ORGANIZE...	\$3.05	
38...	BEANS, COFFEE (1001)	Completed	1/15/2018	Not Downl...	ORGANIZE...	\$0.65	
38...	SMITH, JOHN (1013)	Download...	1/12/2018	1/16/2018	POPULAT...	\$1.95	
38...	SMITH, JOHN (1013)	Download...	1/12/2018	1/12/2018	POPULAT...	\$1.95	
38...	SMITH, JANE (1015)	Download...	1/11/2018	1/12/2018	POPULAT...	\$3.45	
38...	Smith, Jane (1014)	Download...	1/11/2018	1/11/2018	POPULAT...	\$3.45	
38...	Smith, John (1012)	Download...	1/11/2018	1/11/2018	POPULAT...	\$13.40	

Example of Report:

ID	Client Name	Status	Date Sent	Downloaded	Product	Cost	Needed
383322	Smith Jane (1014)	Completed	1/22/2018	Not Downloaded	POPULATE_TRADES	\$2.60	
383048	SMITH JOHN (1013)	Completed	1/16/2018	Not Downloaded	POPULATE_TRADES	\$1.95	
383041	SMITH JOHN (1013)	Downloaded	1/16/2018	1/16/2018	POPULATE_TRADES	\$10.65	
383039	SMITH JOHN (1013)	Downloaded	1/16/2018	1/16/2018	POPULATE_TRADES	\$3.45	
383024	BEANS COFFEE (1001)	Downloaded	1/15/2018	1/22/2018	ORGANIZE_LITE	\$0.65	
383022	BEANS COFFEE (1001)	Downloaded	1/15/2018	1/15/2018	ORGANIZE_LITE	\$3.05	
383021	BEANS COFFEE (1001)	Completed	1/15/2018	Not Downloaded	ORGANIZE_LITE	\$0.65	
382968	SMITH JOHN (1013)	Downloaded	1/12/2018	1/16/2018	POPULATE_TRADES	\$1.95	
382952	SMITH JOHN (1013)	Downloaded	1/12/2018	1/12/2018	POPULATE_TRADES	\$1.95	
382936	SMITH JANE (1015)	Downloaded	1/11/2018	1/12/2018	POPULATE_TRADES	\$3.45	
382932	Smith Jane (1014)	Downloaded	1/11/2018	1/11/2018	POPULATE_TRADES	\$3.45	
382931	Smith John (1012)	Downloaded	1/11/2018	1/11/2018	POPULATE_TRADES	\$13.40	

13 When the download is complete, go to Drake Documents and find your client.

14 You will see that your client now has a plus sign by their name. Click the plus sign to open the client's GruntWorx folder.

Document Name	Type	Last Modified	Description
DRK140475_ECB1D112 (33)	pdf File	2/3/2017 10:37:34 AM	Right click and go to Properties to enter Description
DRK140475_ECB1D112 (33)	xml File	2/3/2017 10:37:34 AM	Right click and go to Properties to enter Description
DRK140475_ECB1D112 (33)_Di...	xls File	2/3/2017 10:37:34 AM	Right click and go to Properties to enter Description
DRK140475_ECB1D112 (33)_Tr...	xls File	2/15/2017 9:55:10 AM	Right click and go to Properties to enter Description

15 GruntWorx sends all the processed files back to the GruntWorx folder within Drake Documents. If you choose Organize, you will have a PDF file. If you choose Populate, you will have an XML file and an organized PDF. If adding Trades to Organize or Populate, you will also have an XLS file containing all the trade details.

16 To review the organized PDF from Drake Documents, click on the PDF file.

17 To review trades from Drake Documents, click on the XLS file and a spreadsheet will appear where you can easily make adjustments to trades, such as a missing cost basis before you import the trades. Be sure to save the file when you are done making any adjustments. The file will be saved back in your Drake Documents folder.

18 The XML file contains your Populate job extracted data. You do not need to open this file.

19 Once you have reviewed this information in the Drake Document Manager, return to the **Drake Software Home Window** and find your client. Click on your client's name.

File EF Tools Reports Last Year Data Setup Help

Open/Create
 Calculate
 Print
 View

CSM
 Scheduler
 Documents
 GruntWorx
 Research
 Support
 Exit

Recent Returns:

	Key	Print/View
SMITH, JOHN	2	
Smith, Jane	3	
Smith, John	4	

Personal Client Manager - (CONTAINS SENSITIVE DATA)

Client Name	Type	Status	Started	Completed	Last Change	Trans D.
SMITH, JOHN	1040	Updated From 2015			02/15/2017	
Smith, John	1040	In Progress	02/03/2017		02/07/2017 ...	
Smith, Jane	1040	Updated From 2015			02/08/2017 ...	
Smith, JaNe	1040	Updated From 2015			02/10/2017 ...	

Appointments:

No upcoming appointments today.

Notifications:

20 The **Data Entry Screen** will appear. Click on the **Import** tab in the tool bar and then **GruntWorx Populate Job**.

[illegible]

21 If you chose Trades, your trades file will open. Click the **Import** button to have your trades automatically imported into your client's 8949.

Calculate

View

Print

Split

Documents

Tax Planner

Import

CSM

Email

ePay

Help

2016

2017

2018

2019

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- 22 Once the import is complete, you will be directed to your client's **Data Entry** screen. You can now easily manipulate or adjust any fields within the software.

The screenshot displays the 'Form W2 - Wage and Tax Statement' software interface. The main window is titled 'Form W2 - Wage and Tax Statement' and includes a 'Video: Entering Multiple State W2s' link. The interface is divided into several sections: a left sidebar with navigation tabs (General, Income, Adjustments), a top menu bar (Calculate, View, Print), and a main data entry area. The 'General' tab is active, showing fields for Employer information (EIN, Name, Address, City, State, ZIP, Country, Postal Code) and Employee information (Name, Address, City, State, ZIP, Country, Postal Code). The 'Income' tab is also visible, showing fields for Wages, Tips, Federal tax withheld, State tax withheld, Medicare wages, Medicare tax withheld, Social Security wages, Social Security tax withheld, and Other income. The 'Adjustments' tab is also visible, showing fields for Non-qualified plan, Code, Amount, Year, and Retirement plan. The bottom of the screen shows a summary of the entered data, including the Employer's state ID number, State wages, State tax, Local wages, Local tax, and Locality.

Tips for best scanning practices can be found here in this [video](#).

If you have any problems or need additional help you can reach us at:
Support@GruntWorx.com
877-830-6059

Here is a list of all the supported forms for the GruntWorx Organize and Populate services.

Organize LITE & Organize

- W-2
- W-2G
- W2C
- 1042S
- 1095-A
- 1095-B
- 1095-C
- 1098
- 1098-C
- 1098-E
- 1098-T
- 1099-A
- 1099-B
- 1099-C
- 1099-CAP
- 1099-G
- 1099-DIV
- 1099-INT
- 1099-H
- 1099-K
- 1099-LTC
- 1099-MISC
- 1099-PATR
- 1099-Q
- 1099-R
- RRB-1099
- RRB-1099-R
- 1099-S
- 1099-SA
- SSA-1099
- Consolidated 1099
- 2439
- 5498-SA
- 5498-ESA
- Grantor Letter as 1041 K-1
- Supporting Tax Documents
- Receipts



Populate

- W-2
- W-2G
- 1095-A
- 1098
- 1098-E
- 1098-T
- 1099-MISC
- 1099-B
- 1099-G
- 1099-DIV
- 1099-INT
- 1099-R
- RRB-1099
- SSA-1099
- 1099-OID
- Consolidated 1099
- 1120S K-1
- 1065 K-1
- 1041 K-1
- 5498

