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TECHNOLOGY

# Coppanion Inc. — GruntWorx Populate

Brian Tankersley • Sep. 05, 2014

## Coppanion Inc. — GruntWorx Populate

2011 OVERALL RATING ★★★★★

★★★★★ CORE PRODUCT FUNCTIONS/FEATURES

★★★★★ PAPERLESS WORKFLOW

★★★★ INTEGRATION

★★★★ HELP/SUPPORT/TRAINING

## 2011 Overall Rating 4.5

### Best Fit

While the GruntWorx Gather, GruntWorx Organize, and GruntWorx Trades services create files that are compatible with almost any tax application or document management tool, the GruntWorx Populate tool integrates fully with GoSystem Tax RS, ProSystem *fx* Tax or UltraTax CS.

### Strengths

- Firms can process as few or as many returns as they like, and pay as they use the 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

Coppanion'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, Coppanion 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 over the last six years, and its OCR engine recognizes and extracts data from thousands of different IRS forms. The list prices for GruntWorx return processing (before early renewal and volume discounts) are as follows:

GruntWorx Organize: \$5 per return

GruntWorx Trades: \$5 for each 50 trades extracted

GruntWorx Populate: \$30 per return

GruntWorx Gather: \$10 per return

## Core Product Functions/Features – 5

### Paperless Workflow – 5

### Integration – 4

### Help/Support/Training – 4

### Technology

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