★★★★★	CORE PRODUCT FUNCTIONS/FEATURES
★★★★☆	PAPERLESS WORKFLOW
★★★★	INTEGRATION
★★★★☆	HELP/SUPPORT/TRAINING

800-291-2136

www.copanion.com

2012 Overall Rating 4.5

Best Firm Fit

Firms that want a user-friendly solution for receiving an organized and bookmarked PDF of source documents, regardless of the firm's tax and document management software. Firms using the supported tax software will benefit from the Populate product. Firms using the Drake professional tax software should also consider it because integration for Drake will soon be released.

Strengths

- GruntWorx is a completely SaaS application so there is nothing to install locally, and it will work on most devices with a web browser and an Internet connection.

- Web interface for uploading and downloading documents is simple and easy to

organized PDF file to the user (though average times were much less, with a two to four hour average during the peak of tax season in March 2011 for Populate jobs). This may make it unsuitable for the "one-hour interview" retail tax preparers.
- Forms containing amounts that could be reported in various parts of a tax return (such as a 1099-MISC) are populated to a point sheet instead of directly to the tax software. Unlike with other systems, the user's placement of these amounts in the tax software is not carried forward to future years.

Summary & Pricing

GruntWorx is a web-based application that provides relief to tax preparers from the "grunt work" of organizing tax documents and data entry. Priced separately, the products offered are as follows:

1. **GruntWorx Organize** uses optical character recognition (OCR) to create a bookmarked PDF of a client's tax documents from scanned tax documents uploaded by the user. The end product groups together tax documents by type (wages, interest income, deductions, etc.) and form, and identifies the issuer of the tax document in the bookmark name.
2. **GruntWorx Populate** performs the same functions as GruntWorx Organize and then imports numbers from supported tax forms into tax software packages. Currently, the tax software packages supported are UltraTax CS, ProSystem *fx* Tax and GoSystem RS (Drake Software and Lacerte soon to be supported).
3. **GruntWorx Trades** extracts information from consolidated brokerage statements, puts the information into a Microsoft Excel spreadsheet where it can be tied out to a 1099-B, and then imports the data into Schedule D of the tax software.

4. GruntWorx Gather automatically aggregates 1099 information from financial

Core Product Functions/Features 4.75

Paperless Workflow 4.5

Integration 4

Help/Support/Training 4.5