

10 TIPS for Getting the Most Out of GruntWorx®



- ① ATTEND A WEBINAR**
Webinars are a great way to brush up on using GruntWorx and learn about any changes to available services.



- ② CHOOSE TO RECEIVE EMAIL NOTIFICATIONS WHEN THE JOB IS DONE**
There is an optional setting that will send a notification email to you when a job is ready to download.



- ③ IMPROVE SCAN QUALITY**
Using a 300 DPI (dots per inch) scanner and scanning documents in black and white will improve the accuracy of GruntWorx services.



- ④ REMOVE PASSWORD PROTECTIONS**
Make sure that all scanned PDFs that you submit to GruntWorx are not password protected, otherwise we cannot process them.



- ⑤ USE THE GRUNTWORX CALCULATOR**
Determine the cost to process a job before submitting it with the easy-to-use GruntWorx calculator.



- ⑥ PRELOAD CLIENTS**
Creating client records for GruntWorx prior to submitting their documents will make the process even more efficient.



- ⑦ BILL YOUR CLIENT**
GruntWorx provides detailed billing information for each job that's processed. You can include these fees in the cost of your services to your client.



- ⑧ CHOOSE THE RIGHT PRODUCT**
Need scan and fill service for a client's 1040? Choose GruntWorx Populate. Want to quickly process trades? Choose GruntWorx Trades.



- ⑨ PROVIDE EXTRA VALUE FOR YOUR CLIENTS**
Give your clients a copy of a GruntWorx-organized PDF with their completed tax return, so they have a digital copy for their records.



- ⑩ SHARE YOUR EXPERIENCE**
Save a lot of time preparing returns? Love automatically having forms organized for a 1040? Let friends on Facebook and Twitter know how much GruntWorx helps during tax season.