GruntWorx

Organize and Organize LITE

Using GruntWorx to Organize Your Client Tax Documents

NEED HELP?

Call us: 877-830-6059

X2 for Sales

X3 for Support

GruntWorx

Organize and Organize LITE

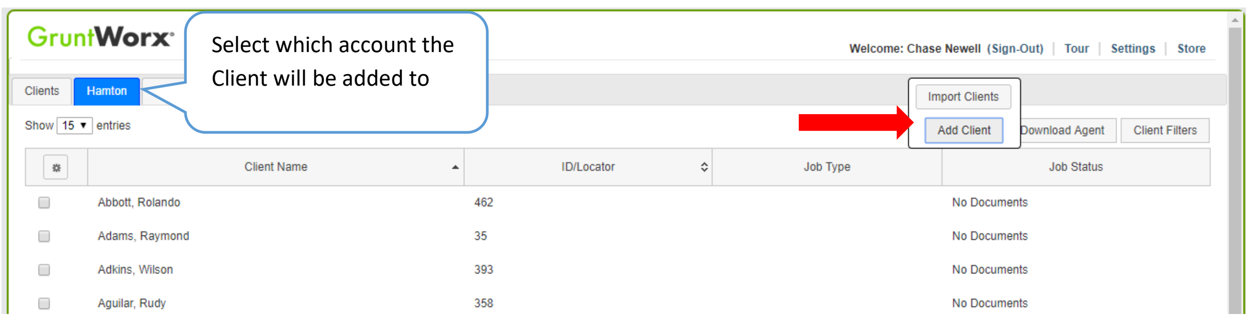
Organize

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

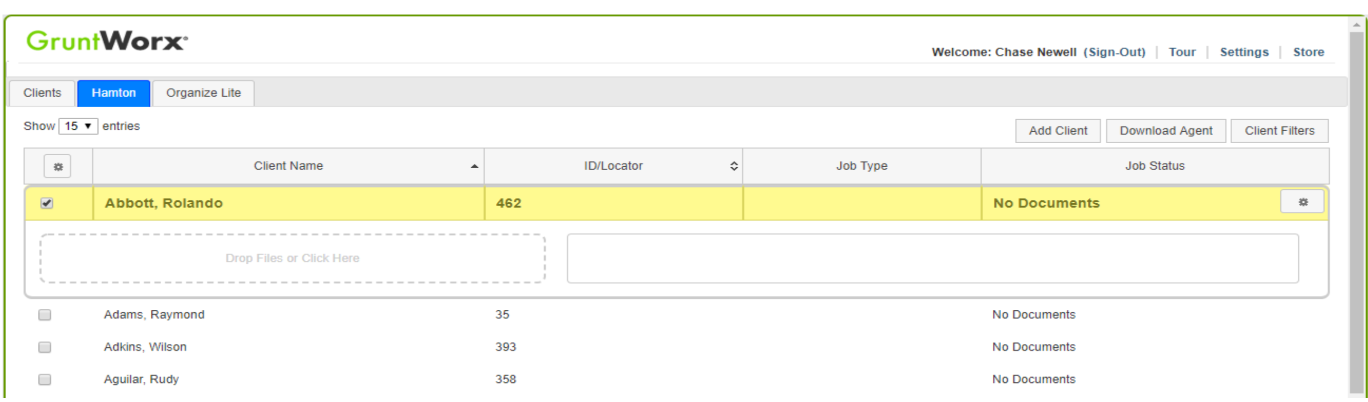
- At the Dashboard – Under the Appropriate Account – Click Add Client



- **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

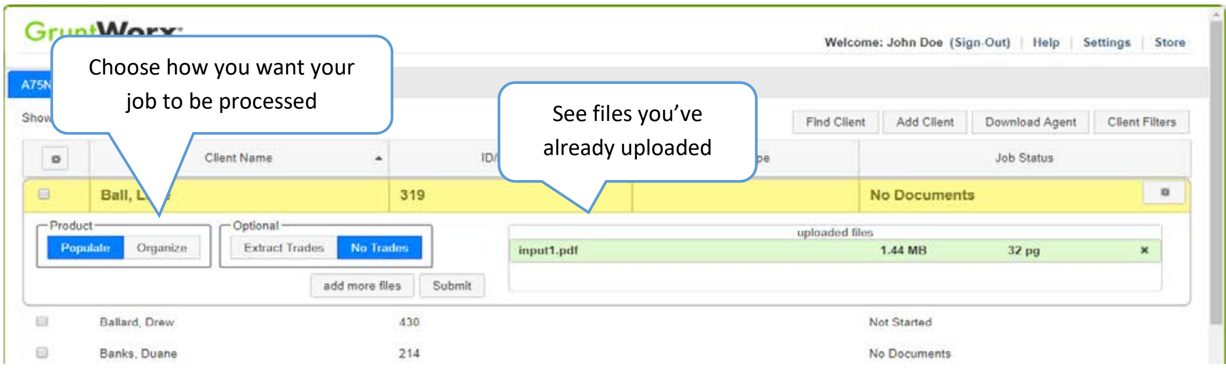
From the GruntWorx Dashboard, click on the client name to open the client's details.



- 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

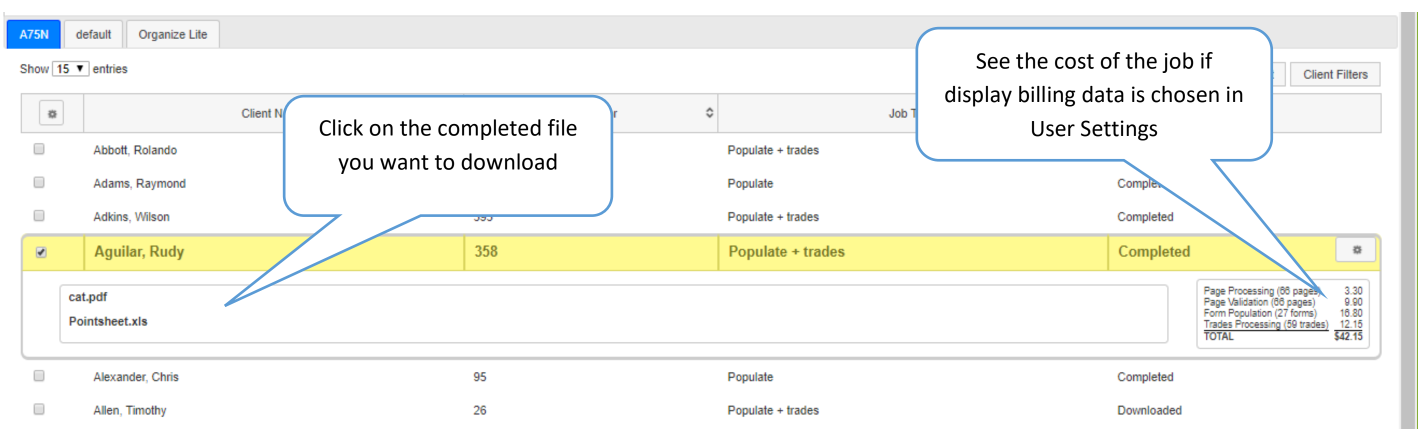
Job Completion Notification

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

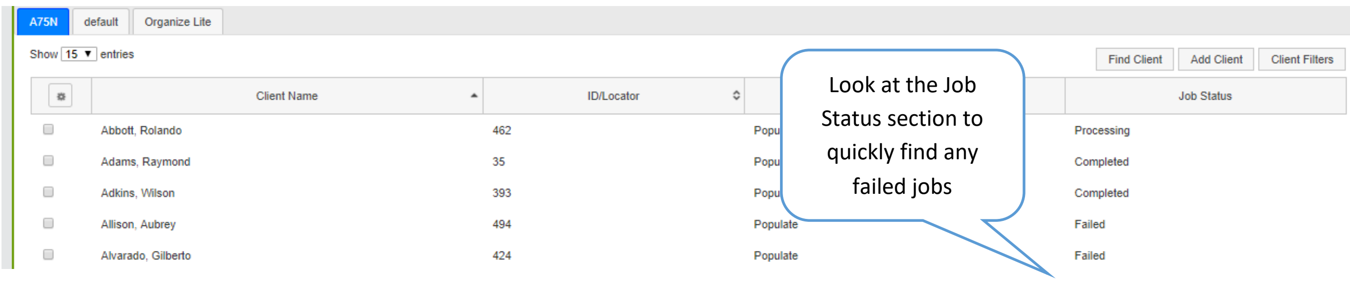
At the Dashboard, click the Client name associated with the completed job. The client's details will be opened.

- 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

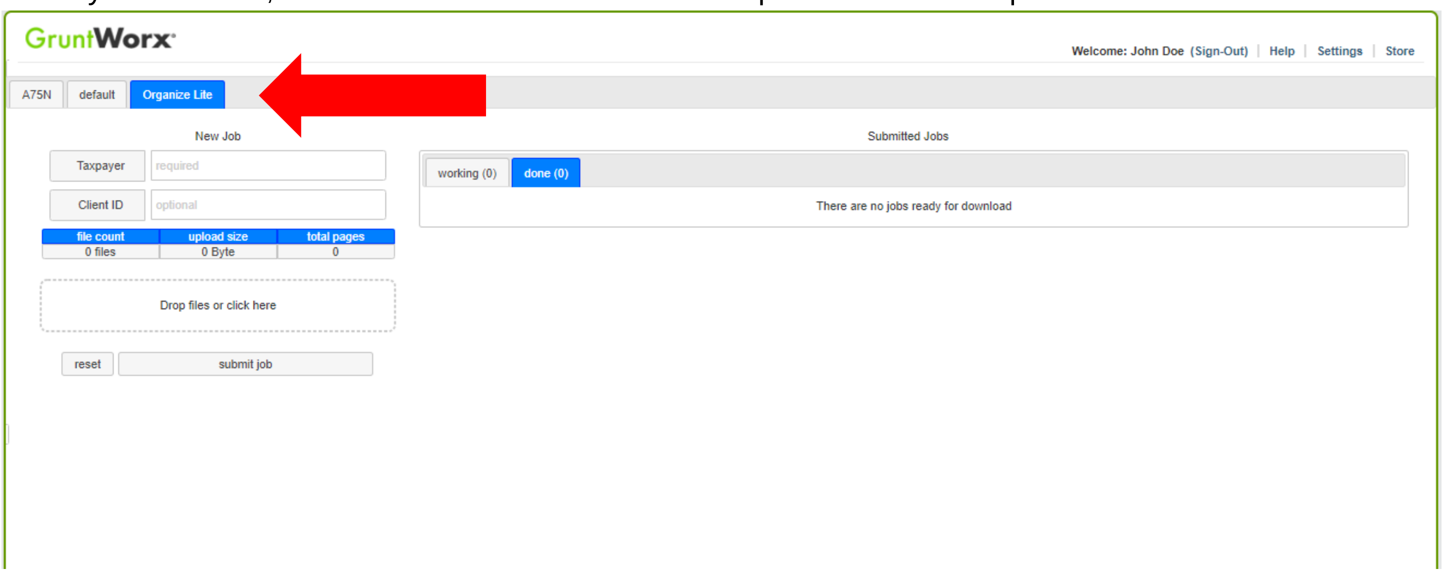
Occasionally the user will receive notification of a failed job. To try again, using the same ClientID, a **Reset Client** function is available for both Populate and Organize jobs.



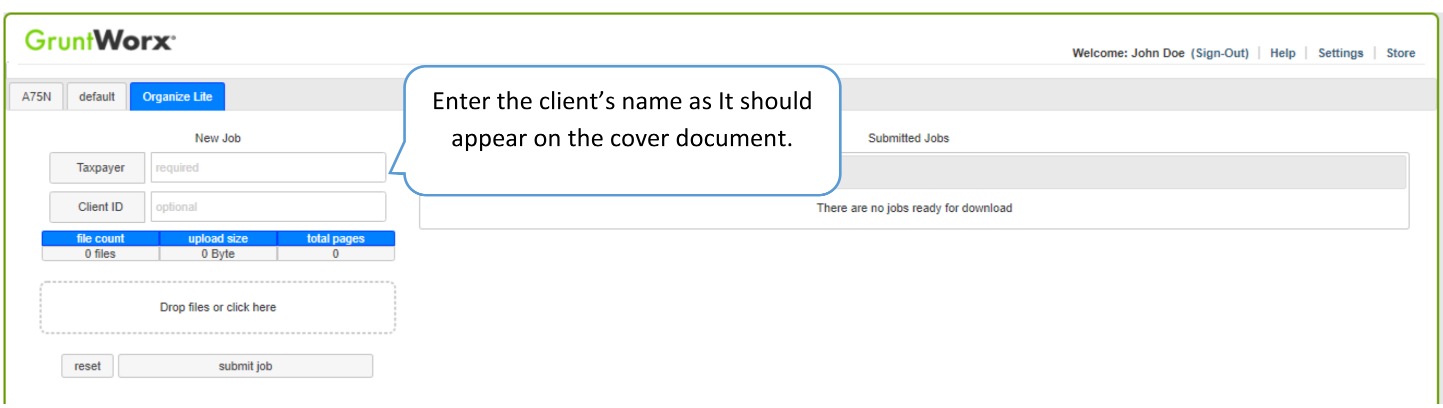
- The user should open the Client's Details and click the Gear icon button at upper right.
- Choose to Reset with or without the original documents
- Confirm Reset to set the job as a "new job"
- Fix the error, e.g.: Print and scan for password protected documents
- Upload documents and "Process".

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



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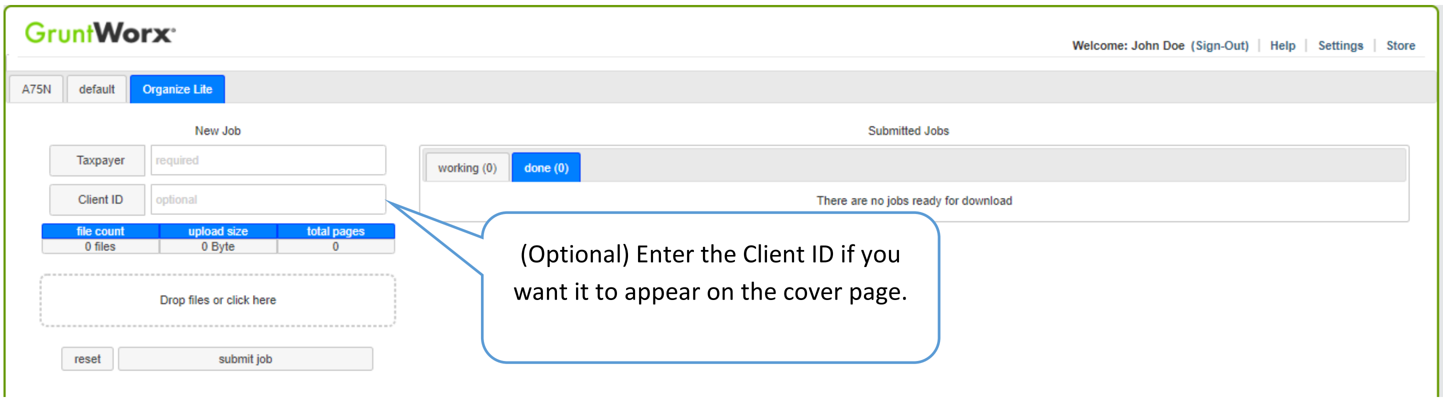
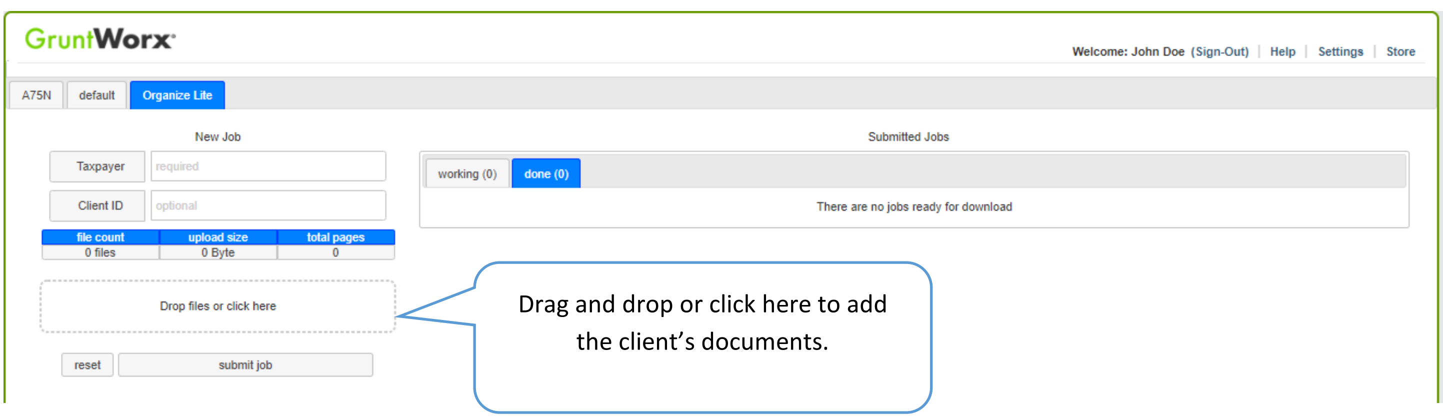
2. (Optional) Add the Client ID

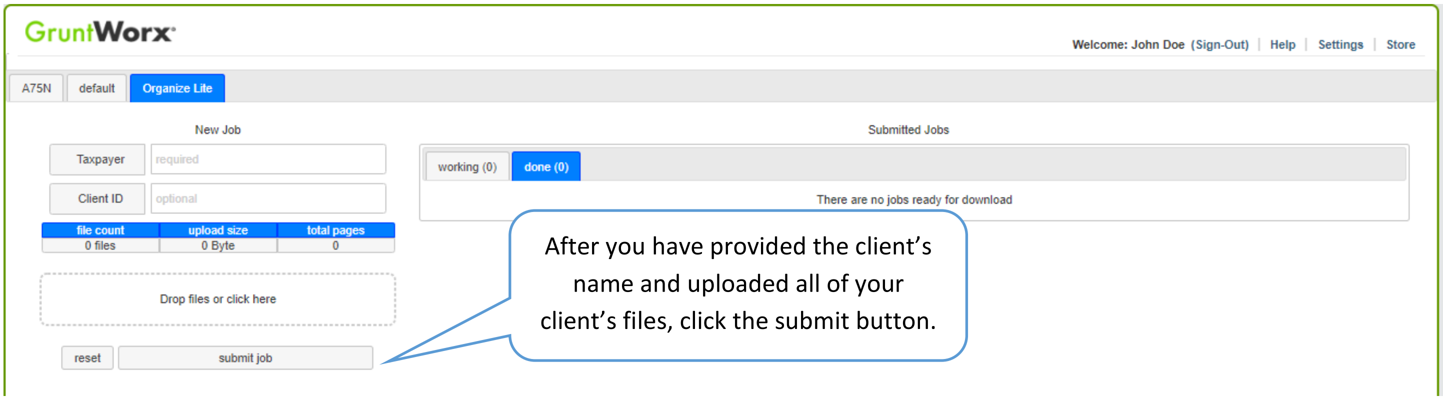
The Client ID will appear on the cover sheet of the bookmarked PDF but is not required to submit an Organize LITE job



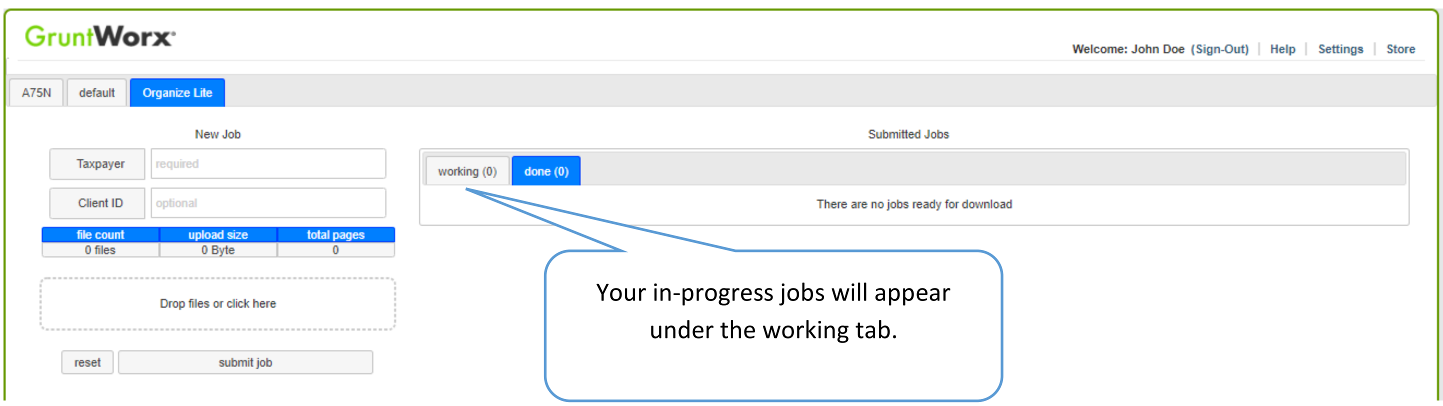
3. Upload scanned documents



4. Submit job



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



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.