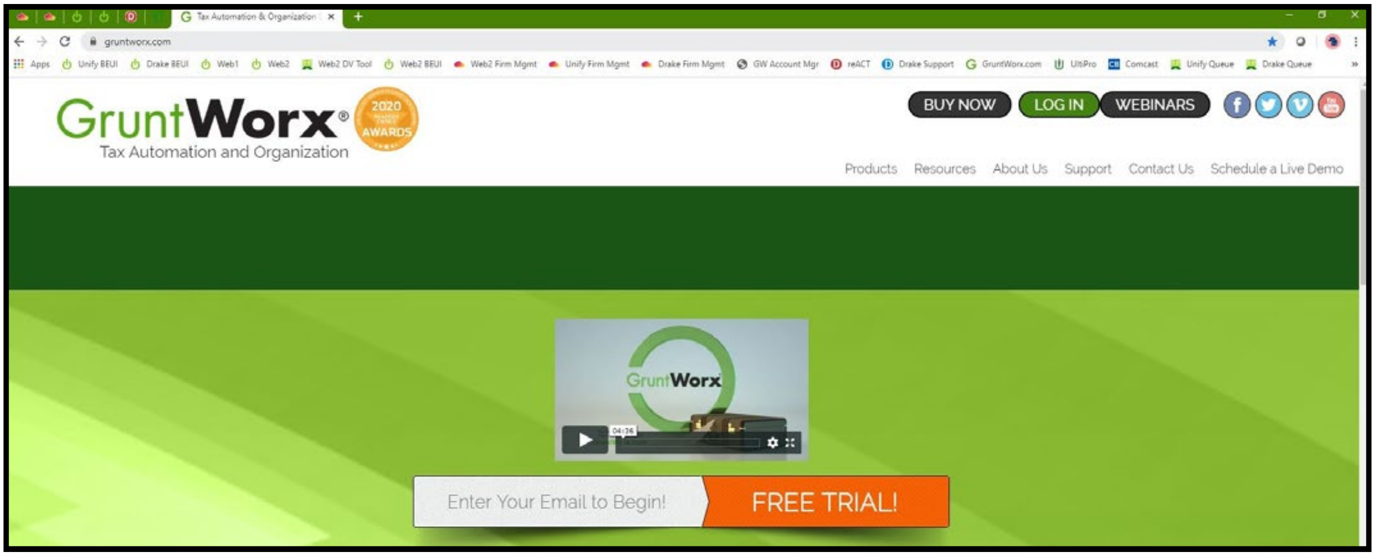
Here are the instructions to help users sign up for a GruntWorx free trial and a GruntWorx account. If user has already signed up for a trial account, jump to the **Using GruntWorx Organize LITE** section.



How to Set up a GruntWorx Account

- From the GruntWorx.com homepage, enter email address and click **FREE TRIAL!**
- Complete the Registration
- Look for the sign-up email including the temporary password
- Log in to the GruntWorx Portal and set up new password
- Read and accept the master agreement and EULA

Using GruntWorx 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 the benefit of human validation. Returns are submitted and retrieved from a screen, specifically designed for Organize LITE. Unlike Organize and Populate, files are removed five days after the first download.

Below are step by step instructions on using GruntWorx Organize LITE.

1. Log into GruntWorx from **GruntWorx.com**.
2. Select the **Organize LITE** tab from the GruntWorx **Dashboard.**

⚠ **IMPORTANT:** GruntWorx Trades product is not available with Organize LITE.

3. Enter the **Taxpayer.** This is required and the name will appear on the cover page of the bookmarked PDF.

4. Enter the **Client ID**. This is not required, but if added it will appear on the cover sheet of the bookmarked PDF.

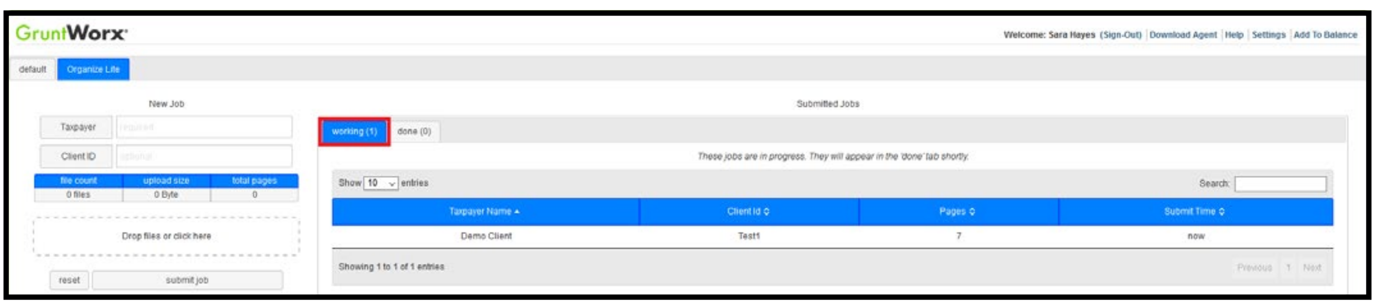
5 Upload client's scanned source documents. Drag and drop or click and browse to select client files to upload.

⚠ **IMPORTANT:** Add up to 15 files per client , 150MB per PDF.

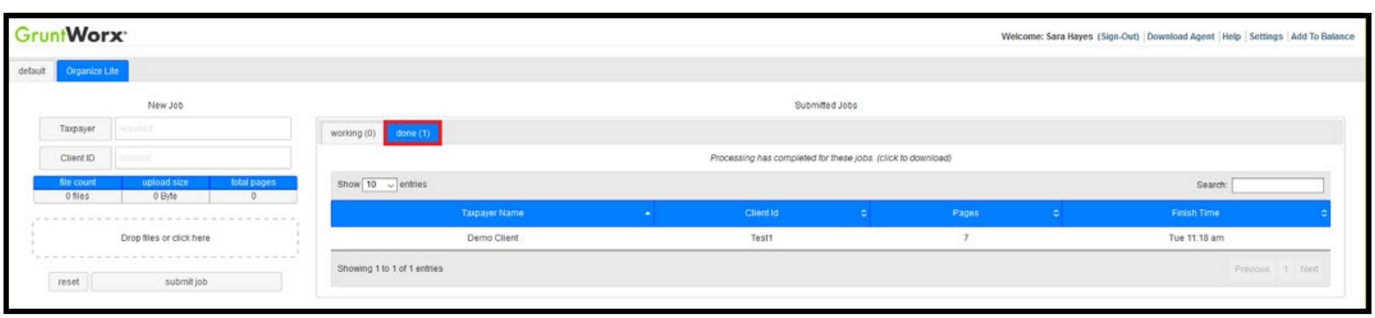
6 Click **submit job** to send the files to GruntWorx.

⚠ **TIP:** Click **reset** to clear all entered data and uploaded files to start over.

7 Once the job is submitted, it will appear under the **working** tab. The average job processing time is one to five minutes.

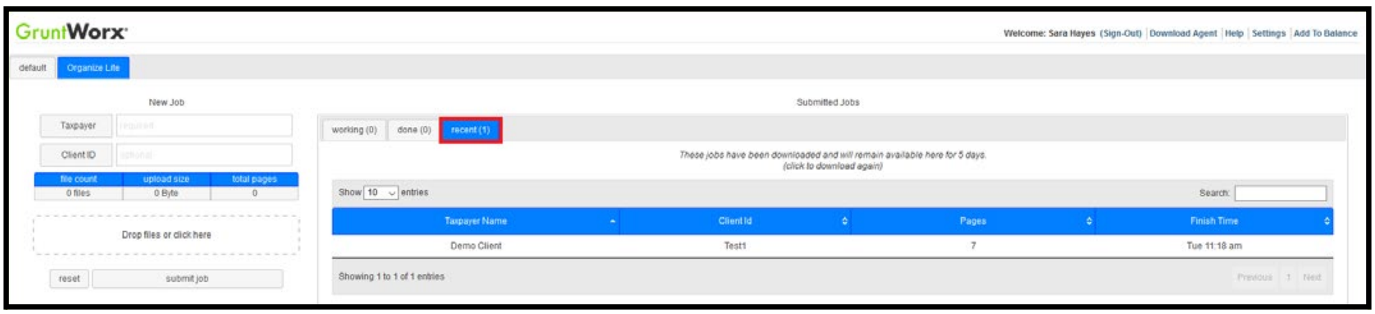


8 Once the job is complete, it will move from the **working** to the **done** tab.



9 Select the completed job from the **done** tab and click on it to download the PDF file.

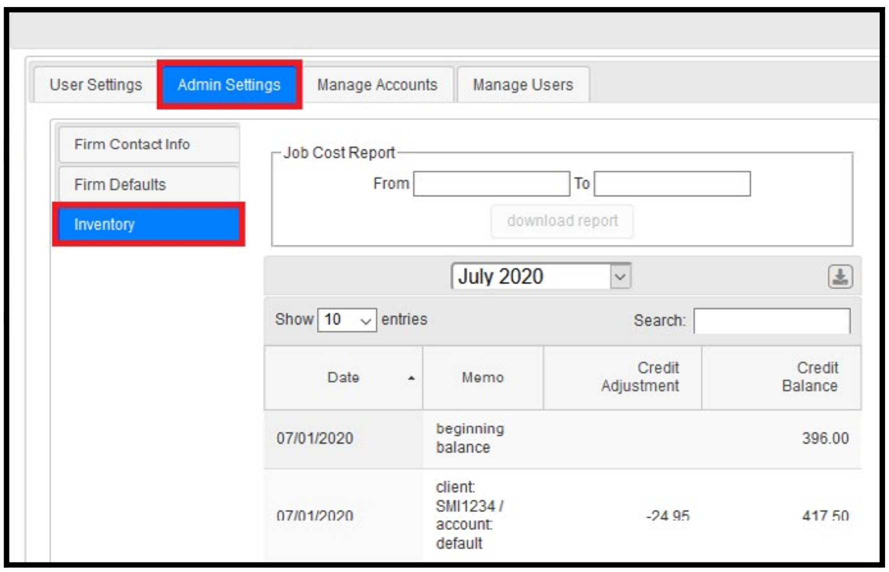
10 After downloading a job, it moves out of the **done** tab and into the **recent** tab. Jobs in the **recent** tab stay there for 5 days after the first download.



⚠ **IMPORTANT:** Access to completed files will expire five days after the first download.

⚠ **TIP:** To see GruntWorx account balance information and add funds to account click on **Add to Balance**.

⚠ **TIP:** To find the cost-per-client information for processing a return, click on **Settings , Admin Settings, Inventory**.



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

ORGANIZE LITE SUPPORTED FORMS

GruntWorx®

- 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