The Next Generation of Tax Software

When deciding on a software purchase, the most common first step is to read reviews from reliable publications. The questions consumers want to see answered are simple but important:

- Does it work?
- Is it easy to use?
- Would you recommend it?

If the answers are "yes" and the price is reasonable, it might mean a demo, free trial, or purchase. However, tax professionals often don't solely rely on product reviews. They seek out peers with first-hand, filing-season experience using the software, but finding those conversations isn't always easy.

GruntWorx sat down with a veteran tax professional to learn about their experience using tax-automation software and what he would say to preparers who are on the fence about tax automation.

Is it too late to start using GruntWorx in my tax practice?

Ben Tallman, EA, is a former IRS auditor who has professionally prepared tax returns for 43 years in Atlanta, Georgia. Since it was established in 1977, Tallman's Tax Service, LLC has served an impressive array of individual and business clients, from lawyers and doctors to consulting firms and movie-production companies. For the past four years, he has been a GruntWorx customer.

While Tallman has reduced the number of clients he serves from 800 to 540, he doesn't turn away new clients. "I mostly [focus on] 1040s, but I'll take whatever comes in the door," he says. "I handle tax exempts, homeowner associations, trusts, estates, businesses of all kinds—whatever comes in."

Grunt**Worx**®

Tallman's decision to try GruntWorx ultimately resulted from the change in IRS due diligence requirements. "Back in 2013, the circular 230—which is what we use as our guide book for our ethics—and a lot of things changed to take us from being preparers to being verifiers," he explains. "Now, we … [need] to have a backup of some kind. This is the reason I found GruntWorx so helpful for me." That meant routinely running important client documents through a high-speed scanner.

"I was scanning all these large number of documents—20, 30, 40 documents per customer sometimes," Tallman recalls. "And GruntWorx … said, 'Hey, we can take that information and organize it for you. In fact, we will even give you an index up front. We will read and identify whether this is a W-2, 1099, 1098, 1095, whatever the form number is and who the payer is.'" That was his introduction to tax automation.

How does tax automation work with my workflow?

Tax automation is any program that automates some part of tax return preparation. GruntWorx offers four different products: Organize LITE, Organize, Populate, and Trades.

Organize LITE and Organize both produce a sorted, labeled, and indexed PDF of scanned client documents, but only Organize includes human data validation.

Populate inserts data from scanned source documents into the proper fields in supported tax preparation software.

Trades imports trade details from scanned consolidated brokerage statements and Forms 1099B into tax preparation software.

Being able to choose the solution you need when you need it is precisely why GruntWorx seamlessly integrates into your office workflow. For Ben, Organize LITE is the perfect solution, since he often prepares returns while clients are in his office.

While organizing scanned returns for tax preparation is an efficiency boost, Ben admits the extra time spent keying returns remains a problem. Hiring seasonal staff is how offices have traditionally addressed data entry during filing season, but this solution can significantly increase overhead. That's why Ben started using Populate.

"I love that GruntWorx will take this and not only read the information, but turn around and send it in a Populate format," he says. "So, when it comes back in, [GruntWorx] populates my tax return for me. What else do I have to do except review and make sure everything is in there? Having all this information populate your tax return, [saving] you all those keystrokes … I think we are seeing the next generation of tax software. And it's taking place with GruntWorx."

How do I sign up for GruntWorx tax automation?

Getting started with GruntWorx is easy. Ben recommends the free trial, because it actually provides new users a $40 balance for processing Organize LITE, Organize, Populate, and Trades jobs. Even better, that trial balance never expires; the money will still be there if you decide to start paying for GruntWorx services.

To sign up for the free trial, simply go to GruntWorx.com, enter your email address in the field next to the orange **FREE TRIAL!** button, and you are on your way to automating your tax practice. If you prefer speaking with a representative, call 1.877.830.6059—we're available Monday through Friday from 9:00 a.m. to 6:00 p.m. EST.

About GruntWorx:

Gruntworx, LLC, is a leader in Cloud-based paperless tax workflow systems. Gruntworx provides a comprehensive and integrated family of web-based products that automate client tax document organization, data entry, and review.

You can watch the full interview with Ben Tallman on the GruntWorx **Vimeo** and **YouTube** channels.