

TRUSS TRIBE · LIVE SERIES

New client intake & recurring tasks.

Spin up any engagement type from scratch — and put your payroll and bookkeeping work on autopilot.

TODAY

Agenda.

A walk through creating a new client intake for every engagement type — plus recurring tasks for payroll and bookkeeping clients.

Question of the Day
Truss Tribe Live Series
New Client Intake
Recurring Tasks

Ten sessions. You are here.

PART 1

Settings: Build Your Foundation
The core configuration walk-through.

REPLAY AVAILABLE

PART 2

Settings: Power Moves & Pro Tips
Advanced configuration, automations, edge cases.

REPLAY AVAILABLE

PART 3

Contacts, Entities & Drive
The Truss backbone.

REPLAY AVAILABLE

PART 4

Meet Max AI
Your new sidekick.

REPLAY AVAILABLE

PART 5

New Client Intake & Recurring Tasks
Get a season off the ground.

TODAY

IN SESSION

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 →

THE BASICS

Create a project.

Every engagement starts the same way — a project, a contact, and an invite.

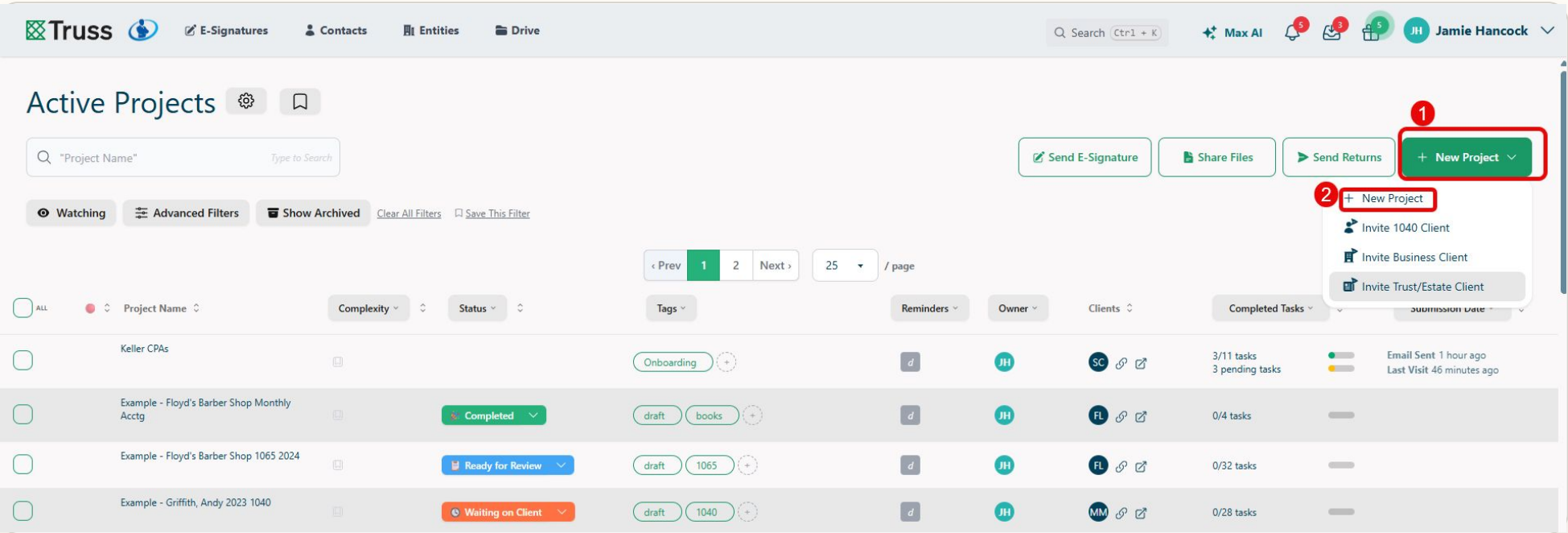
CREATE A NEW PROJECT · MANUALLY

Start from scratch.

Two clicks from anywhere in Truss to a brand-new project.

Click on + New Project

Select + New Project



CREATE NEW PROJECT

The full setup flow.

New Project

1 Selected Project: New Project NEW

1 Project Name
New Project

2 Next ↓

2 Selected 1 Recipients

3 Contact name

4 Contact Email

5 Add Recipient

WC Withdraw Excess A Contribution
jamie@gettruss.io

6 Next ↓

3 Request Documents

7 Search Templates

8 Add Task(s)

8 Ask a question 9 + Task

10 Next ↓ 11 Skip

4 Share Files / E-Signature

12 Upload
Drag or click to upload a file

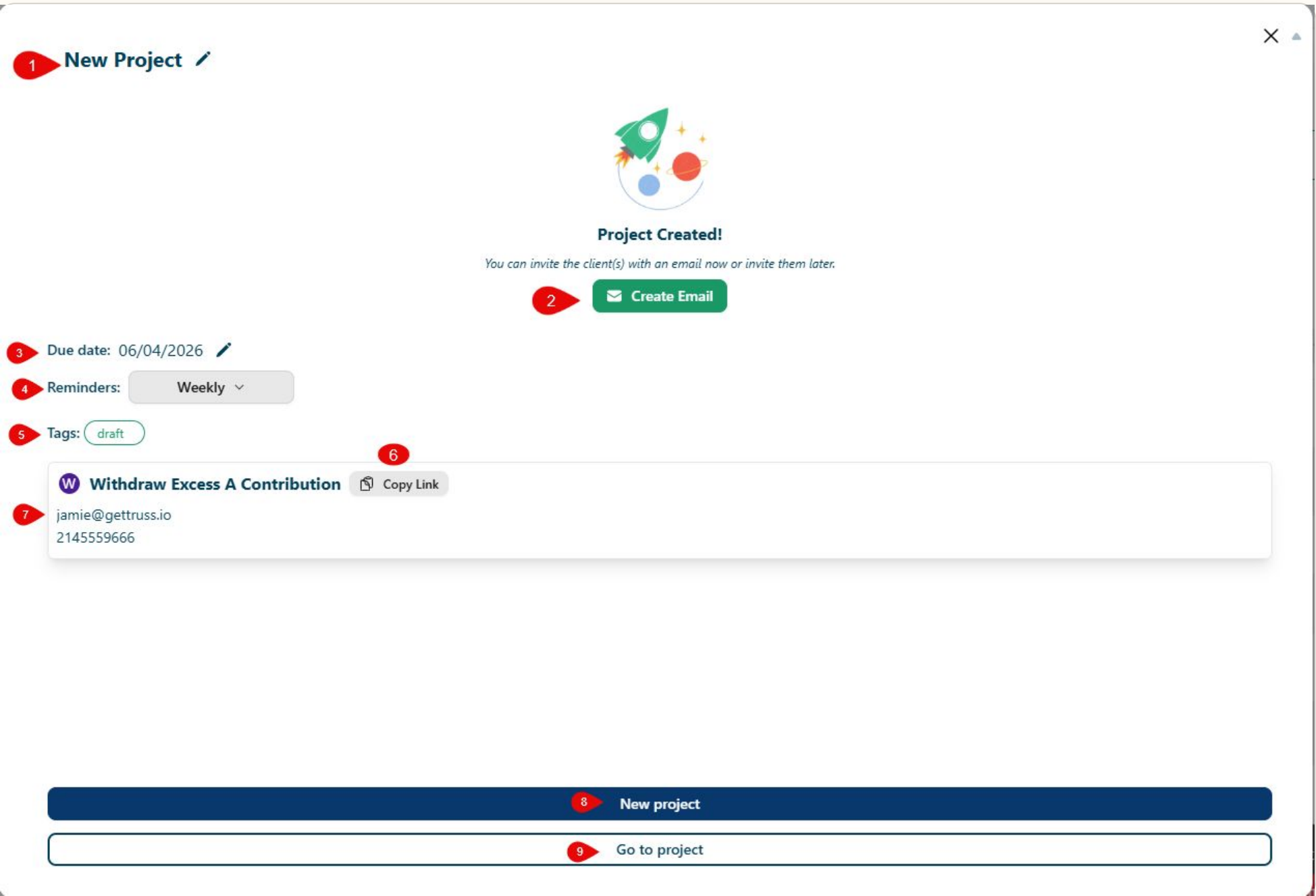
13 Create Project

- Add Project Name
- Click Next
- Add Contact Name
- Add Contact Email
- Add Recipients
- Click Next
- Request Documents / Search Templates
- Add a Question
- Add a Task
- Click Next
- Skip Request Documents
- Upload, Share file, or E-signature
- Click to Create Project

CREATE A NEW PROJECT

Once it exists.

Fine-tune the project, then grab the magic link or jump straight in.



Edit the Project Name

Create Email

Edit Due Date

Set Reminders

Add Tags

Copy Magic Link

Create Another Project

Go To the Project

ENGAGEMENT TYPE · 1 OF 3

1040 intake.

Invite an individual prospect and walk them from email to submitted documents.

Send the invite.

Use **one email** even for MFJ. The link button is only needed if your template doesn't already include one.

×

Invite 1040 Client

Select Client's Contact Owner:

1

Jamie Hancock

Send To:

2

Email

Write a custom email

To insert the form link button, use [link] or [link: customized button text]. To insert the contact owner's email signature, use [email_signature].

3

Subject

Welcome to Jamie's Training Account

Search Template

Email Body

4

B

I

↺

↻

Hi,

5

Please visit the link below and fill out the information form. If you have any questions, please let me know.

Get Started

[email_signature]

→ Insert Link Button

6

Send Invite

Select Contact Owner

Enter Email address

Only one, even for MFJ

Search Email Templates

Insert Link Button

Only if the template lacks one

Review the Body of the Email

Click to Send Invite

Truss

09 / 32

What the prospect receives.



A short series of questions.

Welcome!

We have just a few questions to get you started.

Get Started

A project, then a link.

A project is created on your side, then an email goes out with a link straight to it.

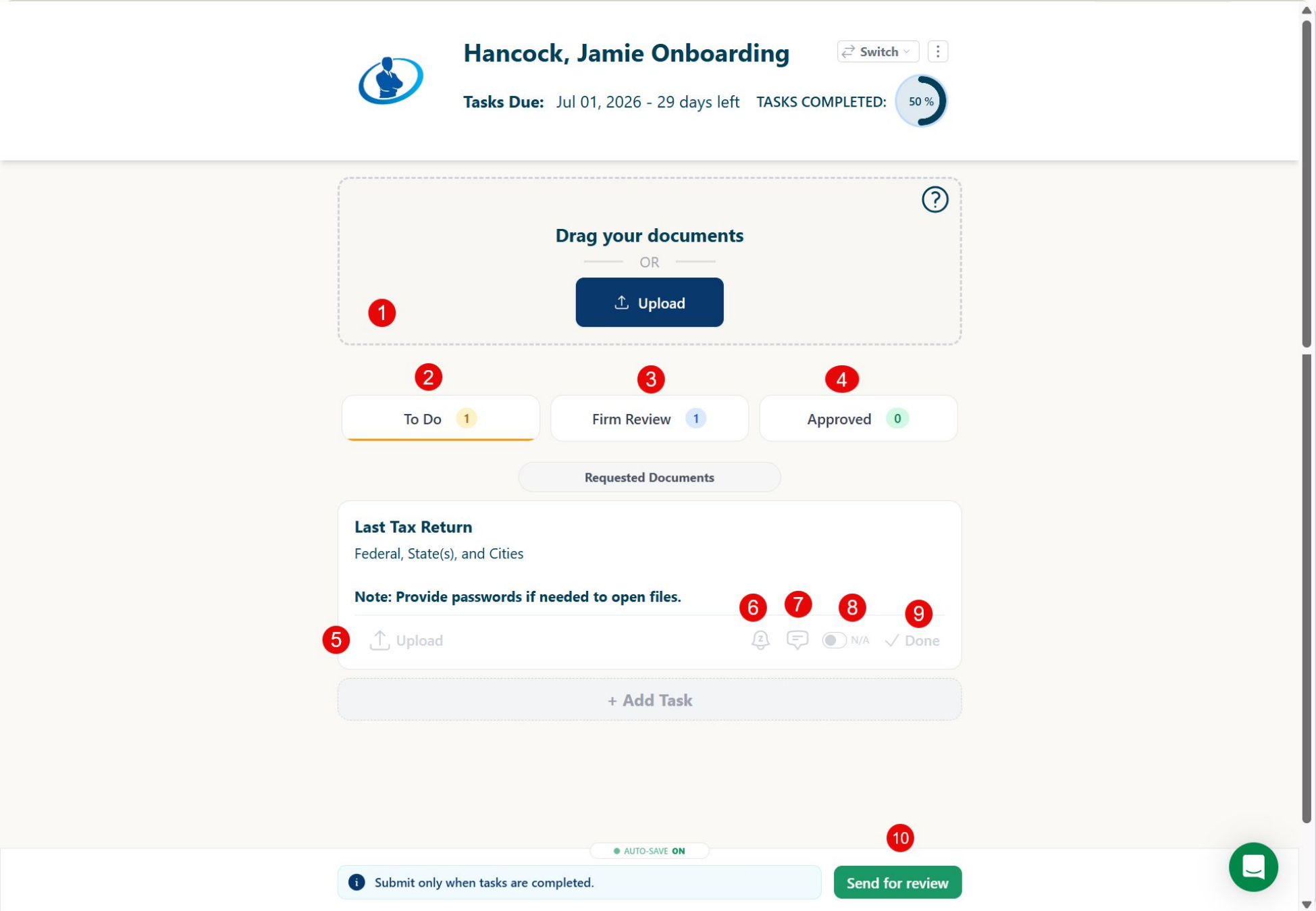
Nice work!

Next Step: Upload Tax Return

You should be receiving an email now with an invite.

(If you don't see one there, please check your spam filter.)

What the client sees.



Upload Documents

To-Do Items

Firm Review

Approved by Firm

Upload Button

Clients can also drag and drop

Snooze Task

Comment

N/A

Mark N/A if they don't have a return

Done

Submit for Review

Track every invite.

Client Invites

1

2

3

4

5

6

7

8

9

10

11

Q "Email or Subject"

Invite Type

Clear All Filters

< Prev

1

Next >

Invite Type	Sent To	Sent As	Sent On	Subject	Status	Actions
1040	jamie@gettruss.io	Jamie Hancock	Mon, Jun 1, 02:57 PM PDT	Welcome to Jamie's Training Account	Project Created	View Details
1040	jamie@gettruss.io	Jamie Hancock	Wed, May 27, 09:18 AM PDT	Welcome to the firm!	Project Created	View Details

< Prev

1

Next >

- Search Bar
- Invite Types
- Clear Filters
- Sent To
- Sent As
- Sent On
- Subject
- Status
- Shows when the project was created
- Actions
- View Details
- Delete

Truss

ENGAGEMENT TYPE · 2 OF 3

Business intake.

Same flow, tuned for partnerships, S-corps, and C-corps.

Invite a business client.

×

Invite Business Client

Select Client's Contact Owner:

1 Jamie Hancock

Send To:

2 Email

Write a custom email

To insert the form link button, use [link] or [link: customized button text]. To insert the contact owner's email signature, use [email_signature].

3 Subject

Welcome to Jamie's Training Account

Search Template

Email Body

4

→ Insert Link Button

5

Hi,

Please visit the link below and fill out the information form. If you have any questions, please let me know.

Get Started

[email_signature]

6

Send Invite

Select Client Contacts Owner

Add Email

Select a Template

Insert Link Button

If needed

Body of Email

Send Invite

What the prospect receives.



Click Start to begin.

Welcome to the Business Questionnaire

Start

🕒 Takes 7+ minutes

What the client sees.



Unicorn Magic Onboarding

Tasks Due: Jul 01, 2026 - 29 days left

TASKS COMPLETED: 25 %

1

2

3

4

To Do 3

Firm Review 1

Approved 0

Requested Documents

Invite us as Accountant on Quickbooks

1. [Sign in to QuickBooks Online](#) as a primary admin.

2. Select **Settings**, then select **Manage users**.

3. Select the **Accountants** or **Accounting firms** tab.

4. Enter your accountant's email address, then select **Invite**.

[Click here for full help article](#)

6

7

8

9

5

Upload

2

3

4

Done

Previous Tax Returns

Last year complete tax returns (Federal, State(s), and Cities).

Note: Provide passwords if needed to open files.

Upload

2

3

4

Done

IRS SS-4 EIN Letter

This would have been mailed to you (or printed from online) from the IRS after you applied for your EIN.

Upload

2

3

4

Done

+ Add Task

- Bulk Upload
- To-Do
- Firm Review
- Firm Approved
- Upload Button
- Snooze Button
- Comment
- N/A
- Done
- Submit for Review

Track every invite.

Client Invites

1

Q "Email or Subject"

2

Invite Type ▾

3

Clear All Filters

4

Invite Type

5

Sent To

6

Sent As

7

Sent On ▾

8

Subject

9

Status ▾

10

Actions

11

1040	jamie@gettruss.io	Jamie Hancock	Mon, Jun 1, 02:57 PM PDT	Welcome to Jamie's Training Account	Project Created ↗	View Details	
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< Prev

1

Next >

Search Bar

Invite Types

Clear Filters

Sent To

Sent As

Sent On

Subject

Status

Shows when the project was created

Actions

View Details

Delete

 **Truss**

ENGAGEMENT TYPE · 3 OF 3

Trust & estate.

The same intake pattern for fiduciary engagements.

TRUST / ESTATE · INVITE

Send the invite.

Invite Trust / Estate Client

Select Client's Contact Owner:

1 Jamie Hancock

Send To:

2 Email

8

Write a custom email

To insert the form link button, use [link] or [link: customized button text]. To insert the contact owner's email signature, use [email_signature].

Subject

3 Welcome to Jamie's Training Account

Search Template

Email Body

4

→ Insert Link Button

Hi,

5 Please visit the link below and fill out the information form. If you have any questions, please let me know.

Get Started

[email_signature]

6

Send Invite

- Select Prospect Contact Owner
- Enter the Prospect Email
- Search Templates
- Insert Link Button
- Body of Email
- Send Invite

What the prospect receives.

Welcome to Jamie's Training Account

Inbox x



Jamie's Training A...

2:57 PM (1 minute ago)

☆

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⋮

to me ▾



Log email to HubSpot ▾

Hi,

Please visit the link below and fill out the information form. If you have any questions, please let me know.

Get Started

Best,

Jamie Hancock

Click Start to begin.

Welcome to the Estate/Trust Questionnaire

Start

🕒 Takes 1 minute

What the client sees.



Unicorn Magic Trust Onboarding

Switch

Tasks Due: Jul 01, 2026 - 29 days left

TASKS COMPLETED: 33 %

1

Drag your documents

OR

Upload

2

To Do2

3

Firm Review1

4

Approved0

Requested Documents

Copy of Death Certificate

Please upload a copy of the Death Certificate.

6789

5

Upload

N/A

Done

Will or Trust Documents

Please upload a copy of the Will or Trust documents

- Bulk Upload
- To-Do
- Firm Review
- Firm Approved
- Upload Button
- Snooze Button
- Comment
- N/A
- Done
- Submit for Review

Track every invite.

Client Invites

1

2

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6

7

8

9

10

11

Q "Email or Subject"

Invite Type

Clear All Filters

< Prev

1

Next >

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Next >

- Search Bar
- Invite Types
- Clear Filters
- Sent To
- Sent As
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- Subject
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- Actions
- View Details
- Delete



Truss

ON AUTOPILOT

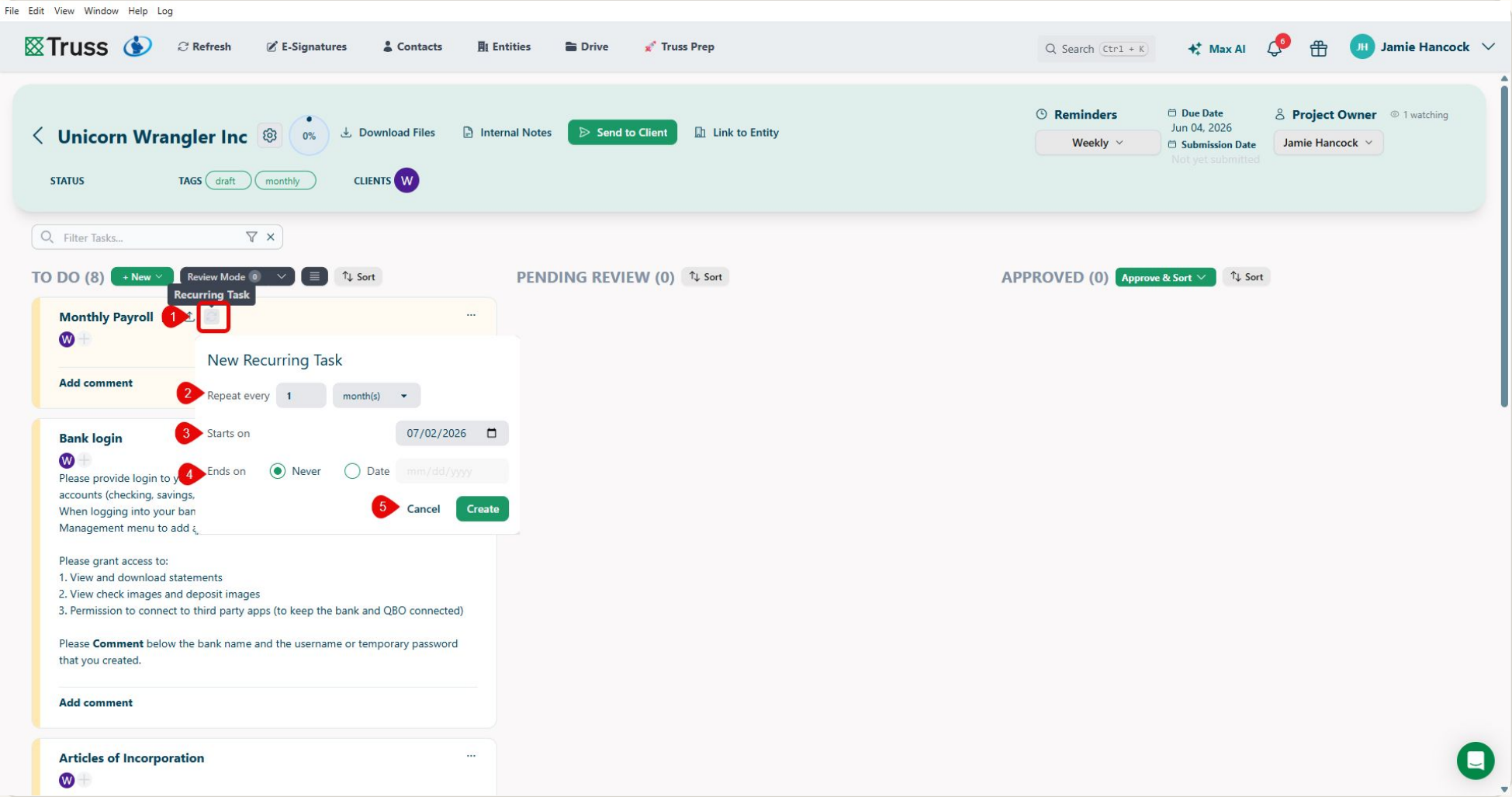
Recurring tasks.

Set payroll and bookkeeping work to repeat on a schedule — and stop recreating it by hand.

RECURRING TASKS

Create a recurring task.

The recycle icon is **gray and easy to miss** — look closely on the task row.



Click the recycle icon
It's gray, so it can be hard to see

Set the frequency

What date is it starting

When does it end

Cancel or Create

SEE YOU NEXT TIME

Thank

Up next: **Organizers,**

Reimagined.

you.