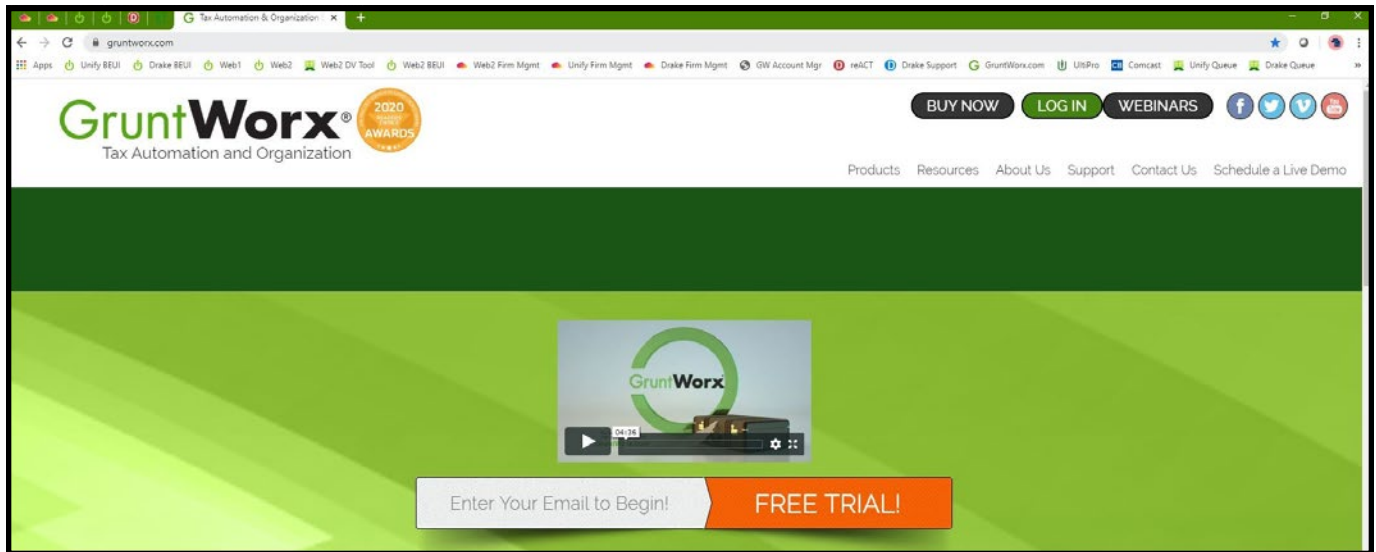


ORGANIZE QUICK START GUIDE



Here are the instructions to help users sign up for a GruntWorx free trial and a GruntWorx account. If user has already signed up for a trial account, jump to the **Using GruntWorx Organize** section.

- 1 Go to GruntWorx.com. Enter email address into the **Enter Your Email to Begin!** field, then click the **FREE TRIAL!** button.



- 2 Fill out the required fields—including name, contact information, and tax system—and click **Register** at the bottom of the page.

- 3 Proceed to the next section, **Using GruntWorx Organize**.

GruntWorx

About your firm

Tax Software:

Firm Name:

Firm Phone:

Address 1:

Address 2:

City:

State:

Zip Code:

About you

A user account will be created for you using the information below. An email with instructions for completing the registration will be sent to the below address. Please carefully verify the address is entered properly.

E Mail:

First Name:

Last Name:

SMS/text phone:

QUICK START GUIDE

Using GruntWorx Organize

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

1 Add Clients

From the **GruntWorx Dashboard**, click on an icon to add client(s)

A form titled "Adding Client to Clients" with a close button (X). It contains four input fields: "First Name *", "Spouse Name", "Last Name *", and "Client ID / Locator*". Below the "Client ID / Locator*" field is a note: "Client ID/Locator must match tax software". At the bottom, there are four buttons: "cancel", "reset", "save and add another", and "save". A note "(*) required fields" is located above the "cancel" and "reset" buttons.

To add a **single client**:

- Click on the icon and fill out all required fields

To add **multiple clients**:

- Click on the icon to upload a .csv file
- Follow the instructions and template to create the .csv import file

A form titled "Import Clients into Clients" with a close button (X). It has a "Select a CSV file to import" section with "import" and "cancel" buttons. Below that, it says "The CSV file must be in this format:" followed by "Last Name, First Name, Spouse Name, Client ID". There is a "CSV info" section with a list of instructions:

- The CSV file should not use column headers: only the client information, in separate columns, following the above format.
- Up to 500 clients can be imported with each CSV file.
- Spouse Name is an optional value and may be left blank (but the column must be present).
- The ClientID must contain only letters, numbers, and/or a comma.
- The ClientID should match that in your tax software.

An "Example:" section shows a table with 5 rows and 5 columns (A, B, C, D, and an unlabeled column).

	A	B	C	D
1	Washington	George	Martha	1789-1797
2	Adams	John	Abigail	1797-1801
3	Jofferson	Thomas	Martha	1801-1809
4	Madison	James	Dolley	1809-1817
5	Monroe	James	Elizabeth	1817-1825

2 Upload Documents

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

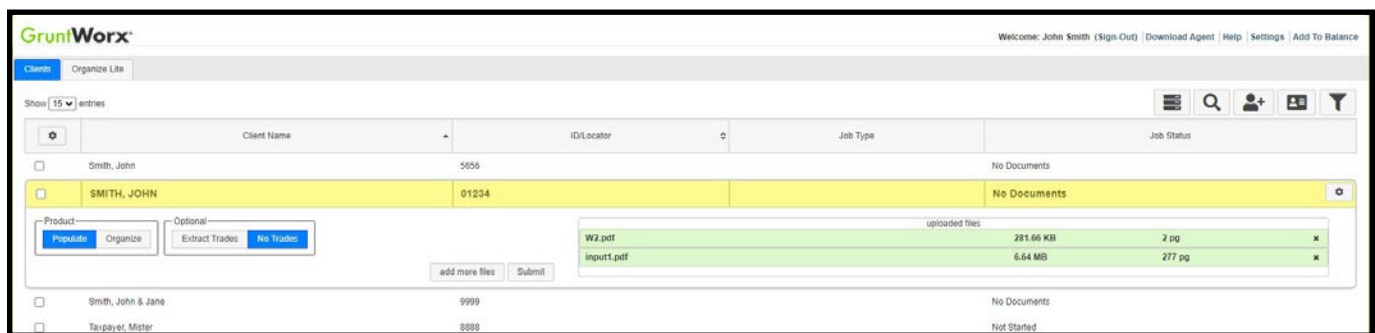


- In the client's details, Drag and drop client's PDF files to the File Upload box, or Click the upload files box
- Browse and add files

IMPORTANT: Add up to 15 PDFs per client, 150 MB per PDF.

3 Submit Job

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



TIP: Once the job is complete, if selected in user settings, the user will receive a job completion text message or email notification.

4 Download and save Output File/s

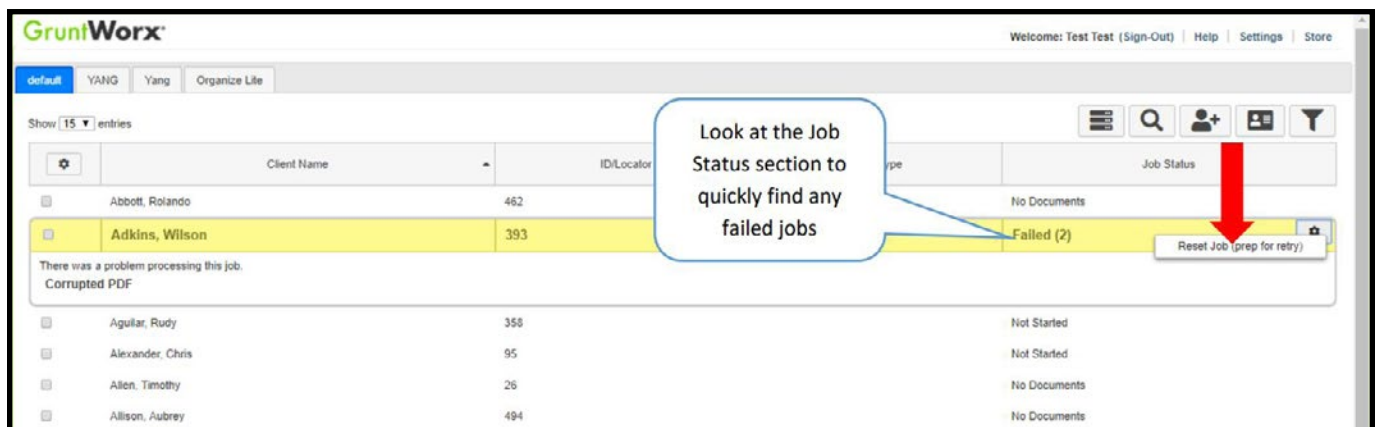
At the Dashboard, click the Client name associated with the completed job. The client's details will be opened.

- 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 Form 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 user should open the Client's Details and click the Gear icon button at upper right.
- Choose to Reset with or without the original documents
- Confirm Reset to set the job as a new submission
- Fix the error: For example, if the PDF documents are password protected, then print and scan the documents to remove the password
- Upload documents and **Submit**

ORGANIZE SUPPORTED FORMS

- W-2
- W-2G
- W2C
- 1042-S
- 1095-A
- 1095-B
- 1095-C
- 1098
- 1098-C
- 1098-E
- 1098-T
- 1099-A
- 1099-B
- 1099-C
- 1099-CAP
- 1099-G
- 1099-DIV
- 1099-INT
- 1099-H
- 1099-K
- 1099-LTC
- 1099-MISC
- 1099-NEC
- 1099-PATR
- 1099-Q
- 1099-R
- RRB-1099
- RRB-1099-R
- 1099-S
- 1099-SA
- SSA-1099
- Consolidated 1099
- 2439
- 5498-SA
- 5498-ESA
- Grantor Letter as 1041 K-1
- Supporting Tax Documents
- Receipts

Tips for best scanning practices can be found here in this [video](#).
For system requirements click [here](#).

For any support questions, call **877-830-6059 X3**
or send an email to Support@GruntWorx.com

For any sales questions, call **877-830-6059 X2**
or send an email to Sales@GruntWorx.com