

GruntWorx with Intuit ProSeries® User Manual

This User Manual is to help you sign up for the GruntWorx Free Trial and use
PREMIUM
Organize, Populate, and Trades features with Intuit ProSeries Tax Software.



GruntWorx System Requirements

Operating System: PC running Windows 8.1 or newer

Processor: 2.0 Ghz or faster multi-core processor

RAM: 4.0 GB or more

Browser: Latest versions of Chrome, Firefox, MS Edge, IE11

Microsoft .Net Framework: 2.0.50727

Additional Programs: Microsoft Excel® version 2003 or higher & Adobe Reader (Adobe Acrobat Standard or DC required for PDF editing)

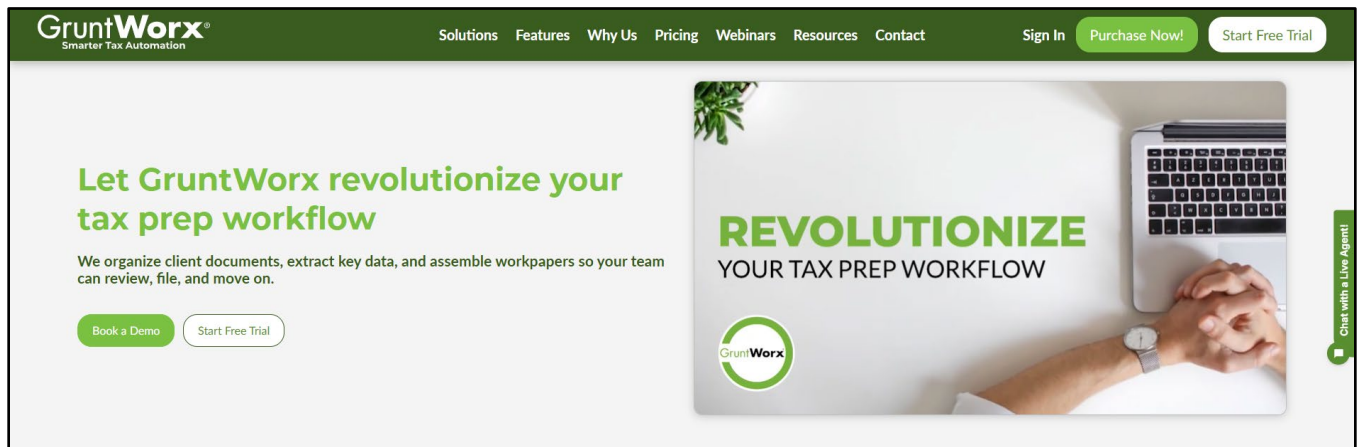
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If you need assistance contact Customer Service at
Support@GruntWorx.com | 877.830.6059

How to Set up a GruntWorx Account

Before setting up an account, check first that another member of your firm hasn't already signed up for the free trial. All members of the same firm will have one account. Accounts can have an unlimited number of members. If your firm has multiple locations, you can use the same account and add Locations via Manage Accounts in Settings.



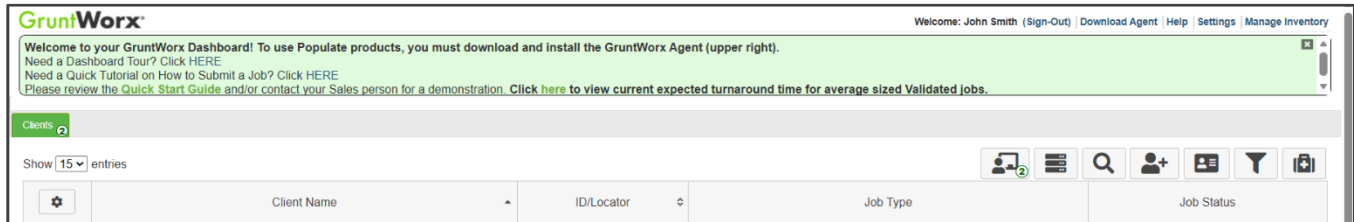
➔ From the GruntWorx.com homepage, click **Start Free Trial**.

- 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: GruntWorx offers free Live Webinars to help you get started with GruntWorx. To sign up for your free session, on the GruntWorx.com homepage click **Webinars** in the top banner.

GruntWorx Dashboard Navigation

- ➔ The Dashboard is where you will do everything for GruntWorx: Submit Jobs, Download Completed Files, Manage Users, Manage Inventory, and Run Reports.



- When a user logs in, a notification displays information about the current tax year, news or updates.
- The logo in the top left corner takes user to GruntWorx.com homepage.
- The Welcome corner displays user's name, option to Sign-Out, Download Agent link, a Help link which turns on ? icons, Settings and Manage Inventory.

[\(Sign-Out\)](#) | [Download Agent](#) | [Help](#) | [Settings](#) | [Manage Inventory](#)

- Hovering over **Manage Inventory** displays account's current balance.
- The **Green Info Banner** provides Help Info, the Learning Hub link for using GruntWorx and the Current Expected Lead-Time. New notifications are displayed on the Info Banner when posted. Close the banner with the x in top right, re-open with the i above the Dashboard buttons.
- Below the Info Banner are buttons –
 - **Awaiting GruntWorx CORE Jobs:** If there are any GruntWorx CORE jobs ready for review, the number will be displayed on the button, and clicking the button will filter the client table to only show jobs that are Awaiting Review.
 - **Show Only Open Clients:** Clicking on a client row opens the Client Details Pane. When there are one or multiple Client Detail Panes open, click this button to filter out all closed clients.
 - **Search/Find a Client:** Search for a client by Client ID, first or last name.
 - **Add a Client:** Add a single client to your Dashboard. Enter in the client's First name, Spouse name if applicable, Last name, and Client ID. Client IDs must match exactly to Client IDs in the tax software if using Populate products.
 - **Import Multiple Clients:** Import up to 500 clients at a time. Export client list out of tax software and edit the csv to the required specifications.
 - **Filter Client Table:** Turn the filter on to filter by Job Types (Organize or Populate) or Job Statuses (No Documents, Not Submitted, Awaiting Review, Review in Progress, Processing, Completed, Downloaded, Failed or Cancelled).
 - **Tutorials:** Opens a new window to gruntworx.com.

- ➔ In the top right-hand corner of the GruntWorx Dashboard, click **Settings** to continue setting up your account.

Admin Settings

→ Firm Contact Information

- Update any firm details
- Click **Save Firm Info** to save any changes

The screenshot shows the 'Admin Settings' tab selected in a navigation bar. Below it, the 'Firm Contact Information' section contains several input fields: 'Firm Name' (placeholder: Firm Name), 'address1' (88 Gruntworx Way), 'address2' (empty), 'city' (Franklin), 'state' (NC), 'zip' (28734), 'phone' (empty), and 'contact' (holly.mckinney@gruntworx.com). A 'Save Firm Info' button is at the bottom right.

→ Security Settings

- Set firm-wide **Two-Factor Authentication** settings here.
 - Adjust code sending protocol under User Settings.
 - New users must select 2FA code protocol at first login.
 - If Authenticator App is selected, when the user logs in, it will provide the relevant information at that time.
- Click **Save Security Settings** after making any changes.

The screenshot shows the 'Security Settings' section. It has a checkbox 'Enable Two-Factor Authentication (for all users)' which is checked. Below it, a message states: 'Your users don't need to provide a two-factor code every time they login. GruntWorx can 'remember' the device they used to login. Subsequent logins for that user, on that device, will only require two factor codes if their last authentication is older than this value: 14 days'. A 'Save Security Settings' button is at the bottom right.

→ Default Settings

- Select **Intuit ProSeries** as Tax Software.
- Set firm-wide job preferences:
 - Option for default Trades product (User can select alternate trades on a per job basis).
 - Users have the option to save selections when submitting documents to GruntWorx. The 'Set Default' button saves the Solution and Features selections to the browser.
 - Repaginate Organized Documents default option.
- Click **Save Default Settings** after making any changes.

The screenshot shows the 'Default Settings' section. It includes a 'Tax Software' dropdown menu set to 'Intuit ProSeries'. Below it, 'Trades default' has three radio buttons: 'Extract Detail', 'Trades Summary', and 'No Trades' (which is selected). There is a checked checkbox for 'Repaginate Organized Documents'. A note at the bottom states: 'Note: This submission will reload the page.' A 'Save Default Settings' button is at the bottom right.

Manage Accounts

Add or edit accounts as needed to the Manage Accounts tab. Most often this is used for firms that have multiple locations. A default account is provided – Clients – but the name can be edited anytime under Manage Accounts.

Manage Users

Add or edit users in the Manage Users tab. Make any user an Admin on the account, get two-factor authentication code if needed and adjust account access permissions.

- ➔ To enable users to have the Inventory tab, check the **job cost display** box.
- ➔ If a user's account gets Locked, under Manage Users click **unlock user**.

The screenshot shows the 'Manage Accounts' tab with a sub-tab 'Clients' selected. It contains a 'New Account' section with a text input for 'account name' and an 'add account' button. Below this is a form for editing the 'Clients' account, with fields for 'account name' (set to 'Clients'), 'description' (set to 'Default account'), 'contact' (empty), and 'contact e-mail' (set to 'holly.mckinney@gruntworx.com'). There are 'delete account' and 'save changes' buttons. At the bottom, there are expandable sections for 'Partners', 'A75N', and 'Demo Clients'.

The screenshot shows the 'Manage Users' tab. At the top, there are buttons for 'add user' and 'reactivate user'. Below is a table with columns for 'status', 'name', 'email', and 'accounts'. The table lists two users: 'McKinney, Holly' and 'Smith, Jane'. Below the table is a form for editing the user 'Jane Smith'. It includes fields for 'first name' (Jane), 'last name' (Smith), and 'email' (jane.smith@email.com). There are checkboxes for 'admin user' and 'job cost display', both of which are checked. Below this is the 'Account Permissions' section, which asks 'What accounts can this user access?'. It has two columns: 'accounts not accessible' (listing Partners, A75N, Demo Clients, GruntWorxLITE, and ProSeries) and 'user access enabled' (listing Clients, Trust Returns, and Liscio). There is a 'remove all' button at the bottom of the permissions section.

status	name ▲	email ⇅	accounts
	McKinney, Holly	holly.mckinney@gruntworx.com	Clients
	Smith, Jane	jane.smith@email.com	Clients Trust Returns Liscio

unlock user set temp password get login code deactivate user

first name:

last name:

email:

admin user: ☒

job cost display: ☒

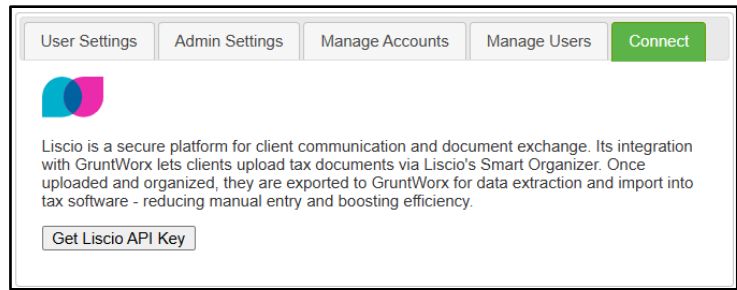
Account Permissions
What accounts can this user access?

accounts not accessible:	user access enabled:
Partners	Clients
A75N	Trust Returns
Demo Clients	Liscio
GruntWorxLITE	
ProSeries	

remove all

Connect

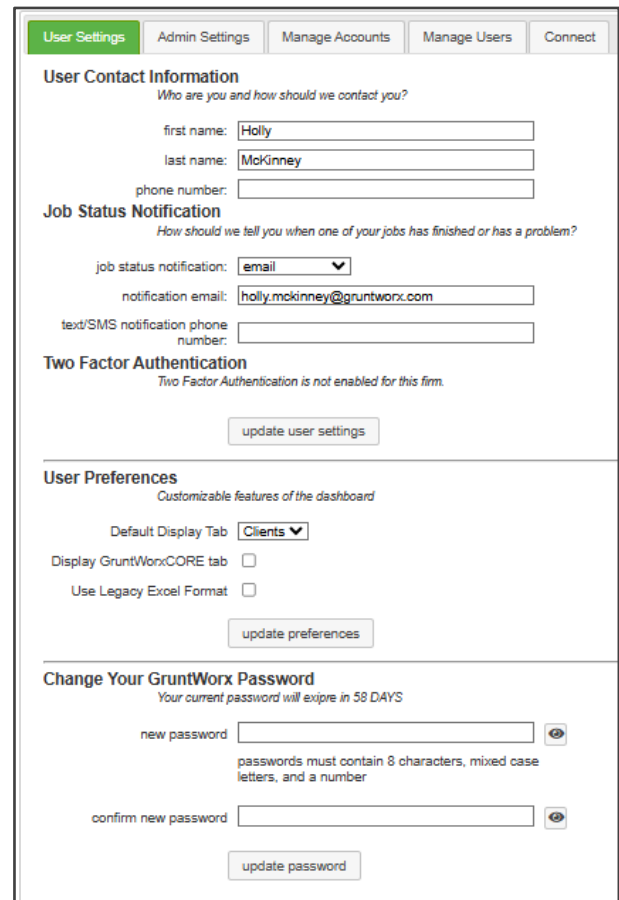
The Connect tab is where any integration can be connected.



The screenshot shows the 'Connect' tab selected in the top navigation bar. Below the navigation bar is a Liscio logo and a description: 'Liscio is a secure platform for client communication and document exchange. Its integration with GruntWorx lets clients upload tax documents via Liscio's Smart Organizer. Once uploaded and organized, they are exported to GruntWorx for data extraction and import into tax software - reducing manual entry and boosting efficiency.' At the bottom is a button labeled 'Get Liscio API Key'.

User Settings

- ➔ All email addresses added as a User to GruntWorx have access to the **User Settings** tab.
 - Update **User Contact Information** at any time. This is used for GruntWorx to report any issues with jobs.
 - **Job Status Notification** preferences can be changed to text, email or no notifications.
 - If enabled by the Firm Admin, **Two Factor Authentication** settings can be adjusted here.
 - Click **Update User Settings** after making changes.
 - Change the **Default Display Tab** under User Preferences.
 - Option to hide or display the **GruntWorx CORE** tab.
 - GruntWorx offers Pointsheets in XLSM or XLS file format. Choose to have both file options available by checking the **Use Legacy Excel Format** box.
- ➔ Change Your **GruntWorx Password** here.



The screenshot shows the 'User Settings' tab selected in the top navigation bar. The settings are organized into three sections: 1. **User Contact Information**: Fields for first name (Holly), last name (McKinney), and phone number. 2. **Job Status Notification**: A dropdown for notification type (email), a notification email address (holly.mckinney@gruntworx.com), and a text/SMS notification phone number. 3. **Two Factor Authentication**: A message stating it is not enabled for this firm and an 'update user settings' button. Below these is the **User Preferences** section with a 'Default Display Tab' dropdown (Clients), checkboxes for 'Display GruntWorx CORE tab' and 'Use Legacy Excel Format', and an 'update preferences' button. The final section is **Change Your GruntWorx Password**, showing a password expiration notice (58 DAYS), fields for new and confirm new passwords, a password strength requirement (8 characters, mixed case, number), and an 'update password' button.

TIP: Passwords expire every 90 days and must contain at least eight characters, mixed case and one number.

GruntWorx Agent Installation

(Sign-Out) **Download Agent** Help Settings Manage Inventory

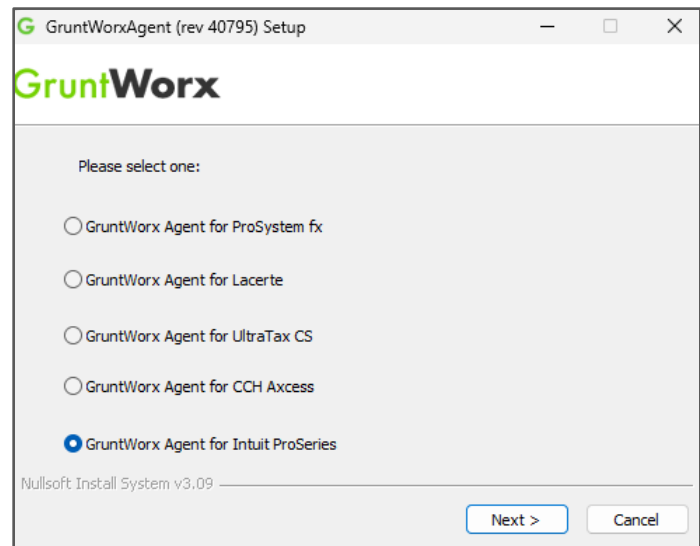
➔ To continue set-up, click **Download Agent** from the top right corner of the GruntWorx Dashboard.

IMPORTANT: The GruntWorx Agent is only needed for Populate products. The Agent should be installed at each workstation where GruntWorx will be utilized.

➔ Once the download is complete, run GWAgentSetup.exe (the file you downloaded).

TIP: Some Chrome users receive a *Windows protected your PC* message. To continue download, click **More info** then **Run anyway**. Edge users click the three dots and choose to **Keep** the file.

- ➔ Select **GruntWorx Agent for Intuit ProSeries**.
- Follow the prompts to complete installation.



IMPORTANT: For users in a **hosted** environment, please note that the GruntWorx Agent must be installed through your cloud provider before the submission of any Populate jobs.

Depending on the user's IT policies and browser permissions, installation of the GruntWorx Agent may require administrator rights and/or the assistance of firm IT personnel. In some cases, antivirus software should be temporarily disabled to allow a complete installation of the GruntWorx Agent software.

TIP: The GruntWorx Agent is a yearly download as it is updated each January to map to the current year tax software. On occasion, there will be new Agent releases throughout the year due to system fixes or software updates. When a new Agent is released, a message is posted in the **Message of the Day** as well as in the **Green Info Banner** on the GruntWorx Dashboard.

How to Submit Jobs

➔ Add Clients.

- From the GruntWorx Dashboard, click on an icon to add client/s.

Adding Client to Clients

First Name *

Spouse Name

Last Name *

Client ID / Locator*

Client ID/Locator must match tax software

(*) required fields

IMPORTANT: Client ID must be identical to the ProSeries Filename less the period and 2-digit tax year and "I" at the end (ex: ".24I").

Special Characters are not supported in Client IDs.

Import Clients into Clients

Select a CSV file to import

The CSV file must be in this format:

Last Name, First Name, Spouse Name, Client ID

CSV info

- The CSV file should not use column headers: only the client information, in separate columns, following the above format.
- Up to 500 clients can be imported with each CSV file.
- Spouse Name is an optional value and may be left blank (but the column must be present).
- The ClientID must contain only letters, numbers, and/or a comma.
- The ClientID should match that in your tax software.

Example:

	A	B	C	D
1	Washington	George	Martha	1789-1797
2	Adams	John	Abigail	1797-1801
3	Jefferson	Thomas	Martha	1801-1809
4	Madison	James	Dolley	1809-1817
5	Monroe	James	Elizabeth	1817-1825
6	Adams	John Quincy	Louisa	1825-1829
7	Jackson	Andrew		1829-1837
8	Van Buren	Martin		1837-1841

- Add a Single Client:
 - Click on the icon and fill out required fields.
- Add Multiple Clients:
 - Click on the icon to upload a CSV file.
 - Follow the instructions and template to create and import the file.

TIP: Clients' names and IDs can be edited prior to job submission by clicking on the gear icon on the far right of the client row. Client information cannot be edited for a job in process.

➔ 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.

☒	Smith, John & Jane	SMITH	No Documents
Drop Files or Click Here		uploaded files	

➔ Once all files are uploaded, make selections.

- Choose from **PREMIUM** - GruntWorx Staff Review or **GruntWorx CORE** - DIY Self-Review.
 - **GruntWorx CORE** is not reviewed by GruntWorx for accuracy. The documents are processed with OCR and Business Intelligence technology only.
 - **PREMIUM** processes through OCR and Business Intelligence as well as human review by GruntWorx US-based Data Validators.

☐	Smith, Jane	SMIT2025	No Documents
Drop Files or Click Here	uploaded files 2025 Testing Docu... 866.57 KB 20 pg x	SOLUTIONS ☒ PREMIUM - GruntWorx Review ☐ CORE - Self-Review ☐ Edit in Review Tool ☐ No Review organized PDF only	FEATURES ☒ Populate Forms ☐ Trade Details ☐ Trade Summary ☐ Expedited Service SSNs (last 4 digits) Taxpayer 2025 Spouse options SUBMIT Manage Inventory More Info Set Default

Choose Features

- **Populate Forms** to have federal form data extracted and populated into ProSeries.
- **Trade Details** to have individual transactions extracted off Brokerage Statements & 1099-Bs.
- **Trade Summary** to have only category totals extracted from Brokerage Statements or 1099-Bs.
- **Expedited Service** for priority processing (100% premium added to job cost).

SOLUTIONS	FEATURES	SSNs (last 4 digits)
☒ PREMIUM - GruntWorx Review	☒ Populate Forms	Taxpayer 2025
☐ CORE - Self-Review	☐ Trade Details ☐ Trade Summary	Spouse option2
☐ Edit in Review Tool	☐ Expedited Service	
☐ No Review organized PDF only		
		SUBMIT
		Manage Inventory
		More Info Set Default

➔ After uploading documents to send to GruntWorx, if the **Populate Forms** Feature is selected, an SSN section opens.

- Enter the last 4 digits of the taxpayers social, and if applicable, the spouses social. Enter these to ensure the forms are assigned to the proper taxpayer in ProSeries during population.

TIP: GruntWorx automatically fills in the Taxpayer SSN field when client IDs already contain the taxpayer's last 4.

TIP: For Product and Pricing information, click the **More Info** button.

TIP: To save your selections for future clients, click **Set Default** below the Submit button. This is a browser setting. If you use GruntWorx from another computer or a different browser, the default is not saved.

➔ To send the documents to GruntWorx, click **Submit**.

- Jobs submitted to GruntWorx process through OCR technology and then, if PREMIUM solution is selected, go to GruntWorx U.S.-based Validation Staff for review.
- If GruntWorx CORE is selected, after 1-15 minutes there will be an **edit in review tool** button to access the self-validation tool. **For instructions on how to use the Self-Validation Tool, refer to the GruntWorx CORE User Manual.**

Turnaround time during tax season varies. 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.

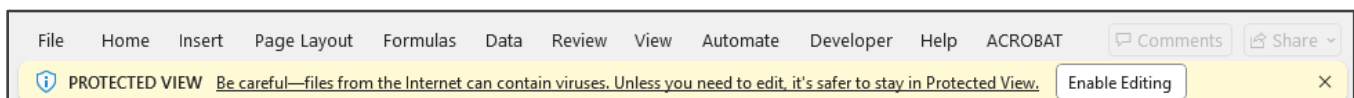
When a Job is Complete

- ➔ Once a job is complete, a job completion 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.
 - If the site stayed open in the browser, the page may need to be refreshed, and sign in again.
- ➔ When Job Status is **Completed**, click on the client's name.
 - Your first file is a PDF named **bookmarked.pdf**.
 - If Populate Forms and/or a Trades feature was selected, there is also a **Pointsheet.xlsm**.

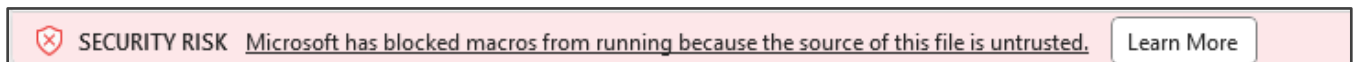
☒	Anderson, Jack & Jill	AJUT83024	Populate + summarized trades	Completed
bookmarked.pdf Pointsheet.xlsm				33 Page Processing 8.25 33 Page Validation 6.60 14 Form Population 14.00 2 Trades Summary 10.00 total 38.85

TIP: Enabling **job cost display** from Manage Users in Settings shows a breakdown of the total job cost in the client's details.

- ➔ Simply click on either file name to download and open.
 - You can also use the **Filter** option in the table and sort **Completed** clients then download them all at once from the table menu accessed via the gear icon in top left of client table.
 - When you download them this way, the Status changes to **Downloaded**.
 - The Pointsheet file requires Microsoft Excel to view, edit and populate into Intuit ProSeries.
 - After opening the file, enable Excel's macro feature.
 - Click **Enable Editing** then **Enable Content**.



TIP: Some users' Security Settings in Microsoft may not allow the enabling of macros. This is usually indicated by a red warning banner in Excel that reads Security Risk. If users have IT, they should ask for assistance with setting up a **Trusted Location** for GruntWorx Pointsheets.



Although GruntWorx Support is unable to assist with making security adjustments to user's workstations, if you do not have IT and are having trouble, please reach out to us. Call **877.830.6059 x3** or email Support@GruntWorx.com.

Populating Intuit ProSeries

➔ The user should then **review the Pointsheet**.

- There may be comments or flags on certain pages added by GruntWorx Validators. It is recommended that the user check those pages thoroughly and make any necessary changes.

TIP: Blue hyperlinks are provided with each form extraction and, when clicked, will bring the user directly to the corresponding page in the opened Bookmarked PDF.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Tax Payer:		Demo, Emily													
2	Tax Year:		2025													
3	Client Id:		DEMO6789													
4																
5																
6																
7																
8	Forms classified but not extracted for population													Preparer Notes:		
9	Forms classified but not populated by GruntWorx															
10																
11	Professional review required															
12																
13																
14																
15																
16																
17																

➔ Users can review or edit the extracted data on each tab of the workbook prior to populating.

- For each supported form, there is a corresponding sheet in the workbook. If any Diagnostics marked records **do not populate**, users should make any necessary adjustments and, if required, remove the x from the do not populate field to enable data import.

➔ With Intuit ProSeries open, click **Populate** on the Diagnostics tab of the Pointsheet.

- The Agent locates the ProSeries screen and uses the Client ID to find the client in the tax program.
- Once the client is found, the Agent opens ProSeries Options window and unchecks the 'Use auto-fill' box for W2 and 1099'.
- The Agent then opens each form that exists in the Pointsheet and fills in the return.
- This is seen in real time.** The Agent and computer should be given the time to complete the import.

	C	D	E
1	W-2		
2	Wages, Salaries, Tips, Etc.		
3			
4	X do not populate		
5			
6	SHEET		1
7	Owner TS		T
8	SSN		016-00-2026
9	Fed ID		95-6000928
10	Employer Name		COUNTY OF ORANGE, CALIFORNIA
11	Employer Street Address		P.O. BOX 567
12	Employer City		SANTA ANA
13	Employer State		CA
14	Employer ZIP		92702
15	Box 1 Wages	1	\$72,948.75
16	Box 2 Fed W/H	2	\$9,781.61
17	Box 3 SS Wages	3	
18	Box 4 SS Tax W/H	4	
19	Box 5 Medi wages tips	5	\$99,394.67
20	Box 6 Medi Tax W/H	6	\$1,441.22
21	Box 7 SS tips	7	
22	Box 8 Allocated tips	8	
23	Box 9 Dep Care	9	
24	Box 10 Dep Care	10	
25	Box 12a code/amount	12	DD 8007.36
26	Box 12b code amount		G 9100.00
27	Box 12c code amount		
28	Box 12d code amount		
29	X for Statutory Employee	13	
30	X for Retirement Plan		
31	X for Third party sick pay		
32	Box 14 Description/Amount	14	
33	Box 14 Description Amount		
34	Box 14 Description Amount		
35	Box 15 State	15	CA
36	Box 15 State ID		80095087
37	Box 15 State ID		80095087

➔ When the import is complete, a message opens "Thank you for using GruntWorx!" and you can close the window.

- Users can easily review or adjust any field within the client's file in Intuit ProSeries.

- ➔ To populate data from the GruntWorx-provided Excel Pointsheet, users can have the client file open or closed but should **not** have a different taxpayer's file open.

- ➔ Because Intuit ProSeries populates all fields, the GruntWorx Agent must turn off auto-fill in the **Options** screen under **Employer/Payer Database**.
 - If you find that population isn't including the city in addresses, or, populating zip codes in the city field, click **Tools** in the ProSeries toolbar then select the Employer/Payer Database page. Uncheck the auto-fill box at the top of the screen and click OK to close.

IMPORTANT: Minimum required fields in the client tax file: Taxpayer and spouse name/s, SSN/s and filing status.

→ How to Find Job Costs

To see individual job costs, open Settings and go to Manage Users. Under your username, check the **job cost display** box. A breakdown of the job cost will be displayed on each Completed job. Click **Manage Inventory** in the Dashboard header to see your balance and job history. Run a report of all transactions by selecting Start and End dates and downloading the csv file.

Completed			
33	Page Processing	8.25	
33	Page Validation	6.60	
14	Form Population	14.00	
2	Trades Summary	10.00	
	total	38.85	

→ If a Job Fails

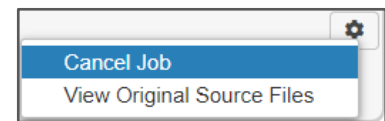
If you have a job failure, you will need to reset the client and submit the documents again. Before resending the client's documents, check to make sure there are no document restrictions on the PDFs. Also make sure, if it is a Populate job, that the client has all required information in the client file in your tax software. To reset the client, click the gear icon in the client's row and select **Reset client (Prep for retry)**.

→ If a Job is Cancelled

If you have a cancelled job, check your email where the reason for the cancellation will be noted. Things like bad quality, prior year documents, duplex scan issue, or documents submitted are not supported are some reasons a job may be cancelled by GruntWorx. You are not charged for cancelled jobs.

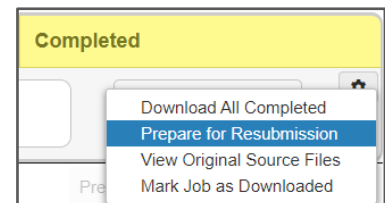
→ How to Cancel a Job

To cancel a job that is processing, locate client on your GruntWorx Dashboard and open the Client Details Pane (click anywhere on the client row to open). Click the gear icon and select **Cancel Job**. You can then reset the client and start over.



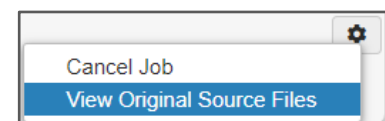
→ How to Send Additional Documents for a Client

If you need to send additional documents for a client, you will make a Resubmission. Before doing so, make sure you have saved the client's completed GruntWorx files to your local workstation, as they will be discarded. After saving the files, click the gear icon in the far right of the client row and choose **Prepare for Resubmission**. Click Yes to continue. If you need to go back and download the original job's files, click No and start over. After clicking Yes, the Client is reset so you can upload the new documents. GruntWorx automatically merges the documents from the first job, with documents from the new job, so you have a complete Bookmarked PDF with all pages submitted in all jobs.



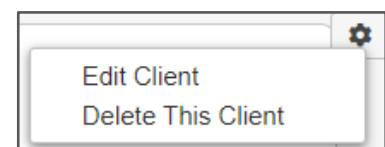
→ How to See What You Sent GruntWorx

To view the PDFs that were uploaded to GruntWorx for processing, click the gear icon in the far right of the client's row. Choose View Original Source Files. You can view these files when a job is processing and/or when it is completed.



→ How to Edit or Delete Clients

If you need to edit a client name/ID, or delete a client from your Dashboard, you will first need to Prepare for Resubmission (from the gear icon on client row). After resetting the client, click the gear icon again and choose Edit Client or Delete This Client. Clients that have jobs in progress cannot be edited.



Here is a list of all the supported forms for the GruntWorx Organize, Populate and Trades products.

ORGANIZE

• W-2	• 1099-A	• 1099-NEC	• 5498-SA
• W-2G	• 1099-B	• 1099-PATR	• 5498-ESA
• W2C	• 1099-C	• 1099-Q	• Grantor Letter as
• 1042S	• 1099-CAP	• 1099-R	1041 K-1
• 1095-A	• 1099-G	• RRB-1099	• Supporting Documents
• 1095-B	• 1099-DIV	• RRB-1099-R	
• 1095-C	• 1099-INT	• 1099-S	
• 1098	• 1099-H	• 1099-SA	
• 1098-C	• 1099-K	• SSA-1099	
• 1098-E	• 1099-LTC	• Consolidated 1099	
• 1098-T	• 1099-MISC	• 2439	



POPULATE

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

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

If you need assistance contact Customer Service at
Support@GruntWorx.com | 877.830.6059