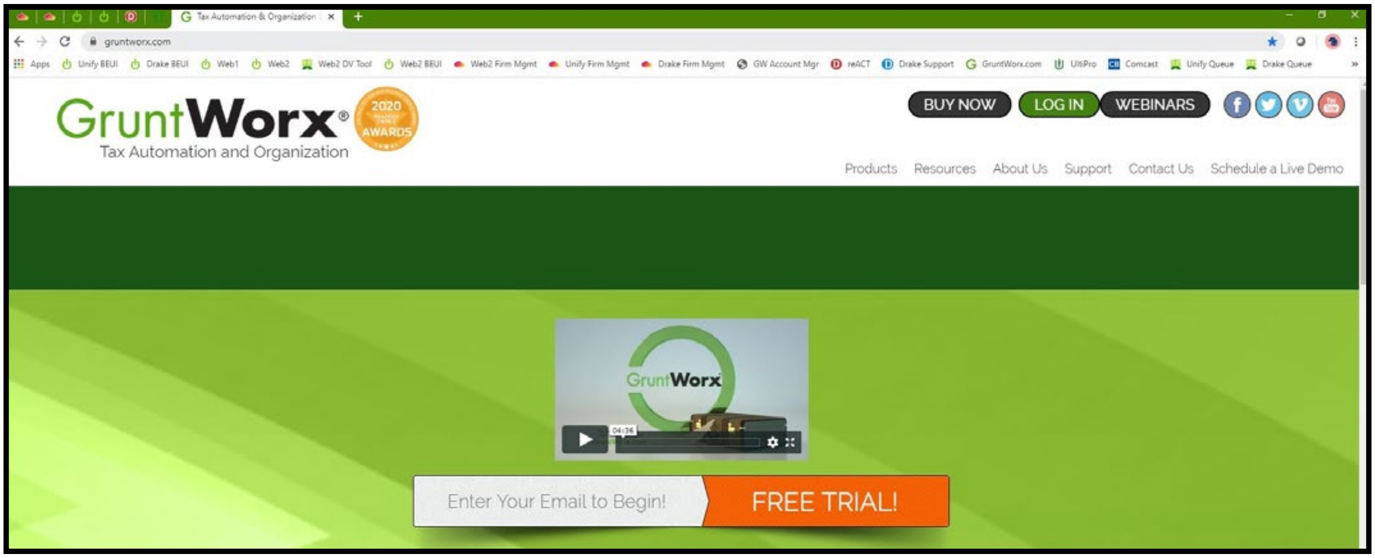
ORGANIZE QUICK START GUIDE

GruntWorx®

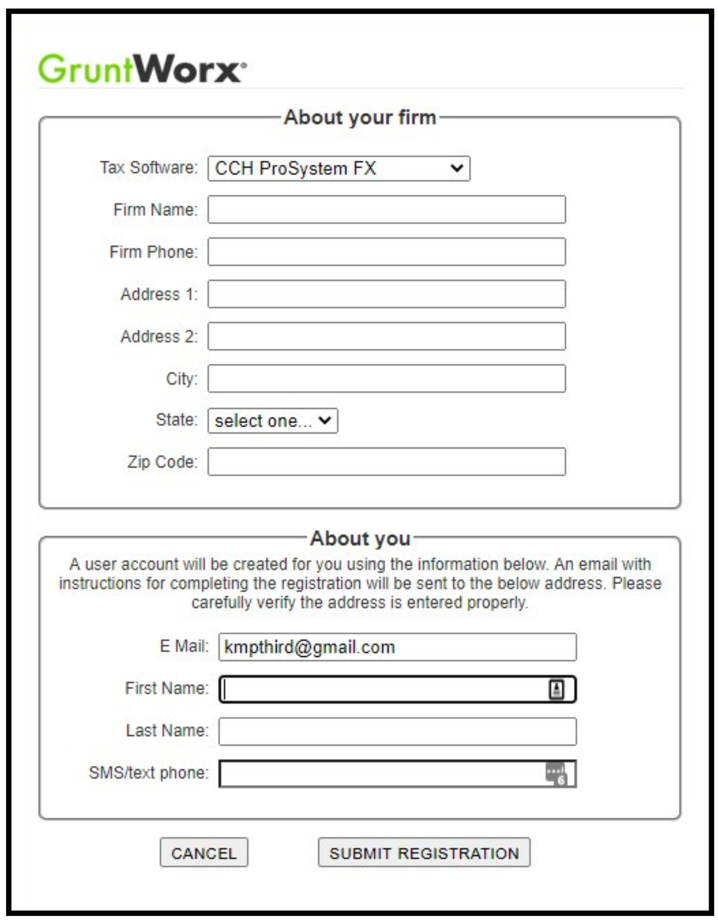
Here are the instructions to help users sign up for a GruntWorx free trial and a GruntWorx account. If user has already signed up for a trial account, jump to the **Using GruntWorx Organize** section.

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.**

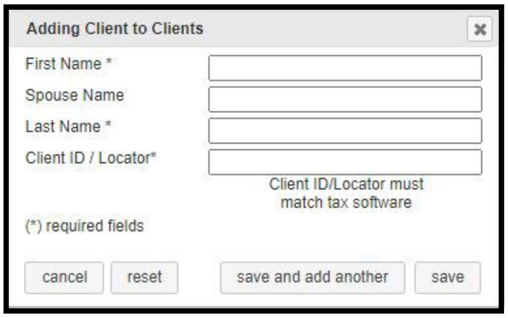


Using GruntWorx Organize

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)

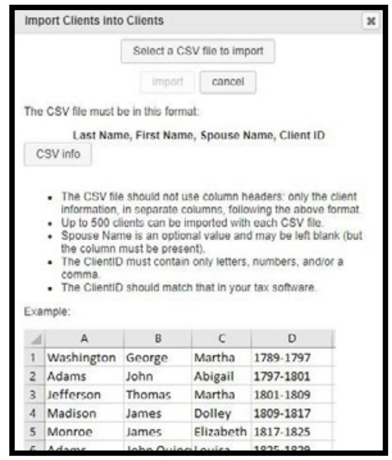


To add a **single** client:

- 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



2 Upload Documents

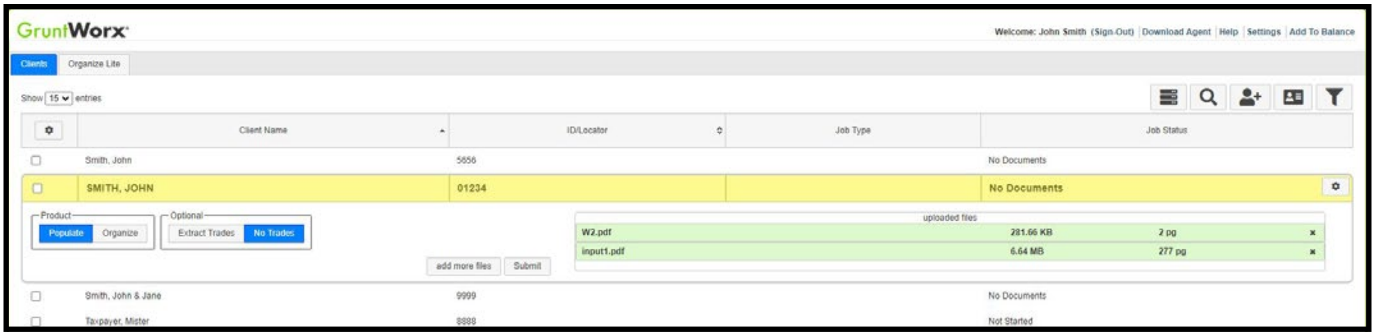
From the GruntWorx Dashboard, click on the client name to open the client's details.

- 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 with out 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.

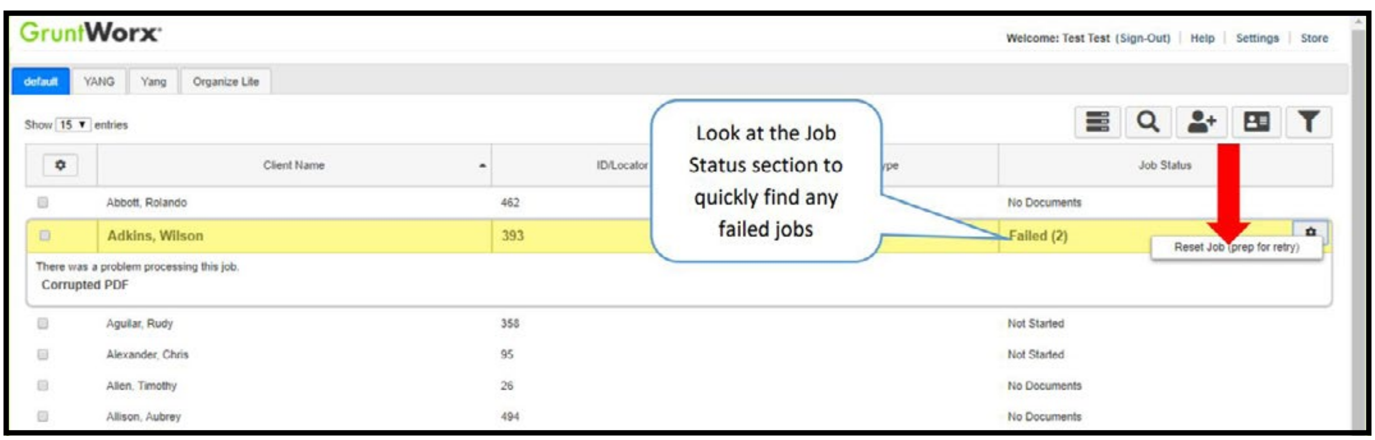
4 Download and save Output File/s

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