

Step 4: Download the GruntWorx Output

At the Dashboard, open the Client page (click the Client name) and click the 'Processed Files' tab. Under the "Processed" tab, the first file listed is the organized and bookmarked PDF. The second file is an Excel workbook called the Pointsheet, used to populate the tax file.

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 buttons for 'MARK AS DOWNLOADED' and 'DOWNLOAD ALL'. Callouts provide instructions: 'To view and download completed files, access from the Processed Files tab.' points to the 'Processed Files' tab; 'Click to view or save files individually' points to the file names; 'Select checkboxes for one or both files and click Download All to download as a ZIP file' points to the checkboxes; and 'Mark as Downloaded after files are saved to the network or DMS' points to the 'MARK AS DOWNLOADED' button. The footer contains links for 'Frequently Asked Questions', 'Contact Support', 'Privacy Policy', and 'About Us'.

Document Name	Status	Processed
<input type="checkbox"/> paul_cra_PAULCRA_bookmarked-1.pdf		1-23-2013
<input type="checkbox"/> paul_cra_PAULCRA_Pointsheet-1.xls		1-23-2013

MARK AS DOWNLOADED

DOWNLOAD ALL

Note: Output files can be viewed from the GruntWorx "Processed File" tab but, to take advantage of the links between the Pointsheet and the Bookmarked PDF, the user must download and save the documents, to their desktop or local 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.