www.gruntworx.com

From the 2020 review of Tax Document Automation systems.

GruntWorx, made by Drake Enterprises, is well-suited for accounting firms of any size. In addition, integration with popular tax programs including Drake Tax, GoSystem Tax RS, CCH ProSystem fx Tax, Intuit Lacerte, CCH Axcess, and Ultra Tax CS helps to automate the entire tax preparation process.

Entirely cloud-based, users can easily access the application at any time, with all created folders stored on GruntWorx servers. The application is scalable, with five editions available from a basic organizing tool to a completely organized folder with human validation included. In addition, options such as Trades, which imports trade details from brokerage statements and Populate, which extracts data and populates related tax forms, can be added to Organize.

Core Product Functions/Features: 5 Stars

Firms can easily choose the GruntWorx product that is best suited for their firm. Users will not need to pay anything upfront, payment is made only when the application is used, and the GruntWorx calculator allows the user to estimate the cost of any job submitted.

Both the Organize Lite and the Organize product from GruntWorx offer a completely sorted, labelled, and indexed PDF of scanned source documents, and the Organize product also includes human validation to increase accuracy. Because no prep time is needed, users can scan documents in any order, which will then be identified and organized by GruntWorx. The newly created PDF will also bookmark the document for easy retrieval. All PDFs are created in the same format, using the same order to

establish firm-wide consistency across the board, and the Populate option offers data

providers located within the U.S. GruntWorx also recently completed the AICPAs Statement on Standards for Attestation Engagements Number 18 (SSAE 18) SOC 1 Examination Type 2, with an annual review of all operations, systems, and technology.

Paperless Workflow: 4.75 Stars

What really sets GruntWorx apart from the competition is that there is absolutely no prep work needed, since all documents are scanned or uploaded to GruntWorx, which handles the complete organizing and bookmarking process. Once the documents have been organized, they are returned to the firm for filing. Because the documents can be scanned or uploaded in any order, it can be completed by support staff. GruntWorx currently uses optical character recognition (OCR) to help identify all documents in order to determine where they should be placed in the PDF.

In addition, any PDF completed by GruntWorx can be edited, with users able to add notes and tick marks to any pages. For those who want to reduce data entry, GruntWorx Populate can extract data from scanned documents and auto-populate tax forms. In addition, GruntWorx offers integration with numerous tax preparation applications to expedite the entire tax preparation process.

Integration: 5 Stars

GruntWorx offers excellent integration options with a variety of popular tax preparation applications including CCH Axcess, Intuit Lacerte, Drake Software, UltraTax CS, CCH ProSystem fx, and Thomson Reuters GoSystem Tax RS. The Populate and Trades for Unify products also integrate with Microsoft Excel. In addition, a list of recommended scanners that work best with GruntWorx is available, with a discount available for anyone purchasing a Fujitsu scanner. Finally,

GruntWorx integrates with PDF editing software, allowing users to create tick marks

business hours. Users can also request support using the form found on the GruntWorx website.

Summary & Pricing

GruntWorx offers five different options to purchase: Organize Lite, Organize, Organize and Trades, Organize and Populate, and Organize and Populate and Trades. All pricing is on a per-page basis, with the Organize Lite edition costing 5 cents per page, which does not include human data validation services. The other Organize editions cost 20 cents per page, with the Trades option costing 15 cents per trade. The Populate feature costs 75 cents per form. GruntWorx offers a calculator on its website that lets you calculate the cost of any job prior to submission so you'll know what it will cost. There is no initial cost to subscribe to GruntWorx; the cost is incurred once the application is used.

2020 Overall Rating: 5 Stars