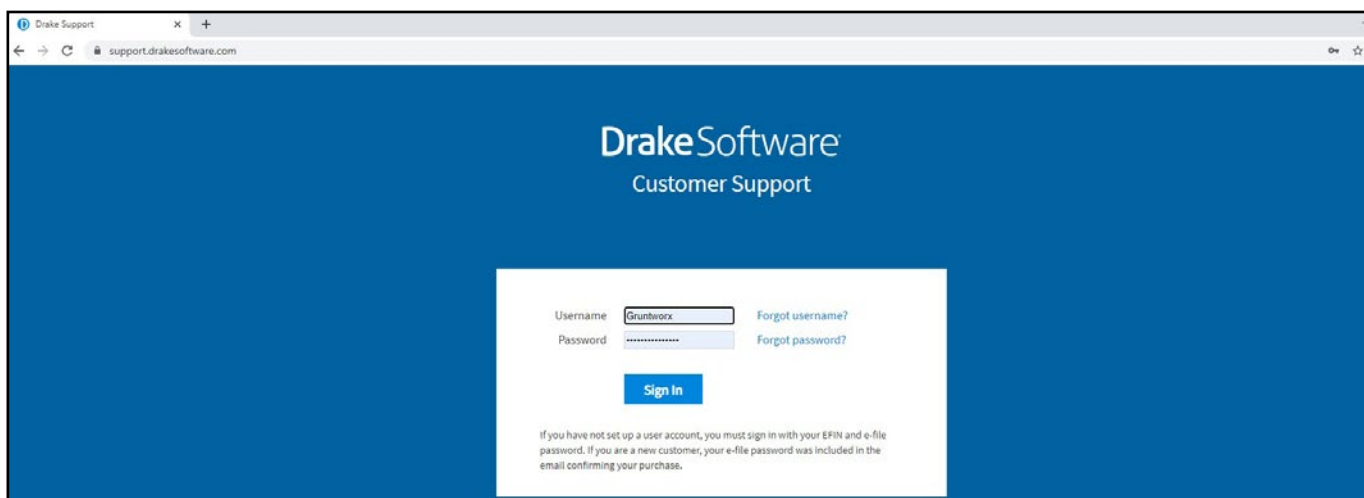


Here are the instructions to help you sign up for your free GruntWorx trial and how to activate your GruntWorx account in Drake Tax. If you have already signed up for your trial account, you can jump to the **Using GruntWorx within Drake Software** section.

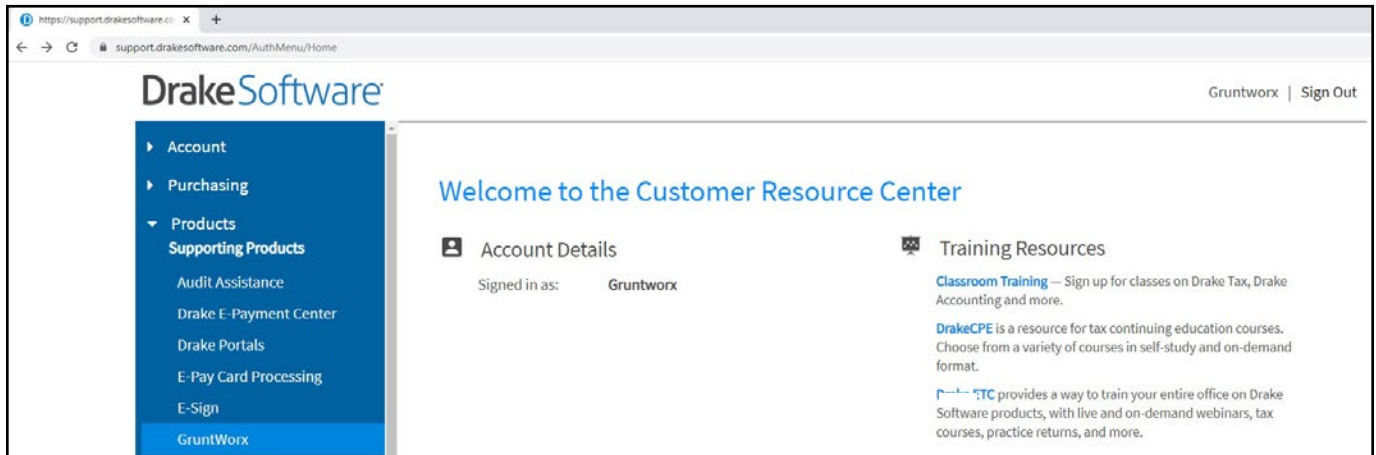
- 1 Go to [DrakeSoftware.com](https://DrakeSoftware.com).



- 2 Sign in to the Drake Software Customer Support site.

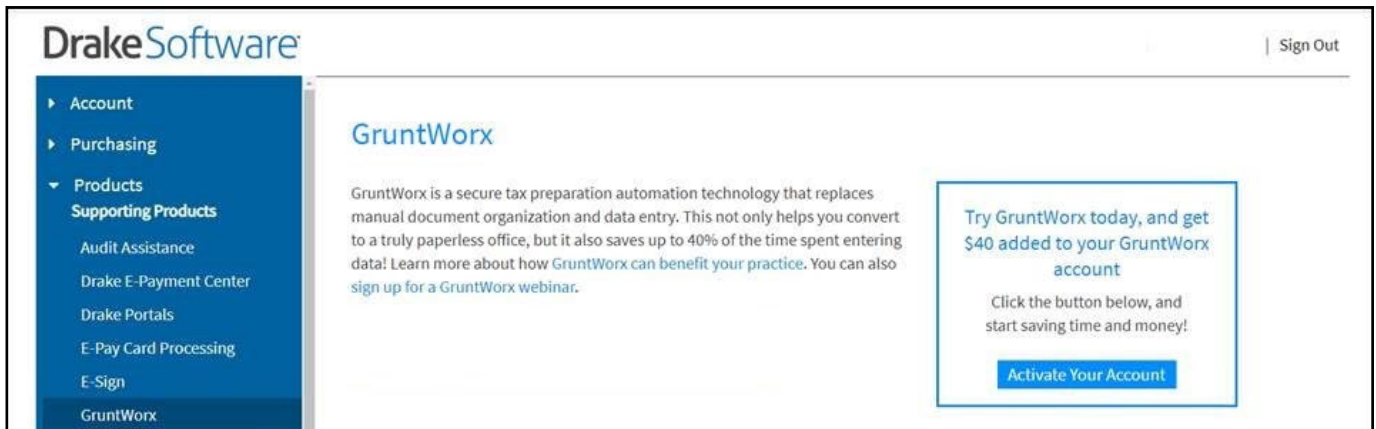


3 Select **GruntWorx** from the **Products** drop list.



4 Click **Activate Your Account** to sign up for the free trial.

**Note:** If the **Activate Your Account** option isn't available, it means GruntWorx has already been activated within your software.



5 Proceed to the next section, **Using GruntWorx within Drake Software**.

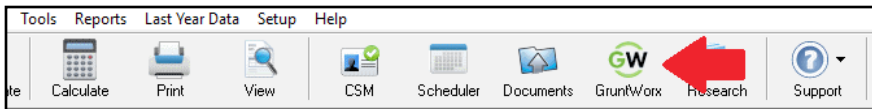
# QUICK START GUIDE

## Using GruntWorx Within Drake Software

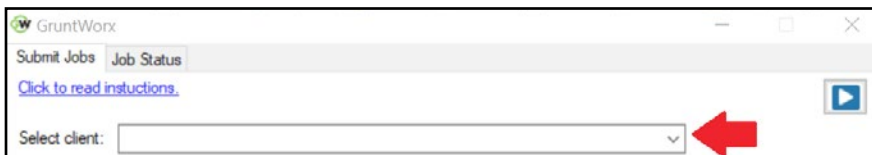
Below are the instructions to walk you through using GruntWorx within Drake Software.

1 Launch Drake Software.

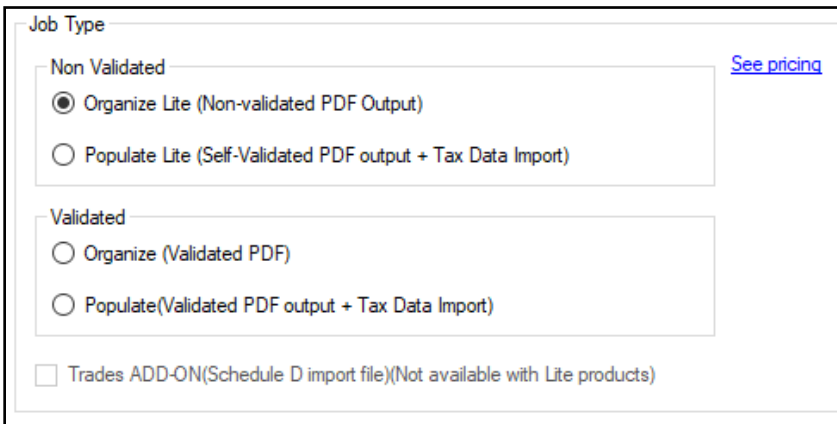
2 Select the **GruntWorx** icon in the toolbar.



3 Choose your client by clicking the **Select client** drop list.



4 Select the **Job Type** you want to use.



### GruntWorx Organize LITE

Organizes, bookmarks, and labels scanned tax documents so you can easily find and review any document without human validation within minutes.

### GruntWorx Organize

Organizes, bookmarks, and labels scanned tax documents so you can easily find and review any document and includes human validation.

### GruntWorx Populate

Eliminates data entry with accurate data extraction and population into most tax software.

### GruntWorx Populate LITE

Automates Form 1040 Data entry with a do it yourself product featuring a quicker turnaround time. Refer to Populate LITE quick start guide for more info.

### GruntWorx Trades

Transforms trade details on scanned consolidated brokerage statements into a spreadsheet file, which can be imported into most tax software.

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5 Click the **Add Files** button to select and add your client's scanned source documents. You can add up to 10 files (maximum of 50 MB per file) for a total of 500 MB at one time. You can also scan your client files and add them here in one step.

**! IMPORTANT:** Make sure your files are in the PDF, JPG, or PNG file format. To use the scan feature you must use a TWAIN compatible scanner at 300 dpi in the black and white setting. If you don't have a TWAIN scanner, then use the **Add Files** option.



6 Enter your email to receive notification when your job is complete.




**! TIP:** Click **Do not re-order pages** if you do not want your pages repaginated.

**! TIP:** Repagination is where GruntWorx Organize sorts the pages you submitted in the order of the 1040. Clicking on **Do not re-order pages** will return your documents in the order they were submitted.



7 Click **Submit**.



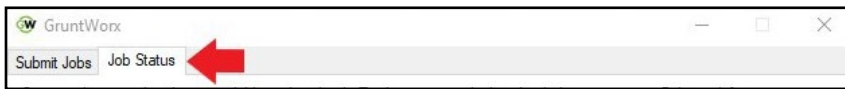
8 Once the job is uploaded, click **Close**. If you selected Organize LITE, the average turnaround time is 1-5 minutes.

**! TIP:** You will receive a notification email when the job is ready to download.

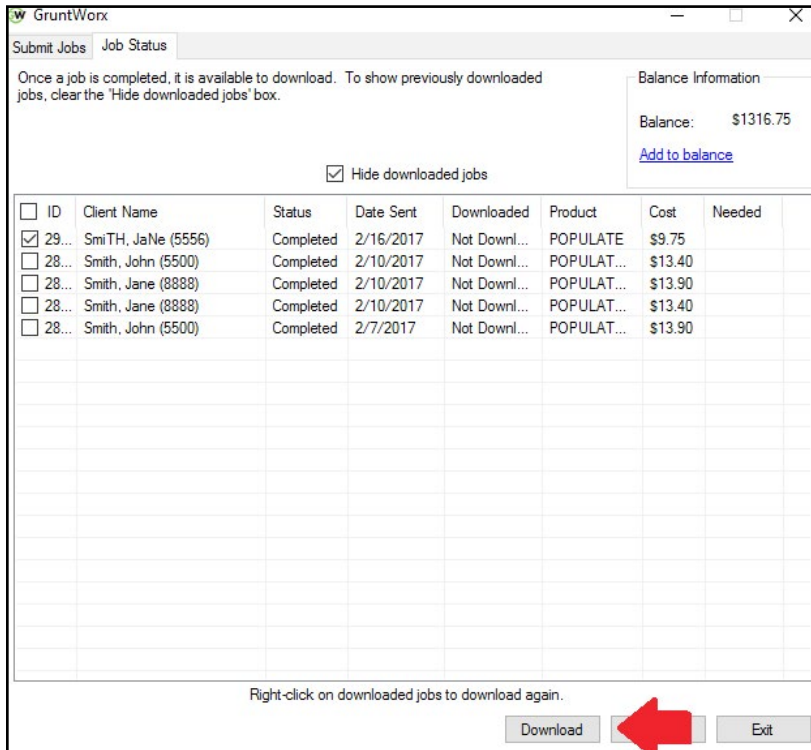
9 To download a completed GruntWorx job, you must navigate back to your **Drake Software Home Window** and click on the **GruntWorx** icon in the toolbar.

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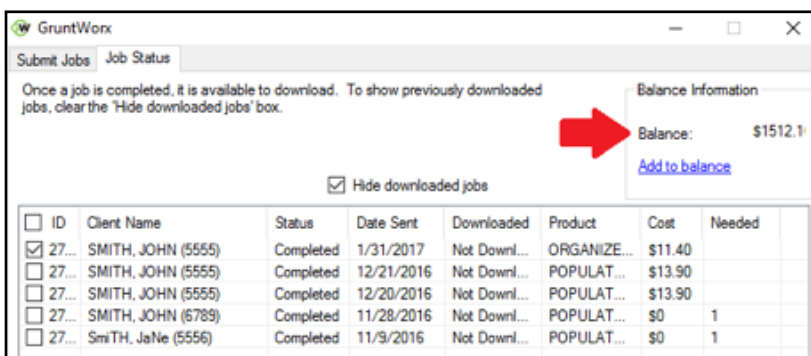
- 10 Once you are back in GruntWorx, go to the **Job Status** tab. Here you should see your client ID, client name, and completion status.



- 11 Select the job you want to use and click **Download**.



- ⚠ **TIP:** Under both the **Submit Jobs** and **Job Status** tabs, balance information is available in the upper right corner of the window.



**TIP:** You can add to your GruntWorx account at any time by clicking **Add to Balance**.

The screenshot shows a web interface with a 'Select client' dropdown menu. Below it, there are two sections: 'Job Type' and 'Balance Information'. The 'Job Type' section has two sub-sections: 'Non Validated' and 'Validated'. Under 'Non Validated', there are two radio buttons: 'Organize Lite (Non-validated PDF Output)' (selected) and 'Populate Lite (Self-Validated PDF output + Tax Data Import)'. Under 'Validated', there are two radio buttons: 'Organize (Validated PDF)' and 'Populate (Validated PDF output + Tax Data Import)'. A red arrow points to the 'Add to balance' link in the 'Balance Information' section, which also displays a 'Balance: \$453.00'.

**TIP:** To find the cost-per-client information for processing a return, click on the **Job Status** tab and uncheck the **Hide downloaded jobs** box. Every return you have submitted will be here, displaying the following information: client name, status, the date it was sent to GruntWorx, the date it was downloaded from GruntWorx, the product used, and the costs.

The screenshot shows the 'Job Status' tab in the GruntWorx interface. It includes a 'Balance Information' section with a 'Balance: \$1134.50' and an 'Add to balance' link. Below this is a checkbox labeled 'Hide downloaded jobs' with a red arrow pointing to it. The main part of the screen is a table with the following columns: ID, Client Name, Status, Date Sent, Downloaded, Product, Cost, and Needed. The table contains several rows of job data.

ID	Client Name	Status	Date Sent	Downloaded	Product	Cost	Needed
38...	Smith, Jane (1014)	Completed	1/22/2018	Not Downl...	POPULAT...	\$2.60	
38...	SMITH, JOHN (1013)	Completed	1/16/2018	Not Downl...	POPULAT...	\$1.95	
38...	SMITH, JOHN (1013)	Downloa...	1/16/2018	1/16/2018	POPULAT...	\$10.65	
38...	SMITH, JOHN (1013)	Downloa...	1/16/2018	1/16/2018	POPULAT...	\$3.45	
38...	BEANS, COFFEE (1001)	Downloa...	1/15/2018	1/22/2018	ORGANIZE...	\$0.65	

**TIP:** You can click on the **Export** button to extract all of this information into a CSV format.

This screenshot is similar to the previous one, showing the 'Job Status' tab. It includes the same 'Balance Information' section and 'Hide downloaded jobs' checkbox. The table below it contains more rows of job data. At the bottom of the interface, there are four buttons: 'Export', 'Download', 'Refresh', and 'Exit'. A red arrow points to the 'Export' button.

ID	Client Name	Status	Date Sent	Downloaded	Product	Cost	Needed
38...	Smith, Jane (1014)	Completed	1/22/2018	Not Downl...	POPULAT...	\$2.60	
38...	SMITH, JOHN (1013)	Completed	1/16/2018	Not Downl...	POPULAT...	\$1.95	
38...	SMITH, JOHN (1013)	Downloa...	1/16/2018	1/16/2018	POPULAT...	\$10.65	
38...	SMITH, JOHN (1013)	Downloa...	1/16/2018	1/16/2018	POPULAT...	\$3.45	
38...	BEANS, COFFEE (1001)	Downloa...	1/15/2018	1/22/2018	ORGANIZE...	\$0.65	
38...	BEANS, COFFEE (1001)	Downloa...	1/15/2018	1/15/2018	ORGANIZE...	\$3.05	
38...	BEANS, COFFEE (1001)	Completed	1/15/2018	Not Downl...	ORGANIZE...	\$0.65	
38...	SMITH, JOHN (1013)	Downloa...	1/12/2018	1/16/2018	POPULAT...	\$1.95	
38...	SMITH, JOHN (1013)	Downloa...	1/12/2018	1/12/2018	POPULAT...	\$1.95	
38...	SMITH, JANE (1015)	Downloa...	1/11/2018	1/12/2018	POPULAT...	\$3.45	
38...	Smith, Jane (1014)	Downloa...	1/11/2018	1/11/2018	POPULAT...	\$3.45	
38...	Smith, John (1012)	Downloa...	1/11/2018	1/11/2018	POPULAT...	\$13.40	

Example of Report:

ID	Client Name	Status	Date Sent	Downloaded	Product	Cost	Needed
383322	Smith Jane (1014)	Completed	1/22/2018	Not Downloaded	POPULATE_TRADES	\$2.60	
383048	SMITH JOHN (1013)	Completed	1/16/2018	Not Downloaded	POPULATE_TRADES	\$1.95	
383041	SMITH JOHN (1013)	Downloaded	1/16/2018	1/16/2018	POPULATE_TRADES	\$10.65	
383039	SMITH JOHN (1013)	Downloaded	1/16/2018	1/16/2018	POPULATE_TRADES	\$3.45	
383024	BEANS COFFEE (1001)	Downloaded	1/15/2018	1/22/2018	ORGANIZE_LITE	\$0.65	
383022	BEANS COFFEE (1001)	Downloaded	1/15/2018	1/15/2018	ORGANIZE_LITE	\$3.05	
383021	BEANS COFFEE (1001)	Completed	1/15/2018	Not Downloaded	ORGANIZE_LITE	\$0.65	
382968	SMITH JOHN (1013)	Downloaded	1/12/2018	1/16/2018	POPULATE_TRADES	\$1.95	
382952	SMITH JOHN (1013)	Downloaded	1/12/2018	1/12/2018	POPULATE_TRADES	\$1.95	
382936	SMITH JANE (1015)	Downloaded	1/11/2018	1/12/2018	POPULATE_TRADES	\$3.45	
382932	Smith Jane (1014)	Downloaded	1/11/2018	1/11/2018	POPULATE_TRADES	\$3.45	
382931	Smith John (1012)	Downloaded	1/11/2018	1/11/2018	POPULATE_TRADES	\$13.40	

12 When the download is complete, go to **Drake Documents** and find your client.

13 You will see that your client now has a plus sign by their name. Click the plus sign to open the client's **GruntWorx** folder.

Document Name	Type	Last Modified	Description
DRK140475_ECB1D112 (33)	pdf File	2/3/2017 10:37:34 AM	Right click and go to Properties to enter Description
DRK140475_ECB1D112 (33)	xml File	2/3/2017 10:37:34 AM	Right click and go to Properties to enter Description
DRK140475_ECB1D112 (33)_D...	xls File	2/3/2017 10:37:34 AM	Right click and go to Properties to enter Description
DRK140475_ECB1D112 (33)_Tr...	xls File	2/15/2017 9:55:10 AM	Right click and go to Properties to enter Description

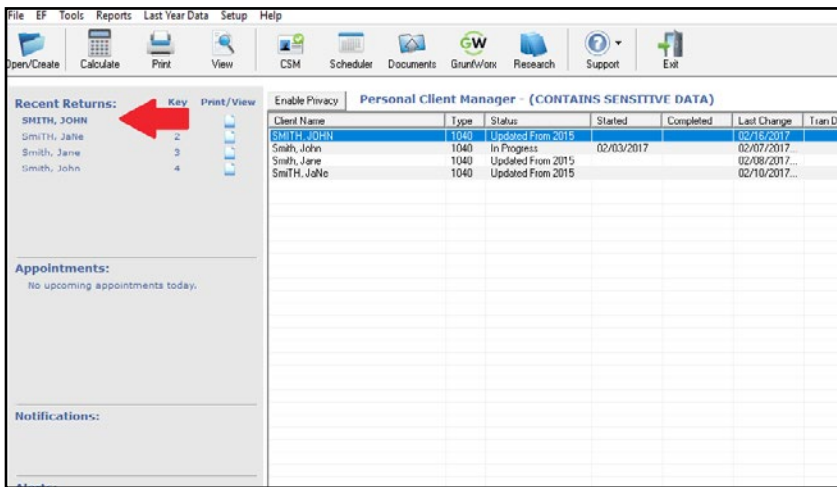
14 GruntWorx sends all the processed files back to the GruntWorx folder within Drake Documents. If you choose Organize, you will have a PDF file. If you choose Populate, you will have an XML file and an organized PDF. If adding Trades to Organize or Populate, you will also have an XLS file containing all the trade details.

15 To review the organized PDF from **Drake Documents**, click on the PDF file.

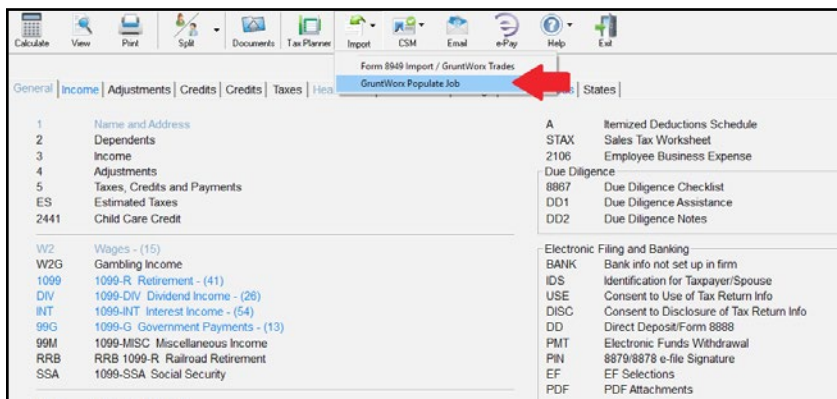
16 To review trades from Drake Documents, click on the XLS file and a spreadsheet will open where you can easily make adjustments before you import. Be sure to save the file when you are finished making changes. The file will be saved in your Drake Documents folder.

17 The XML file contains your Populate job extracted data and should not be edited.

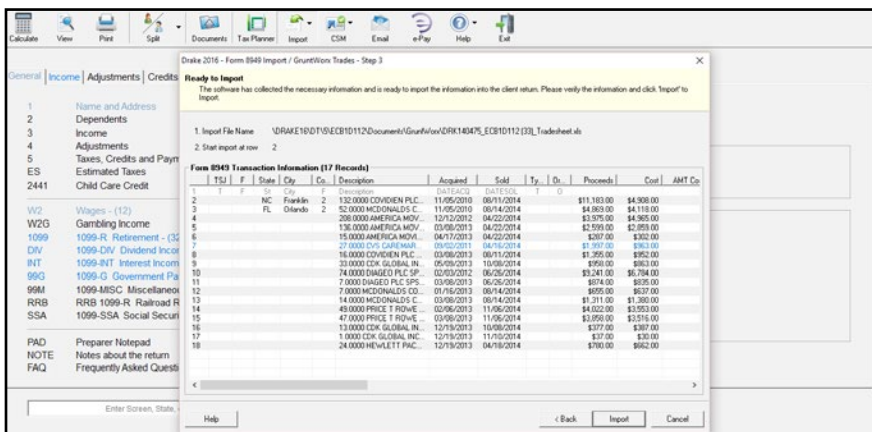
- 18 Once you have reviewed this information in the Drake Document Manager, return to the Drake Software Home Window and find your client. Click on your client's name.



- 19 The Data Entry Screen will appear. Click on the Import tab in the tool bar and then GruntWorx Populate Job.



- 20 If you chose Trades, your trades file will open. Click the Import button to have your trades automatically imported into your client's 8949.





- 21 Once the import is complete, you will be directed to your client's **Data Entry** screen. You can now easily manipulate or adjust any fields within the software.

The screenshot displays the 'Form W2 - Wage and Tax Statement' software interface. The main window is titled 'Form W2 - Wage and Tax Statement' and includes a 'Video: Entering Multiple State W2s' link. The interface is divided into several sections:

- General Information:** Includes fields for Employer information (EIN: 04-2207413, Name: TREE 12X COMPARTES INC, Address: 710 COCKBUTT RD., PRANTIRGAN, IL 61701) and Employee name and address (Name: First, Last, Street, City, State, ZIP, U.S. ONLY, Foreign ONLY).
- Tax and Social Security Information:** Includes fields for 1 Wages, tips, 2 Federal tax wth (174624, 36772), 3 Soc Sec wages (117000), 4 Soc Sec wth (7254), 5 Medicare wages, 6 Medicare tax wth (2924), 7 Soc Sec tips, 8 Allocated tips, 9, and 10 Dep care benefit.
- Other Information:** Includes 11 Non-qual plan, 12 Code (C), Amount (792), Year (1995), 13 Stat employee (checked), Retirement plan (checked), Sick pay, and 14 Other (SEH).
- Summary Table:** A table at the bottom with columns for 15 ST, 16 State wages (174624), 17 State tax (8787), 18 Local wages, 19 Local tax, and 20 Locality.

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](mailto:Support@GruntWorx.com)  
828.349.5505

Here is a list of all the supported forms for the GruntWorx Organize and Populate services.

## Organize LITE & Organize

- W-2
- W-2G
- W2C
- 1042S
- 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
- 2439
- 5498-SA
- 5498-ESA
- Grantor Letter as 1041 K-1
- Supporting Tax Documents
- Receipts



## Populate

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

