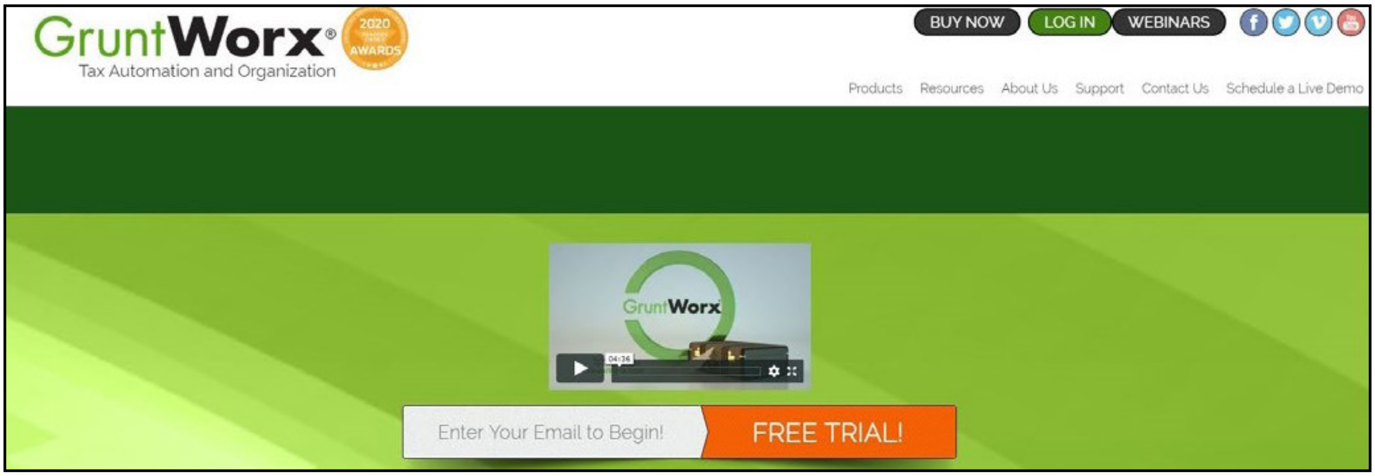
ORGANIZE QUICK START GUIDE

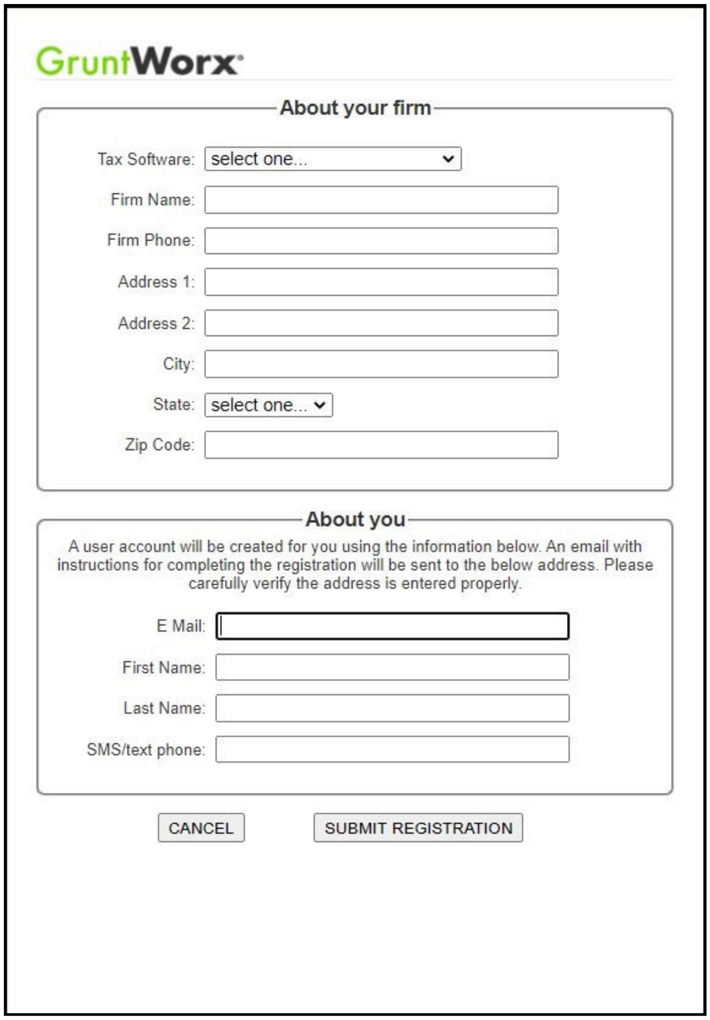
Here are instructions to help users sign up for a GruntWorx Free Trial and use GruntWorx. If user has already signed up for a trial account, jump to the **Using GruntWorx Organize** section.



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

TIP: These instructions are to register a new firm. If your firm has already signed up for a free trial, please contact your Firm Admin to be added as a user to your firm's account.



QUICK START GUIDE

GruntWorx®

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 a Trades Add On product (extraction of capital gains) that can be easily imported from within most tax preparation software.

1 Add Clients

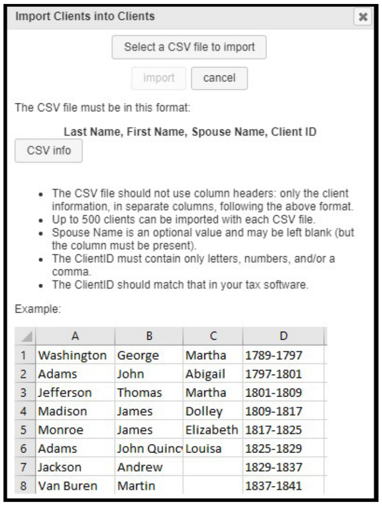
From the GruntWorx Dashboard, click on an icon to add client/s

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 and import the file


Import Clients into Clients

Select a CSV file to import

import cancel

The CSV file must be in this format:

Last Name, First Name, Spouse Name, Client ID

CSV info

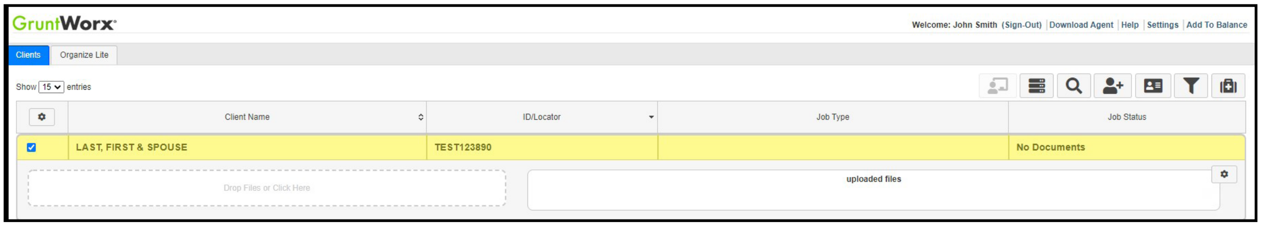
- The CSV file should not use column headers: only the client information, in separate columns, following the above format.
- Up to 500 clients can be imported with each CSV file.
- Spouse Name is an optional value and may be left blank (but the column must be present).
- The ClientID must contain only letters, numbers, and/or a comma.
- The ClientID should match that in your tax software.

Example:

	A	B	C	D
1	Washington	George	Martha	1789-1797
2	Adams	John	Abigail	1797-1801
3	Jefferson	Thomas	Martha	1801-1809
4	Madison	James	Dolley	1809-1817
5	Monroe	James	Elizabeth	1817-1825
6	Adams	John Quinc	Louisa	1825-1829
7	Jackson	Andrew		1829-1837
8	Van Buren	Martin		1837-1841

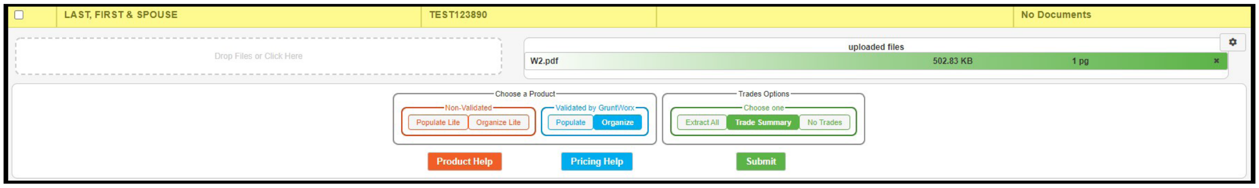
2 Upload Documents

To submit client's source documents: Click on the client's name, then either drag and drop PDF files into the dotted box or click in the box to browse computer for PDF files



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

- Once all files are uploaded, choose **Organize** under the Validated by GruntWorx section



- The Validated Organize product can have **Extract All Trades** or **Trades Summary** added. Or have **No Trades** extracted.

⚠ TIP: For Product and Pricing information, click a Help button below the product section to learn more.

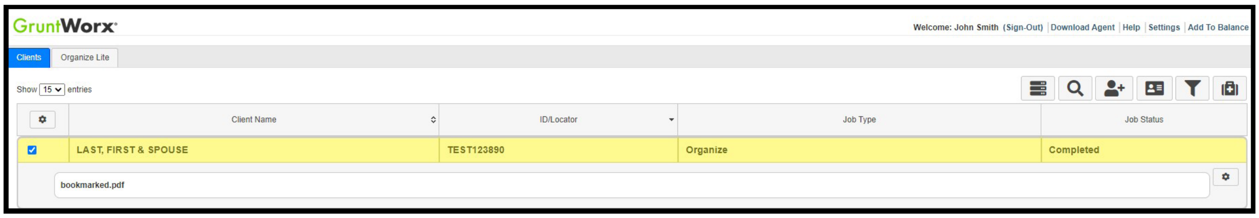
- Once selections are made, click **Submit**

❸ Download and save Output File/s

- When a job is complete, a text message or email notification is sent to the user if set up in User Settings. Log back in to the GruntWorx Dashboard and locate client.
- The first file listed is the Organized and Bookmarked PDF
- If a Trades product was added on, the second file is an Excel workbook with capital gains (either Details or Summaries) ready for import from within your tax preparation software.

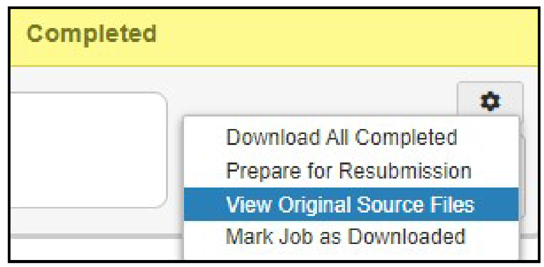
⚠ **TIP:** Depending on your tax software, adjustments may need to be made to the Trades Excel file prior to import.

- Simply click on file name to download and open



⚠ **TIP:** To view all PDFs uploaded and submitted to GruntWorx, click the Gear icon on right of Client panel and select **View Original Source Files.**

- Users can view files while a job is processing and after it is completed.



⚠ **TIP:** Users can now cancel processing jobs from the Client panel on the GruntWorx Dashboard.

- Click the Gear icon on the far right and select **Cancel Job.**
- Click **reset client** to refresh the submission screen.

⚠ **IMPORTANT:** If a message indicates the job cannot be canceled, it means the job is currently being reviewed by a GruntWorx Validator.

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

Here is a list of all the supported forms for GruntWorx Organize

Organize LITE & Organize

- 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