

Upload Tax Documents

To send GruntWorx tax documents for one of your clients, follow the following process

- **Step 1:** Click on the name of the client to modify or upload tax documentation for
- **Step 2:** Verify the Client Id matches the Id in your tax program.
- **Step 3:** Click on the Upload Files button
- **Step 4:** Click on the 'Choose File' button and select the tax documents to send to GruntWorx. **Important Note:** Files sent to GruntWorx must be in either TIFF or PDF format
- **Step 5:** Once all files have been selected, click 'Upload Documents' button
- **Step 6:** Once all the files for this client have been uploaded to GruntWorx, give us the go ahead to process them by clicking on the 'Process Files' button.

Illustrated Step-By-Step Process

(See Below)

Illustrated Step-by-Step Process

Step 1: Click on the name of the client to modify or upload tax documentation for

The screenshot shows the GruntWorx dashboard with the 'Client List' tab selected. At the top, there is a navigation bar with the GruntWorx logo, a welcome message for John Morganti, and links for Dashboard, User Settings, and Admin Settings. Below this, there are buttons for 'PURCHASE TOKENS', 'ADD/IMPORT CLIENTS', 'SEARCH NAME', 'SELECTORS', 'REFRESH PAGE', 'DOWNLOAD GRUNTWORX AGENT', and 'BATCH ACTIONS'. The main content area displays a table of 5 client records. The first record, 'Adams, Jonathan A', is highlighted with a red box. A red arrow points from this box to a text box that reads 'Click on the name of the client to open the Client's Dashboard'. The table columns are Client Name, ID, Job Type, and Job Status. The footer contains links for 'Frequently Asked Questions', 'Contact Support', 'Help', 'Privacy Policy', and 'About Us', along with the copyright notice '© 2013 GruntWorx, LLC. All Rights Reserved'.

Client Name	ID	Job Type	Job Status
Adams, Jonathan A	003-45-6789	-	Not Started
Duplicateid, Adams, Jonathan A	123456789	-	No Documents
Duplicateid, Jason	12-3456789	-	No Documents
Duplicateid, John	123-45-6789	-	No Documents
Testuser, John F	12-3456789	-	No Documents

Step 2: Verify the Client Id matches the Id in your tax program.

Step 3: Click on the Upload Files button

The screenshot shows the GruntWorx user interface. At the top, the GruntWorx logo is on the left, and the user's name 'John Morganti' with links for 'Sign-Out', 'Dashboard', 'User Settings', and 'Admin Settings' is on the right. Below this is the 'Client Details' section for 'Jonathan A Adams', with a 'MANAGE CLIENT ACCOUNT' button. A red box highlights the ID '003-45-6789' and a yellow callout bubble asks 'VERIFY: Does this Id match the client's Id in your tax program?'. The '2012 Documents' section shows a table with columns for Document Name, Status, Uploaded, and Processed. A red box highlights the '+ UPLOAD FILES' button. At the bottom, there are links for 'Frequently Asked Questions', 'Contact Support', 'Help', 'Privacy Policy', and 'About Us', along with the copyright notice '© 2013 GruntWorx, LLC. All Rights Reserved'.

GruntWorx

Welcome: John Morganti (Sign-Out) | Dashboard | User Settings | Admin Settings

Client Details | Jonathan A Adams | MANAGE CLIENT ACCOUNT

ID: 003-45-6789
Account: Default

VERIFY: Does this Id match the client's Id in your tax program?

2012 Documents | Job Status: Not Started

Source Files | Processed Files | DOWNLOAD GRUNTWORX AGENT | REFRESH PAGE | + UPLOAD FILES

Document Name	Status	Uploaded	Processed
Added by Firm			
<input checked="" type="checkbox"/> 003-45-6789 tein.pdf	Not Submitted	9-8-2013	-

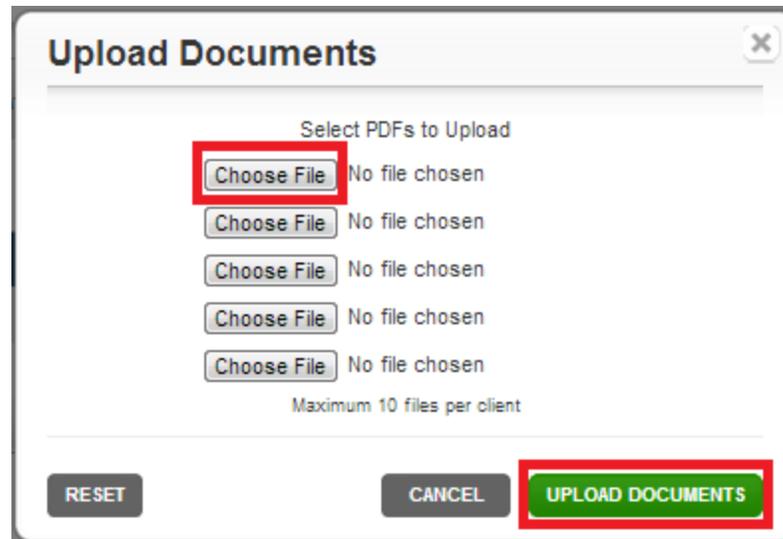
PROCESS FILES...

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Step 4: Click on the 'Choose File' button and select the tax documents to send to GruntWorx.

Important Note: Files sent to GruntWorx must be in either TIFF or PDF format

Step 5: Once all files have been selected, click 'Upload Documents' button.



Helpful Tip: Create a folder called 'GruntWorx' on your local system and put all of your scanned tax documents in that folder.

Step 6: Once all the files for this client have been uploaded to GruntWorx, give us the go ahead to process them by clicking on the 'Process Files' button.

The screenshot shows the GruntWorx interface for a client named Jonathan A Adams. The page includes a navigation bar with links for 'Dashboard', 'User Settings', and 'Admin Settings'. Below the client name, there are tabs for 'Source Files' and 'Processed Files'. A table lists documents, with one document selected. A 'PROCESS FILES...' button is highlighted with a red box.

Document Name	Status	Uploaded	Processed
003-45-6789 tein.pdf	Not Submitted	9-8-2013	-

Congratulations! Your customer files are now being processed by **GruntWorx**.