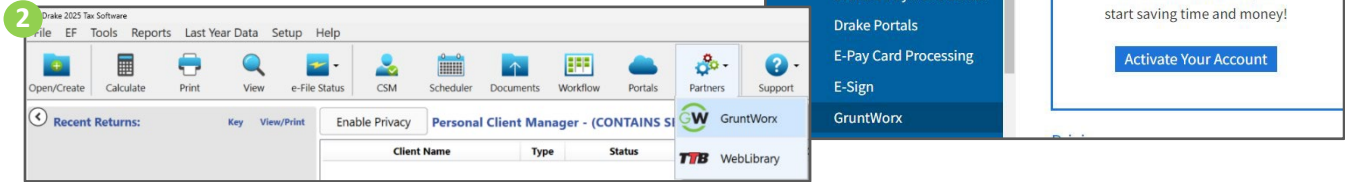


Follow these Quick Steps to try out GruntWorx with Drake Tax Software!

1 Log in to your Drake Support account and under the GruntWorx page, click **Activate Your Account** to sign up for the free trial.

2 Open **GruntWorx** from the Partners menu and select your client.

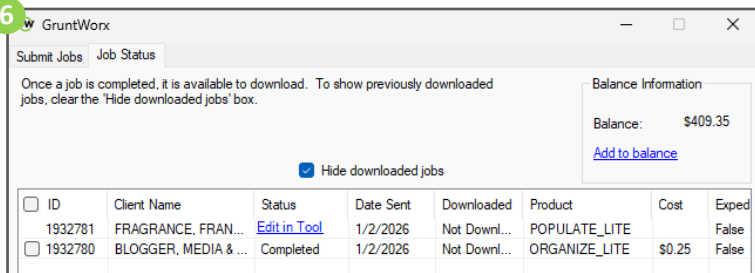
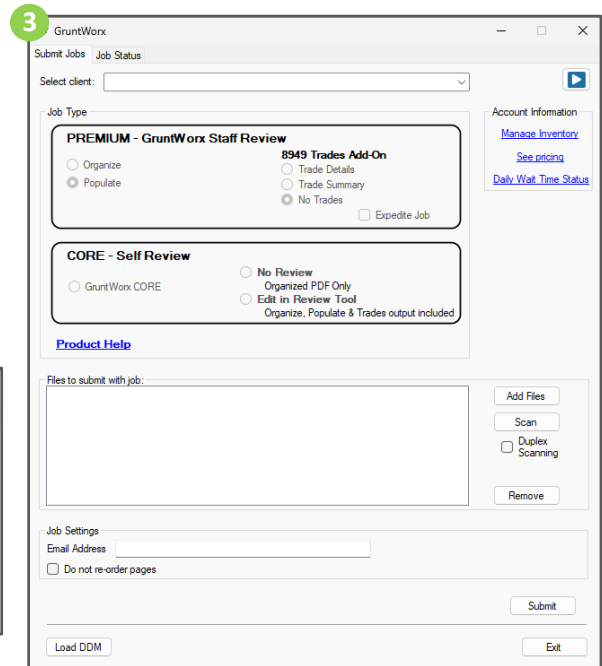


3 Choose the **Job Type**: Solution Level of **PREMIUM** or **CORE** and Features from **Organize, Populate, Trade Details** or **Trade Summary**.

4 Upload client's source documents.
 • Add up to 10 PDFs, PNGs, JPEGs or JPGs per client, 50 MB per file.

5 Enter email address and click **Submit**.

6 After receiving Job Completion Email, open GruntWorx to the **Job Status** tab.



7 Check box to left of client name and click **Download** in bottom of window.
 • When it is finished, click **Close** and exit GruntWorx.

8 Open client's **Data Entry Screen**. You are prompted to import a GruntWorx Populate job.
 • Alternatively, click **Import > GruntWorx Populate Job**.

9 Click **Import** to complete population.
 • Users can easily review or adjust any fields within the client's file in Drake Tax.

