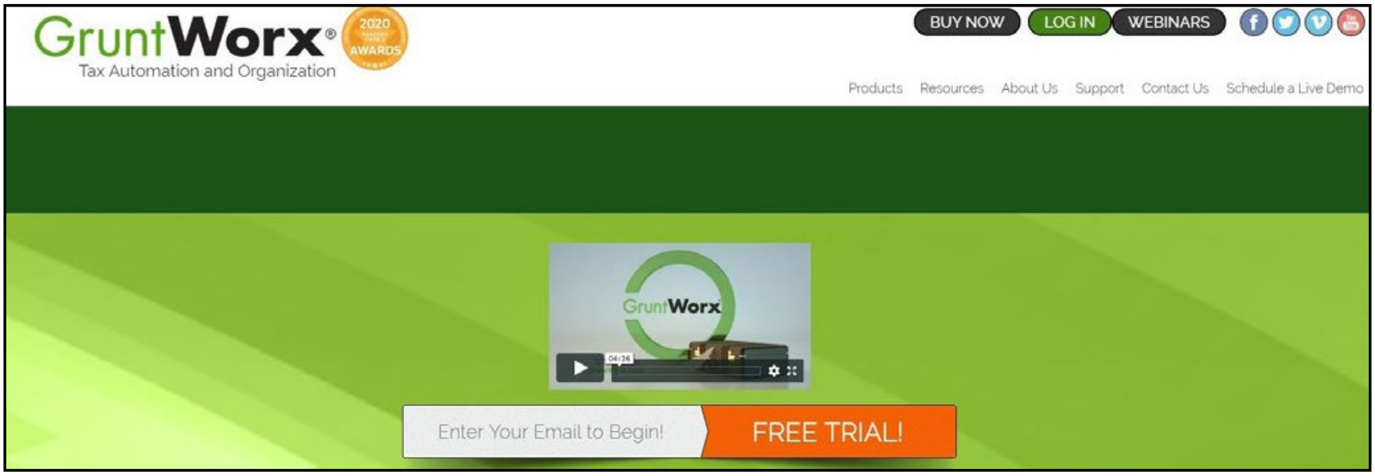
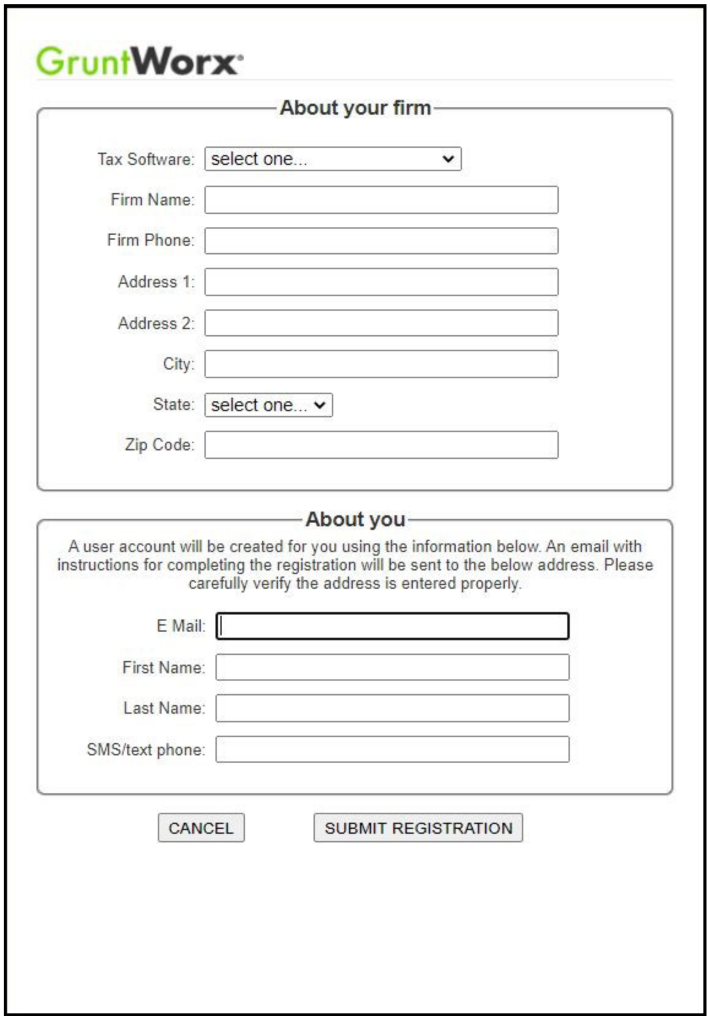
ORGANIZE LITE QUICK START GUIDE

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



QUICK START GUIDE

GruntWorx®

Using GruntWorx Organize LITE

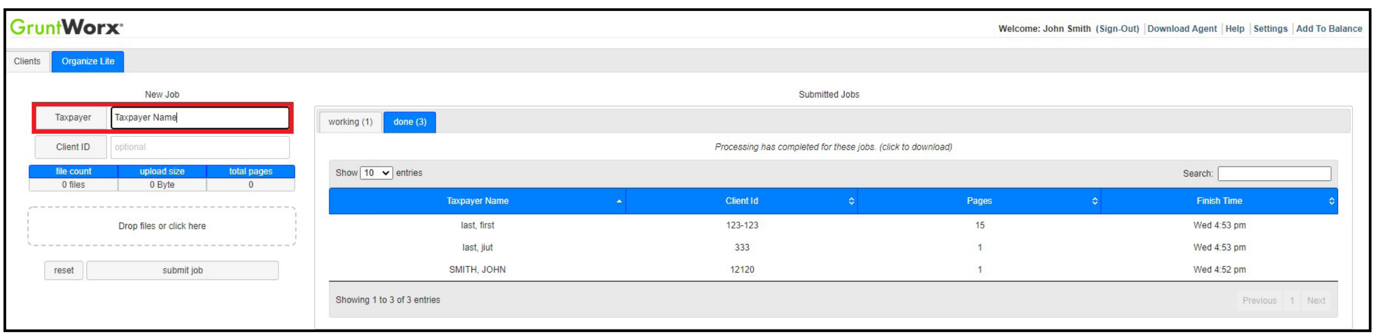
GruntWorx Organize LITE is an economical and quick turn-around (just minutes) option providing the same book-marked PDF as the Organize product—but without the benefit of human validation. Returns are submitted and re-trieved from a portal specifically designed for Organize LITE. Unlike the Clients submission 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.

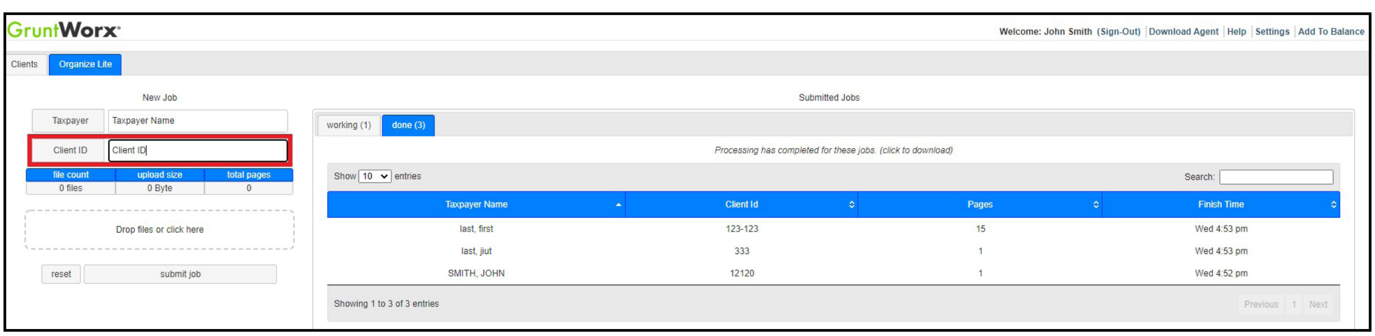
1. Log in to GruntWorx Dashboard

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.



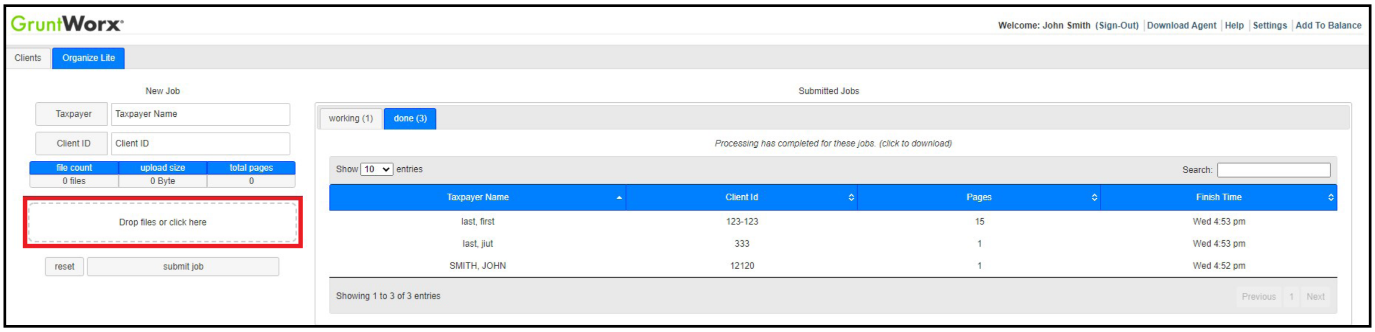
4. Enter the **Client ID.** This is not required, but if added, will appear on the cover sheet of the bookmarked PDF.



⚠ **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.

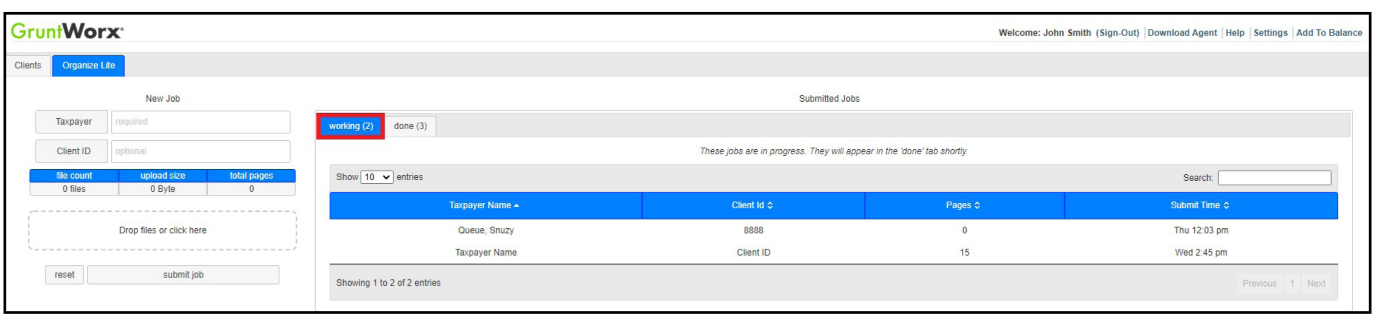
⚠ **IMPORTANT:** Add up to 15 PDFs per client, 150 MB per PDF.



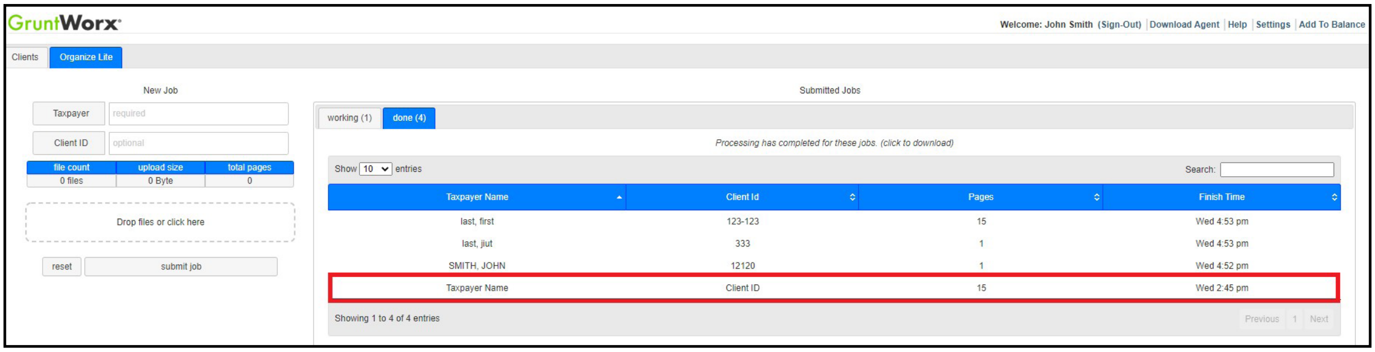
6 Click **submit job** to send the files to GruntWorx

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

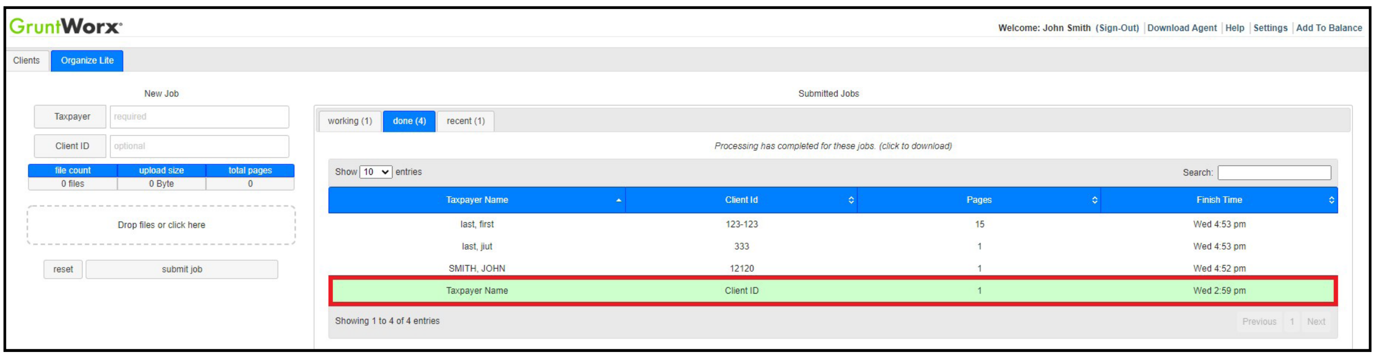
7 Once the job is submitted, it appears in the **working** tab. The average processing time is one to five minutes.



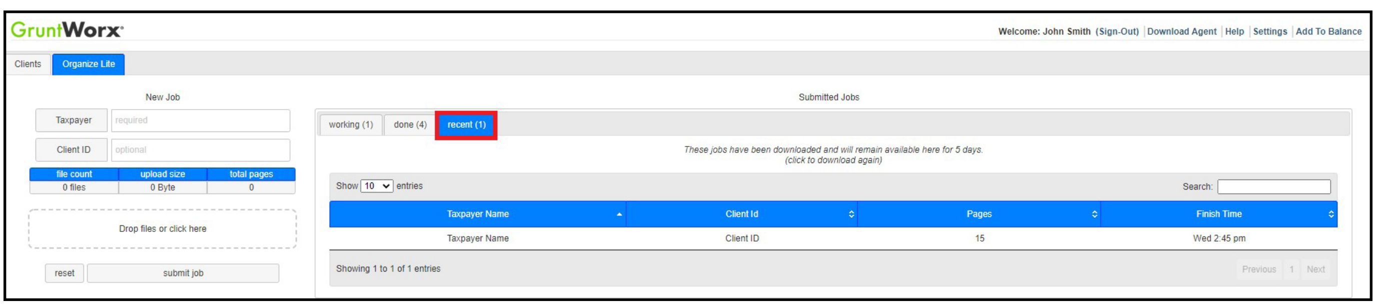
8 Once the job is complete, it moves from the **working** to the **done** tab



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



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.

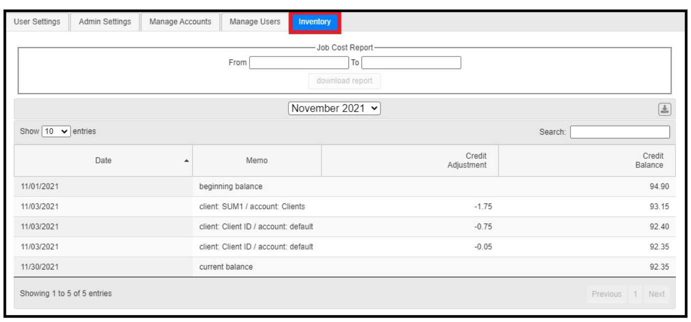


⚠ **IMPORTANT:** Access to completed files will expire **five days** after the first download.

⚠ **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.**

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



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
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- 5498-ESA
- Grantor Letter as 1041 K-1
- Supporting Tax Documents
- Receipts