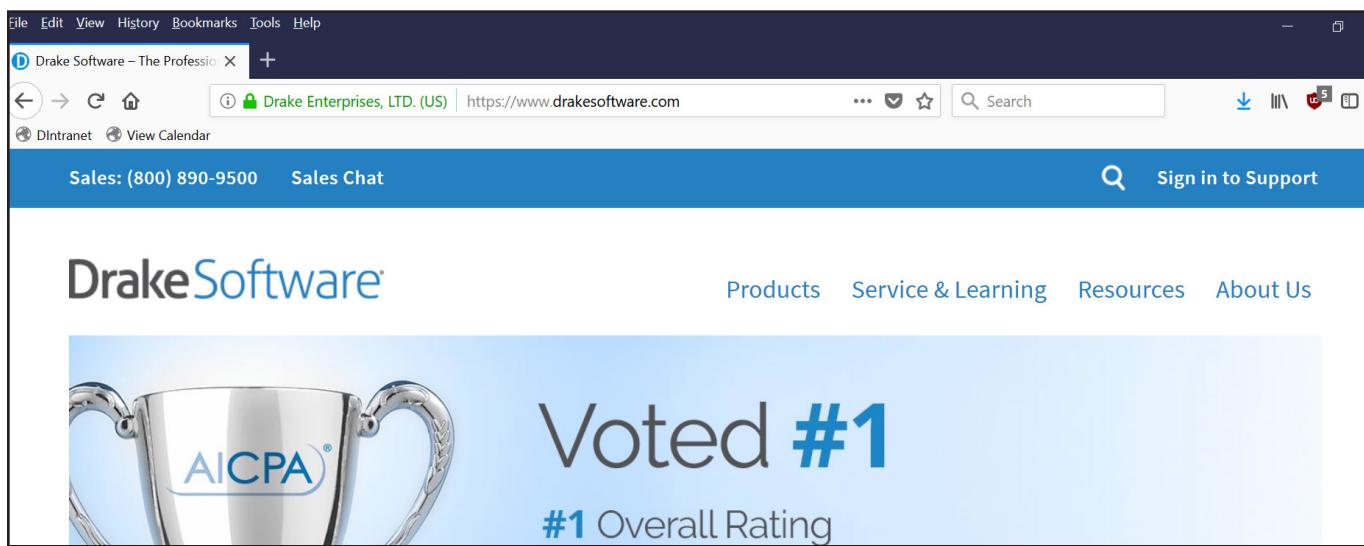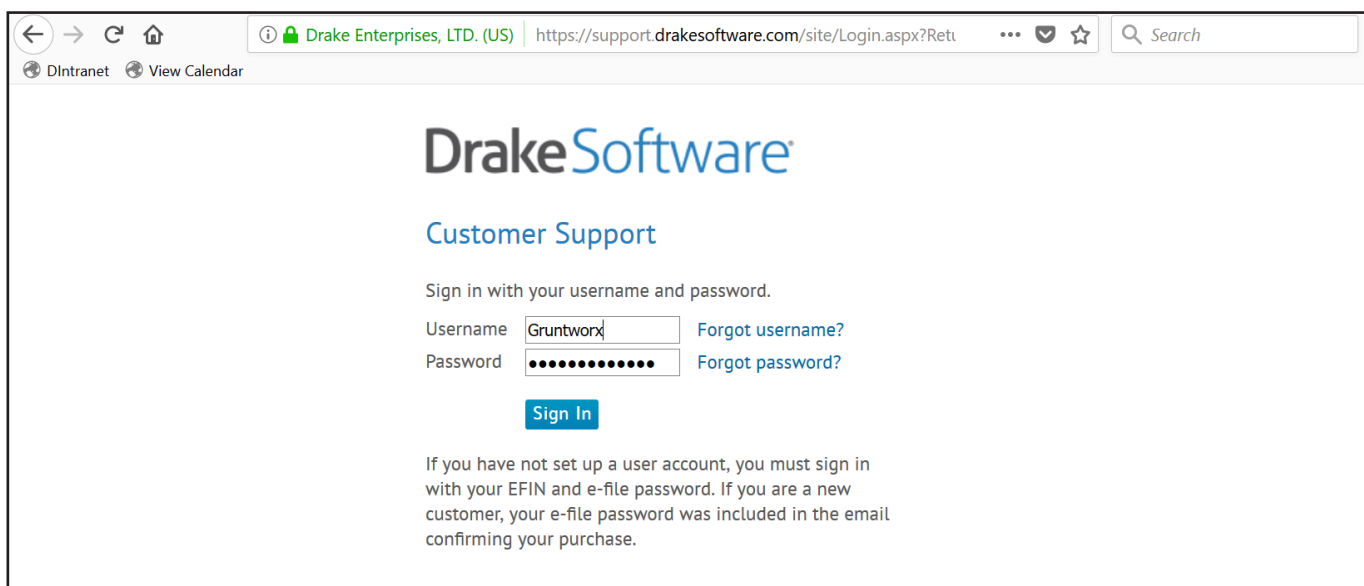# Drake Quick Start Guide

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.
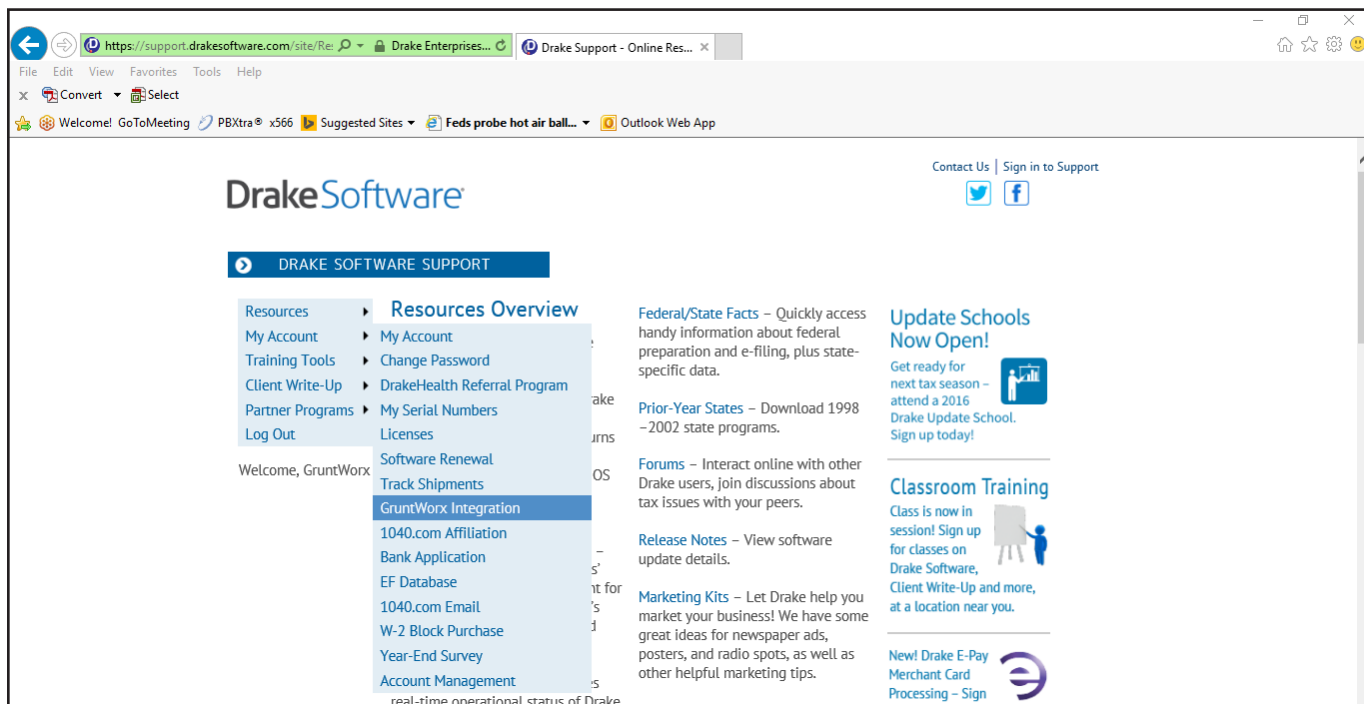
**1** Go to DrakeSoftware.com.



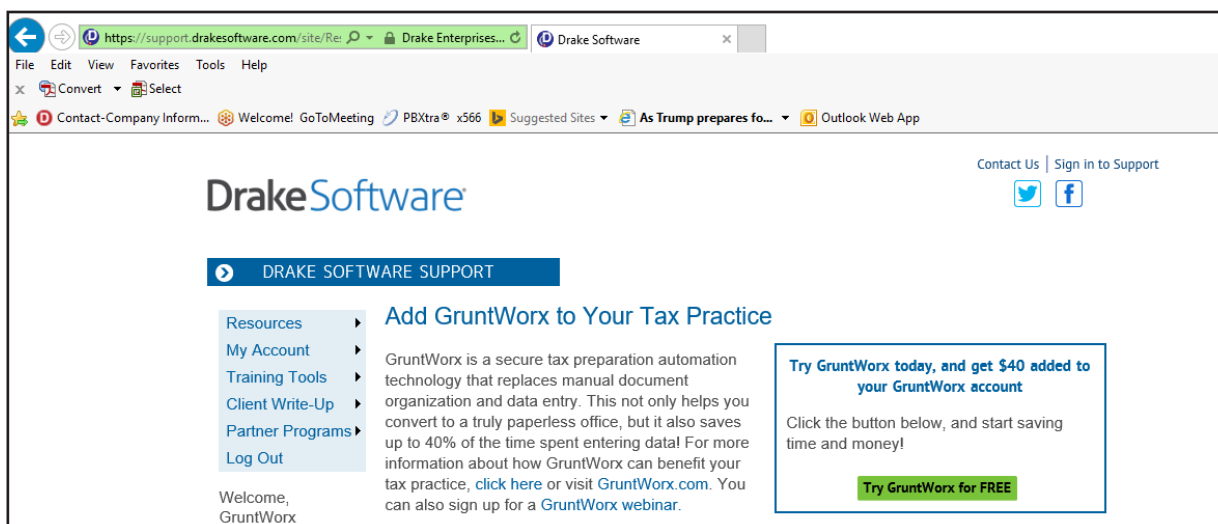**2** Sign into the Drake Software Support site.

**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.**
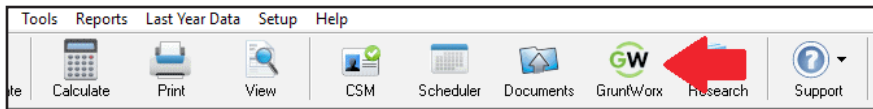
# QUICK START GUIDE

**GruntWorx®**

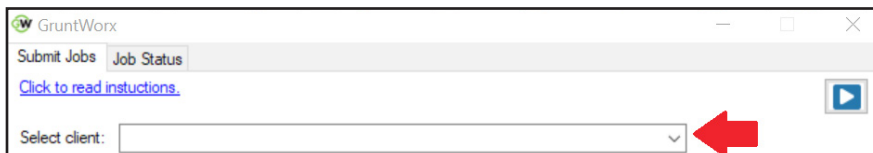## Using GruntWorx Within Drake Software

**DrakeSoftware®**

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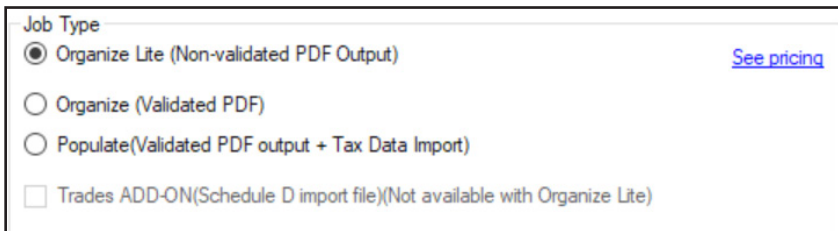
**1** Launch Drake Software.

**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** | GruntWorx **Organize** | GruntWorx **Populate** | GruntWorx **Trades** |
|---|---|---|---|
| Organizes, bookmarks, and labels scanned tax documents so you can easily find and review any document without human validation within minutes. | Organizes, bookmarks, and labels scanned tax documents so you can easily find and review any document and includes human validation. | Eliminates data entry with accurate data extraction and population into most tax software. | 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.



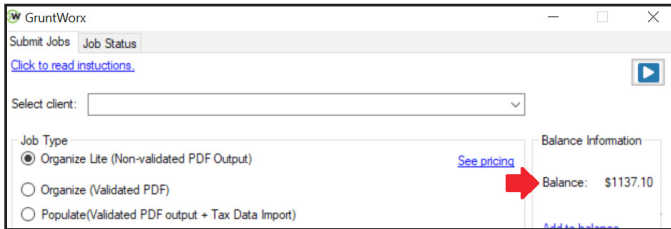**12** Select the job you want to use and click **Download.**
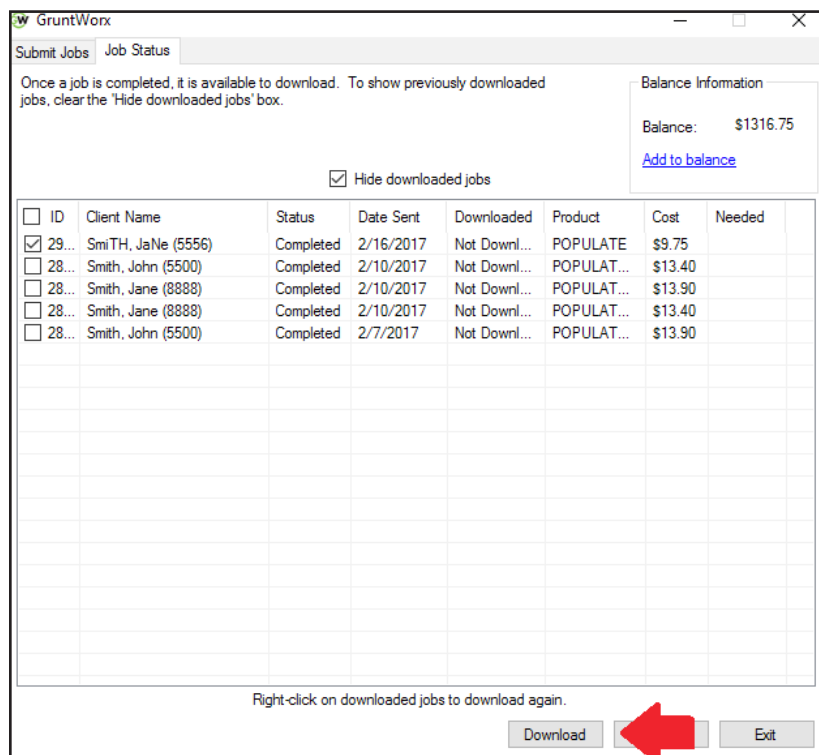


⚠ **TIP:** Under both the **Job Status** tab and **Submit Jobs** tab, you can see your balance information in the upper right-hand corner. Your balance information will be displayed down to the penny.
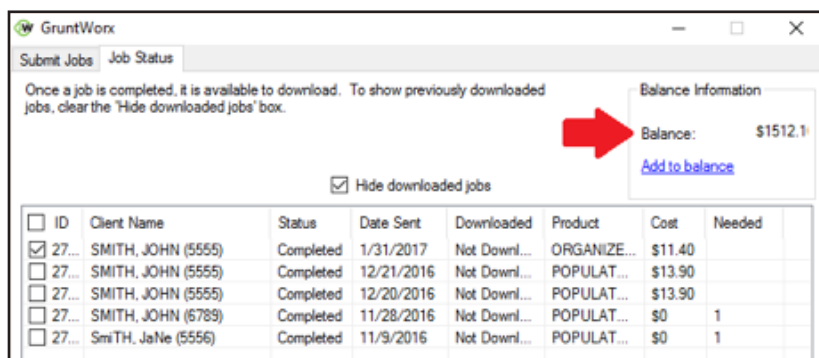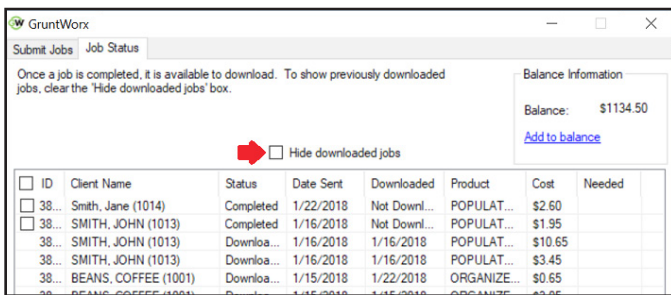
Balance Information under **Submit Jobs** tab:

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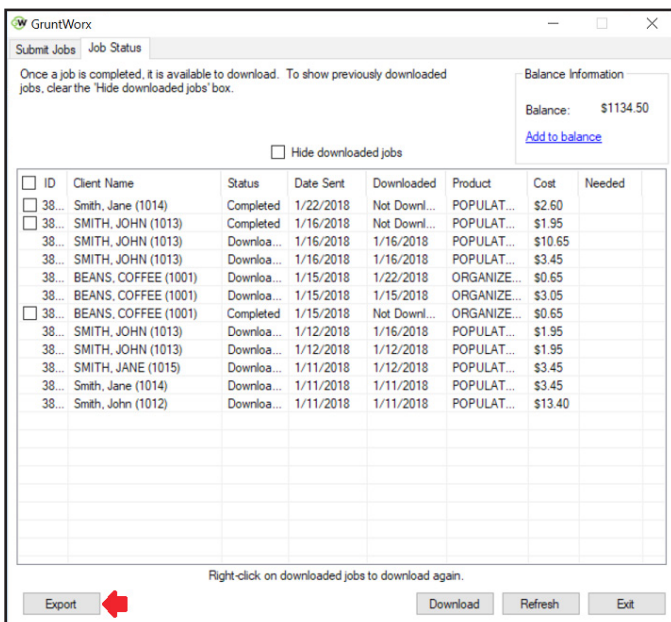


⚠ **TIP:** To find the cost-per-client information for processing a return, click on the **Job Status** tab and uncheck the **Hide downloaded jobs** box. Every return you have submitted will be here, displaying the following information: client name, status, the date it was sent to GruntWorx, the date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



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

Example of Report:



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

⓮ 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.



⓯ 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.

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

⓱ 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.

⓲ 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.



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



**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.

**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.



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

# Supported Forms

**GruntWorx**®

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