

# GruntWorx® Organize

## Automatically Organize, Bookmark, and Label Scanned Tax Documents

- ▶ **Easily find and review any tax document.**
- ▶ **Consistently organized tax workpapers.**
- ▶ **Secure. Accurate. Affordable.**

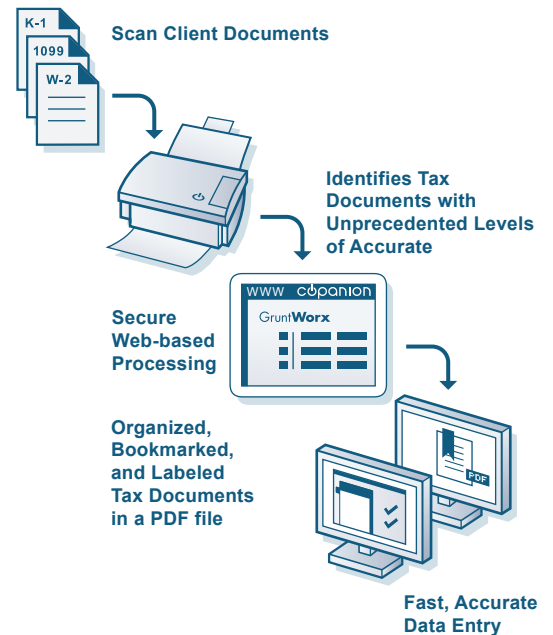
**GruntWorx Organize** makes it easy for firms of all sizes to use scanned tax documents to prepare returns. Just scan a client's "shoebox" of tax documents. GruntWorx *Organize* automatically identifies, organizes and labels the scanned tax documents in a PDF file, with the document issuer's name on each bookmark. The labeled bookmarks allow you to quickly find and review any tax document in even the most complex returns.

**GruntWorx Organize** is a web-based application that "reads" and classifies data from paper-based forms and PDF files with greater than 90% accuracy across thousands of variations of complex IRS forms, tax organizers, and brokerage statements. Powerful tax document automation capabilities, in an easy-to-use solution, make GruntWorx *Organize* the right choice to increase productivity during tax season.

## Enables Paperless Tax Workflows

**GruntWorx Organize** enables paperless tax workflows by eliminating the need to manually sort and identify scanned tax documents. Scan piles of tax documents and GruntWorx *Organize* automatically identifies, organizes, and labels the documents -- even if they are scanned sideways or upside down. GruntWorx *Organize* also identifies blank pages and handwritten notes, so you can scan everything without losing time deciding what to scan.

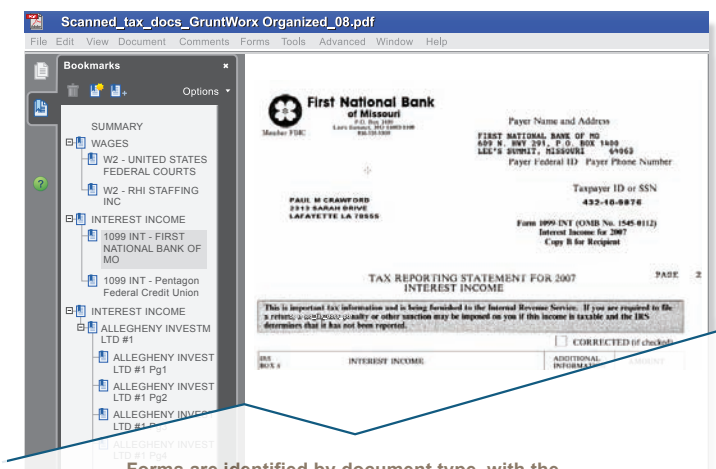
**GruntWorx Organize** produces an organized, bookmarked PDF file of tax documents for each client. Simply click on a bookmark to jump to that document. Tax forms are labeled with the document issuer's name on each bookmark, and are consistently organized in an order that matches the tax preparation process -- no matter who does the scanning.



## Key Benefits

- ▶ **Improves productivity.** GruntWorx *Organize* allows you to easily find and review any tax document. This automated process for organizing and bookmarking scanned tax documents eliminates the time-consuming manual task of identifying and sorting client documents before scanning. GruntWorx *Organize* requires no knowledge of tax documents, making it easy for support staff to scan and automatically index source documents -- freeing tax professionals to focus on high value activities and high quality customer service.
- ▶ **Consistent tax document organization for every client.** Standardize your workflow with consistently-organized tax workpapers that allow your staff to quickly find and enter tax data. The GruntWorx *Organize* PDF output is bookmarked in the same order every time, no matter what order the documents were scanned in.
- ▶ **Easy to use.** This web-based application comes with no software to install and no training required. It fits easily into existing workflows -- and the simple, intuitive user interface lets support staff be productive quickly.
- ▶ **Affordable for firms of any size.** Process an unlimited number of tax documents per GruntWorx *Organize* return. There's no annual license or support fees -- buy only the amount that you need.

## Organized and Labeled Tax Documents



Forms are identified by document type, with the document issuer's name on each bookmark.

Bookmarks are consistently organized for every client.

Easily add tick marks and notes.

### Key Features:

- ▶ **Advanced image processing for accurate tax document recognition and indexing.**  
GruntWorx *Organize* uses patented pattern recognition and machine learning to deliver greater than 90 percent accuracy identifying tax documents. GruntWorx *Organize* identifies more tax documents than any other solution available.
- ▶ **Easily organize documents for multiple clients.**  
Upload a spreadsheet of client names to quickly create multiple client IDs in GruntWorx *Organize*. Upload scanned tax documents and download organized documents for multiple clients in simple batch processes.
- ▶ **Enables workflows with multiple tax preparers.** Multiple users can share one account, so all organized source documents may be accessed from a single location. Preparers can access completed GruntWorx *Organize* source documents while support staff upload scanned client documents.
- ▶ **Easily add tick marks and notes.** Move and edit bookmarks to meet your needs. The GruntWorx *Organize* industry standard PDF file output is compatible with Adobe Acrobat and most PDF tools.

### Key Functionality:

- **Batch Client Creation:** create all your client accounts in GruntWorx *Organize* by uploading a spreadsheet (CSV file).
- **Batch Download:** download organized source documents for multiple clients.
- **Multi-User Accounts:** create multiple users within one GruntWorx *Organize* account to share organized documents across multiple tax preparers.
- **Reorder Documents Option:** reorder scanned documents to match the order of the bookmarks.
- **Search:** search by client name, client ID or job status.

## Financial Grade Security Infrastructure

GruntWorx servers are hosted at a highly secure data center, closely monitored 24x7x365. All communications between user computers and our servers are secured with the same technology used in electronic filing and electronic banking (128-bit SSL/Secure Sockets layer encryption). We use a DigiCert SSL Certificate and server-gated cryptography for strong encryption of all communication to and from our application services. Users have complete control and can delete data any time.

## IRC Section 7216 compliant

Tax Professionals using GruntWorx products in the preparation of a return are not required to have clients sign a written consent to use or disclose tax data. The use of the GruntWorx products is permitted as a tax preparer to tax preparer disclosure described in Treasury Regulations Section 301.7216-2(d)(1) since all of GruntWorx service providers are located in the United States and GruntWorx provides an auxiliary service in connection with the preparation of tax returns that does not provide substantive determinations or advice affecting the tax liability reported by taxpayers.

## System Requirements

GruntWorx *Organize* requires a PC with an Internet connection.

- PC running Windows XP Professional or higher
- Internet Explorer 8 or higher, Firefox 22 or higher
- Adobe Acrobat Reader version 6 or higher

## For More Information

To learn more and sign up for the **GruntWorx *Organize* free trial**, please call GruntWorx at **877-830-6059** or visit **[www.GruntWorx.com](http://www.GruntWorx.com)**