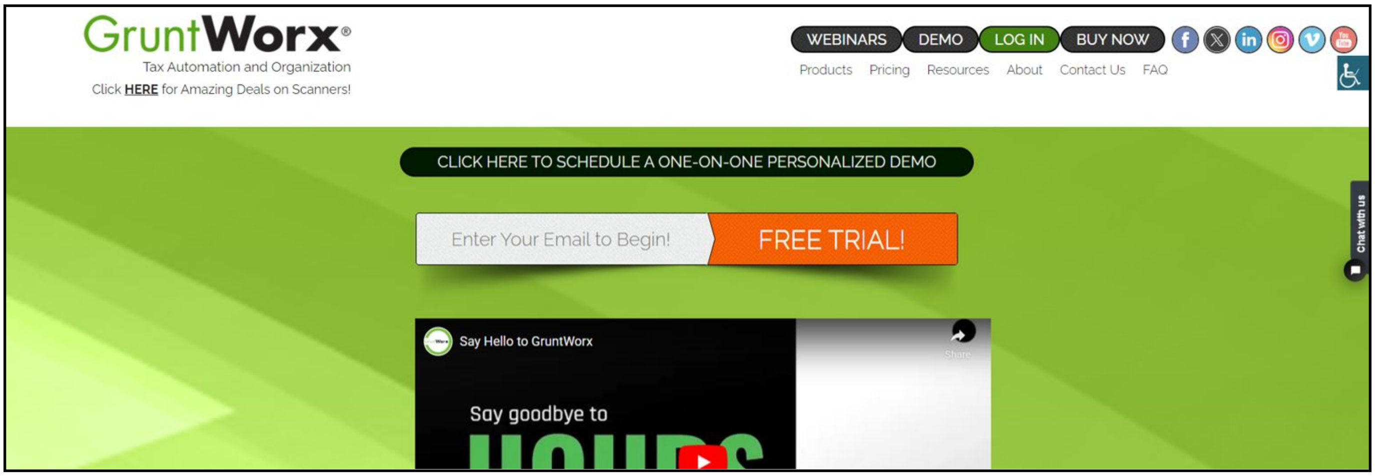
GRUNTWORX QUICK START GUIDE

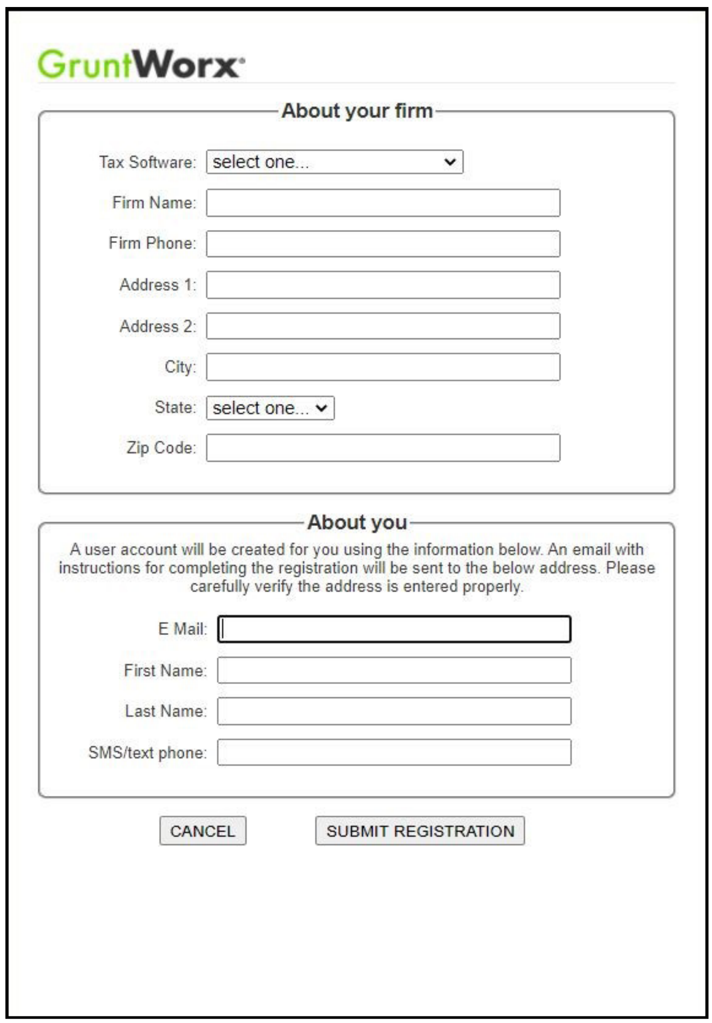
Here are instructions for users that **do not** have Supported Tax Software to sign up for a GruntWorx Free Trial and use GruntWorx **VERIFIED Organize** or **GruntWorxLITE.** If user has already signed up for a trial account, jump to the Using GruntWorx Organize section.



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.

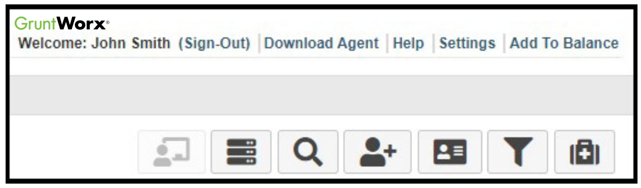


Using GruntWorx Organize

GruntWorx Organize classifies, organizes and labels client's source documents and provides users with a bookmarked PDF, arranged in the order of a 1040. Users can choose to use the VERIFIED version or the GruntWorxLITE version. Organize products 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.

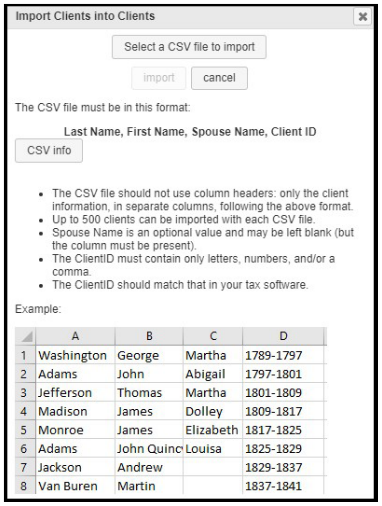


To add a **single** client:

- Click on the icon and fill out all required fields.

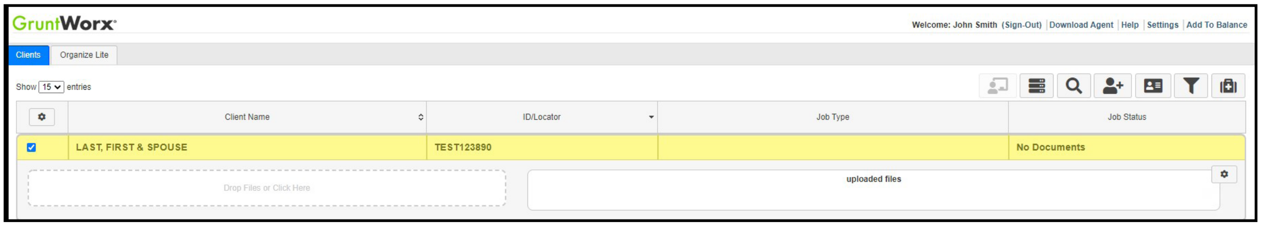
To add **multiple** clients:

- Click on the icon to upload a .csv file.
- Follow the instructions and template to create and import the file.



2 Submit 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.

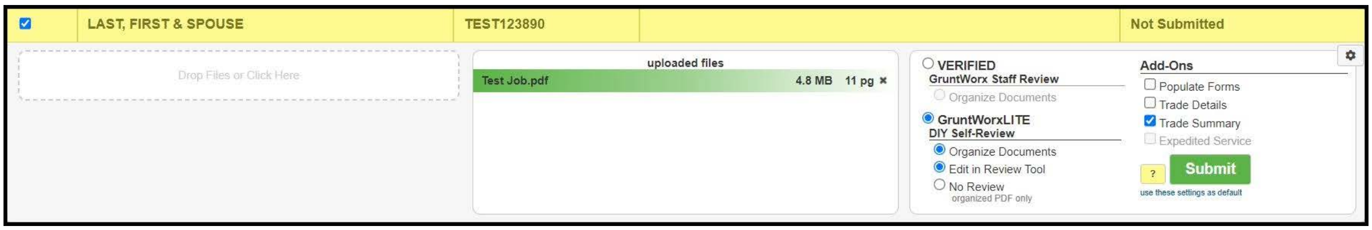


⚠ IMPORTANT: Add up to 15 PDFs per client, 150 MB per PDF.

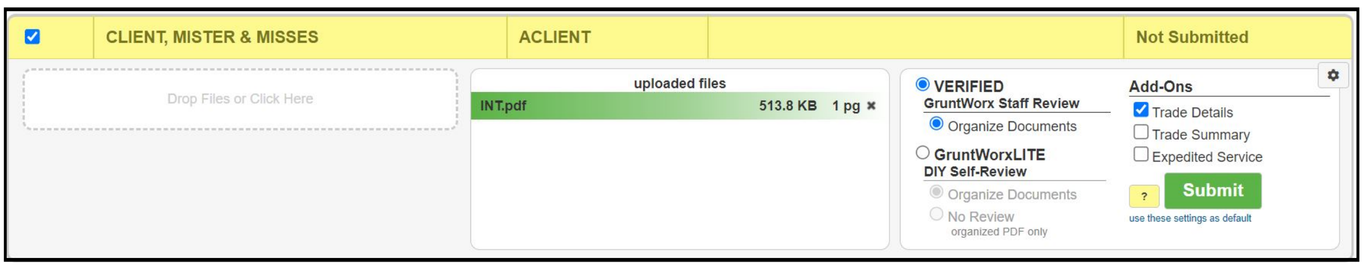
Once all files are uploaded, choose your solution.

- To receive a completed Bookmarked PDF in just minutes that goes through GruntWorx technology with no review, choose GruntWorxLITE with No Review selected.
- To review the classifications and payer names that will be on the Bookmarked PDF before it is completed, choose GruntWorxLITE with Edit in Review Tool selected.
- At this time, you can also choose a Trades Add-On if desired.

⚠ **TIP:** To add a Trades product, Edit in Review Tool must be selected.



- To receive a completed Bookmarked PDF that has been reviewed for accuracy by GruntWorx Staff, choose VERIFIED.
- At this time, you can also choose a Trades Add-On if desired. When you add a Trades product to a VERIFIED job, the trades data will be reviewed for accuracy by GruntWorx Staff.



⚠ TIP: For Product and Pricing information, click the ? button.

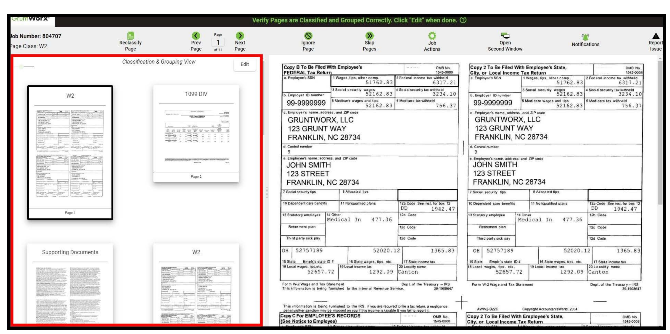
- Once selections are made, click **Submit**

⚠ **TIP:** Turnaround time during tax season is 1-3 days for VERIFIED jobs. During this time, users can click a link in the Info Banner to view the current estimated lead-time. Estimated lead-times are updated daily during peak seasons.

3 Additional GruntWorxLITE Steps

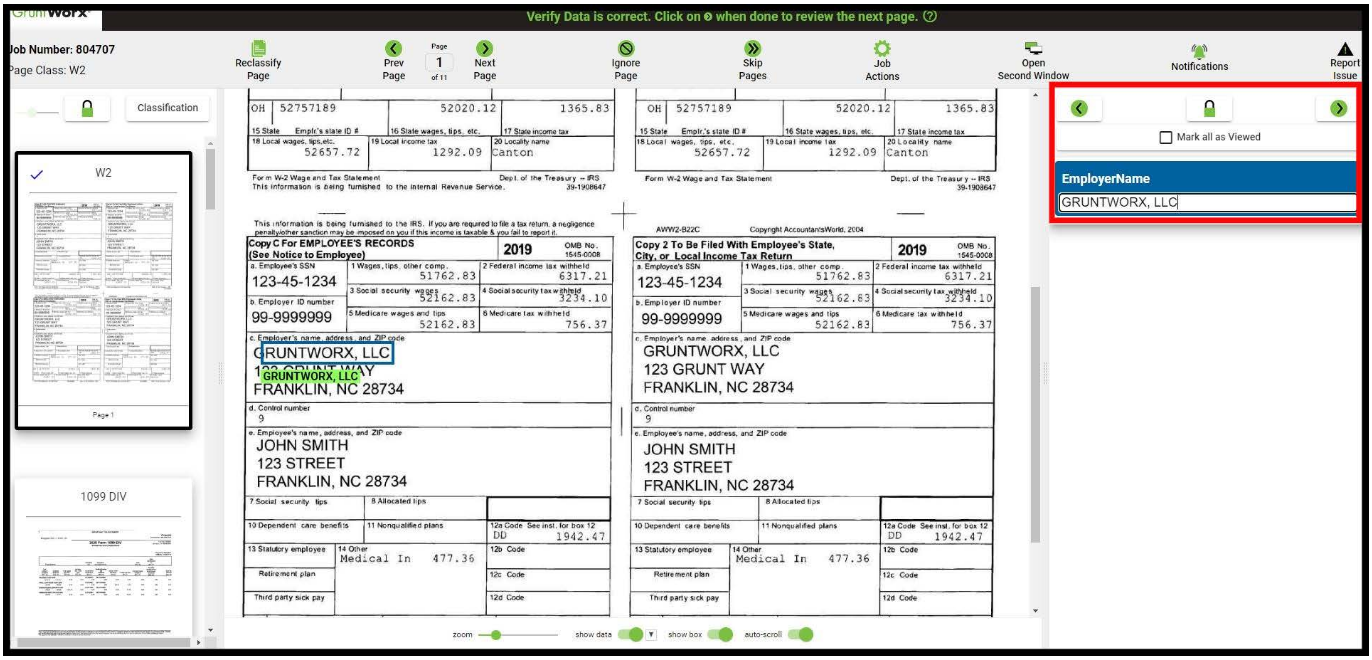
If GruntWorxLITE was selected along with **Edit in Review Tool**, there are additional steps that take place before receiving your completed files.

After the pages process through GruntWorx technology, the Job Status changes to **Awaiting Review.**



- Click anywhere on the client row to open client details. Click the **edit in review tool** button to launch the Self-Validation tool.
- Once the review tool is open, in the left-hand **Classification & Grouping View**, click into each page, verify that the classification of the document is correct, changes classifications if needed, rotate any pages, and make grouping adjustments that are necessary.

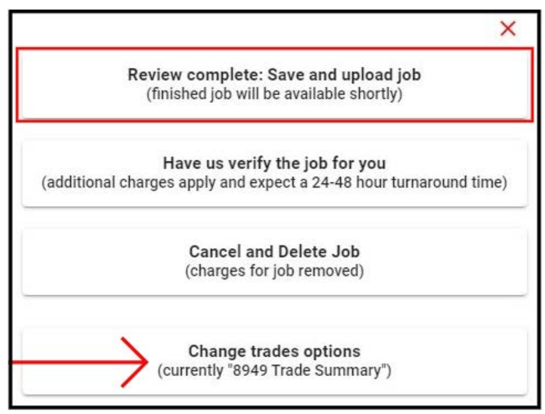
- Switch to the **Field View** to review the extracted data by clicking **Edit** in the Classification panel. Verify data using the right-hand Data Entry Panel if in single-screen mode, or in full view in dual-screen mode.



Once every page has been reviewed by the user, it is ready to be sent back to GruntWorx for completion.

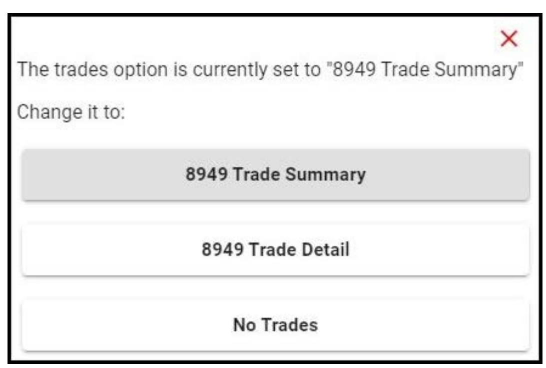
- Tabbing out of the last field of the last page opens the **Job Actions** menu (Users can also click Job Actions in the toolbar at any time).

  - **Review complete: Save and upload job** - The job returns to GruntWorx for production of the bookmarked PDF and Population file.
  - **Have us verify the job for you** - This option sends the files to GruntWorx as a VERIFIED job, where it is validated by US-based GruntWorx staff. Standard VERIFIED charges apply and the turnaround 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.**

⚠ **TIP:** Users have the ability to change the Trades Add On selection from within the Self-Validation tool. To access this option, open the Job Actions menu and choose Change trades options. On the next menu you will choose your Trades options.



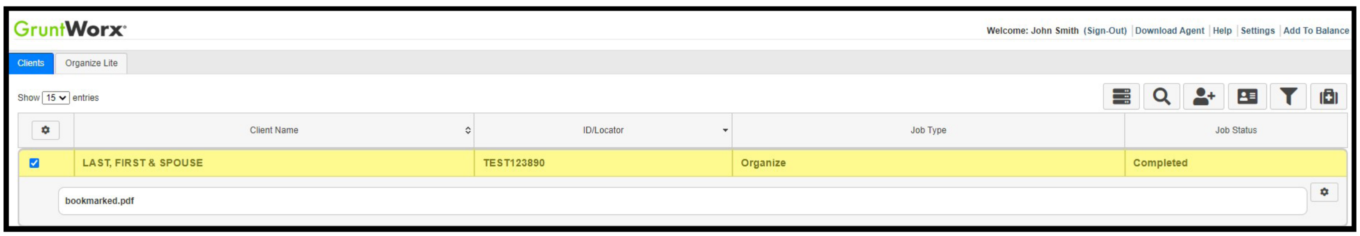
❹ Download and Save Output File/s

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



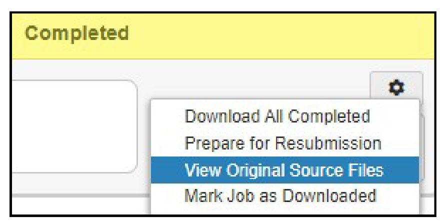
The Bookmarked.PDF is bookmarked in the same order every time, no matter what order the documents were scanned in. The labeled bookmarks and added searchable function allow you to quickly find and review any tax document in even the most complex returns.

If you added on a Trades product, the Pointsheet.xls allows you to quickly and easily manipulate trade data, perform calculations within the spreadsheet, and import the data into your tax software.

Use the tax software Schedule D/8949 Import tool to automatically populate the trade data into your client's return. Refer to your specific tax software for specifications and instructions.

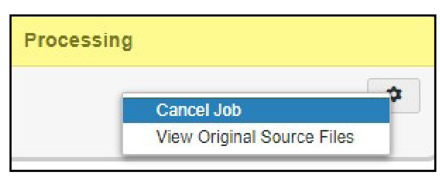
⚠ **TIP:** To view all PDFs uploaded and submitted to GruntWorx, click the Gear icon on far right of Client panel and select **View Original Source Files.**

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



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

Supported Forms

GruntWorx®

Here is a list of all the supported forms for GruntWorx Organize & Trades Products.

GruntWorxLITE & VERIFIED 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

Trade Details & Trade Summary

- Federal 1099-Bs
- Year-End Brokerage Statements

The following documents are not supported for Trades products:

- Coinbase Statements
- 8949 Worksheets
- Monthly Statements
- IRA Account Statements

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