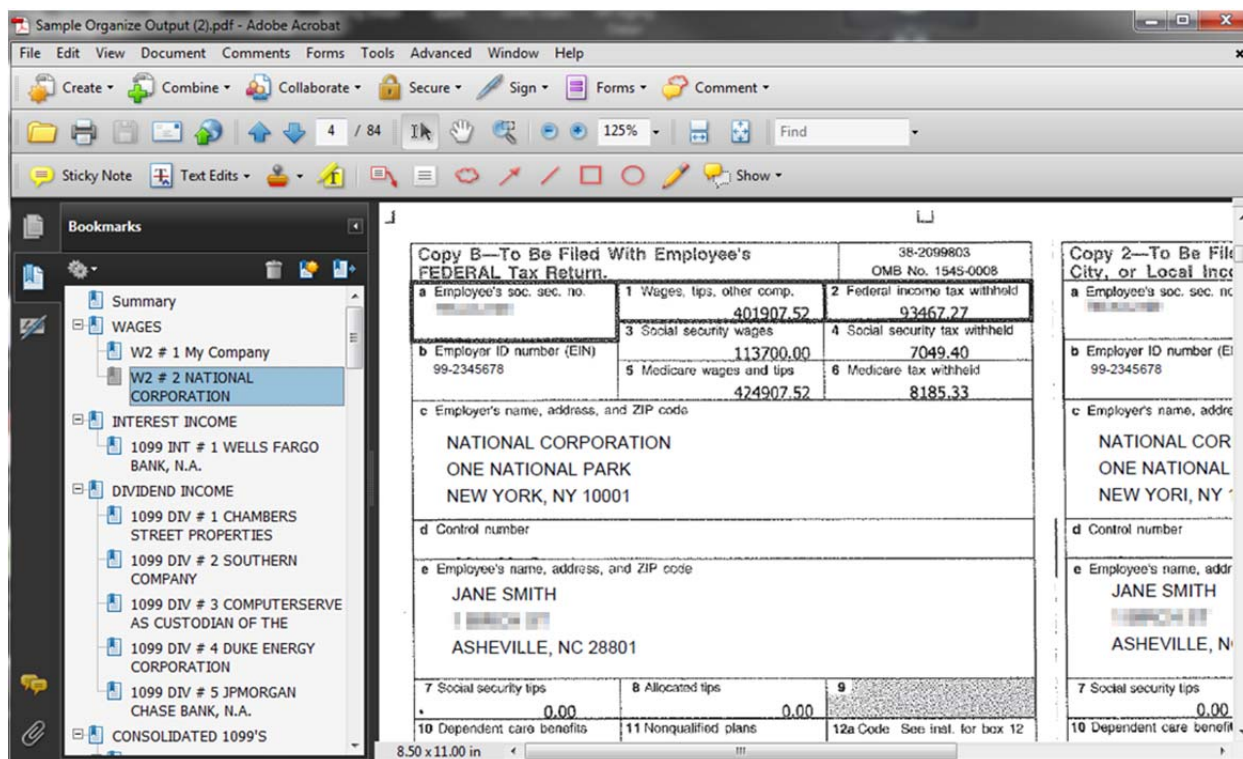


# GW Lite - Insert Additional Scanned PDF Documents Into an Organize PDF

Obtaining a complete set of client tax documents in a timely manner is one of the biggest challenges facing tax professionals during tax season. Editing and customizing bookmarks are important techniques that make it easy to scan and combine client tax documents that arrive late, after a return has already been started.

Using GruntWorx Organize to automatically organize scanned client tax documents produces a single PDF file with each tax document bookmarked, labeled and consistently organized. A bookmark is a virtual link to a scanned document. Simply click on a bookmark to go to that document. Because a bookmark is a virtual link, a bookmark can be created, edited and moved anywhere in the GruntWorx Organize tax document hierarchy while preserving the link to the document. Using these techniques, client tax documents that arrive late can be scanned, combined and bookmarked with an original set of source documents.



*This PDF has been automatically organized, bookmarked, and labeled by GruntWorx Organize*

## Manually Combining Scanned Tax Documents vs. Reprocessing with GruntWorx

In a paperless tax workflow, there are two options to handle additional client documents that arrive after a return has already been started.

1. **If a large number of additional tax documents arrive after the return has been started, it is faster and more efficient to resubmit all of the tax documents for processing with GruntWorx .** Reprocessing all of this client's documents will produce a complete organized and bookmarked set of source documents in one PDF file. GruntWorx Organize will preserve annotations on PDF source documents so preparers won't lose notes that they've already inserted onto PDF source documents. Simply scan the late tax documents, add the PDF file to the client record in GruntWorx Organize, and resubmit for processing.

2. **If a small number of additional tax documents arrive after the return has been started, it may be more efficient to scan the late documents and manually combine them with the GruntWorx PDF output file.** This approach will require tax expertise to identify the late tax documents so they can be correctly bookmarked and combined with the

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GruntWorx *Organize* source documents. Tax preparers should consider the amount of time to manually combine and bookmark late tax documents versus the time savings from resubmitting everything for processing with GruntWorx *Organize*.

## Merge Scanned Tax Documents with a GruntWorx PDF file using the following steps:

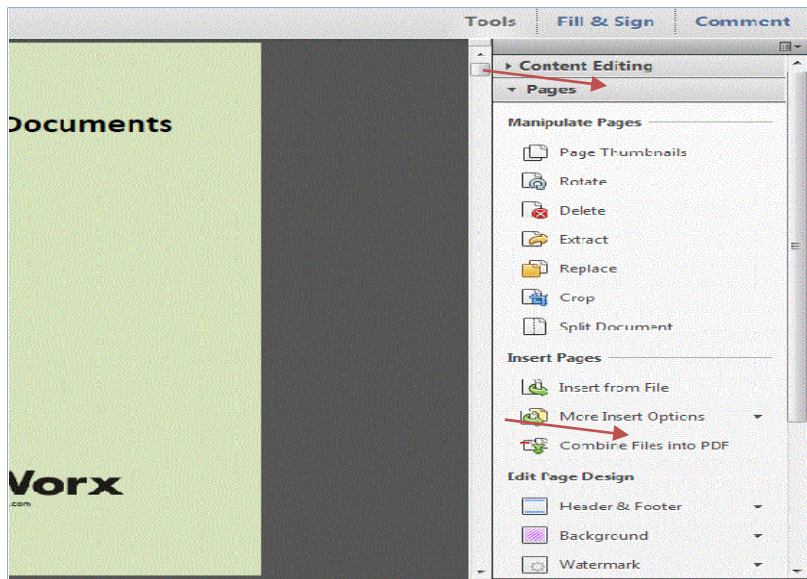
- Scan the additional documents and save them as a PDF file
- Combine the new PDF file with the GruntWorx Organize source documents (PDF)
- Bookmark the additional documents
- Move the bookmarks to appropriate tax document category in the Bookmark Navigation Panel

## Combining PDF files in Adobe Acrobat

You cannot use Adobe Reader to combine PDF files. The steps below require Adobe Acrobat.

After scanning the additional tax documents and saving them as a PDF file, use the **Combine Files** function to merge the additional tax documents with the GruntWorx *Organize* PDF source documents.

- Open the GruntWorx Organize PDF file, select the Combine Files into PDF feature in the Pages section of the Acrobat tool panel (Adobe Acrobat versions 10 and 11 illustrated here).



- Select **Add Files** to choose the files to add to the GruntWorx Organize output.
  - o If you prefer, you can drag and drop to add files to the **Combine Files Screen**.

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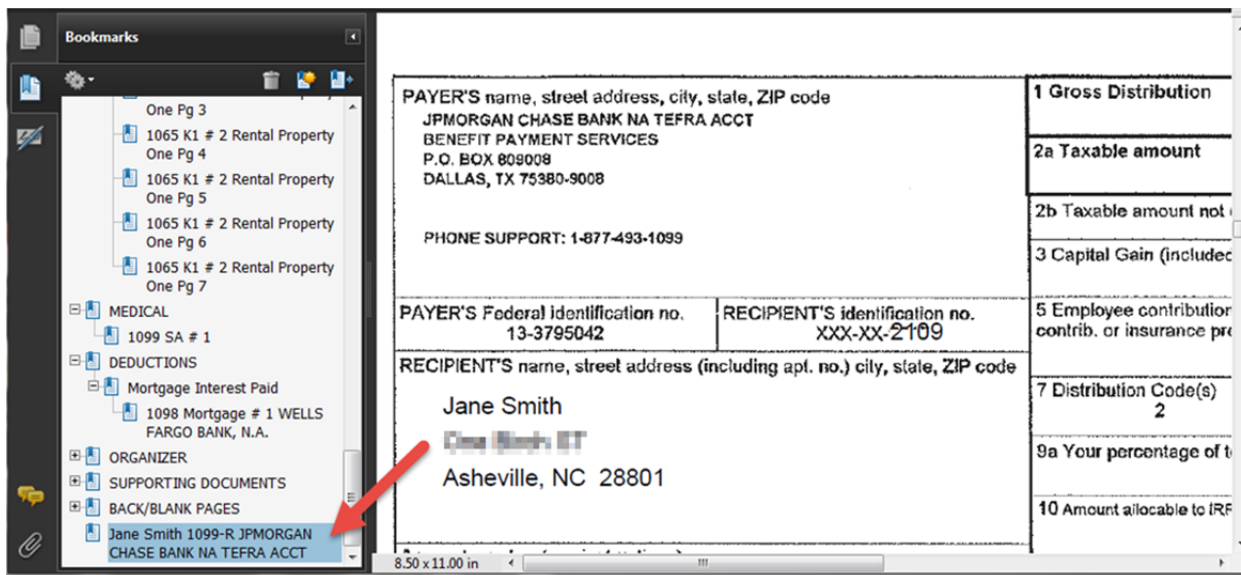
- o Note the order of the PDF documents. The PDF for the 1099-R is added to the end of the GruntWorx Organize output.
- After you've finished adding files, select **Combine Files**.

Adobe Acrobat combines the files. The additional PDF file has been added to the end of the GruntWorx Organize PDF file.

Click **Save** to save the new combined file name.

## Creating, Editing and Moving Bookmarks

In the combined file, the additional tax document (1099-R) was added to the end of the GruntWorx *Organize* bookmarked file. The Combine feature automatically bookmarked the document with the name of the PDF file and added it at the end of the GruntWorx *Organize* bookmark hierarchy.



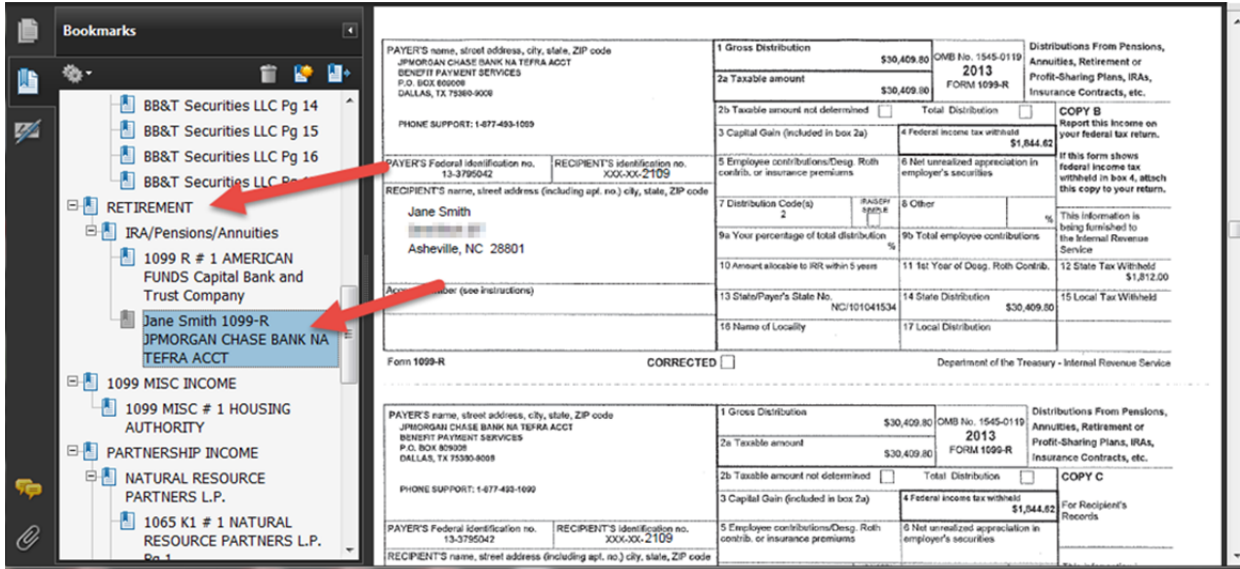
The Combine feature bookmarks the tax document with the name of the PDF file and places it at the end of the GruntWorx Organize Bookmark Hierarchy.



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## Moving a Bookmark

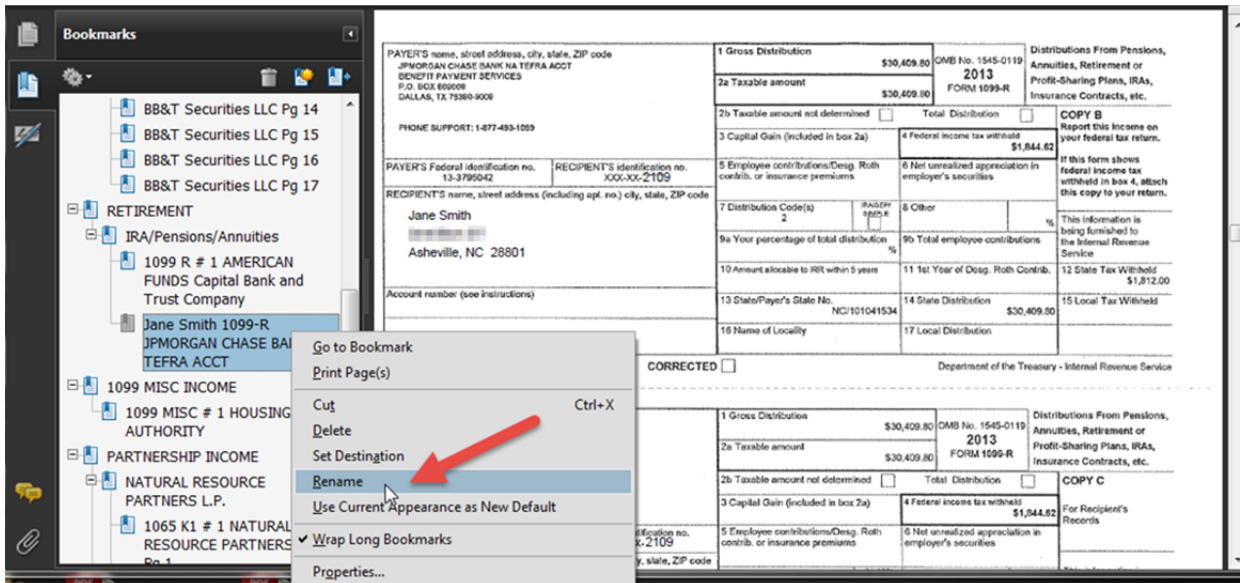
To move a bookmark, simply click and hold on a bookmark and drag it to the desired location in the bookmark hierarchy. In this example, the bookmark for the additional 1099-R has been moved to the Retirement classification in the GruntWorx Organize bookmark hierarchy.



Click, hold and drag bookmarks to the desired location in the GruntWorx Organize bookmark hierarchy.

## Changing the Name of a Bookmark

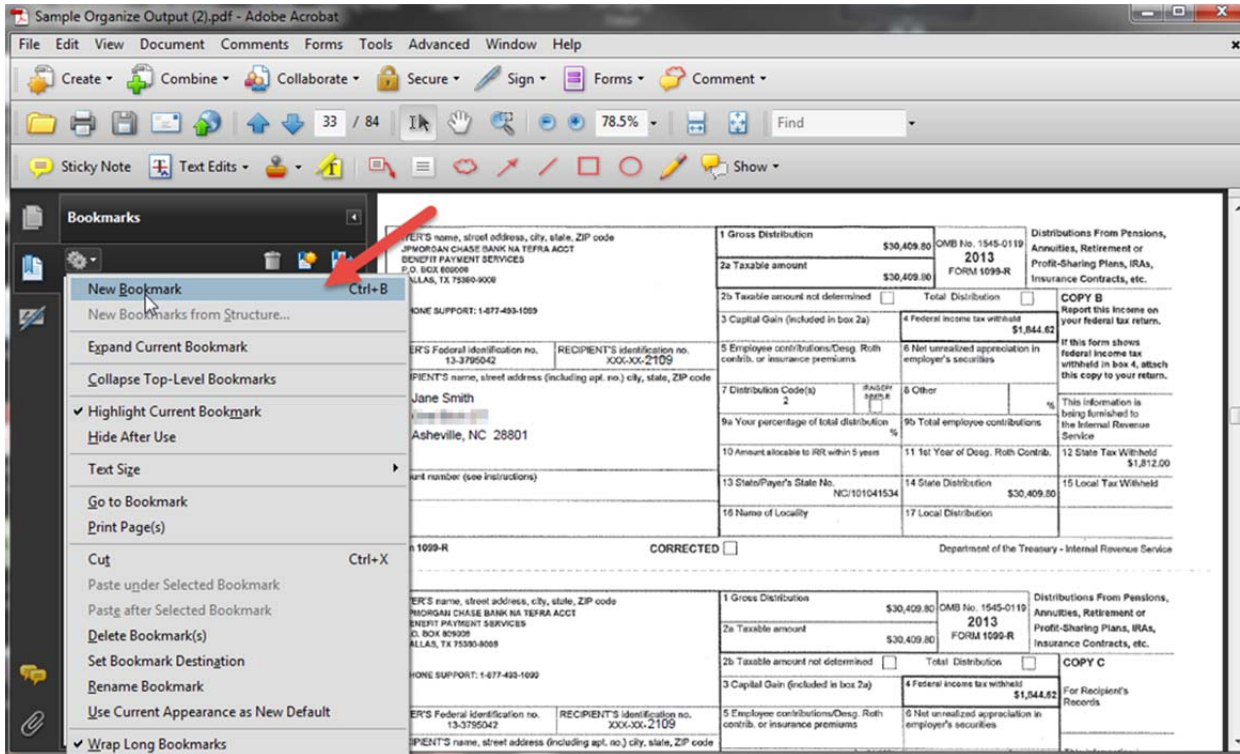
To change the name of a bookmark, simply **right click your mouse on the bookmark and select Rename** from the menu. Then type the new name of the bookmark.



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## Creating a New Bookmark

It's easy to create a bookmark for any scanned client document in the PDF file. First, scroll or page to the desired document in the PDF. Then use the **Bookmarks Options** menu to create a new bookmark for that page. **Tip:** You can also create a new bookmark by using the shortcut: **Ctrl B**.



Following the steps described above allows you to change your bookmarked PDF to best suit your requirements.

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