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GruntWorx, LLC — GruntWorx

800-291-2136

www.gruntworx.com

Best Fit: Tax professionals who want a user-friendly way to quickly create organized and bookmarked PDF workpapers generated from source documents, and that can be used alongside any professional tax system. The optional auto-populate functions only work with specific systems, however.

Strengths

- Completely web-based means nothing to install and easy access from computer or mobile device with user-friendly interface
- Expanded management features enable detailed security access controls
- Saves time by organizing source documents into one pdf to prepare from; or importing the tax information into the tax software, eliminating data entry time.
- Auto-populate feature works with Drake, GoSystem Tax RS, ProSystem *fx* Tax and UltraTax CS.
- Integration with Tic, Tie & Calculate workpaper tool

Potential Limitations

- Average turnaround time for a completed organized PDF created from client source documents is two to four hours, but license allows for up to 24 hours. Therefore, it is not suited to high volumes of simple returns or retail kiosk type preparers.

The GruntWorx system is designed to give tax firms a completely web-based solution that automatically performs the often tedious tasks involved with compiling client source documents. It does so in a way that provides the firm with digital workpaper

PDFs that can be edited and annotated. Gruntworx, LLC, is a Drake Enterprises

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Security functions allow administrators to assign user access rights, including clients and client groups, while additional functions are available for setting standard preferences or for users to customize personal settings. GruntWorx is recognized by CPA2Biz a subsidiary of the AICPA, as a Trusted Business Advisor Solution.

There are three separate program offerings under the GruntWorx name that can be used together or individually. First, with the GruntWorx Organize system, users scan and upload client source documents and the system then uses optical character recognition (OCR) to create a bookmarked PDF. The system can identify what types of forms are what (1099, 1098, W-2, etc), so that the resulting workpapers group tax documents by type (wages, interest income, deductions, etc.) and form, and identifies the issuer of the tax document in the bookmark name.

The GruntWorx Populate system performs the same PDF workpaper creation functions as GruntWorx Organize and takes it a step further, identifying specific data on specific lines on forms and allowing users to have that data automatically populated onto the appropriate forms and schedules of a client's return. This feature works with the following tax programs: Drake Software, UltraTax CS, ProSystem fx Tax and GoSystem RS.

For tax firms who have clients with more extensive investment activity, the GruntWorx Trades program can pull information from consolidated brokerage statements and create an Excel spreadsheet with the data. From there, it can be tied out to a 1099-B, and the data imported into a client's Schedule D.

Paperless Workflow: 4.5 Stars

One of the key time and resource saving factors in going to an automated workpaper solution like GruntWorx is that the "grunt work" part of building client files can be easily handled by non-professional administrative staff. With GruntWorx, client

source documents can even be scanned and uploaded in any order, since the program

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information it extracts. This spreadsheet also includes diagnostics that identify potential missing data or errors, such as a mismatched SSN. The Populate program can identify and extract data from most standard IRS forms and bank issued documents, and then pushes that data into Drake Tax, GoSystem RS, ProSystem *fx* Tax and UltraTax CS. Forms that contain data that may be reported in various places in a client return (such as a 1099-MISC), data is only extracted to the Excel point sheet, where the professional can determine the appropriate place on the client return.

From the time the user uploads client documents to GruntWorx, to when the organized PDF workpaper is finished, the turnaround time during last tax season averaged between two to four hours. The user license, however, allows up to a maximum of 24 hours. The system is, therefore, more suited to firms with complex clients, not those with clients who expect to start and finalize their return during a one-hour engagement.

Integration: 4.5 Stars

The core GruntWorx Organize system, which creates an organized and bookmarked PDF from uploaded client source documents, can be used by professionals using any tax system. The Populate system, however, is designed to integrate with Drake Tax, GoSystem Tax RS, ProSystem *fx* Tax and UltraTax CS. Additionally, GruntWorx Populate has extended integration with GoSystem Tax RS that allows a specific naming system to be assigned to PDFs. This allows GoFileRoom to automatically pull the PDF into the program's document management system.

GruntWorx also has a partnership with Tic, Tie & Calculate, an Acrobat plug-in designed for accountants that lets users add bookmarks that correspond to the GruntWorx bookmark hierarchy. Other notable features include multi-colored tick

marks and a calculator that functions like a 10-key adding machine. Tic, Tie &

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during tax season.

Summary & Pricing

GruntWorx Organize, Populate, and Trades are each designed to provide streamlined workflow for tax firms, allowing them to focus on more profitable tax engagements and review processes, not on the often tedious paper-pushing functions of putting together client workpapers. The web-based system provides bookmarked digital workpaper PDFs that can be edited and annotated, and with the GruntWorx Populate system, data can automatically be extracted from source documents and entered into client returns for firms using Drake Tax, GoSystem Tax RS, ProSystem *fx* Tax or UltraTax CS.

Pricing GruntWorx is on a per-use basis, allowing firms to easily test it or use it on a limited, as-needed basis if they only have a few clients with high complexity. The Organize system costs \$5 per use (regardless of the number of source documents). The Populate system costs \$30 per use. A high volume discount is available for firms with a commitment of 100 or more uses.

2013 Overall Rating: 4.75 Stars

Software • Technology

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