

**Using GruntWorx to Organize
Your Client Tax Documents**

NEED HELP?

Call us: 877-830-6059

X2 for Sales

X3 for Support

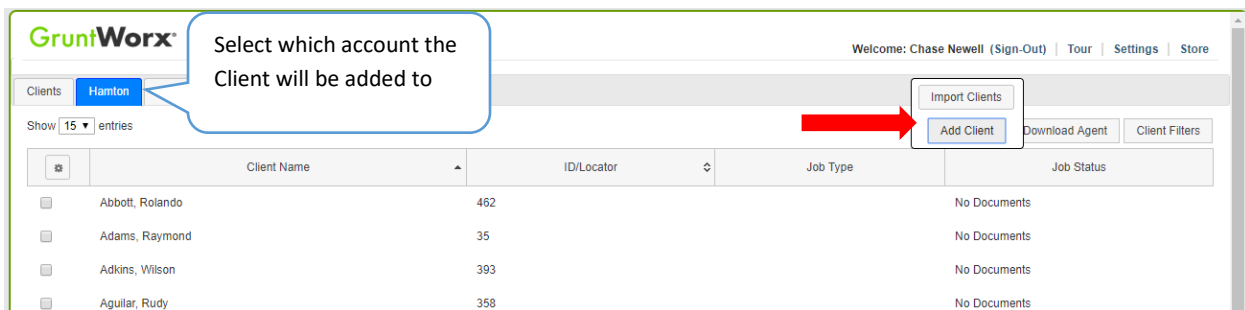
Organize

GruntWorx Organize classifies, organizes and labels your client's source documents and provides you with a bookmarked PDF, arranged in the order of a 1040. The Organize product also offers the option of selecting Trades (extraction capital gains transactions to a spreadsheet) easily imported from within most tax preparation software.

Job Submission

1. Add Client/s

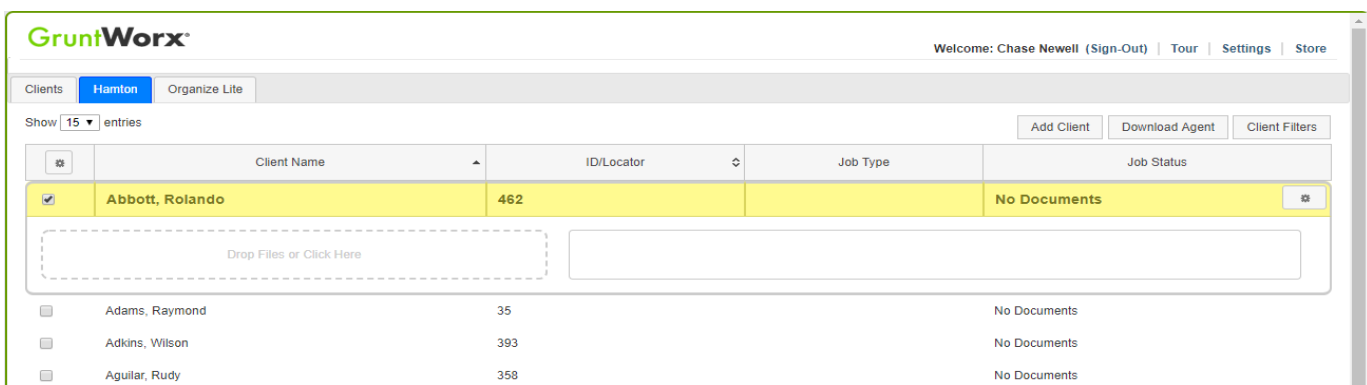
- At the Dashboard – Under the Appropriate Account – Click Add Client



- To add a single client** - on the “Add Client” dropdown menu click “Add Client”; fill all required fields
- To upload multiple clients** - on dropdown menu click “Import Clients”, follow instructions and template displayed on the screen to create the csv import file

2. Upload Documents

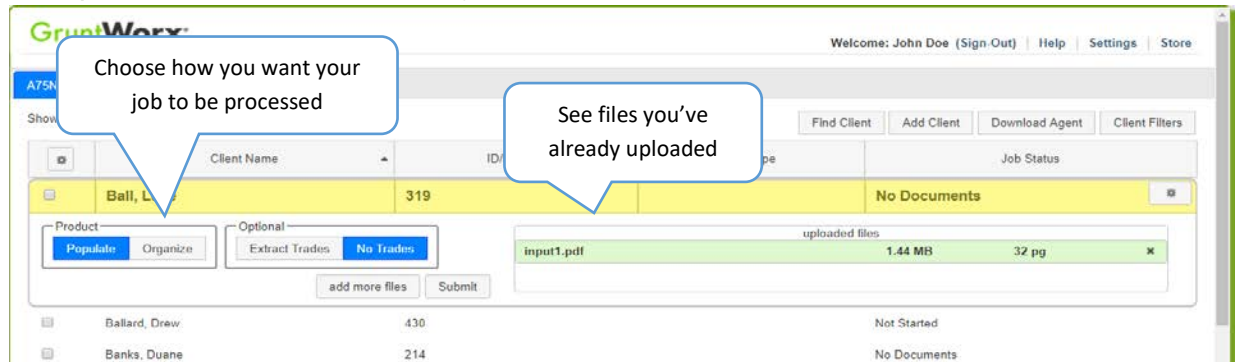
From the GruntWorx Dashboard, click on the client name to open the client's details.



- In the client's details, Drag and drop client's PDF files to the File Upload box,
- Or** Click the File Upload box
- Browse and add files (as many as 15; maximum of 150MG per file)

3. Submit Job

- Once documents are uploaded, select process files, choose processing options (Organize or Populate; with or without Trades) and click "Submit"



Job Completion

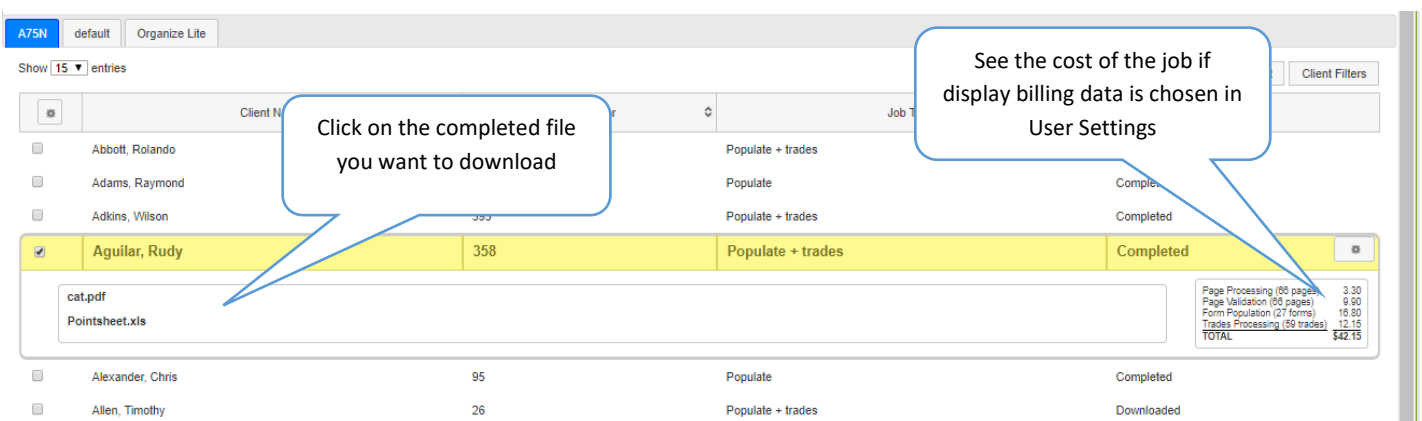
Job Completion Notification

If selected in "User Settings" the user is notified by email or SMS once the job is ready to be downloaded.

1. Download and save Output File/s

At the Dashboard, click the Client name associated with the completed job. The client's details will be opened.

- The first file listed is the organized and bookmarked PDF
- If Trades option was selected, the second file is an excel workbook with capital gains transactions extracted from 1099-B and Consolidated 1099 forms ready for import from within your tax program.



Reset Failed Job

Occasionally the user will receive notification of a failed job. To try again, using the same ClientID, a **Reset Client** function is available for both Populate and Organize jobs.

The screenshot shows the GruntWorx web interface. At the top, there's a navigation bar with 'default', 'YANG', 'Yang', and 'Organize Lite' tabs. Below that, a search bar and a 'Show 15 entries' dropdown are visible. The main area is a table with columns for 'Client Name', 'ID/Locator', and 'Job Status'. The row for 'Adkins, Wilson' is highlighted in yellow, and its 'Job Status' is 'Failed (2)'. A red arrow points from the 'Job Status' column to a 'Reset Job (prep for retry)' button. A callout box with a blue border and white background says 'Look at the Job Status section to quickly find any failed jobs'.

Client Name	ID/Locator	Job Status
Abbott, Rolando	462	No Documents
Adkins, Wilson	393	Failed (2)
There was a problem processing this job. Corrupted PDF		
Aguilar, Rudy	358	Not Started
Alexander, Chris	95	Not Started
Allen, Timothy	26	No Documents
Allison, Aubrey	494	No Documents
Alvarado, Gilberto	424	No Documents
Anderson, Christopher	10	No Documents (2)
Andrews, Herman	182	No Documents (2)

- The user should open the Client's Details and click the Gear icon button at upper right.
- Choose the Reset Job (prep for retry) option
- Fix the error, e.g.: Print and scan for password protected documents
- Upload documents and "Process".

Job Resubmission

To accommodate client's missing documents and/or extensions, GruntWorx allows resubmission for **Populate and Organize** Jobs.

Please note: Preparing a job for resubmission will remove all that client's documents. Make sure you have downloaded and documents you wish to keep before preparing for resubmission.

- The user should open the Client's Details and click the Gear icon in the upper right.

The screenshot shows the GruntWorx interface with a table of jobs. The job for 'Anderson, Christopher' is selected. A dropdown menu is open over the job, showing options: 'Download All Completed', 'Prepare for Resubmission', 'Mark Job as Downloaded', 'Form Population (Optional)', and 'TOTAL \$22.20'. A red arrow points to the 'Prepare for Resubmission' option.

Client Name	ID/Locator	Job Type	Job Status
Abbott, Rolando	462	Organize	Completed
Adkins, Wilson	393	Organize	Completed (2)
Agular, Rudy	358		Not Started
Alexander, Chris	95		Not Started
Allen, Timothy	26		No Documents
Allison, Aubrey	494		No Documents
Alvarado, Gilberto	424		No Documents
Anderson, Christopher	10	Populate	Completed (2)
Andrews, Herman	182	Populate	Completed (2)

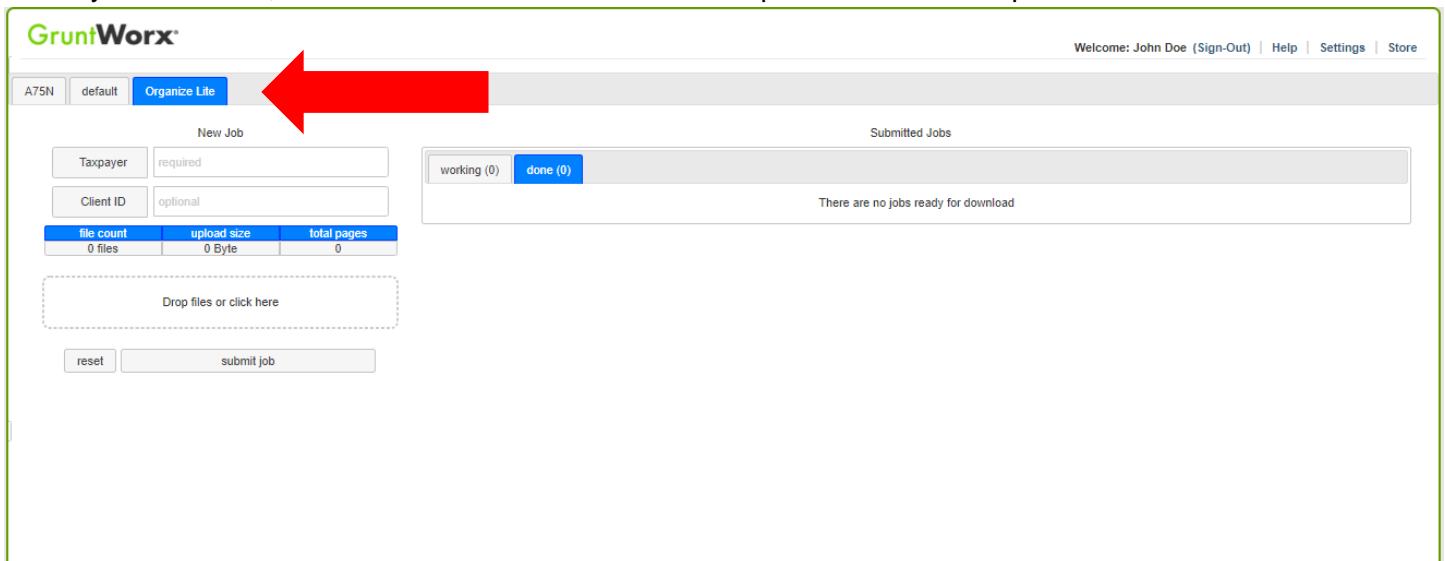
- On the dropdown menu choose Prepare for Resubmission
- Upload the client's files and submit as if it was an entirely new job
- When attempting to submit there will be a box to decide if the user wants to combine the new documents with the previous documents

The screenshot shows the GruntWorx interface with the job details for 'Anderson, Christopher'. The job status is 'Not Started (2)'. A dropdown menu is open over the job, showing options: 'Download All Completed', 'Prepare for Resubmission', 'Mark Job as Downloaded', 'Form Population (Optional)', and 'TOTAL \$22.20'. A red arrow points to the 'Prepare for Resubmission' option. Below the job details, there are buttons for 'Populate', 'Organize', 'Extract Trades', and 'No Trades'. A 'Resubmission' box is also visible, containing a checkbox for 'Do not merge with previous bookmarked pdf'.

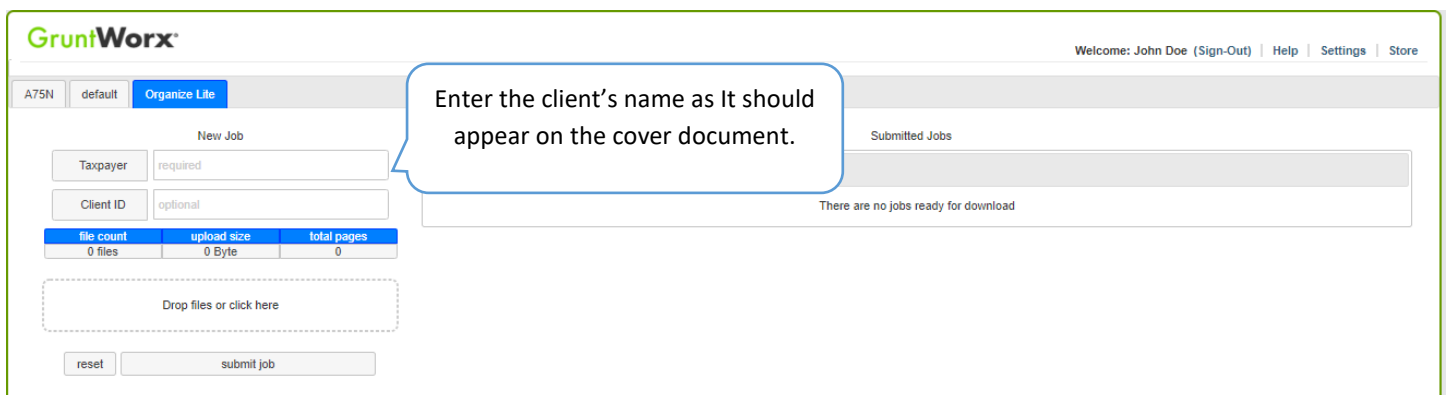
Client Name	ID/Locator	Job Type	Job Status
Anderson, Christopher	10		Not Started (2)

Organize LITE

GruntWorx Organize Lite is an economical and quick turn-around (just minutes) option providing the same bookmarked PDF as the Organize product but without benefit of human validation. Returns are submitted and retrieved from a screen, specifically designed for Organize LITE, accessed by clicking on the Organize LITE tab. Unlike the Organize and Populate products, downloaded files are removed within just a few days. Note also, that Trades are not available as an option with the LITE product.

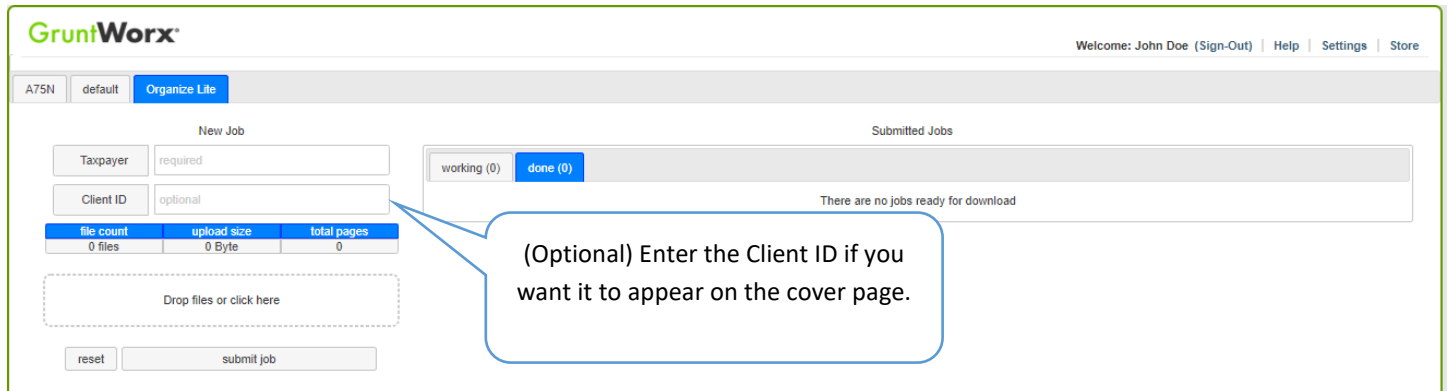


1. Add the Client Name



2. (Optional) Add the Client ID

The Client ID will appear on the cover sheet of the bookmarked PDF but is not required to submit an Organize LITE job

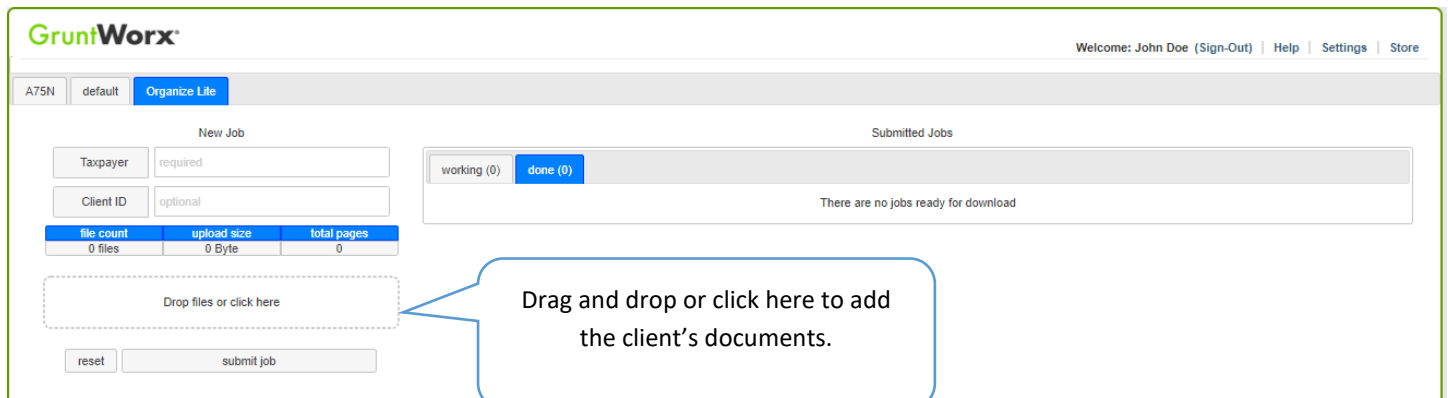


The screenshot shows the 'New Job' form in the GruntWorx interface. The form includes fields for 'Taxpayer' (required) and 'Client ID' (optional). Below these fields is a table showing job statistics:

file count	upload size	total pages
0 files	0 Byte	0

Below the table is a dashed box labeled 'Drop files or click here' and buttons for 'reset' and 'submit job'. To the right, the 'Submitted Jobs' section shows 'working (0)' and 'done (0)' counts, with a message 'There are no jobs ready for download'. A blue callout box points to the 'Client ID' field with the text: '(Optional) Enter the Client ID if you want it to appear on the cover page.'

3. Upload scanned documents



This screenshot is identical to the one above, showing the 'New Job' form. A blue callout box points to the 'Drop files or click here' area with the text: 'Drag and drop or click here to add the client's documents.'

4. Submit job

The screenshot shows the 'New Job' form in the GruntWorx interface. The form includes fields for 'Taxpayer' (required) and 'Client ID' (optional). Below these is a table showing 'file count' (0 files), 'upload size' (0 Byte), and 'total pages' (0). A dashed box indicates where to 'Drop files or click here'. At the bottom are 'reset' and 'submit job' buttons. A callout box points to the 'submit job' button with the text: 'After you have provided the client's name and uploaded all of your client's files, click the submit button.'

We'll take it from here! Your job will appear under the working tab while it's processing.

The screenshot shows the 'Submitted Jobs' section of the GruntWorx interface. The 'working (0)' tab is selected, and the 'done (0)' tab is also visible. A callout box points to the 'working' tab with the text: 'Your in-progress jobs will appear under the working tab.'

5. Download the completed job: Once your job is complete, find it under the "done" tab, ready for download. Remember, access to the client record and the downloaded PDF will expire after just a few days.

The screenshot shows the 'Submitted Jobs' section of the GruntWorx interface. The 'done (0)' tab is selected, and the 'working (0)' tab is also visible. A callout box points to the 'done' tab with the text: 'Once the job is completed you will find it on the "done" tab ready for download.'