

ORGANIZE LITE QUICK START GUIDE



Here are the instructions to help users sign up for a GruntWorx Free Trial and use GruntWorx. 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

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:

Using GruntWorx Organize LITE

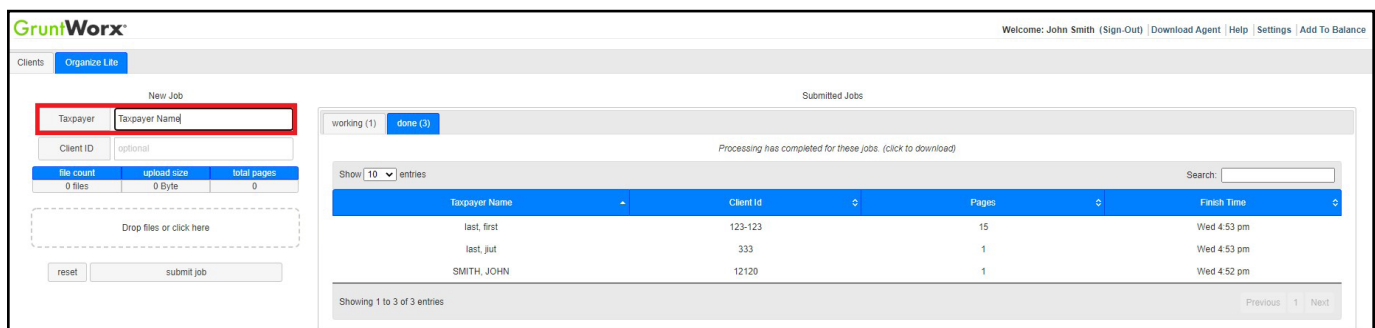
GruntWorx Organize LITE is an economical and quick turn-around (just minutes) option providing the same bookmarked PDF as the Organize product—but without the benefit of human validation. Returns are submitted and retrieved from a portal specifically designed for Organize LITE. Unlike the Clients submission screen, files are removed five days after the first download from the Organize Lite submission screen. However, users are able to submit Organize LITE jobs from the GruntWorx Clients screen where the files are available until the next tax season.

Below are step by step instructions on using GruntWorx Organize LITE within the Organize LITE portal.

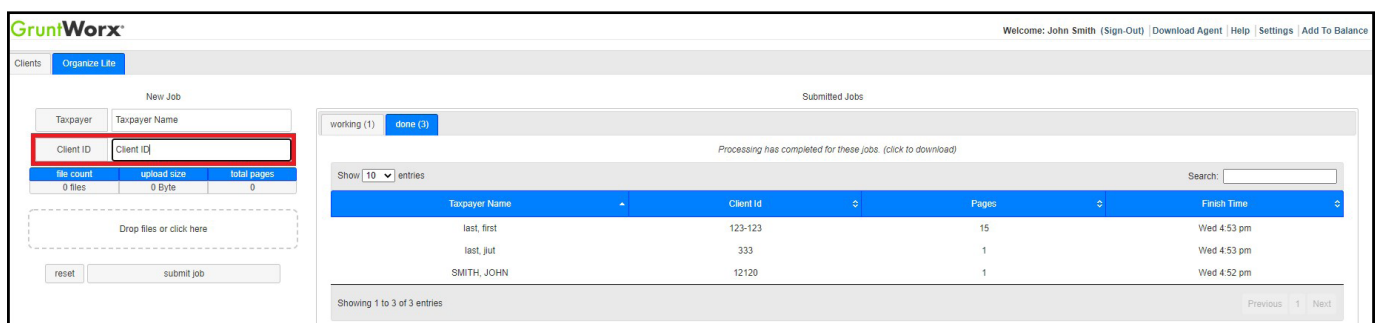
- 1 Log in to GruntWorx Dashboard
- 2 Select the **Organize LITE** tab from the GruntWorx Dashboard



- 3 Enter the **Taxpayer Name** (required). The name will appear on the cover page of the bookmarked PDF.



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



IMPORTANT: GruntWorx Trades products are not available with Organize LITE.

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

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

The GruntWorx interface shows the 'New Job' form on the left and the 'Submitted Jobs' table on the right. The 'New Job' form has fields for 'Taxpayer' and 'Client ID', both labeled 'required'. Below these fields are summary statistics: 'file count' (0 files), 'upload size' (0 Byte), and 'total pages' (0). A red dashed box highlights the 'Drop files or click here' area. At the bottom of the form are 'reset' and 'submit job' buttons. The 'Submitted Jobs' table on the right shows a list of jobs with columns: 'Taxpayer Name', 'Client Id', 'Pages', and 'Finish Time'. The table contains three entries: 'last, first' (123-123, 15 pages, Wed 4:53 pm), 'last, juit' (333, 1 page, Wed 4:53 pm), and 'SMITH, JOHN' (12120, 1 page, Wed 4:52 pm). The 'working' tab is selected, and the 'done' tab shows 3 entries.

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

The GruntWorx interface shows the 'New Job' form on the left and the 'Submitted Jobs' table on the right. The 'New Job' form has fields for 'Taxpayer' and 'Client ID', both labeled 'required'. Below these fields are summary statistics: 'file count' (1 files), 'upload size' (3.1 MB), and 'total pages' (15). A red dashed box highlights the 'Drop files or click here' area. At the bottom of the form are 'reset' and 'submit job' buttons. The 'Submitted Jobs' table on the right shows a list of jobs with columns: 'Taxpayer Name', 'Client Id', 'Pages', and 'Finish Time'. The table contains three entries: 'last, first' (123-123, 15 pages, Wed 4:53 pm), 'last, juit' (333, 1 page, Wed 4:53 pm), and 'SMITH, JOHN' (12120, 1 page, Wed 4:52 pm). The 'working' tab is selected, and the 'done' tab shows 3 entries.

! TIP: Clicking **reset** clears all entered data and uploaded files to start over.

- 7 Once the job is submitted, it appears in the **working** tab. The average processing time is one to five minutes.

The GruntWorx interface shows the 'New Job' form on the left and the 'Submitted Jobs' table on the right. The 'New Job' form has fields for 'Taxpayer' and 'Client ID', both labeled 'required'. Below these fields are summary statistics: 'file count' (0 files), 'upload size' (0 Byte), and 'total pages' (0). A red dashed box highlights the 'Drop files or click here' area. At the bottom of the form are 'reset' and 'submit job' buttons. The 'Submitted Jobs' table on the right shows a list of jobs with columns: 'Taxpayer Name', 'Client Id', 'Pages', and 'Submit Time'. The table contains two entries: 'Queue, Shuzy' (8888, 0 pages, Thu 12:03 pm) and 'Taxpayer Name' (Client ID, 15 pages, Wed 2:45 pm). The 'working' tab is selected, and the 'done' tab shows 3 entries.

- 8 Once the job is complete, it moves from the **working** to the **done** tab

The screenshot shows the GruntWorx interface with the 'Organize Lite' tab selected. On the left, there's a 'New Job' form with fields for 'Taxpayer' (required) and 'Client ID' (optional), and a table for 'file count', 'upload size', and 'total pages'. Below this is a 'Drop files or click here' area with 'reset' and 'submit job' buttons. On the right, the 'Submitted Jobs' section has tabs for 'working (1)', 'done (4)', and 'recent (1)'. The 'done (4)' tab is active, showing a message 'Processing has completed for these jobs. (click to download)'. Below this is a table with columns: Taxpayer Name, Client Id, Pages, and Finish Time. The table contains four entries, with the last one, 'SMITH, JOHN' with Client ID '12120' and 1 page, highlighted with a red border. The bottom of the table shows 'Showing 1 to 4 of 4 entries' and navigation links 'Previous', '1', and 'Next'.

- 9 Click anywhere on the completed job from the **done** tab to download the PDF file

This screenshot is similar to the previous one, but the 'done (4)' tab is still active. The table entry for 'SMITH, JOHN' is now highlighted with a green background and a red border, indicating it is the selected job for download. The rest of the interface remains the same.

- 10 After downloading a job, it moves from the **done** tab into the **recent** tab. Jobs in the **recent** tab are available for 5 days after the first download.

The screenshot shows the GruntWorx interface with the 'Organize Lite' tab selected. The 'Submitted Jobs' section now has the 'recent (1)' tab active, which is highlighted with a red border. A message above the table states: 'These jobs have been downloaded and will remain available here for 5 days. (click to download again)'. The table below shows one entry for 'SMITH, JOHN' with Client ID '12120' and 1 page, highlighted with a red border. The bottom of the table shows 'Showing 1 to 1 of 1 entries' and navigation links 'Previous', '1', and 'Next'.

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

💡 TIP: Organize Lite jobs can be submitted from the default jobs tab - Clients. User's should refer to the **Organize Quick Start Guide** to learn how to utilize the Clients Dashboard.

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

The screenshot shows the GruntWorx dashboard. In the top right corner, the navigation bar includes 'Welcome: John Smith (Sign-Out) | Download Agent | Help | Settings | **Add To Balance**'. The 'Add To Balance' button is highlighted with a red box. The main content area is divided into 'New Job' and 'Submitted Jobs' sections. The 'Submitted Jobs' section shows a table with columns: Taxpayer Name, Client ID, Pages, and Finish Time. A message states: 'These jobs have been downloaded and will remain available here for 5 days. (click to download again)'.

TIP: To find cost-per-client information, click **Settings** then **Inventory**.

This screenshot is identical to the previous one, but the 'Settings' button in the top right navigation bar is highlighted with a red box instead of 'Add To Balance'.

The screenshot shows the 'Inventory' report in the GruntWorx system. The top navigation bar includes 'User Settings | Admin Settings | Manage Accounts | Manage Users | **Inventory**'. The report is titled 'Job Cost Report' and shows data for 'November 2021'. The table has columns: Date, Memo, Credit Adjustment, and Credit Balance.

Date	Memo	Credit Adjustment	Credit Balance
11/01/2021	beginning balance		94.90
11/03/2021	client: SUM1 / account: Clients	-1.75	93.15
11/03/2021	client: Client ID / account: default	-0.75	92.40
11/03/2021	client: Client ID / account: default	-0.05	92.35
11/30/2021	current balance		92.35

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

If you have any problems or need additional help you can reach us at:
Support@GruntWorx.com • 877.830.6059

Organize LITE

- W-2
- W-2G
- W2C
- 1041 K-1
- 1042S
- 1065 K-1
- 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
- 1120S K-1
- 2439
- 5498-SA
- 5498-ESA
- Grantor Letter as 1041 K-1
- Supporting Tax Documents
- Receipts

