

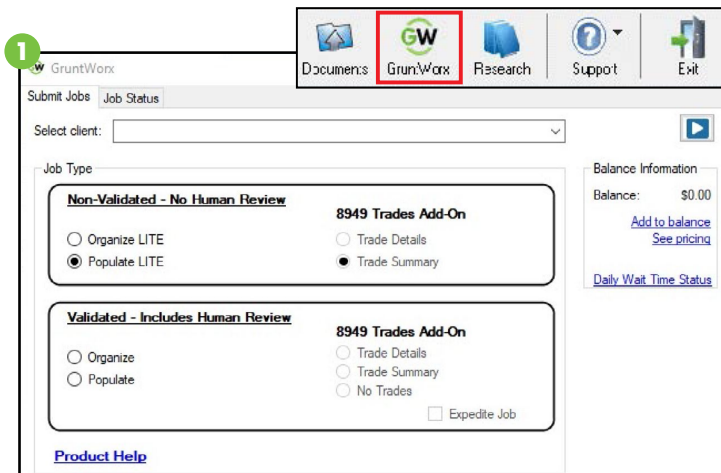
POPULATE LITE WITH NO USER REVIEW QUICK START GUIDE



This guide explains how to use Populate LITE with a minimal amount of review in the Populate Lite review tool. To ensure that data is populated into the correct forms you must use the tool to ensure the documents submitted have been properly classified and grouped. Once form types have been reviewed the data can then be imported into the Tax Software program for review and validation.

1 Submit Populate LITE Job

- Launch Drake Software.
- Select the **GruntWorx** icon in the toolbar.
- Submit Populate LITE job.
 - Be sure to select **Trades Summary**. It is strongly recommended to not select Trade Details if you are not planning on reviewing the job in the Populate LITE tool. GruntWorx will extract data off of any supported forms submitted.



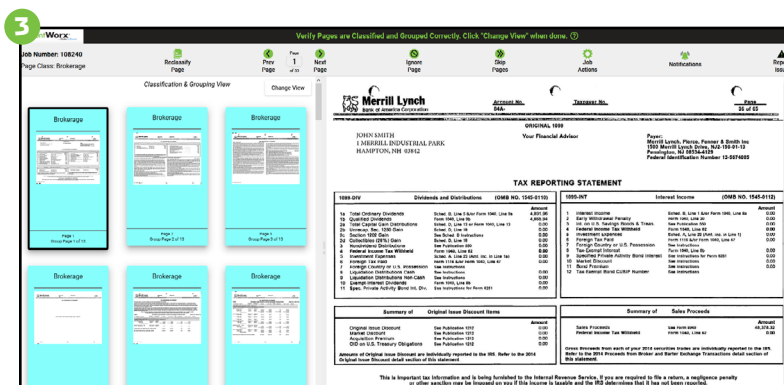
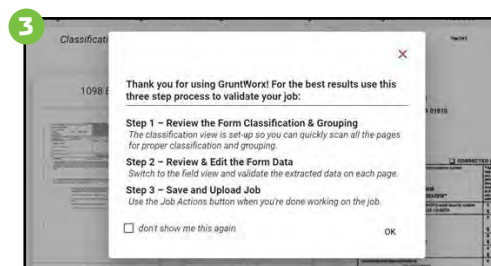
2 Access Job

- Once a job has been submitted, it shows on the **Job Status** tab of GruntWorx with a status of **Pending**.
- After the pages have been processed through GruntWorx, the status changes to **PopLite Ready**.
- Click directly on the **PopLite Ready** link to open the Populate LITE job.



3 Classify & Group

- The review tool opens in the user's default web browser.
- When loading a job, you are presented with an instructional pop-up. The user can disable this at any time.
- All of the pages submitted are displayed in the **Classification & Grouping View**. Here, users click into each page, verify that the classification of the document is correct, rotate the page if needed, and make any necessary grouping adjustments.



- Making sure Classifications are correct is the best way to ensure the return does not have missing data.
- If you have to reclassify a page, select the correct classification from the drop-down menu, then choose **Reclassify** and reprocess this page.

- This feature sends the page back through GruntWorx with the new classification and re-extracts the data for that form.
- While the page reprocesses you can continue checking additional pages.

You are about to change the classification of this tax document.
This will discard any previously extracted data.

New classification:
Document Type
Brokerage/1099 B

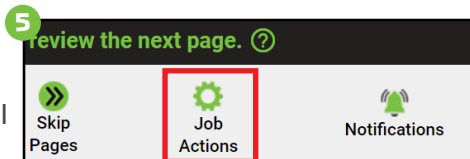
Reclassify and I'll type the data myself
Key the data into the new form fields.

Reclassify and reprocess this page
This page will be locked for a short time while GruntWorx reprocesses the page using the updated classification. You can continue to edit other pages but should return to this page to review before completing the job.

- Correctly grouping brokerages, K1s and multi-page 1099-Bs together is extremely important. Only pages that are next to each other can be grouped. The best way to ensure correct output is to upload brokerage or K1 accounts together in ascending order.

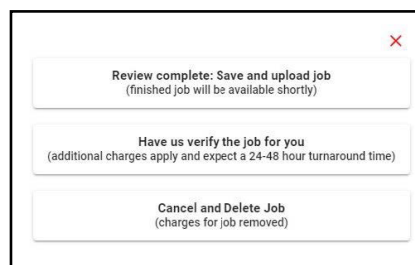
5 Send Back to GruntWorx

- Once pages have been checked for Classification and Grouping, it is ready to be sent back to GruntWorx for creation of import-ready files.
- Click on Job Actions in the Toolbar to send the job to GruntWorx. You will be presented with the following options:



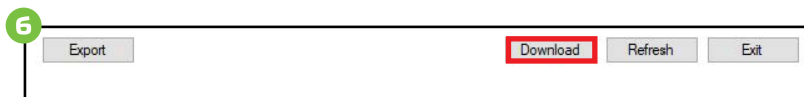
- ✓ **Review complete: Save and upload job** – The job returns to GruntWorx for production of a bookmarked PDF, the Diagnostics Excel Sheet (if applicable), and the Population XML file.
- ✓ **Have us verify the job for you** – This option sends the job to GruntWorx as a Populate job, where it is validated by US-based GruntWorx staff. Standard Populate charges apply and the turn-around time will be subject to normal wait times.
- ✓ **Cancel and Delete Job** – This option removes the job from processing. The job will not be charged.

- Select **Review Complete: Save and upload job**.



6 Download Completed Files

- After receiving a Job Completion Notification email, navigate back to GruntWorx from Drake Tax Software, go to the **Job Status** tab and locate client. Check the box to the left of the client's name and click **Download** in the bottom of the window.



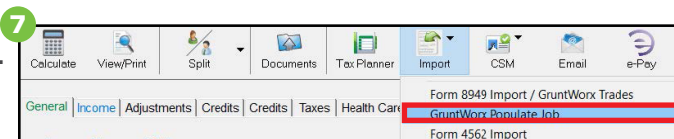
Best Practices for Downloaded Jobs

- ✓ GruntWorx recommends checking Drake Documents after downloading the job and looking for Diagnostics prior to population. Doing so will result in a better understanding of what to expect when the import takes place.
- ✓ Keep in mind, the XML file is not a file that is meant to be open and reviewed. It is all coding, and if altered, could negatively impact data population. There is no need to open and view this file.
- ✓ After confirming the contents of the GruntWorx completed files are what was expected, you are ready to import.

7 Import into Client's Tax Return

- Open the client's return—a prompt appears saying there is a Populate job ready to import for this client.

- If there is no prompt on the data-entry screen.
 - ✓ Click **Import** from **Data Entry Screen** toolbar.
 - ✓ Select **GruntWorx Populate Job**.
 - ✓ Click **Import**.



- Because the extracted data was not reviewed in the Populate LITE tool, users should carefully review data that was populated into the client's return.
 - Open the Bookmarked PDF from the client's DDM GruntWorx folder
 - ✓ Check each page to verify all data was picked up, and that it is correct.
 - ✓ Fix any data that was populated incorrectly in the tax software program.

Here is a list of all the supported forms for the GruntWorx Populate services.

- W-2
- W-2G
- 1095-A
- 1098
- 1099-MISC
- 1099-NEC
- 1099-B
- 1099-G
- 1099-DIV
- 1099-INT
- 1099-R
- RRB-1099
- SSA-1099
- 1099-OID
- Consolidated 1099
- 1120S K-1
- 1065 K-1
- 1041 K-1



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, call Drake Software® at **828.349.5505** or email Support@DrakeSoftware.com.