

**Using GruntWorx to Organize  
Your Client Tax Documents**

**NEED HELP?**

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X2 for Sales

X3 for Support

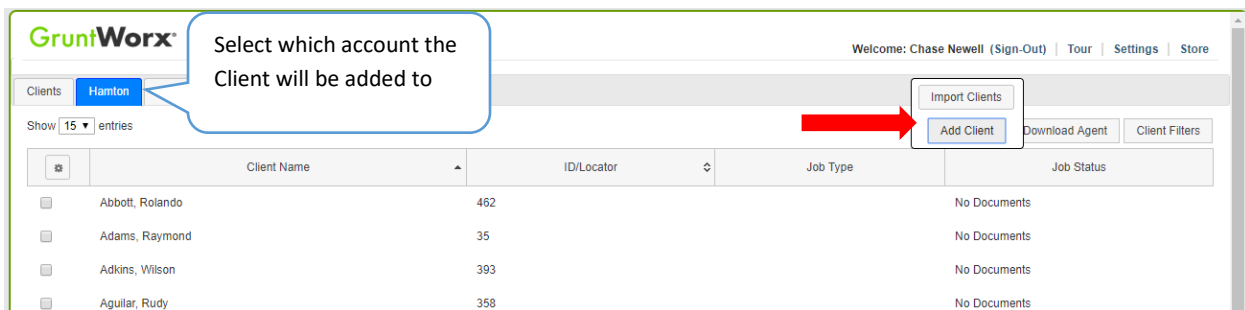
## Organize

GruntWorx Organize classifies, organizes and labels your client's source documents and provides you with a bookmarked PDF, arranged in the order of a 1040. The Organize product also offers the option of selecting Trades (extraction capital gains transactions to a spreadsheet) easily imported from within most tax preparation software.

### Job Submission

#### 1. Add Client/s

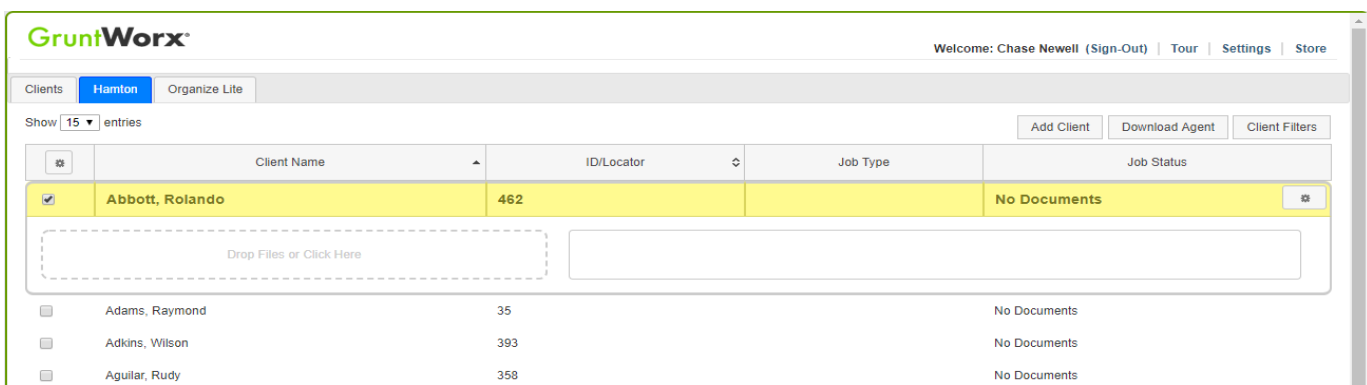
- At the Dashboard – Under the Appropriate Account – Click Add Client



- To add a single client** - on the “Add Client” dropdown menu click “Add Client”; fill all required fields
- To upload multiple clients** - on dropdown menu click “Import Clients”, follow instructions and template displayed on the screen to create the csv import file

#### 2. Upload Documents

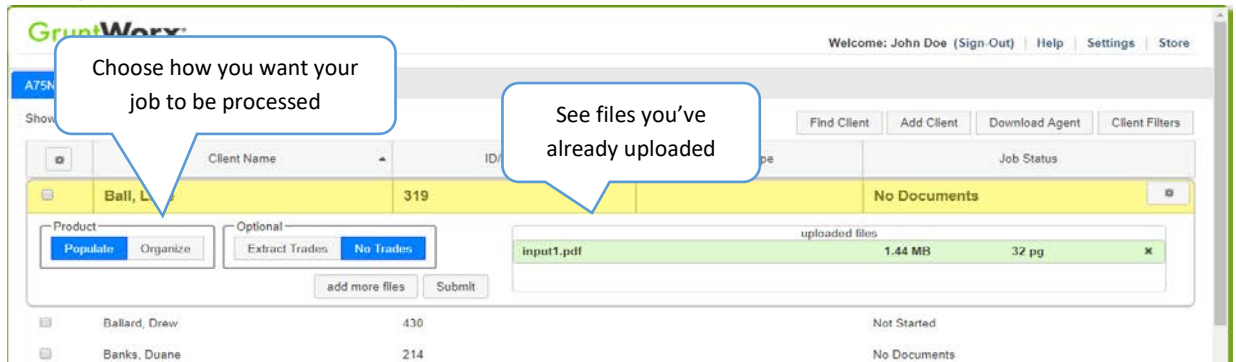
From the GruntWorx Dashboard, click on the client name to open the client's details.



- In the client's details, Drag and drop client's PDF files to the File Upload box,
- Or** Click the File Upload box
- Browse and add files (as many as 15; maximum of 150MG per file)

### 3. Submit Job

- Once documents are uploaded, select process files, choose processing options (Organize or Populate; with or without Trades) and click "Submit"



## Job Completion

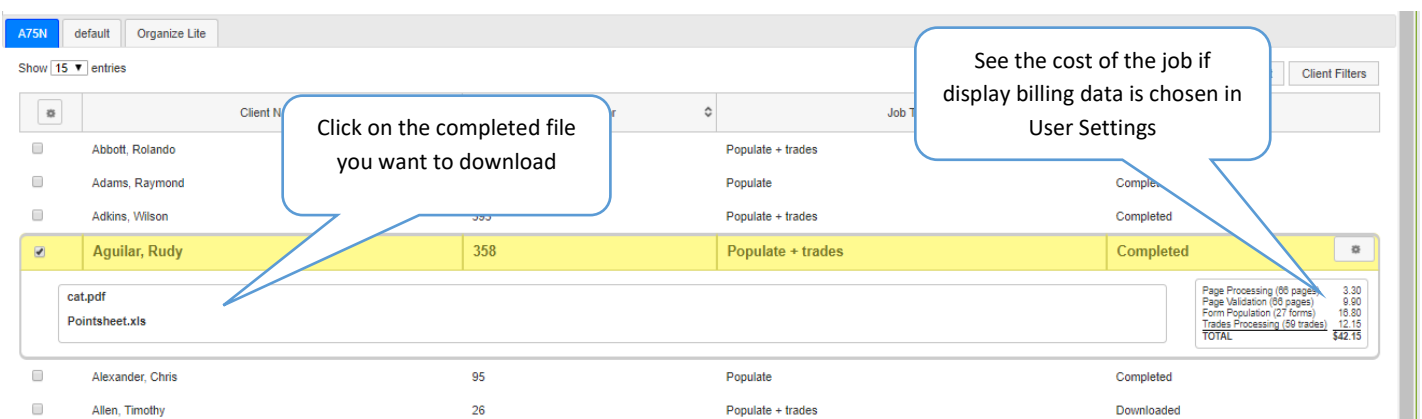
### Job Completion Notification

If selected in "User Settings" the user is notified by email or SMS once the job is ready to be downloaded.

#### 1. Download and save Output File/s

At the Dashboard, click the Client name associated with the completed job. The client's details will be opened.

- The first file listed is the organized and bookmarked PDF
- If Trades option was selected, the second file is an excel workbook with capital gains transactions extracted from 1099-B and Consolidated 1099 forms ready for import from within your tax program.



### Reset Failed Job

Occasionally the user will receive notification of a failed job. To try again, using the same ClientID, a **Reset Client** function is available for both Populate and Organize jobs.

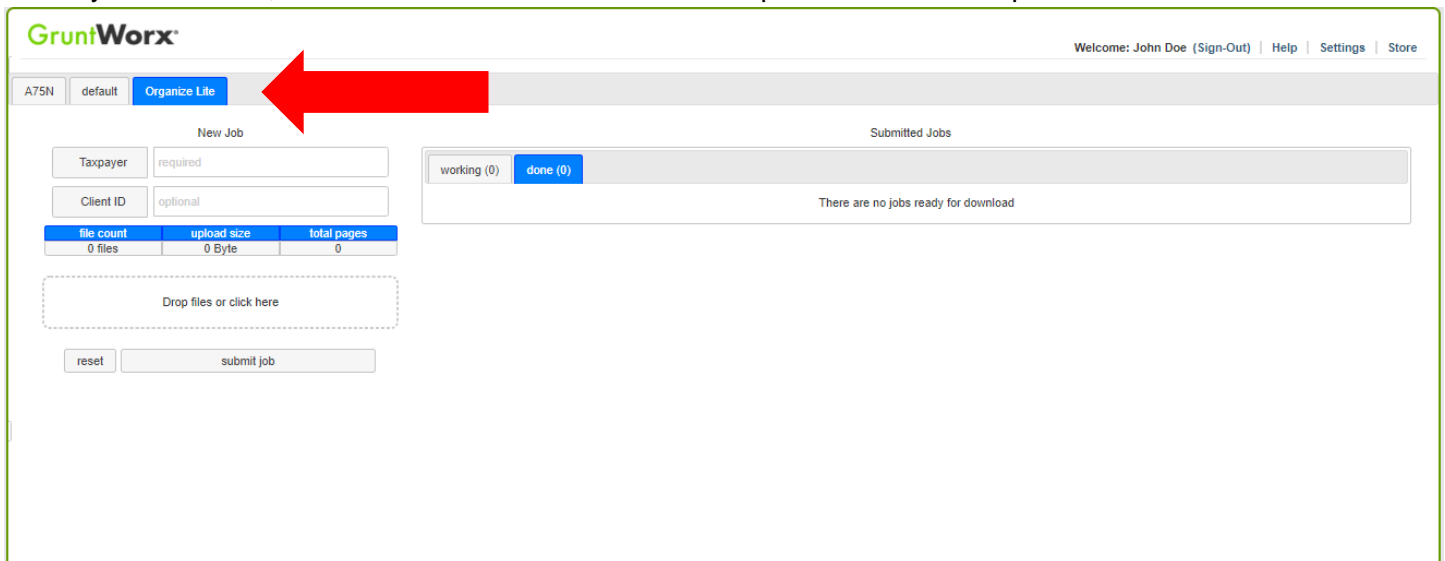
The screenshot shows a web interface with a table of clients. The table has columns for 'Client Name', 'ID/Locator', and 'Job Status'. A callout box points to the 'Job Status' column, highlighting a 'Failed' status for the client 'Allison, Aubrey'.

Client Name	ID/Locator	Job Status
Abbott, Rolando	462	Processing
Adams, Raymond	35	Completed
Adkins, Wilson	393	Completed
Allison, Aubrey	494	Failed
Alvarado, Gilberto	424	Failed

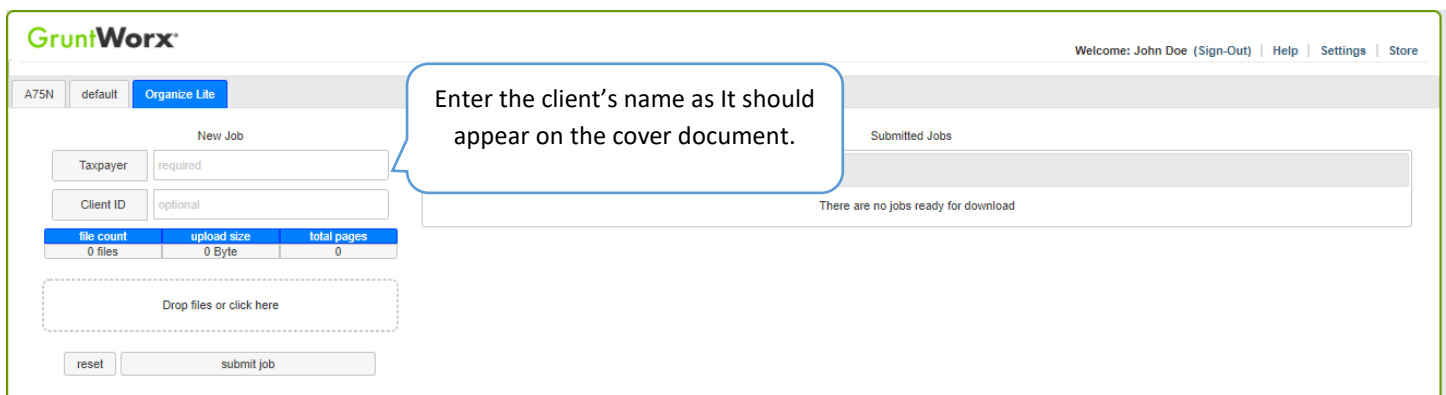
- The user should open the Client's Details and click the Gear icon button at upper right.
- Choose to Reset with or without the original documents
- Confirm Reset to set the job as a "new job"
- Fix the error, e.g.: Print and scan for password protected documents
- Upload documents and "Process".

## 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 benefit of human validation. Returns are submitted and retrieved from a screen, specifically designed for Organize LITE, accessed by clicking on the Organize LITE tab. Unlike the Organize and Populate products, downloaded files are removed within just a few days. Note also, that Trades are not available as an option with the LITE product.



### 1. Add the Client Name



## 2. (Optional) Add the Client ID

The Client ID will appear on the cover sheet of the bookmarked PDF but is not required to submit an Organize LITE job

The screenshot shows the 'New Job' form in the GruntWorx interface. The 'Client ID' field is labeled as 'optional'. A callout box points to this field with the text: "(Optional) Enter the Client ID if you want it to appear on the cover page." Below the form is a table showing job statistics:

file count	upload size	total pages
0 files	0 Byte	0

Below the table is a dashed box labeled "Drop files or click here" and buttons for "reset" and "submit job". To the right, the "Submitted Jobs" section shows "working (0)" and "done (0)" buttons, with the text "There are no jobs ready for download" below.

## 3. Upload scanned documents

The screenshot shows the 'New Job' form in the GruntWorx interface. A callout box points to the "Drop files or click here" area with the text: "Drag and drop or click here to add the client's documents." Below the form is a table showing job statistics:

file count	upload size	total pages
0 files	0 Byte	0

Below the table is a dashed box labeled "Drop files or click here" and buttons for "reset" and "submit job". To the right, the "Submitted Jobs" section shows "working (0)" and "done (0)" buttons, with the text "There are no jobs ready for download" below.

## 4. Submit job

The screenshot shows the 'New Job' form in the GruntWorx interface. The form includes fields for 'Taxpayer' (required) and 'Client ID' (optional). Below these is a table with columns for 'file count', 'upload size', and 'total pages', all showing '0'. A dashed box indicates where to drop files. At the bottom are 'reset' and 'submit job' buttons. A callout box points to the 'submit job' button.

After you have provided the client's name and uploaded all of your client's files, click the submit button.

We'll take it from here! Your job will appear under the working tab while it's processing.

The screenshot shows the 'Submitted Jobs' section of the GruntWorx interface. It features two tabs: 'working (0)' and 'done (0)'. Below the tabs is a message: 'There are no jobs ready for download'. A callout box points to the 'working (0)' tab.

Your in-progress jobs will appear under the working tab.

5. Download the completed job: Once your job is complete, find it under the "done" tab, ready for download. Remember, access to the client record and the downloaded PDF will expire after just a few days.

The screenshot shows the 'Submitted Jobs' section of the GruntWorx interface. It features two tabs: 'working (0)' and 'done (0)'. Below the tabs is a message: 'There are no jobs ready for download'. A callout box points to the 'done (0)' tab.

Once the job is completed you will find it on the "done" tab ready for download.