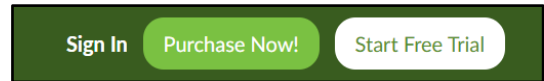


Follow these Quick Steps to try out GruntWorx with UltraTax CS.

- From the [GruntWorx.com](https://GruntWorx.com) homepage, click **Start Free Trial**
  - Complete the Registration.
  - Read and accept the master agreement.



- From the **GruntWorx Dashboard**, click to add a client.
  - The Client ID entered into the GruntWorx Dashboard must match exactly to the Client ID in UltraTax CS.

**Adding Client to Clients** ✕

First Name \*

Spouse Name

Last Name \*

Client ID / Locator\*

Client ID/Locator must match tax software

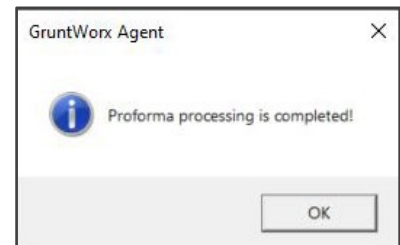
(\*) required fields

- Upload client's PDFs.
  - Add up to **15 PDFs** per client, 150 MB per PDF.

- Once all files are uploaded, choose your **Solution: CORE** or **PREMIUM**.
  - Choose **Features: Populate Forms, Trade Details, Trade Summary**.

<input type="checkbox"/>	SMITH, JOHN	SMITHJ	Not Submitted
Drop Files or Click Here	uploaded files Basic W2 1.pdf 47.6 KB 1 pg ✕ Internal Revenue Service.pdf 93.9 KB 1 pg ✕ 1099 Mortgage Real Estate T... 117 KB 1 pg ✕ American Enterprise Inve... 909.6 KB 24 pg ✕	<b>SOLUTIONS</b> <input type="radio"/> PREMIUM - GruntWorx Review <input checked="" type="radio"/> CORE - Self-Review <input checked="" type="radio"/> Edit In Review Tool <input type="radio"/> No Review organized PDF only	<b>FEATURES</b> <input checked="" type="checkbox"/> Populate Forms <input type="checkbox"/> Trade Details <input checked="" type="checkbox"/> Trade Summary <input type="checkbox"/> Expedited Service
			<input type="button" value="SUBMIT"/> <input type="button" value="Manage Inventory"/> <input type="button" value="More Info"/> <input type="button" value="Set Default"/>

- With your UltraTax open, click **Submit**.
  - The GruntWorx Agent pulls your client's data from UltraTax.
  - A successful submission provides a **Proforma processing is completed!** message.



- When Job Status is **Completed**, click on the client's name.
  - Simply click on either file name to download and open.

<input checked="" type="checkbox"/>	Anderson, Jack & Jill	AJUT83024	Populate + summarized trades	Completed
bookmarked.pdf Pointsheet.xlsm			33 Page Processing 8.25 33 Page Validation 6.60 14 Form Population 14.00 2 Trades Summary 10.00 <b>total 38.85</b>	

- With UltraTax open, and the client's tax file closed, click **Populate** on the Diagnostics tab of the Pointsheet.xlsm and watch the import in real time!
- Open the client's file in UltraTax and accept the pending records from Data Sharing.

	A	B	C	D	E	F	G	H
1	<b>Tax Payer:</b>		ANDERSON, JACK & JILL					
2	<b>Tax Year:</b>		2023					
3	<b>Client Id:</b>		AJUT83024			Check Data	Populate	
4								

For more detailed instructions, refer to the User Manual.

If you need assistance contact Customer Service at [Support@GruntWorx.com](mailto:Support@GruntWorx.com) | 877.830.6059