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Copanion Inc. — GruntWorx Populate

2011 OVERALL RATING ★★★★★



CORE PRODUCT FUNCTIONS/FEATURES



PAPERLESS WORKFLOW



INTEGRATION



HELP/SUPPORT/TRAINING

800-291-2136

www.copanion.com

2011 Overall Rating 4.5

Best Fit

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services. There are no large up-front costs associated with this offering.

- The GruntWorx web portal is easy to use and makes uploading and downloading documents very easy, even for novice computer users.
- GruntWorx Gather is one of two offerings in this review that facilitates indirect download of data from financial institutions.
- GruntWorx is one of two offerings in this review that allows import of information into most major advanced workflow tax preparation applications.
- Since GruntWorx is a SaaS application, there is no need to purchase and set up a separate server to run the OCR applications needed to extract data from scanned documents.

Potential Limitations

- The service level agreement (SLA) for Copanion GruntWorx Organize indicates that it may take as much as four hours for GruntWorx to organize and bookmark batches of source documents. This may prevent firms built around the traditional “one-hour interview” model of retail tax preparation from adopting this technology.
- Firms using document management systems with built-in PDF printers like Doc-It DM and File Cabinet CS may need to follow specialized procedures to retain the bookmarks created by GruntWorx applications.
- The GruntWorx portal does not integrate with other client portal products, nor does it provide tools for client submission of images into the GruntWorx system.

Executive Summary & Pricing

Copanion's GruntWorx is one of the two independent providers of tax document automation tools reviewed here. Unlike many competitors who license optical character recognition (OCR) engines to convert images to text, Copanion took a more basic approach and wrote its own OCR engine to serve as the backbone of

GruntWorx. The company has processed millions of documents through this engine

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GruntWorx Gather: \$10 per return

Core Product Functions/Features – 5

Paperless Workflow – 5

Integration – 4

Help/Support/Training – 4

Technology

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