

TRUSS TRIBE · LIVE SERIES

Contacts, Entities & Drive.

The Truss backbone — how people, places, and files come together to power the client experience.

TODAY

Agenda.

Three product surfaces, one mental model.

Question of the Day

Truss Tribe Live Series

Contacts

Entities

Drive

All ten sessions. Pick your favourites.

PART 1

Settings: Build Your Foundation

The core configuration walk-through.

WATCH REPLAY →

PART 2

Settings: Power Moves & Pro Tips

Advanced configuration, automations, edge cases.

WATCH REPLAY →

PART 3

Contacts, Entities & Drive

The Truss backbone.

IN SESSION

PART 4

Meet Max AI

Your new sidekick.

REGISTER →

PART 5

New Client Intake & Recurring Tasks

Get a season off the ground.

REGISTER →

PART 6

Organizers, Reimagined

From PDF to structured intake.

REGISTER →

PART 7

Workpapers Made Simple

Review-ready in one click.

REGISTER →

PART 8

Assembly & Delivery

Send, signed, finished.

REGISTER →

PART 9

Client Experience

Next-level experience for taxpayers.

REGISTER →

PART 10

File Sharing & E-Signatures

Secure handoff, end to end.

REGISTER →

PART 1 OF 3

Contacts.

The people you communicate with. Where the client experience begins.

CONTACTS

What are Contacts in Truss?

CONTACT

The person.

A Contact represents an individual you communicate with and assign access to.

This is the person who:

Receives emails and notifications

Logs into the client portal

Uploads documents and completes tasks

Signs e-signature requests

Is connected to projects and entities

Examples of Contacts

John Smith

Jane Doe

A spouse on a joint return

A business owner or representative

How Contacts power the client experience

Access their portal

View shared documents

Complete organizers and questionnaires

Upload files securely

Review and sign returns

Receive reminders and updates

Best practice.

Every Contact should have a matching Entity connected to them.

This helps:

Keep projects organized year over year

Ensure proper Drive folder creation

Improve portal visibility and syncing

Maintain cleaner integrations with systems like Karbon

Important notes

Multiple Contacts can be connected to the same Entity (example: MFJ clients)

Contacts can have different email addresses and permissions

Portal visibility is based on what is shared through the Entity's Drive

Notifications are sent to the Contact, not the Entity

STEP 1 · NAVIGATION

Click the **Contacts** tab at the top of Truss.

FileEditViewWindowHelpLog

Truss

TILTONRADOMSKIACCOUNTING

Refresh

E-Signatures

Contacts

Entities

Drive

Truss Prep

Search

Ctrl + K

Max AI

3

5

JKH

Jamie k Hancock

Active Projects

Project Name

Type to Search

Send E-Signature

Share Files

Send Returns

New Project

Watching

Advanced Filters

Show Archived

Clear All Filters

Save This Filter

< Prev

1

2

3

Next >

25

/ page

ALL

Project Name

Complexity

Status

Tags

Reminders

Owner

Clients

Completed Tasks

Submission Date

Ice Town Consulting 1120S 2025 90

Completed

estimated-payment1120-s

d

JT

14/23 tasks2 pending tasks

Email Sent 9 hours agoInitial Submission on Sep 4, 2025Last Upload on Jan 2Last Visit on Jan 20

Saperstein, Jean-Ralphio - 2024 1040 [lacerte] 11122233

Waiting on Client

1040

d

JS

2/3 tasks2 pending tasks

Email Sent 9 hours agoInitial Submission on Dec 19, 2025Last Visit on Jan 9

Utesch, Charles Onboarding

Waiting on Client

prospect

d

SU

3/4 tasks

Email Sent 9 hours agoLast Upload on Jan 15Last Visit on Jan 20

An Investor, Mr. and Ms. - 2025 1040

draft10402025

d

JKH

1/11 tasks1 pending tasks

Doe, John Onboarding

Waiting on Client

prospect1040

d

JD

2/4 tasks2 pending tasks

Email Sent yesterdayInitial Submission on Mar 10Last Upload on Mar 10Last Visit on Mar 10

Ludgate, Natalie - 2025 1040

L0

Not Started

1040

d

NL

1/16 tasks

Email Sent 5 days ago

Meagle, Donna and Joe - 2025 1040

L0

Waiting on Client

draft1040

d

DM

0/4 tasks

Dwyer, Andy and Ludgate, April - 2025 1040

L1

Truss Prep

1040

d

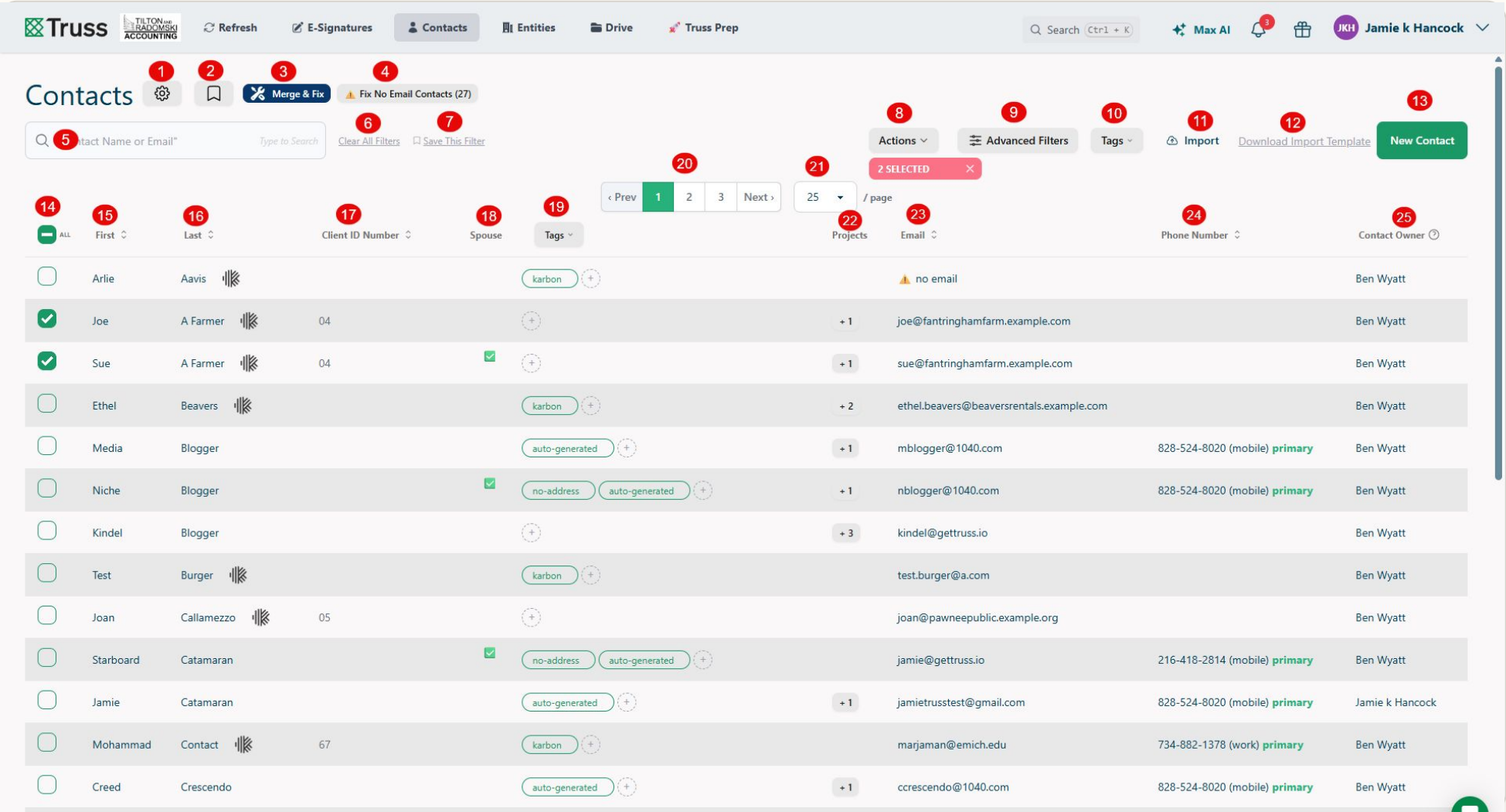
AL

14/26 tasks3 pending tasks

Email Sent 2 days agoLast Upload on Jan 19

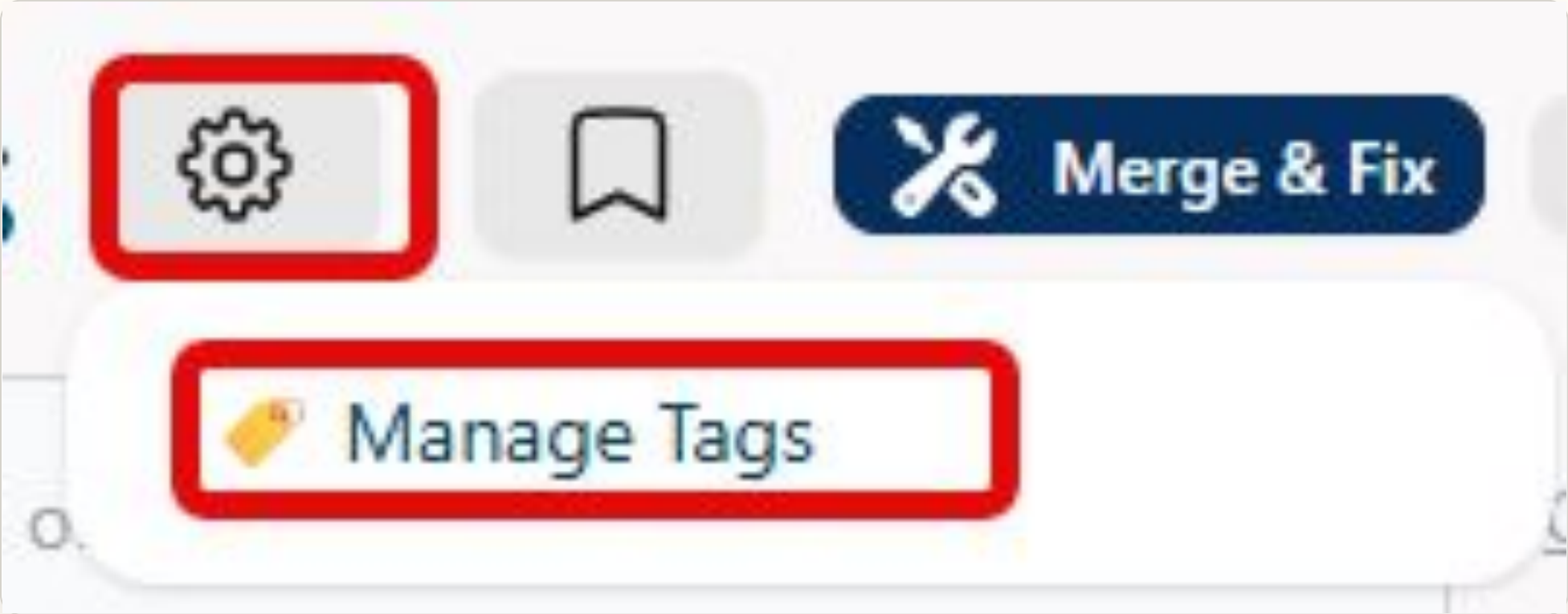
REFERENCE

Every control on the Contacts page.



- Settings
- Saved Filters
- Merge & Fix
- Fix No Email Clients
- Search Contacts
- Clear Filters
- Save Filters
- Actions
- Advanced Filters/Actions
- Tags
- Import
- Download Import Template
- New Contact
- Select Contacts
- First Name
- Last Name
- Client ID
- Spouse
- Tags
- Page Number
- Per Page Option
- Contact Projects
- Email
- Phone Number
- Contact Owner

Manage tags.



Tag Manager

- Search for Tags
- Project Tags (active & archived)
- Contacts (searchable on active projects)
- Entities (shown in Entities)
- Add New Tags
- Tag Name
- Usage Count
- Edit Tag
- Delete Tag

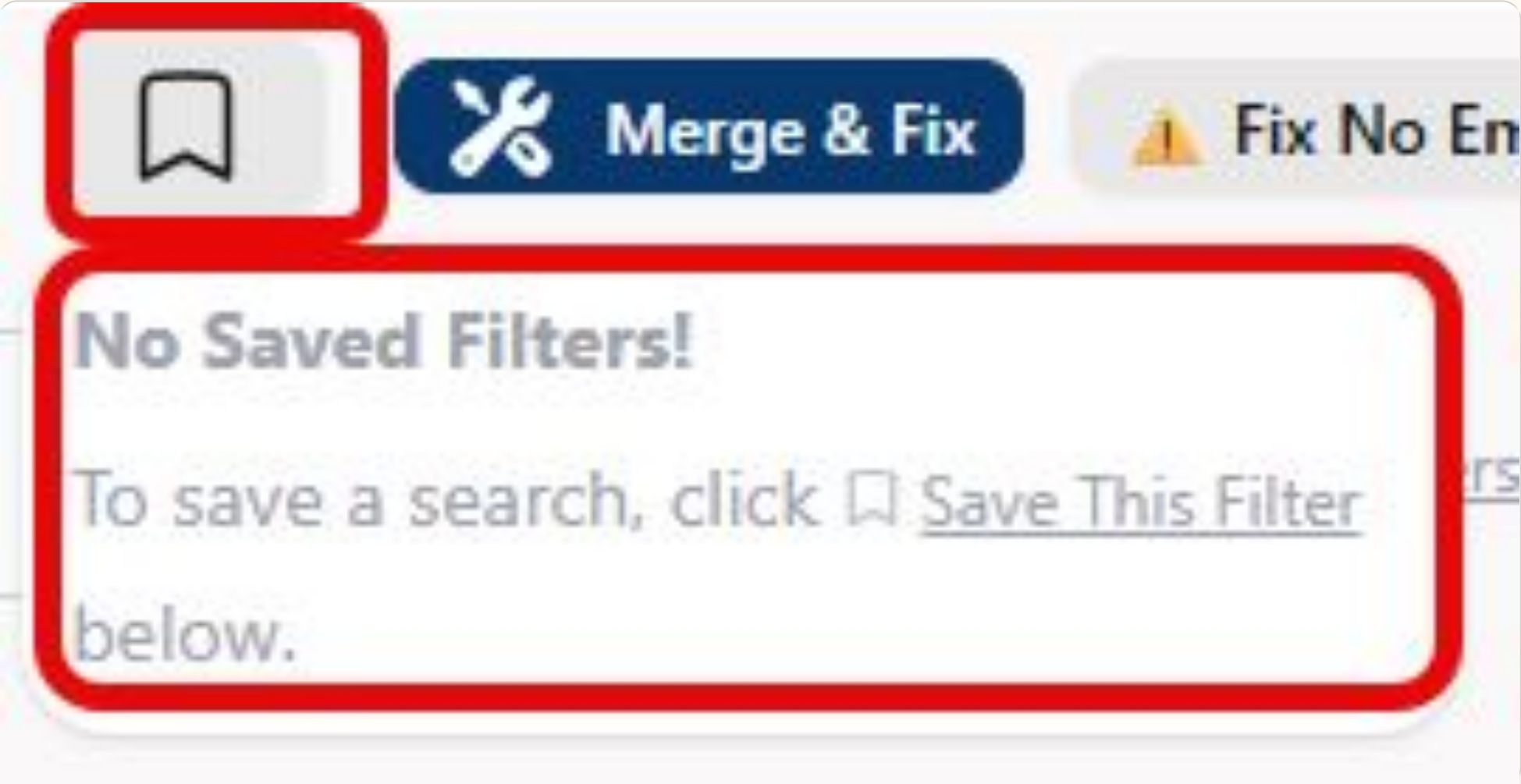
Tags

- Add new tag
- Search tag
- Remove tag from contact

CONTACTS

Saved filters.

Build a query once, save it, run it any season. Combine with advanced filters for fine-grained matching.



Advanced filters

- Match All or Any conditions
- Select the information field
- Criteria
- Type condition
- Delete condition
- Add condition
- Apply filter

Save Filter · Clear Filters — from the filter strip.

Four matching modes.

Choose how aggressively Truss looks for duplicates — from strict identity match up to AI-enhanced fuzzy.

Merge & Fix Contacts

☐ One-click mode

1

2

Q

Strict

Fast & precise. Start here.

Run Check

3

✓

No Duplicates to Review

Run a detection method to find potential duplicates.

Run Check

4

✦

AI Enhanced

Finds hard-to-find duplicates. Takes up to 2 hours (we'll email you when it's done).

Run Check

- One Click Mode
- Strict Matching
- Loose Matching
- AI-Enhanced Matching

CONTACTS

Fix No Email contacts.

Sweep through every Contact missing an email and resolve them in one place.

< Fix No Email Contacts (25)

1

Me Me

2

< Prev 1 Next >

3

Email Address

4

Fix

Floyd Lawson

Email Address

Fix

Proprietor A Sole

Email Address

Fix

Ms. A Passive Example

Email Address

Fix

Electronic A Filer

Email Address

Fix

Pamela Halpert

Email Address

Fix

Mr. A Limited IRA

Email Address

Fix

Sales Rep An Outside

Email Address

Fix

Pamela Halpert

Email Address

Fix

A Keogh

Email Address

Fix

Ms. A Limited IRA

Email Address

Fix

Contact name

Pages

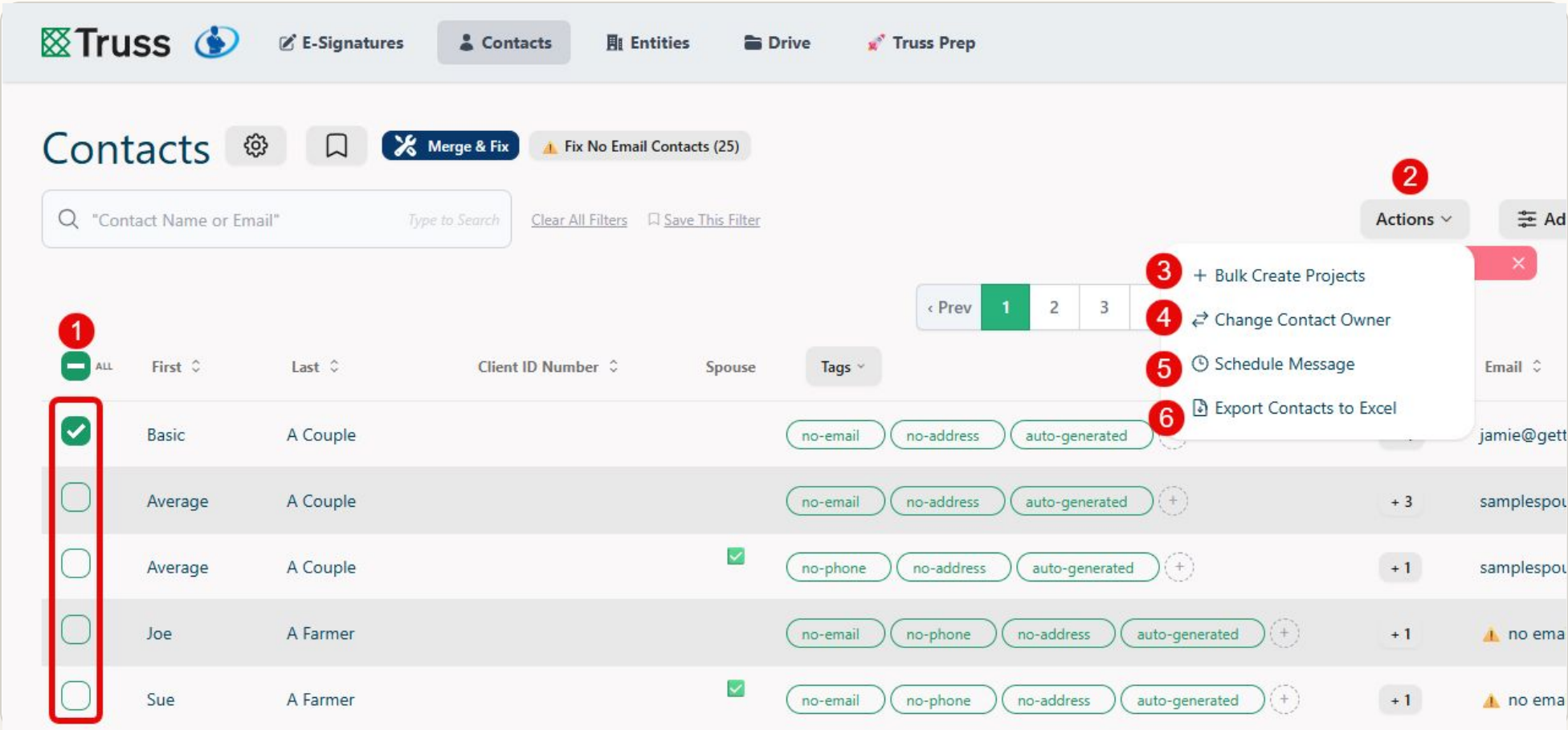
Add Email

Click to add or fix the contact

CONTACTS

Actions.

You must select at least one contact before Actions populates.



Select contacts
Must select at least one contact

Click on Actions

Bulk Create Projects
Create projects from Checklist templates

Change Contact Owner

Schedule Message
Schedule an email to send to all selected contacts

Export Contacts to Excel

CONTACTS

Two ways to add.

Either upload a CSV or create one Contact at a time.

CSV is the fastest at the start of a season.



Click to Import CSV

Download CSV Template

Include SSN, DOB, and email — these power matching
Entity type should also be selected

Create New Contact

Twelve fields.

Capture identity, contact channels, and identifiers in one form.

X

New Contact

1

Name

First Name

Last Name

2

Emails

Primary Email

+ Add Email

3

Spouse

Ignore Duplicate Warning

4

5

Phone numbers

i

+ Add Phone

Name

Email

Spouse

Ignore Duplicate Warning

Phone Number

Address

SSN / ITIN

DOB

Nickname

Filing Status

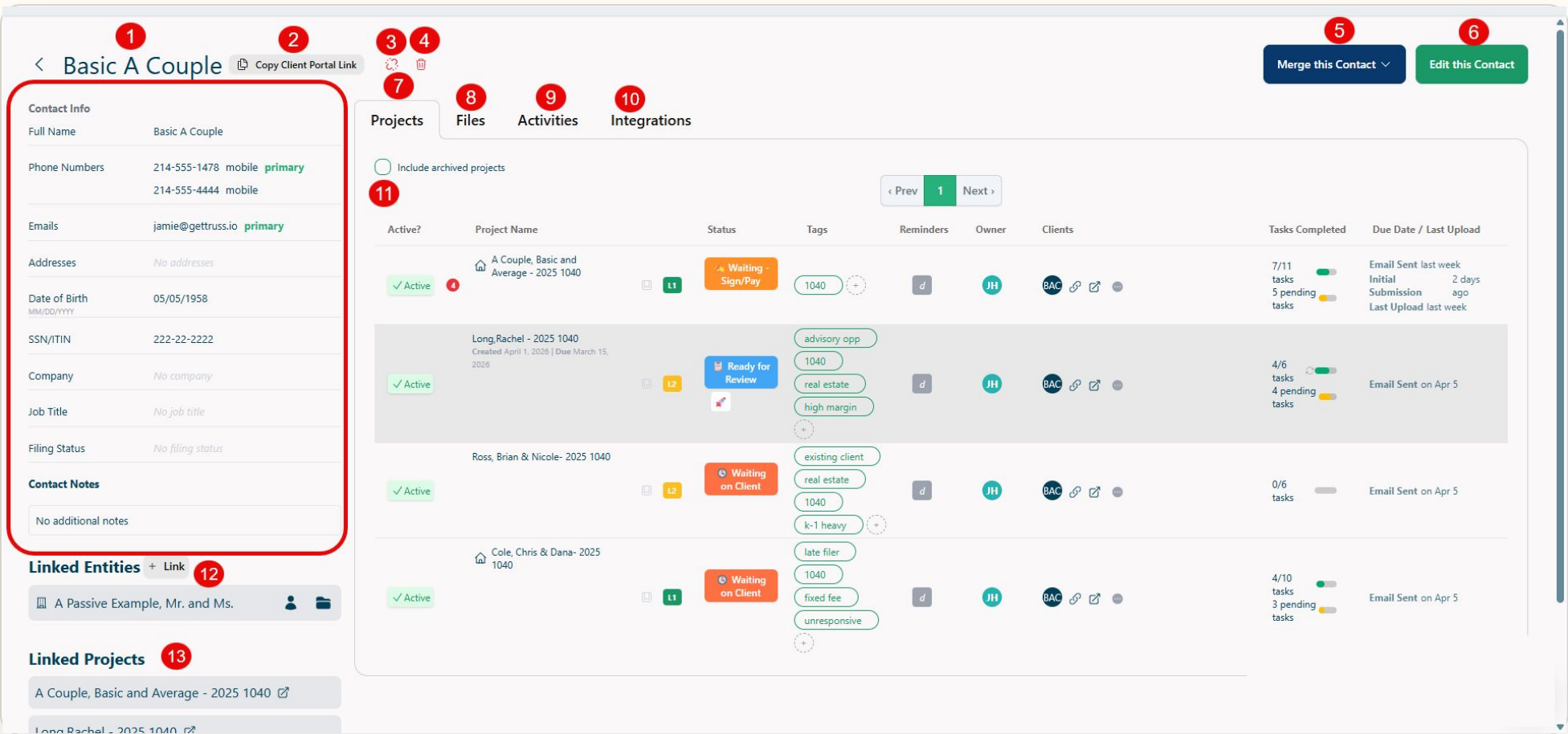
Client ID

Contact Notes

CONTACTS

The contact profile.

Everything you know about a person, in one panel —
info, files, activity, integrations.



Contact Information

Copy Client Portal Link

Invalidate all links

Delete Contact

Merge Contact

Edit Contact

Projects

Files

Activities

Integrations

Include archived projects

Linked Entities

Linked Projects

The fields that matter.

Only the **Primary** phone and email are used. If a client has more than one email, make a second contact.

Contact Info

Full Name

Basic A Couple

Phone Numbers

214-555-1478 mobile **primary**
214-555-4444 mobile

Emails

jamie@gettruss.io **primary**

Addresses

No addresses

Date of Birth

05/05/1958

MM/DD/YYYY

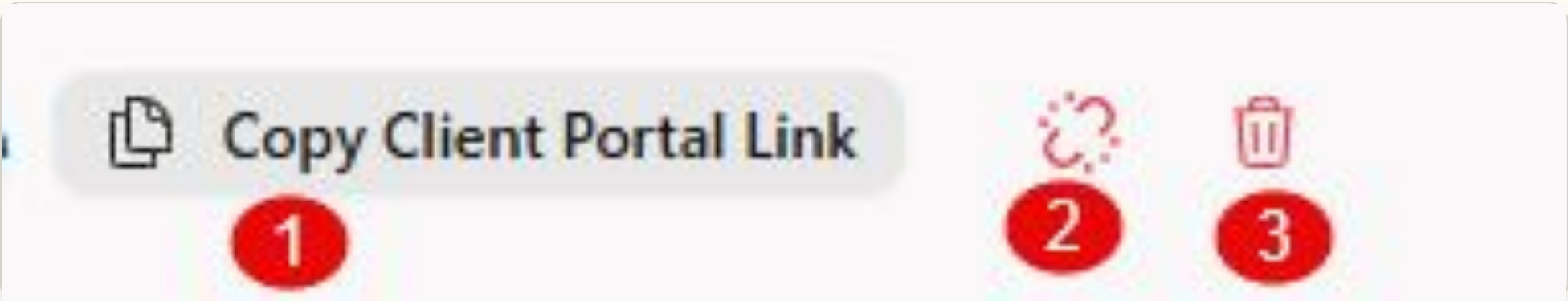
SSN/ITIN

222-22-2222

- Full Name
- Phone Numbers
- Emails
- Addresses
- DOB
- SSN / ITIN
- Company
- Job Title
- Filing Status
 - Single
 - MFJ
 - MFS
- Notes

Sharing and lifecycle.

Manage how the client gets in — and how cleanly they can be removed.



Copy Client Portal Link

Direct access for the client
Firm cannot view — everything lives in the Drive

Invalidate Link

Removes all access links previously sent

Delete Contact

Permanently removes the contact
There is no way to restore — delete carefully

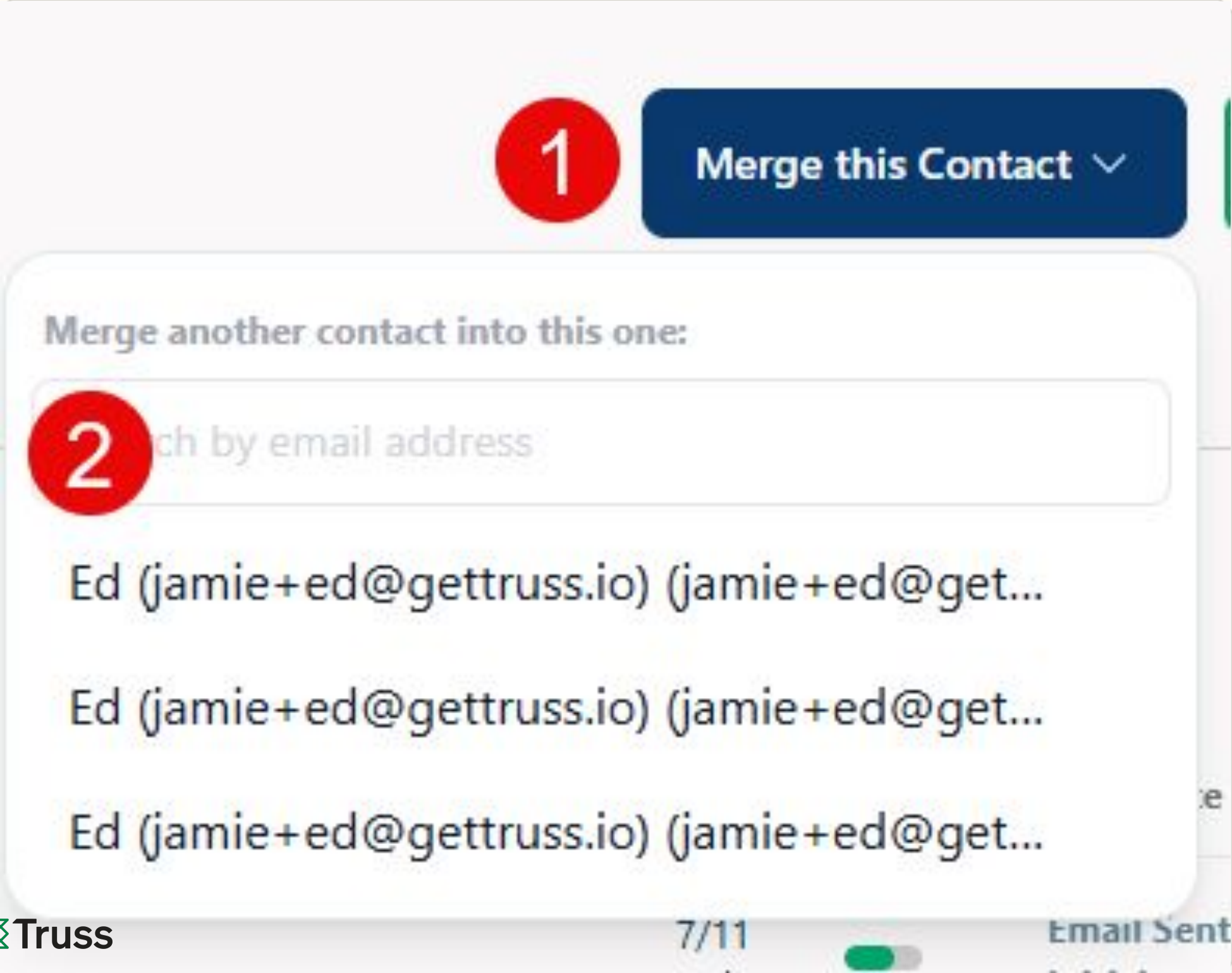
Merging duplicates.

Three clicks to clean a duplicate. Use this whenever Merge & Fix flags something Truss is unsure about.

Click [Merge this Contact](#)

Search by email address

Select the correct email or contact



Editing a contact.

SSN/ITIN should always be added — it powers de-duplication and integrations.

✕

▲

Edit Contact

1

First Name

Basic

Last Name

A Couple

2

jamie@gettruss.io

jamie@gettruss.io

+

Add Email

3

☐ Spouse

☐ Ignore Duplicate Warning

4

Phone numbers ⓘ

5

Code

us

🇺🇸

Type

Mobile

▼

Number

2145551478

Code

Type

🗑

Name	Nickname
Email (primary only)	Filing Status — MFS / MFJ / Single
Spouse	Client ID
Ignore Duplicate Warning	Notes
Phone Number	Always require OTP
Address	Disallow Email Access Codes
SSN / ITIN	Save
DOB	

Every project this contact touches.

By default you see active projects only. Toggle Include Archived to look across years.

Include Archived Projects

Only active projects show by default

Projects assigned to the contact

ProjectsFilesActivitiesIntegrations

1

2

Include archived projects

< Prev1Next >

Active?	Project Name	Status	Tags	Reminders	Owner	Clients	Tasks Completed	Due Date / Last Upload
✓ Active 4	A Couple, Basic and Average - 2025 1040	L1 Waiting - Sign/Pay	1040					

 d | JH | BAC | 7/11 tasks 5 pending tasks | Email Sent last week Initial Submission 2 days ago Last Upload last week || ✓ Active | Long Rachel - 2025 1040 Created April 1, 2026 | Due March 15, 2026 | L2 Ready for Review | advisory opp 1040 real estate high margin |

 d | JH | BAC | 4/6 tasks 4 pending tasks | Email Sent on Apr 5 || ✓ Active | Ross, Brian & Nicole- 2025 1040 | L2 Waiting on Client | existing client real estate 1040 k-1 heavy |

 d | JH | BAC | 0/6 tasks | Email Sent on Apr 5 || ✓ Active | Cole, Chris & Dana- 2025 1040 | L1 Waiting on Client | late filer 1040 fixed fee unresponsive |

PROFILE · FILES TAB

Every file across every project.

A flat view of every document this contact has uploaded
— across every project they're part of.

File Name

Date Uploaded

Project Name

Search

Download

Delete

ProjectsFilesActivitiesIntegrations

All Files

1

2

3

4

5

6

File Name	Date Uploaded	Project		
2015_Form_1099-MISC_1.pdf	Thu, May 7	A Couple, Basic and Average - 2025 1040	Download	Delete
W2 Example-1.pdf	Thu, May 7	A Couple, Basic and Average - 2025 1040	Download	Delete
1099R.pdf	Thu, May 7	A Couple, Basic and Average - 2025 1040	Download	Delete
1099div_irs_copy_s.pdf	Thu, May 7	A Couple, Basic and Average - 2025 1040	Download	Delete
W2 Example-1.pdf	Thu, May 7	A Couple, Basic and Average - 2025 1040	Download	Delete
2015_Form_1099-MISC_1.pdf	Thu, May 7	A Couple, Basic and Average - 2025 1040	Download	Delete
1099div_irs_copy_s.pdf	Thu, May 7	A Couple, Basic and Average - 2025 1040	Download	Delete
2025 - Doe, John - 1099-R Distribution Statement.pdf	Thu, May 7	A Couple, Basic and Average - 2025 1040	Download	Delete

The full conversation log.

Emails can be pulled in from your integrated email — reach out to support to turn this on.

Projects

Files

Activities

Integrations

1

2

3

4

5

All

Emails

Activity

Comments

Reminders

Search activities...

Any time

May 2026

Basic A Couple marked as Not Applicable

May 13, 10:13 AM on A Couple, Basic and Average - 2025 1040 > Real Estate Taxes - principal residence

Basic A Couple marked as Not Applicable

May 13, 10:12 AM on A Couple, Basic and Average - 2025 1040 > Last Savings (1099-INT)

Opened: Basic A Couple (jamie@gettruss.io) has opened a update client email

May 7, 2:04 PM on A Couple, Basic and Average - 2025 1040

Opened: Basic A Couple (jamie@gettruss.io) has opened a update client email

May 7, 11:04 AM on A Couple, Basic and Average - 2025 1040

Truss to jamie@gettruss.io Update client

Tax Season is Here! *Your Personal Checklist*

Hi Basic!We're gearing up for the 2025 tax filing season! We're excited to introduce a new onlin...

April 2026

Bounced: Basic A Couple (sample@lacertesoftware.com) project reminder email bounced

Apr 5, 5:17 AM on Reed, Hannah- 2025 1040

Bounced: Basic A Couple (sample@lacertesoftware.com) project reminder email bounced

All items on one screen

Emails only

Activity
What the client has marked complete

Comments
Comments between the firm and contact

Reminders
Reminders we have sent to the contact

Plays nicely with your stack.

Any integration the firm has connected shows up here on a per-contact basis.

ProjectsFilesActivitiesIntegrations

 **Karbon**

No Practice Management Integration. Go to your settings to set one up.

- Karbon
- QuickBooks
- Truss Prep

PART 2 OF 3

Entities.

The location where projects live. Where year-over-year structure begins.

STEP 1 · NAVIGATION

Click the **Entities** tab.

FileEditViewWindowHelpLog

Truss

TILTONRADOMSKIACCOUNTING

Refresh

E-Signatures

Contacts

Entities

Drive

Truss Prep

SearchCtrl + K

Max AI

3

5

JKHJamie k Hancock

Active Projects

"Project Name"Type to Search

Send E-SignatureShare FilesSend ReturnsNew Project

WatchingAdvanced FiltersShow ArchivedClear All FiltersSave This Filter

< Prev123Next >

25 / page

ALLProject NameComplexityStatusTagsRemindersOwnerClientsCompleted TasksSubmission Date

Ice Town Consulting 1120S 2025 90

Completed

estimated-payment1120-s

d

JT

14/23 tasks2 pending tasks

Email Sent 9 hours agoInitial Submission on Sep 4, 2025Last Upload on Jan 2Last Visit on Jan 20

Saperstein, Jean-Ralphio - 2024 1040 [lacerte] 11122233

Waiting on Client

1040

d

JS

2/3 tasks2 pending tasks

Email Sent 9 hours agoInitial Submission on Dec 19, 2025Last Visit on Jan 9

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prospect

d

SU

3/4 tasks

Email Sent 9 hours agoLast Upload on Jan 15Last Visit on Jan 20

An Investor, Mr. and Ms. - 2025 1040

2

draft10402025

d

JKH

1/11 tasks1 pending tasks

Doe, John Onboarding

6

Waiting on Client

prospect1040

d

JD

2/4 tasks2 pending tasks

Email Sent yesterdayInitial Submission on Mar 10Last Upload on Mar 10Last Visit on Mar 10

Ludgate, Natalie - 2025 1040

L0

Not Started

1040

d

NL

1/16 tasks

Email Sent 5 days ago

Meagle, Donna and Joe - 2025 1040

10987

Waiting on Client

draft1040

d

DM

0/4 tasks

Dwyer, Andy and Ludgate, April - 2025 1040

02845

L1

Truss Prep

1040

d

AL

14/26 tasks3 pending tasks

Email Sent 2 days agoLast Upload on Jan 19

Truss

26 / 50

ENTITIES

What are Entities in Truss?

ENTITY

The location where projects live.

An Entity is the organizational container that holds a client's projects, Drive structure, and portal visibility.

Projects are stored year over year

Drive folders are created and managed

Portal visibility is controlled

Documents are organized

Client history is maintained

Household Entity

Individual taxpayers, MFJ clients, families.

Examples: Smith Household · Johnson Family

Business Entity

Partnerships, S-Corps, C-Corps, trusts, estates, nonprofits.

Examples: ABC Consulting LLC · Smith Family Trust

ENTITIES

What lives inside.

An Entity can contain:

Multiple projects
Drive folders
Uploaded documents
Prior year returns
Organizers
Workpapers
Shared portal files

This is what makes **year-over-year client structure** possible.

Why Entities matter

Keep projects organized year over year
Create the Truss Drive structure
Control what clients see in the portal
Improve document management
Support integrations like Karbon
Prevent duplicate or disconnected client records

Three rules to live by.

Every Contact should have a matching

Entity Entity syncing, Drive creation, portal organization

Use Household for personal

clients "Personal Organization" = Truss "Household" Entity

Avoid using

"Other" Breaks syncing, creates duplicates, causes portal confusion

WORKED EXAMPLE

Smith Household.

Connected Contacts

John Smith

Jane Smith

Projects inside

2024 1040 Return

2025 Organizer

Estimated Payments

Prior Year Returns

Drive Structure

Tax Returns · Source Documents · Signed Forms

REFERENCE

Every control on the Entities page.

Entities

1

2

3

Merge & Fix

Entities are used to link together contacts and projects. They can be clients, households, or companies, and a single contact can be linked to many entities.

4

Type to Search

Clear All Filters

Save This Filter

5

Actions

6

Advanced Filters

7

Entity Types

8

Tags

9

Import

10

+ New Entity

11

ALL

12

Name

13

Client ID Number

14

Tags

15

Primary Contact

16

Entity Type

17

Projects

18

Created at

19

Updated at

11 ✓	Acme Corporation	+	Wile Coyote	LLC	March 31, 2026	March 31, 2026
12	A Farmer, Joe and Sue	+	Joe A Farmer	Household	April 1, 2026	April 1, 2026
12	A Filer, Electronic	+	Electronic A Filer	Household	April 1, 2026	April 1, 2026
12	A Home, Office	+	Resident A Multi-State	Household	April 1, 2026	April 1, 2026
12	A Limited IRA, Mr. and Ms.	+	Mr. A Limited IRA	Household	April 1, 2026	April 1, 2026
12	A Multi-State, Full Year and Nonresident	+	Full Year A Multi-State	Household	April 1, 2026	April 1, 2026
12	A Multi-State, Part Year and Resident	+	Part Year A Multi-State	Household	April 1, 2026	April 1, 2026

Settings

Saved Filters

Merge and Fix

Search

Actions

Advanced Filters

Entity Type

Tags

Import

New Entity

Select Entity

Name

Client ID

Tags

Primary Contact

Entity Type

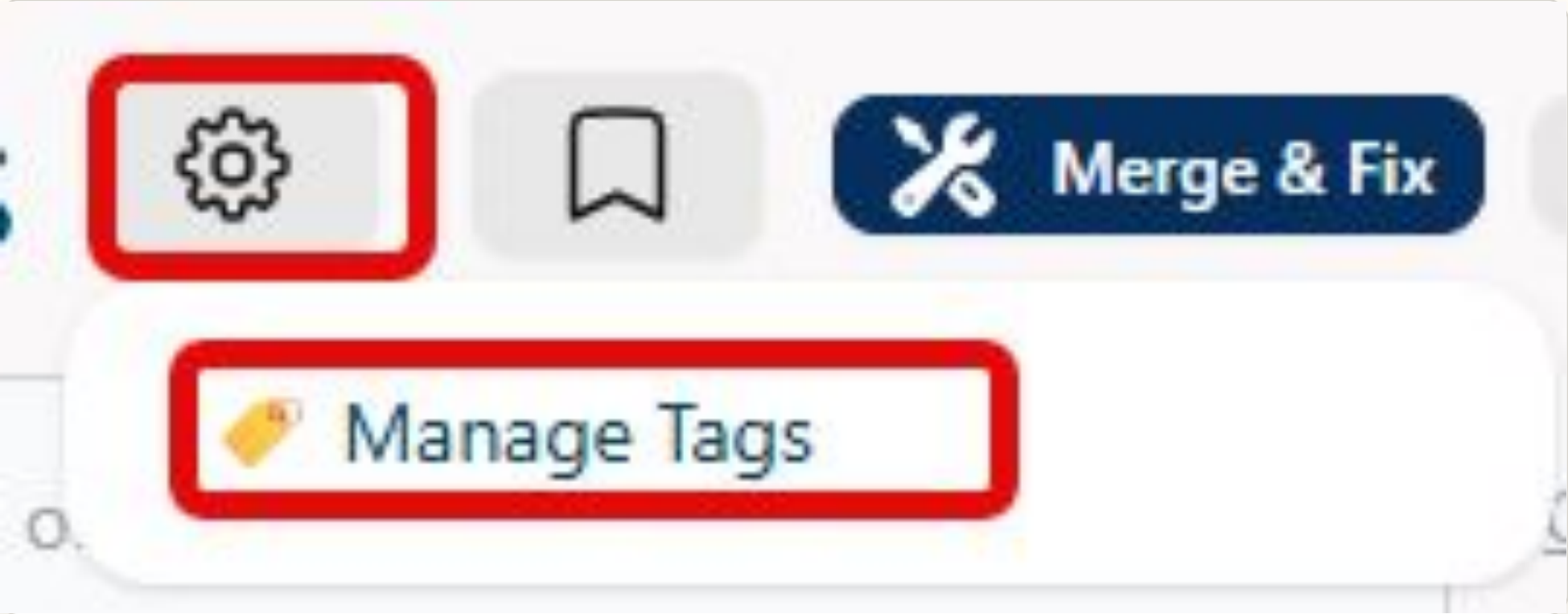
Projects in the Entity

Created on

Updated on

Manage tags.

Same tag manager as Contacts — tags are firm-wide and shared across Contacts, Entities, and Projects.



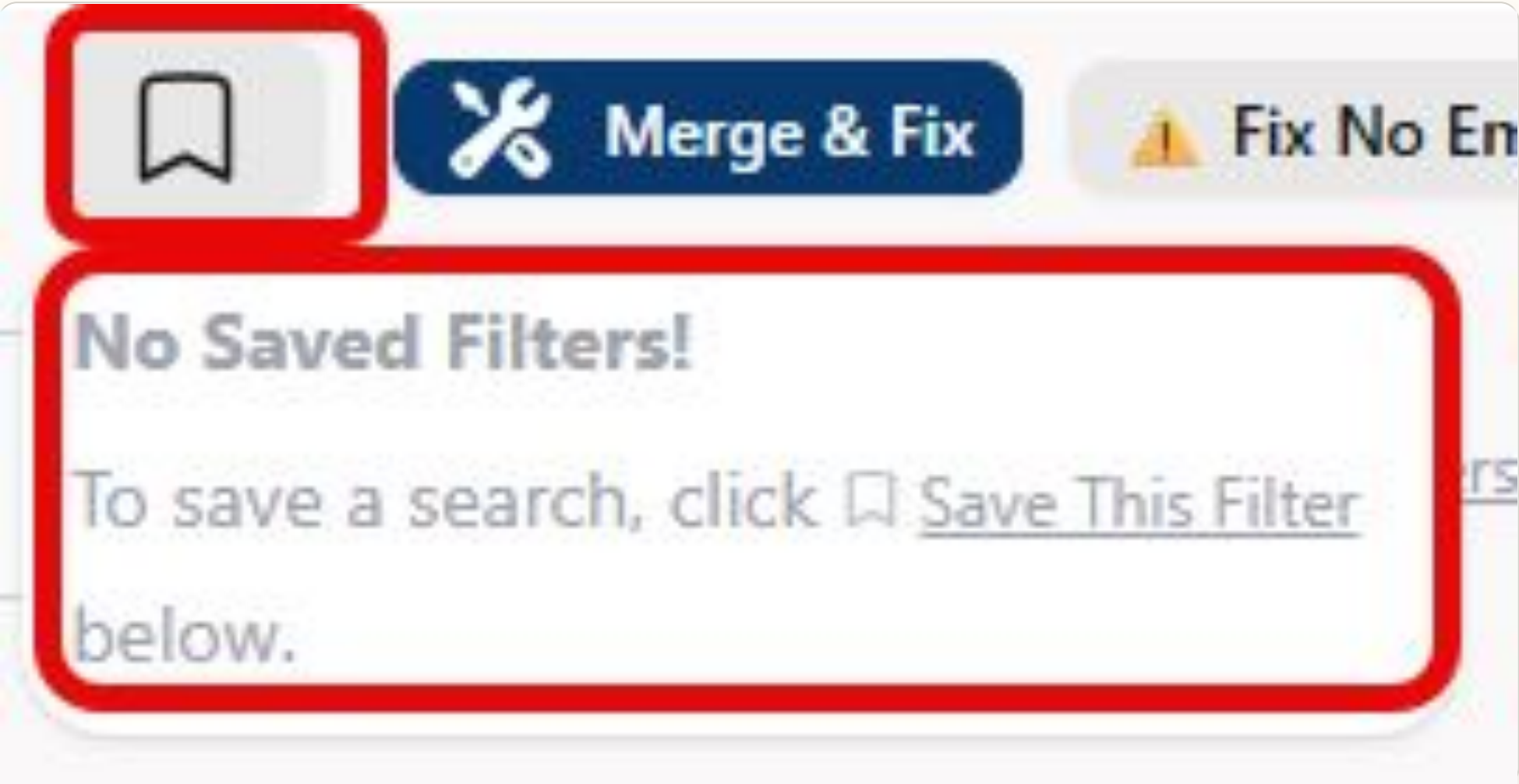
Tag Manager

Search for Tags
Project Tags (active & archived)
Contacts
Entities
Add new tags · Edit · Delete · Usage count

ENTITIES

Saved filters.

Identical to the Contacts experience — build once, save, run anytime.



Advanced filters

- Match All or Any conditions
- Select the information field
- Criteria
- Type condition
- Delete · Add condition
- Apply Filter

Four matching modes.

Useful when migrating from another system, or after a CSV import.

Merge & Fix Contacts

☐ One-click mode

1

2

Q

Strict

Fast & precise. Start here.

Run Check

3

✓

No Duplicates to Review

Run a detection method to find potential duplicates.

3

⊕

Loose

80%+ match. Finds more duplicates, and more false positives.

Run Check

4

✦

AI Enhanced

Finds hard-to-find duplicates. Takes up to 2 hours (we'll email you when it's done).

Run Check

One Click Mode

Strict Matching

Loose Matching

AI-Enhanced Matching

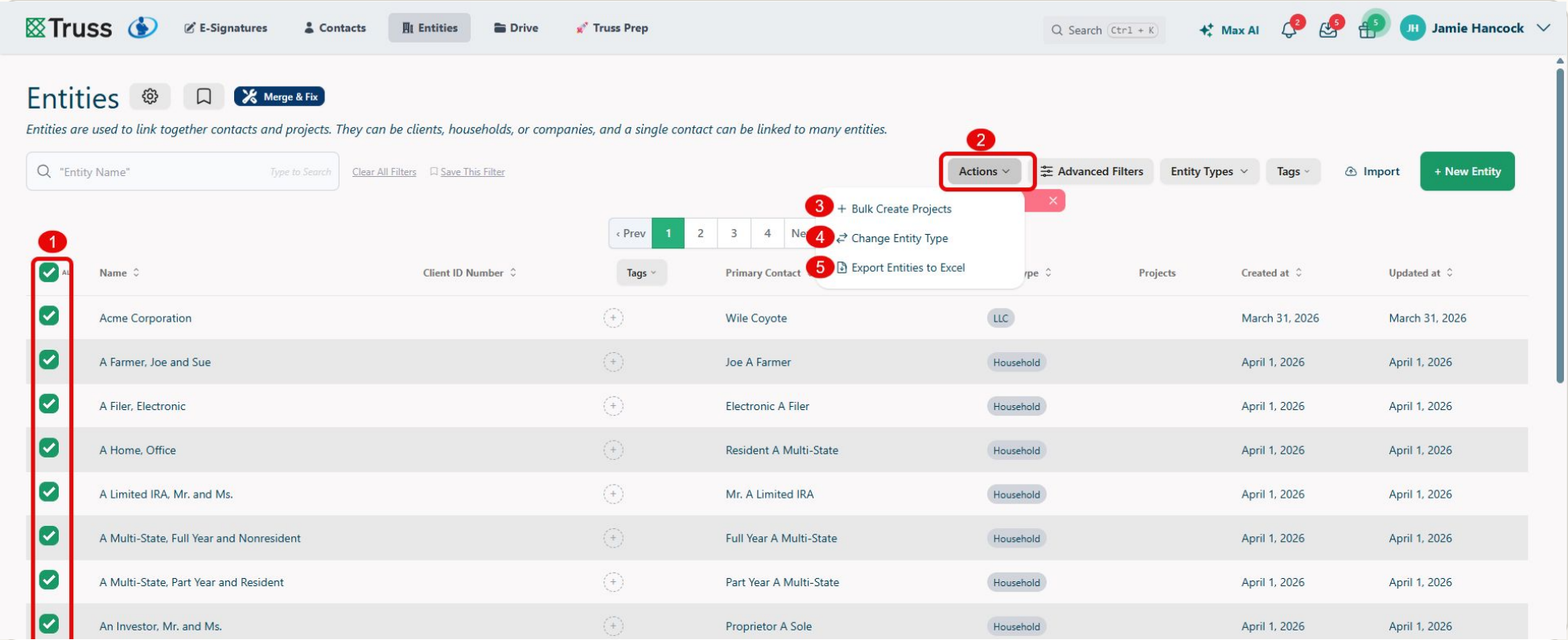
 Truss

33 / 50

Bulk moves.

Reach for these at the start of a season to spin up every project at once.

- Select Entities
- Click on Actions
- Bulk Create Projects
- Bulk Change Entity Types
- Export list to Excel



ENTITIES · FILTERING

Filter by Entity type.

Click on Entity Types

Filter by used entity types in Truss

Click Apply

Truss

E-Signatures

Contacts

Entities

Drive

Truss Prep

Search

Max AI

5

5

JH Jamie Hancock

Entities

Settings

Bookmark

Merge & Fix

Entities are used to link together contacts and projects. They can be clients, households, or companies, and a single contact can be linked to many entities.

Entity Name

Clear All Filters

Save This Filter

Advanced Filters

Entity Types

Tags

Import

New Entity

Prev

1

2

3

4

Next

25

/ page

☐ All	Name	Client ID Number	Tags	Primary Contact	Entity Type	Project	Created at	Updated at
☐	Acme Corporation			Wile Coyote	LLC		March 31, 2026	
☐	A Farmer, Joe and Sue			Joe A Farmer	Household		April 1, 2026	April 1, 2026
☐	A Filer, Electronic			Electronic A Filer	Household		April 1, 2026	April 1, 2026
☐	A Home, Office			Resident A Multi-State	Household		April 1, 2026	April 1, 2026
☐	A Limited IRA, Mr. and Ms.			Mr. A Limited IRA	Household		April 1, 2026	April 1, 2026
☐	A Multi-State, Full Year and Nonresident			Full Year A Multi-State	Household		April 1, 2026	April 1, 2026
☐	A Multi-State, Part Year and Resident			Part Year A Multi-State	Household		April 1, 2026	April 1, 2026
☐	An Investor, Mr. and Ms.			Proprietor A Sole	Household		April 1, 2026	April 1, 2026
☐	An Oil, Gas Example			Gas Example An Oil	Household		April 1, 2026	April 1, 2026

Adding new entities.

Truss

E-Signatures

Contacts

Entities

Drive

Truss Prep

Search

Max AI

2

5

JH Jamie Hancock

Entities

Entities are used to link together contacts and projects. They can be clients, households, or companies, and a single contact can be linked to many entities.

"Entity Name"

Type to Search

Clear All Filters

Save This Filter

Advanced Filters

Entity Types

Tags

1 Import

2 + New Entity

All

Name

Client ID Number

Tags

Primary Contact

Entity Type

	Acme Corporation			Wile Coyote	LLC
	A Farmer, Joe and Sue			Joe A Farmer	Household
	A Filer, Electronic			Electronic A Filer	Household
	A Home, Office			Resident A Multi-State	Household
	A Limited IRA, Mr. and Ms.			Mr. A Limited IRA	Household
	A Multi-State, Full Year and Nonresident			Full Year A Multi-State	Household
	A Multi-State, Part Year and Resident			Part Year A Multi-State	Household
	An Investor, Mr. and Ms.			Proprietor A Sole	Household

3 New Entity

Entity Name

Select Entity Type

FIN

Client ID Number

State Corp ID

Secretary of State ID

IP Pin

Bank Accounts

Show Additional Fields

Members

Contract name

Contract Email

Add Recipients

Create Entity

April 1, 2026

April 1, 2026

Import CSV Template

Find it in the Contacts tab

Create a new entity manually

Fill out the client's information

PART 3 OF 3

Drive.

The client's digital filing cabinet. Where documents live, and what the portal shows.

STEP 1 · NAVIGATION

Click **Drive** at the top of Truss.

FileEditViewWindowHelpLog

Truss

TILTONRADOMSKIACCOUNTING

Refresh

E-Signatures

Contacts

Entities

Drive

Truss Prep

Search

Ctrl + K

Max AI

3

5

JKH Jamie k Hancock

Active Projects

Settings

Bookmark

Project Name

Type to Search

Watching

Advanced Filters

Show Archived

Clear All Filters

Save This Filter

< Prev

1

2

3

Next >

25

/ page

ALL

Project Name

Complexity

Status

Tags

Reminders

Owner

Clients

Completed Tasks

Submission Date

Ice Town Consulting 1120S 2025 90

Completed

estimated-payment1120-s

d

JT

14/23 tasks2 pending tasks

Email Sent 9 hours agoInitial Submission on Sep 4, 2025Last Upload on Jan 2Last Visit on Jan 20

Saperstein, Jean-Ralphio - 2024 1040 [lacerte] 11122233

Waiting on Client

1040

d

JS

2/3 tasks2 pending tasks

Email Sent 9 hours agoInitial Submission on Dec 19, 2025Last Visit on Jan 9

Utesch, Charles Onboarding

Waiting on Client

prospect

d

SU

3/4 tasks

Email Sent 9 hours agoLast Upload on Jan 15Last Visit on Jan 20

An Investor, Mr. and Ms. - 2025 1040

2

draft10402025

d

JKH

1/11 tasks1 pending tasks

Doe, John Onboarding

6

prospect1040

d

JD

2/4 tasks2 pending tasks

Email Sent yesterdayInitial Submission on Mar 10Last Upload on Mar 10Last Visit on Mar 10

Ludgate, Natalie - 2025 1040

Not Started

1040

d

NL

1/16 tasks

Email Sent 5 days ago

Meagle, Donna and Joe - 2025 1040 10987

Waiting on Client

draft1040

d

DM

0/4 tasks

Dwyer, Andy and Ludgate, April - 2025 1040 02845

Truss Prep

1040

d

AL

14/26 tasks3 pending tasks

Email Sent 2 days agoLast Upload on Jan 19

Truss

38 / 50

DRIVE

What is the Truss Drive?

DRIVE

The client's digital filing cabinet.

The centralized document storage system connected to an Entity.

Uploaded client documents

Tax returns

Organizers

Signed forms

Workpapers

Shared files

Prior year documents

Why the Drive matters

Client portal visibility

Document organization

Year-over-year storage

Secure file sharing

Internal document management

The Drive determines **what clients can and cannot see** in their portal.

Drive controls visibility.

If a document is not inside a client-visible folder, the client cannot see it in the portal.

Clients only see:

- Folders marked visible to the client
- Files shared through visible folders

Client-visible folders

- Tax Returns
- Source Documents
- Signed Forms
- Organizers

Internal-only folders

- Workpapers
- Review Notes
- Internal Checklists
- Draft Returns

Four rules for clean drives.

1 · Use a standard folder structure

Staff locate files quickly

Client portals stay organized

Onboarding and training improve

2 · Use Drive templates

Reusable structures by entity type

By tax return type

By workflow need

3 · Confirm folder visibility

Verify folder is marked visible

Ensure correct files are inside

4 · Keep internal docs separate

Workpapers

Review notes

Internal checklists

Never inside client-visible folders.

DRIVE

Drive templates.

Manage from **Templates** → **Drive Folders**

A consistent structure that scales from one client to a thousand.

From there, firms can

Create standard folder structures

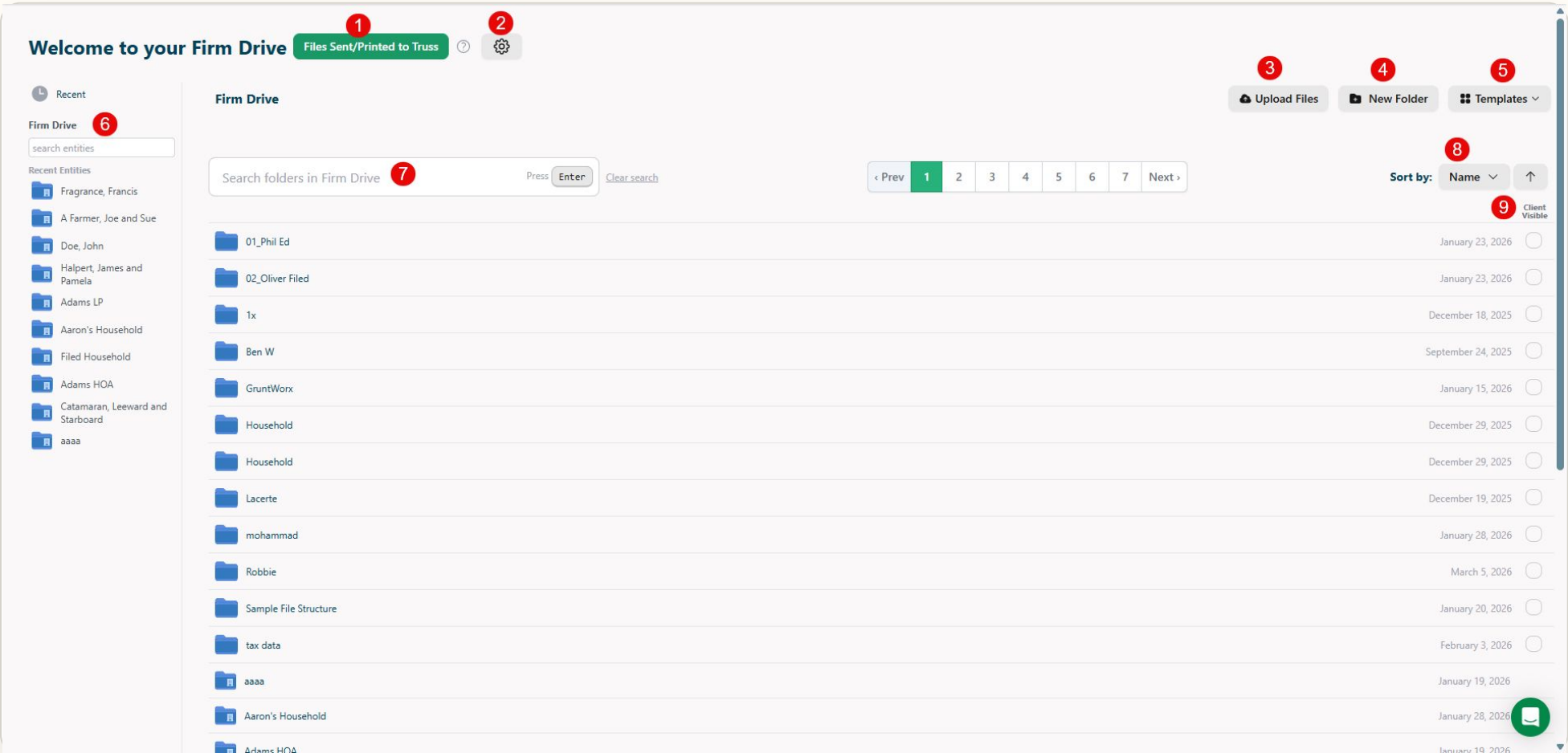
Apply templates to entities

Update existing drives

Customize by entity type or year

REFERENCE

Every control on the Drive page.



Files sent/printed to Truss

More on this later in the series

Settings

Upload files

New Folder

Templates

Recently viewed

Search Drive

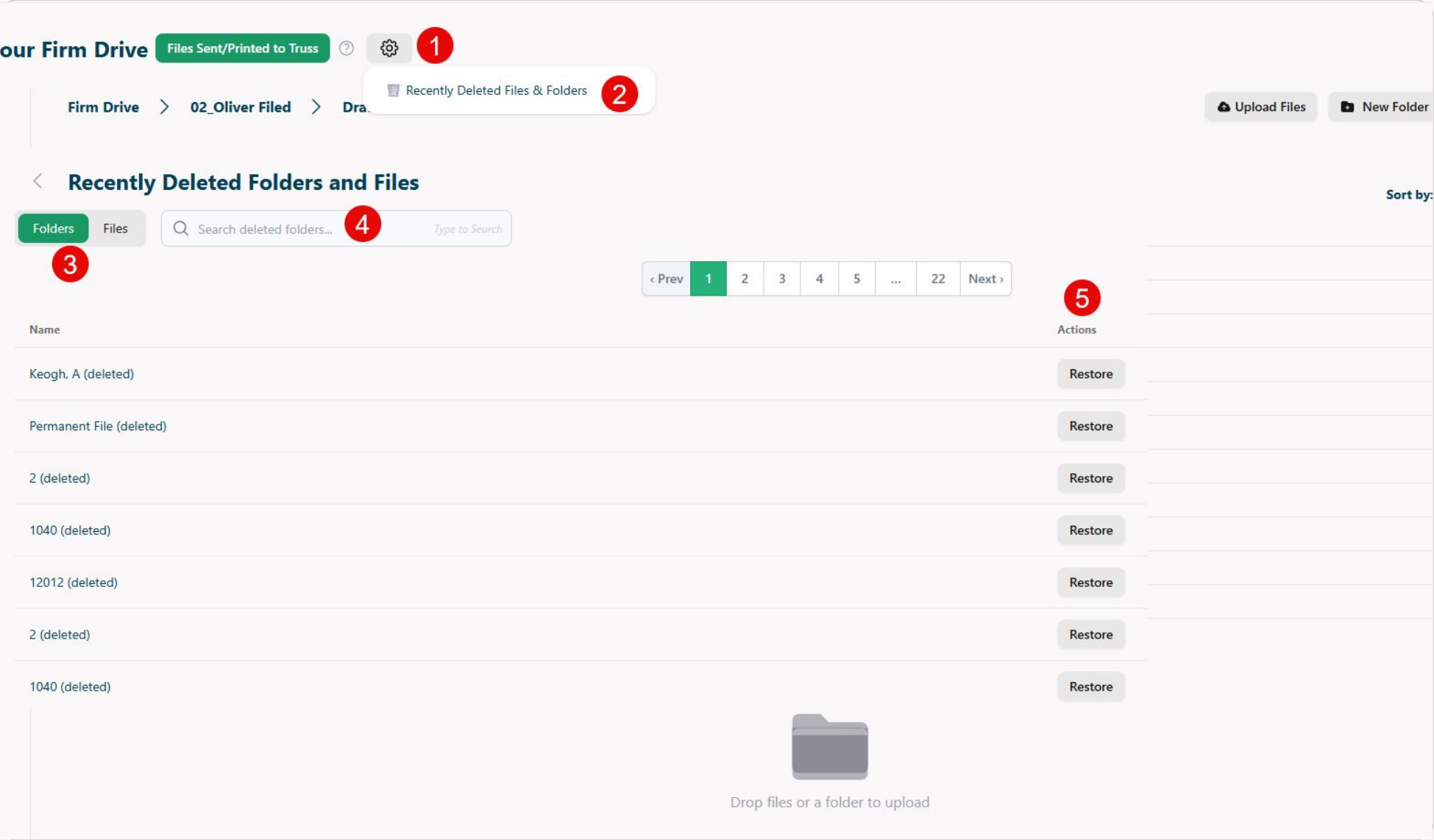
Sort By

Client Visible

Restore deleted items.

Recently deleted files and folders aren't gone forever — open the gear to bring them back.

- Click on the Gear
- Recently Deleted files or folders
- Search for folders or files
- Search for specific items
- Restore deleted items



DRIVE

Upload new files.

Files land at the bottom of the Drive if you're not inside one. Drag to the right folder when needed.



Click on Upload Files

Select the item you're uploading

Locate the uploaded file

At the bottom of the Drive if you're not inside one

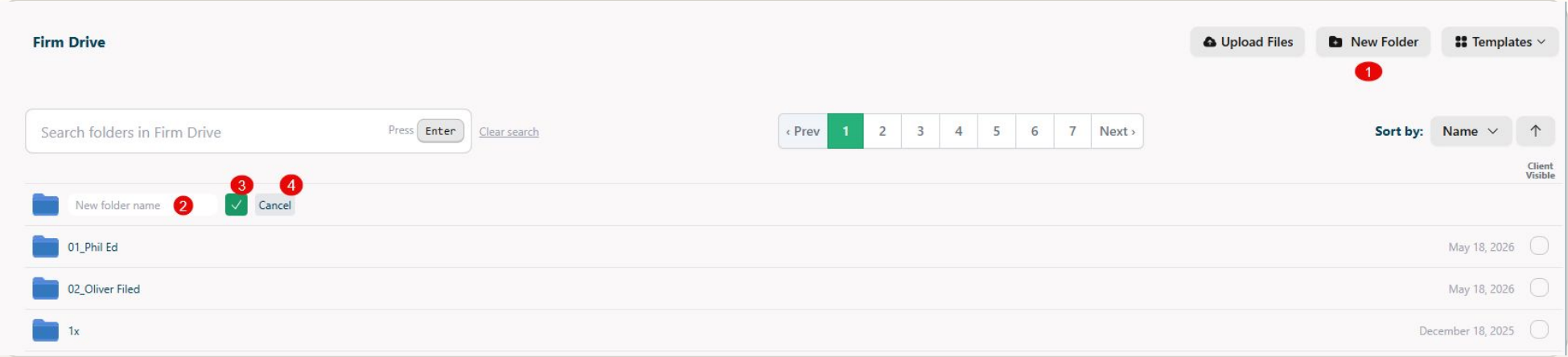
Drag and drop to the correct folder

DRIVE

Create a new folder.

A four-step round trip — fast enough that it's worth doing it well.

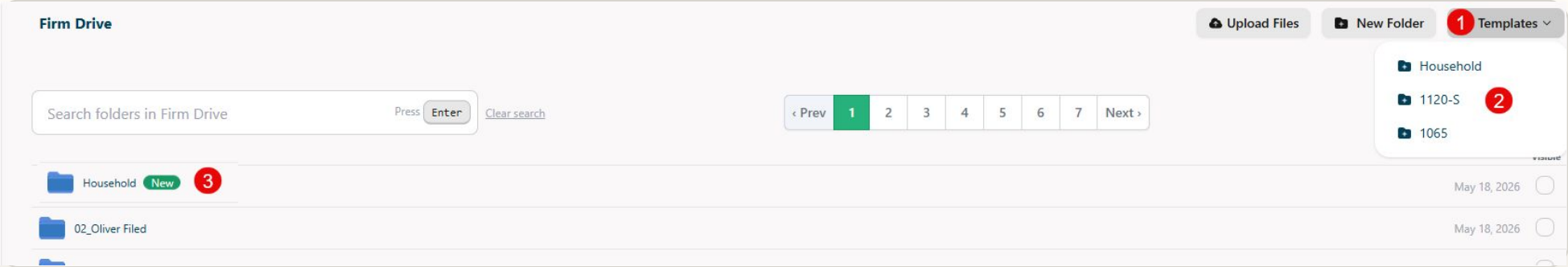
- Click on New Folder
- Name the folder
- Click the checkmark to save
- Click Cancel to remove the folder



DRIVE

Apply a template.

Open a client first — otherwise Truss creates a random standalone Drive folder.

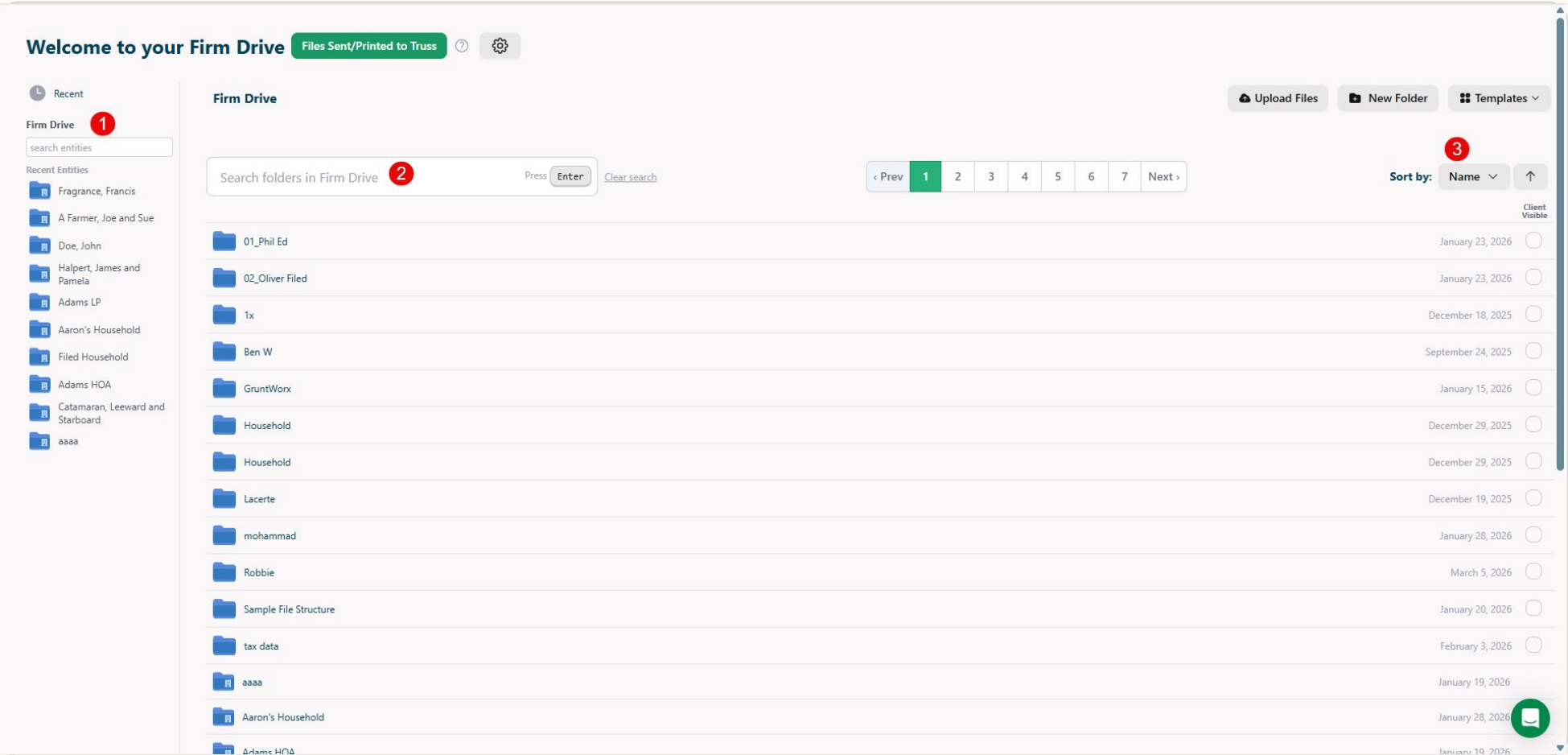


Click on Templates

Select Template

Have a client open, or you'll make a stray folder

Quick navigation.



Recently Viewed items

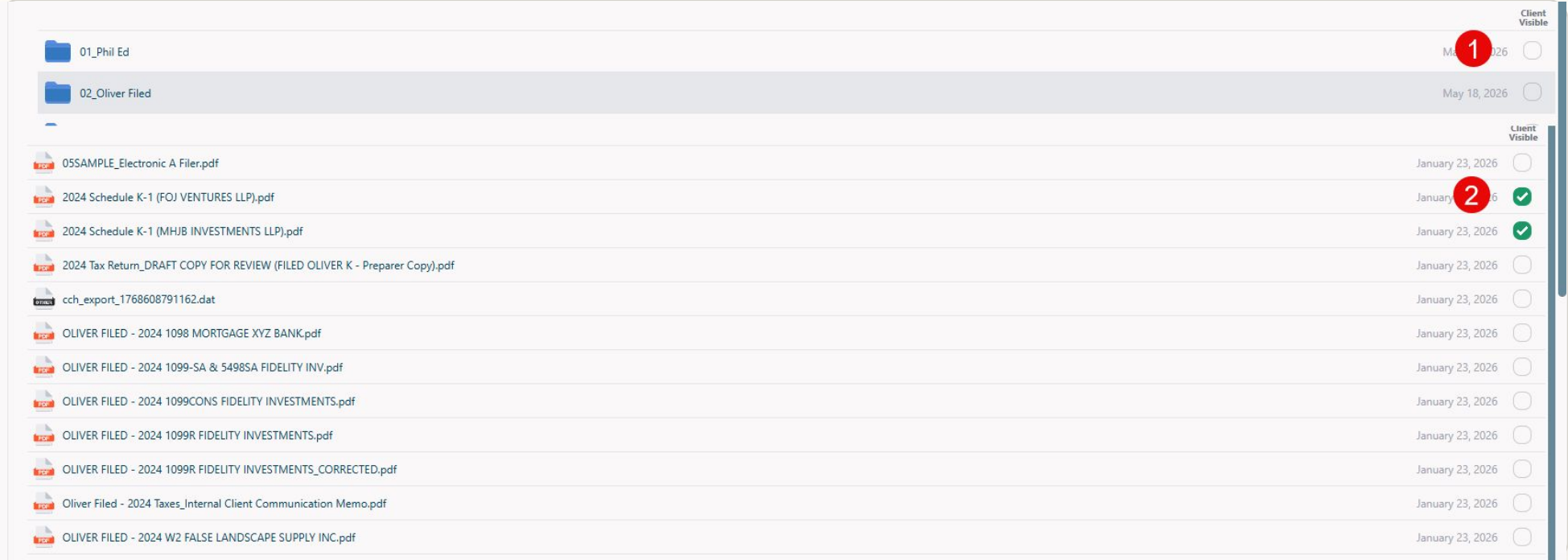
Search bar

Sort by the name of the drives

DRIVE

Pick what clients see.

Control visibility at the folder level — or down to individual documents.



Folder selected

All items in the folder will not be visible to the taxpayer

Documents selected

Specific items in the Drive you want visible to taxpayers

SEE YOU NEXT TIME

Thank

Up next: **Meet Max AI** — your new
sidekick.

you.