

TRUSS TRIBE · LIVE SERIES

Reimagine organizers.

From a stack of PDFs and data files to structured, review-ready intake — without the busywork.

TODAY

Agenda.

From raw data files to scheduled client outreach — the full organizer workflow.

Question of the Day

Truss Tribe Live Series

Data Upload

Organizer Uploads Tab

Create a Project

Schedule a Message

Client Side

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.

REPLAY AVAILABLE

PART 6

Organizers, Reimagined

From PDF to structured intake.

IN SESSION

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 →

STEP 1

Data upload.

Export from your tax software, then hand the file to Truss.

DATA FILE UPLOADS

Download your data, by tax software.

Follow the steps in the **Client File Upload Instructions** article for your software before uploading.

[UltraTax](#)

[Lacerte](#)

[ProSeries](#)

[ProConnect](#)

[ATX](#)

[Crosslink](#)

[TaxWise](#)

[TaxAct](#)

[TaxSlayer](#)

[ProSystem FX](#)

[CCH Axcess](#)

[Drake](#)

STEP 2

Organizer tab.

Where every upload lands, gets read by AI, and turns into a project.

UPLOAD ORGANIZERS

Drag, drop, done.

We **manually convert** these files for you. We move quickly, but timing depends on volume.

Navigate to Upload Organizers

Drag and drop, or click to Browse
Your .zip data file or PDF organizer

FileEditViewWindowHelpLog

Truss

RefreshE-SignaturesContactsEntitiesDriveTruss Prep

SearchCtrl + KMax AINotificationsGift

JHJamie Hancock

Organizer Uploads

TAX SOFTWARE

Lacerte

Change in Organization Settings

We support data file imports for your tax software. Learn More

CONTACT INFO

Will overwrite with Tax Software Data

Updates SSN, DOB, email, and name from Tax Software when draft projects are created.

Contact support to change

ENGAGEMENT LETTERS

Auto-add OFF

Enable in Engagement Letter Templates

Drag your PDF organizers (single or multiple) or .zip client data file (complete data sets only) here

OR

Browse Files

Organizer Name

Prev1Next

25

Displaying 8 items

All8Ready0Needs Fixing0

Status

Complexity

View Archived

Sort By

Advanced Filters

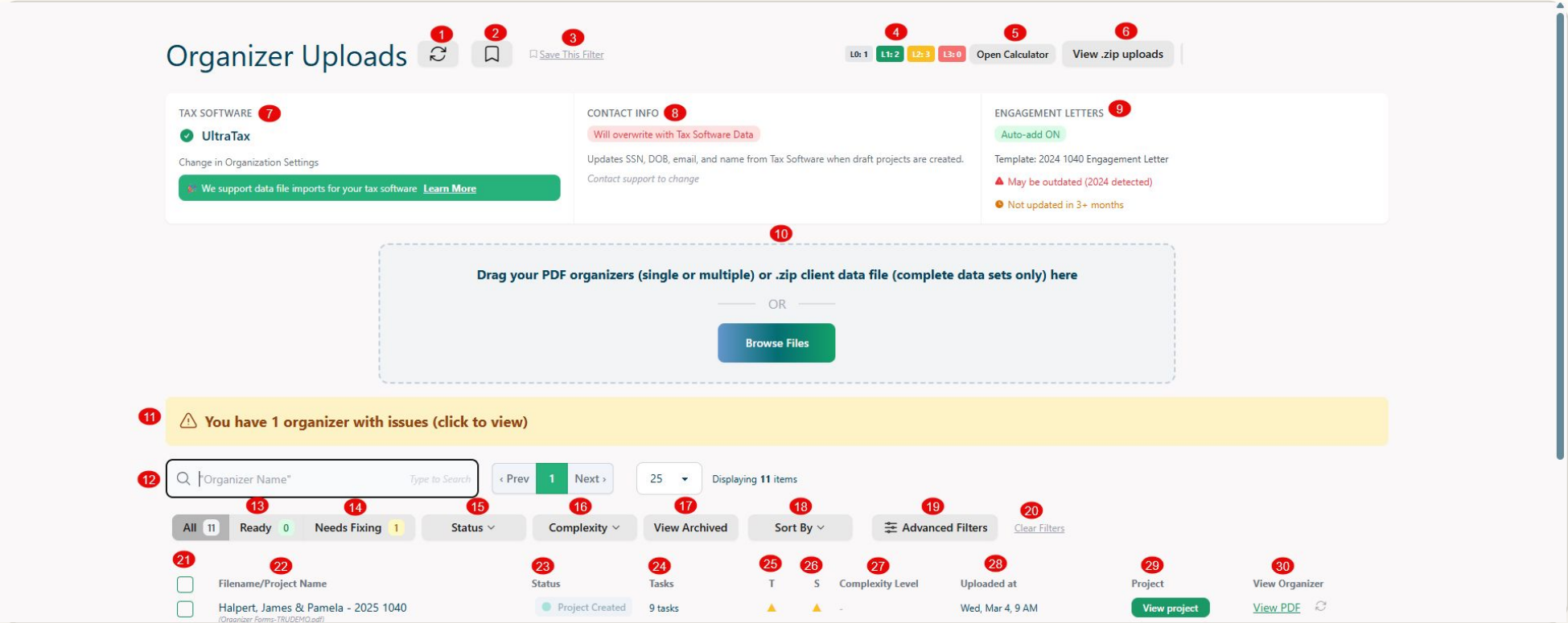
Clear Filters

Filename/Project Name	Status	Tasks	T	S	Complexity Level	Uploaded at	Project	View Organizer
14SAMPLE_Mr. and Ms. A Passive Example.pdf	Project Created	5 tasks	✓	▲	L2	Mon, Jun 8, 1 PM	View project	View PDF
02SAMPLE_Withdraw Excess and IRA A Contribution.pdf	Project Created	6 tasks	✓	✓	L0	Fri, May 29, 1 PM	View project	View PDF
02SAMPLE_Withdraw Excess and IRA A Contribution.pdf	Project Created	5 tasks	✓	✓	L0	Fri, May 29, 12 PM	View project	View PDF
02SAMPLE_Withdraw Excess and IRA A Contribution.pdf	Project Created	2 tasks	✓	✓	L0	Thu, May 28, 11 AM	View project	View PDF
02SAMPLE_Withdraw Excess and IRA A Contribution.pdf	Project Created	3 tasks	✓	✓	L0	Wed, May 27, 9 AM	View project	View PDF
16SAMPLE_Dad and Mom A Sample (1).pdf	Project Created	0 tasks	✓	✓	L0	Wed, May 27, 9 AM	View project	View PDF
2024 1040 Test Organizer Micky & Minnie .pdf	Project Created	7 tasks	✓	▲	L2	Thu, May 21, 2 PM	-	View PDF
18SAMPLE_Earner A Wage.pdf	Project Created	1 task	✓	■	L0	Wed, Apr 1, 11 AM	View project	View PDF

- Refer & Earn
- My Settings
- Integrations
- Organization Settings
- Templates
 - Upload your Organizers
 - Upload your Returns
 - Upload Scanned PDF
 - Scheduled Messages
- Forms
- File Shares
- Client Invites
- Contact Support
- Set Up Payments
- Max AI NEW
- Sign Out

REFERENCE

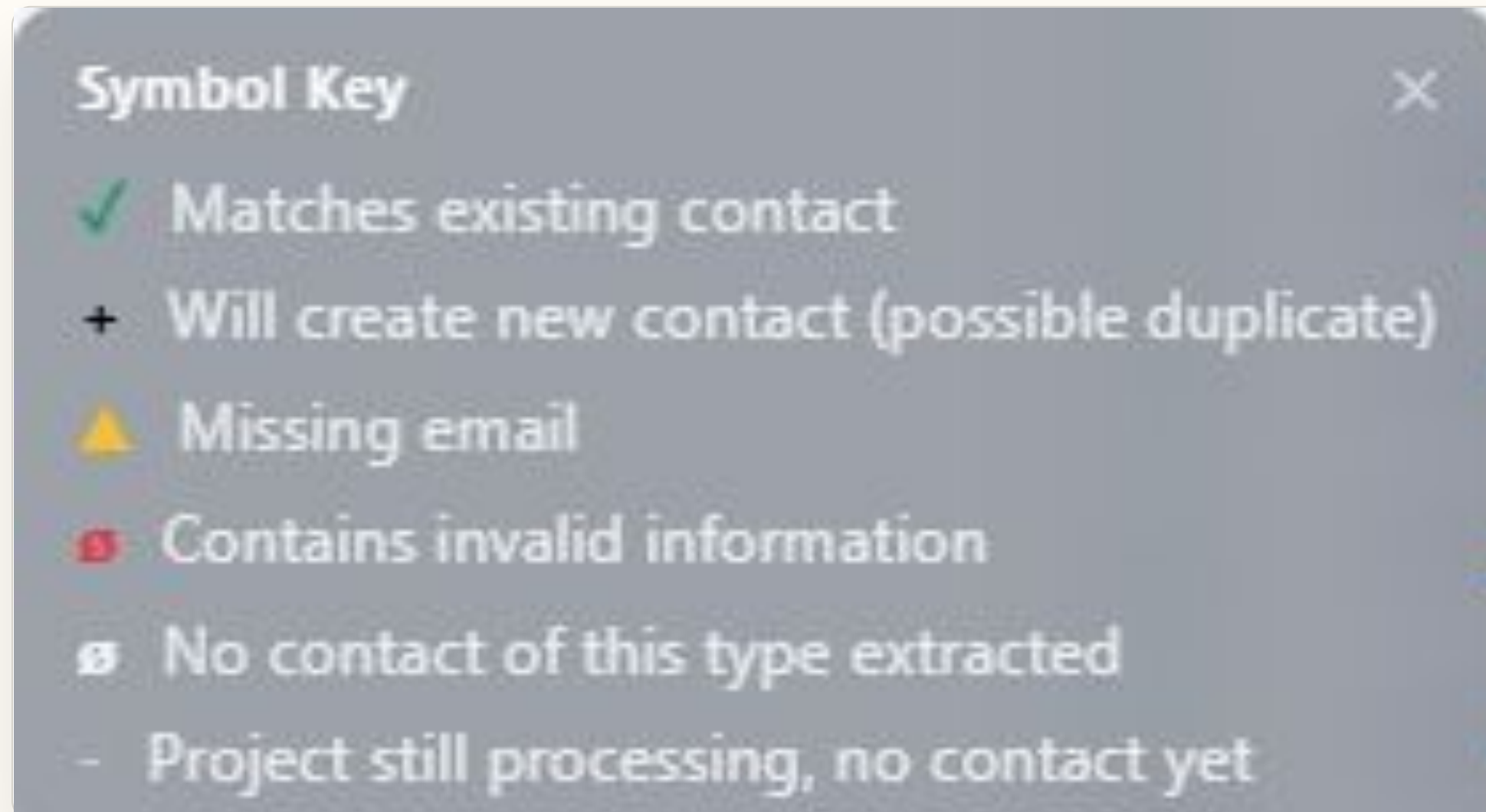
Every control on the upload page.



- Refresh
- Saved Filters
- Save this Filter
- Complexity Level Count
- Open Truss Prep Calculator
- View .zip uploads
- Tax Software
- Contact Info
- Engagement Letters
- Upload zip or organizers
- Organizers with issues
- Search bar
- Ready to create
- Needs Fixing
- Status
- Complexity
- View Archived
- Sort By
- Advanced Filters
- Clear Filters
- Select clients to create projects
- File / Project Name
- Tasks pulled
- Taxpayer
- Spouse
- Complexity Level
- Uploaded Date
- Project
- View PDF

UPLOAD ORGANIZERS

Symbol key.



Already a Truss Contact



Truss got the data from the upload and will create a contact
— can cause duplicates.



Missing email

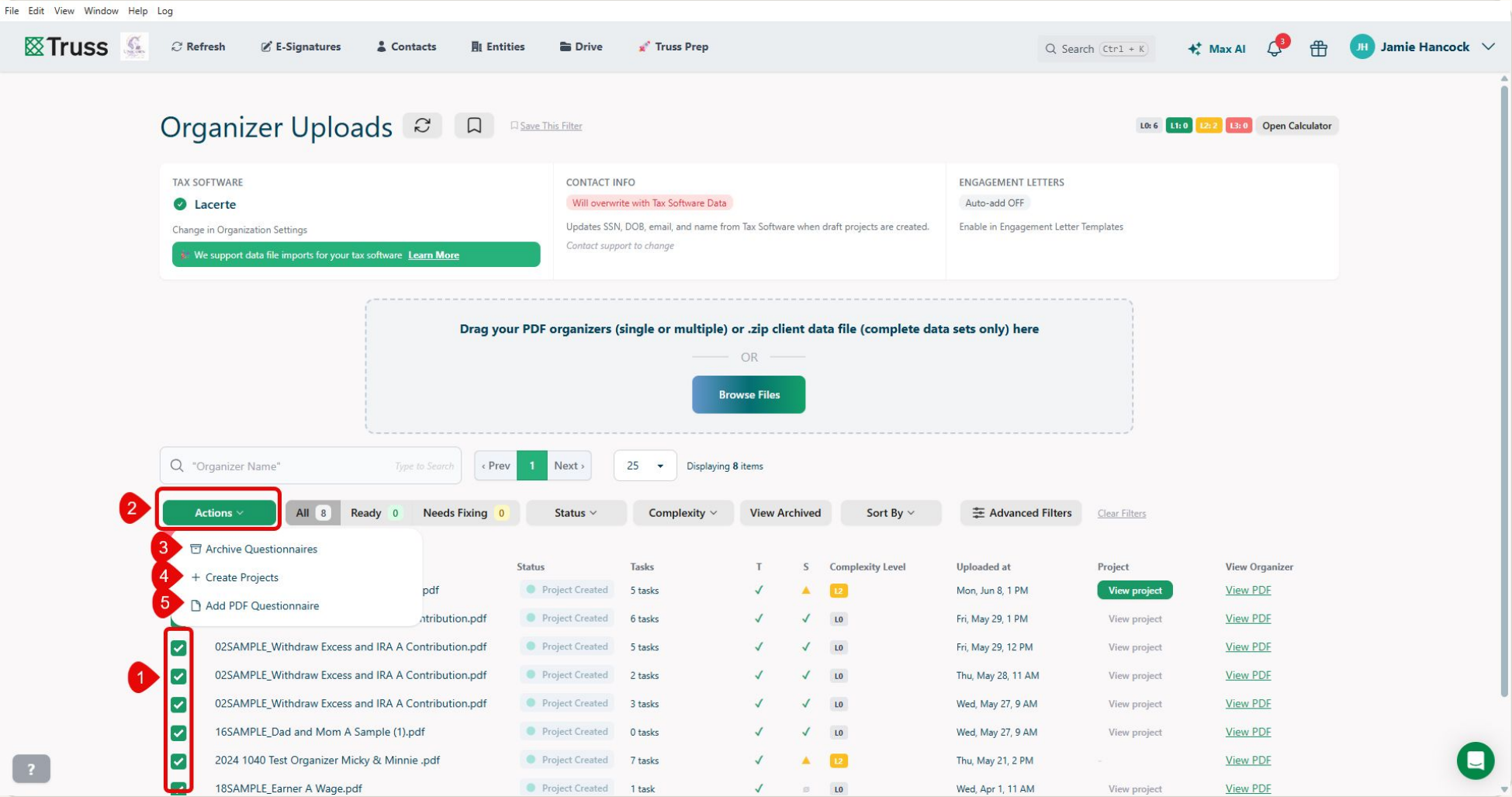


Contains invalid info — must be fixed before the project can
be created.

UPLOAD ORGANIZERS

Actions.

Select files first — the Actions menu only populates once something is checked.



Select files to populate Actions

Click on Actions

Archive all projects selected

Create Projects

More on this shortly

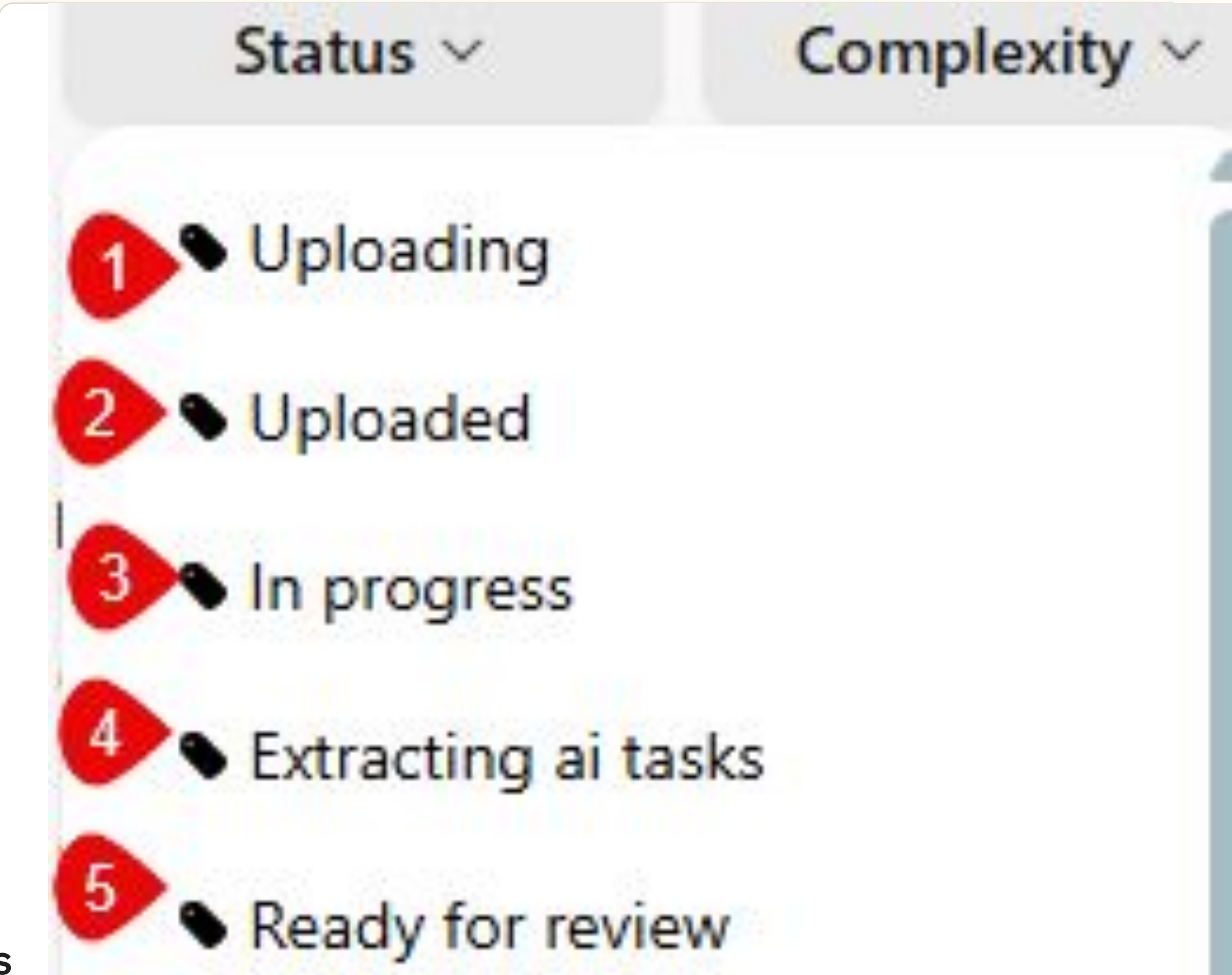
Add PDF Organizer

Adds the organizer for the client to download and fill out

UPLOAD ORGANIZERS

Status, end to end.

Track each upload from arrival through AI extraction to ready.



Uploading

Still in process

Uploaded

Complete — you can start to create a project

In Progress

The AI is still reading the upload

Extracting AI Tasks

Ready for Review

Complete

Error

UPLOAD ORGANIZERS

Needs fixing.

Resolve missing details inline, right on the upload page.

 **You have 1 organizer with issues (click to view)**

- Project name
- Taxpayer first name
- Taxpayer last name
- Enter missing email
- Spouse first name
- Spouse last name
- Enter email address
- Click the green check box

< Organizer Uploads With Issues

 **You have 1 organizer with issues**

Some of your organizer uploads have issues - please fix each of the following:

1		2		3		4		5		6		7		8	
Filename/Project Name		First Name		Last Name		Taxpayer Email		First Name		Last Name		Spouse Email		SSN	
TRUSS Test Client 2 84470001 V1.pdf		Lou		Lane		Email Missing		ON FILE		Lisa		Lane		Email Missing	
														ON FILE	
														☒	

UPLOAD ORGANIZERS

Sort by.

Archived

Sort By ▾

1

Tasks (Most)

2

Tasks (Least)

3

🕒 Date Added (Newest)

4

🕒 Date Added (Oldest)

- Task (most)
- Task (least)
- Date added (newest)
- Date added (oldest)
- File name (A–Z)
- File name (Z–A)

Four levels of return.

L0	Basic Return
L1	Essential Returns
L2	Advanced Returns
L3	Ultra Complex

Truss Prep

Truss Prep support by software
Use the calculator to see how much you'll save

STEP 3

Create a project.

Turn a batch of ready uploads into live projects in one move.

CREATE A PROJECT

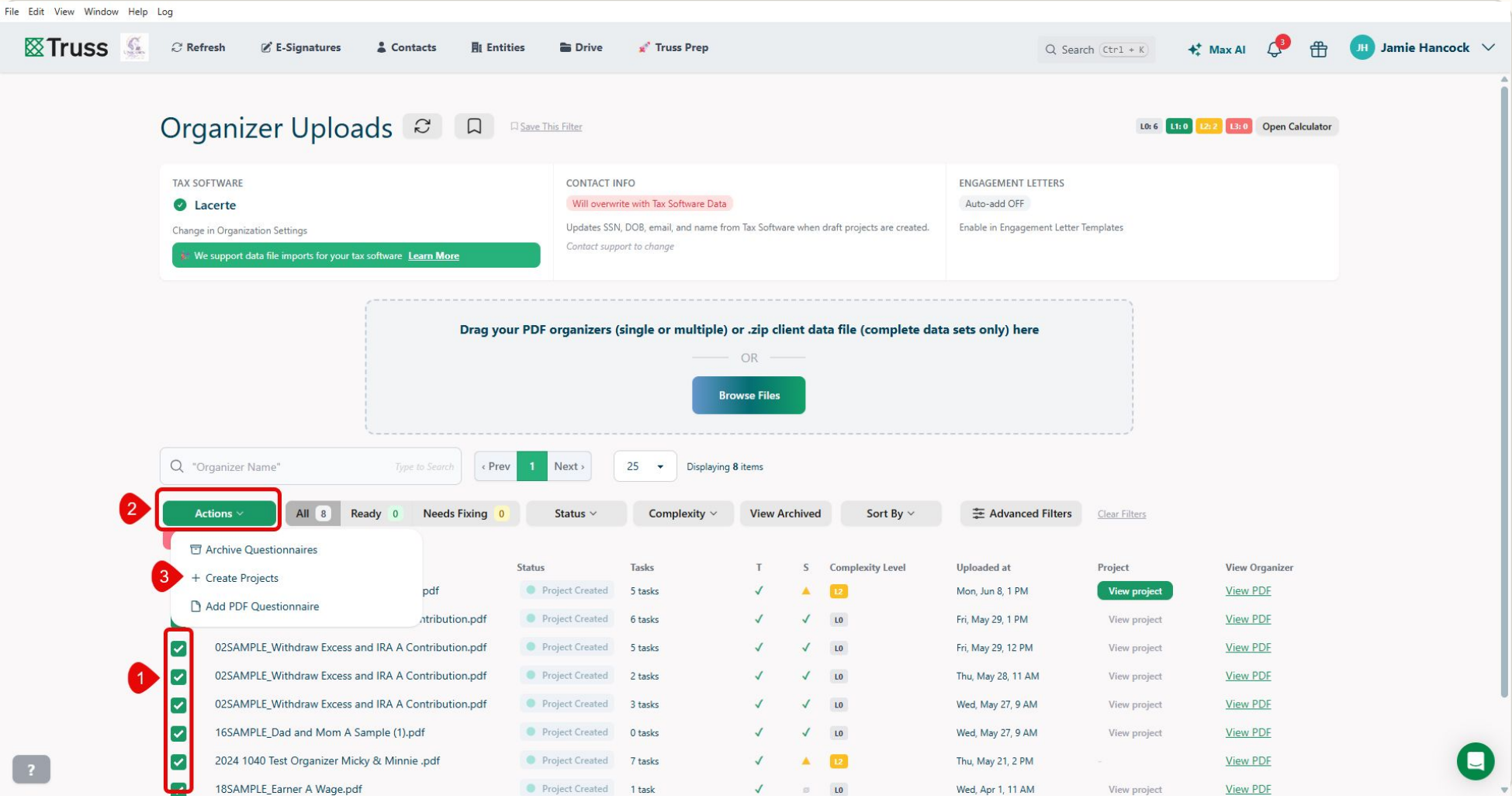
Create bulk projects.

Select everything that's ready and spin up projects together.

Select File / Project

Click on Actions

Create Project



STEP 4

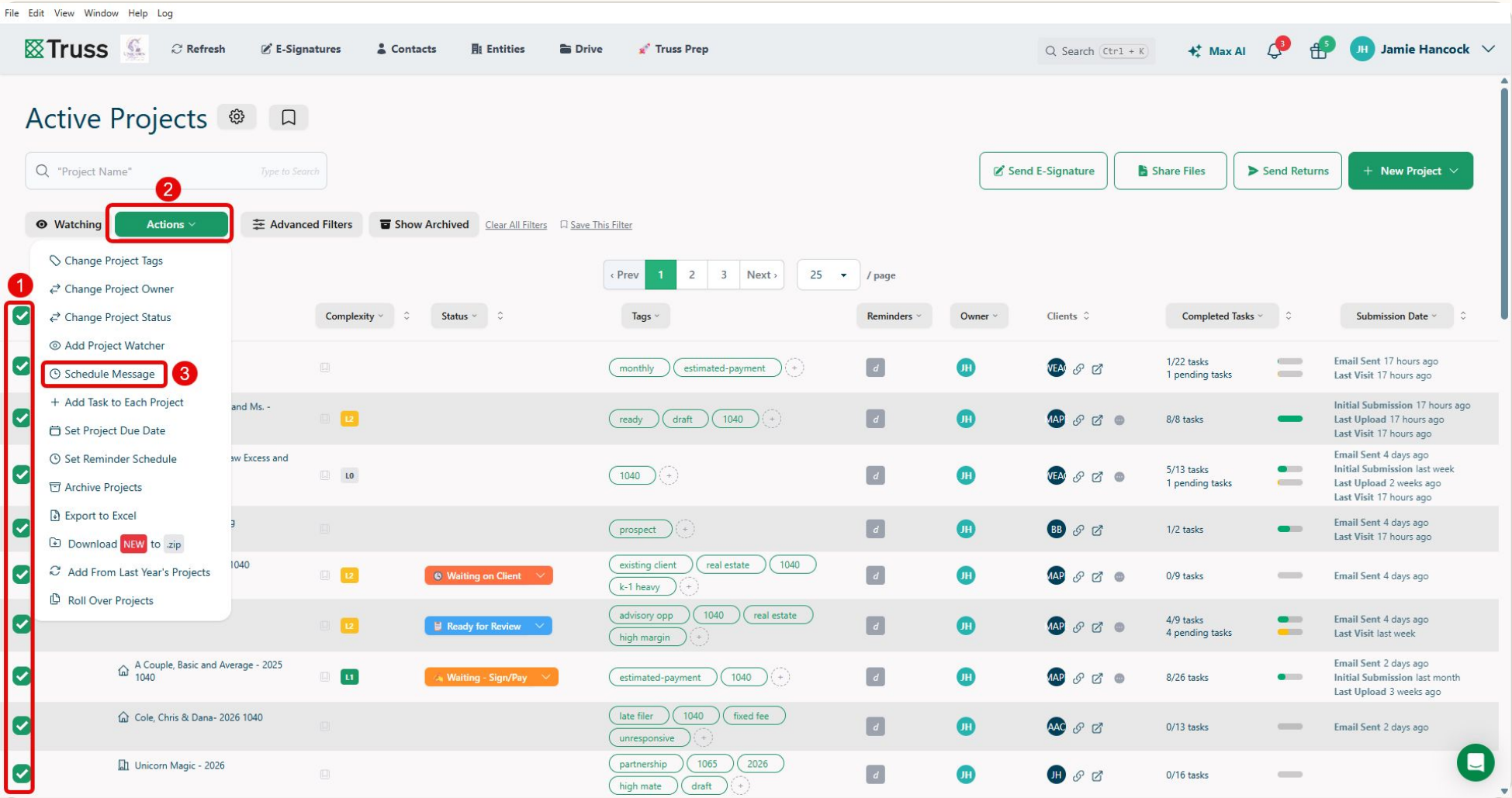
Schedule a message.

Queue email and SMS outreach to land exactly when you want it to.

SCHEDULE A MESSAGE

Three steps to queue.

- Select the projects
- Click on Actions
- Select Schedule Message



SCHEDULE A MESSAGE

Schedule email.

Consolidate emails per contact works for business clients, but not for MFJ couples sharing an email.

Schedule Message

EmailText (SMS)NEW

1

☐ Consolidate Emails for Each Contact

Choose a Date to Send

2

mm/dd/yyyy

3

9 AM

4

PT

☒ Skip weekends (Sat/Sun) when batching

5

Send Email As This User:

6

Luis Tully

Write a custom Email message

You can use placeholders such as [first_name], [last_name], [email], and [entity]. To insert the button, use [link] or [link: customized button text]. To insert an external url as a button, use [link: customized button text](https://my-external-url.com). To insert the sender's email signature, use [email_signature].

7

Subject

Email Body

B I  

10

Hi [first_name],

I've requested some documents from you. Please visit the link below and take action. If you have any questions, please let me know.

[link]

[email_signature]

8

Insert Email Template

9

Insert Link Button

Consolidate Emails for Each Contact	Subject
Enter the date to send	Only needed if not using a template
Select a send time	Insert Template
What time zone	Insert Link if needed
Skip Weekends (on by default)	Body
Select who the email is from	Schedule Send

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SCHEDULE A MESSAGE

SMS message.

Same scheduling controls, sent as a text.

Schedule Message

EmailText (SMS)NEW

Note: We're testing a new texting feature that is currently open to all firms. Please feel free to trial it, and reach out if you are interested in using this feature or have any feedback!

Choose a Date to Send

1

mm/dd/yyyy

2

9 AM

3

PT

☒

Skip weekends (Sat/Sun) when batching

4

Send Text (SMS) As This User:

5

Luis Tully

Write a custom Text (SMS) message

You can use placeholders such as [first_name], [last_name], [email], and [entity]. To insert the project link, use [link] or [link: customized button text]. To insert the sender's email signature, use [email_signature].

Text (SMS) Body

B I

7

Hi [first_name],

I've requested some documents from you. Please visit the link below and take action. If you have any questions, please let me know.

[link]

[email_signature]

6

Insert Link

8

- Select date
- Set time to send
- Select time zone
- Skip Weekends
- Select who it's coming from
- Insert link if needed
- Body of text
- Schedule Send

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SCHEDULE A MESSAGE

Manage scheduled email.

Truss defaults to 200 emails per day — you can raise this to 500.

<

EDITING

Scheduled Email - Tax Season is Here! *Your Personal Checklist*

1

Send Test Email

i

PRO TIP

Consider scheduling this in batches (takes one click)!

This email is scheduled to send to 1940 projects (2369 total emails). In some cases, sending more than 200 emails a day from the same account may cause a greater portion of the emails to go to your client's spam folder. We recommend scheduling these to be sent over several business days in batches of 200 emails or less.

2

Schedule this email to be spread out in batches of 200 emails per day

3

Change

Scheduled to send to: 1940 projects (2369 total emails).

4

Edit Projects

Scheduled to send on: Tue, Jun 9, 2026, 9 AM PDT

5

Choose a new date

Sending as this user:

Luis Tully

This email will be sent as dan@gettruss.io

6

☐

Esignature only

7

Write a custom Email message

You can use placeholders such as [first_name], [last_name], [nickname], [email], and [entity]. To insert the button, use [link] or [link: customized button text]. To insert an external url as a button, use [link: customized button text](https://my-external-url.com)

Subject

Tax Season is Here! *Your Personal Checklist*

8

9

Email Body

B

I

↺

↻

Hi [first_name]!

We're gearing up for the 2024 tax filing season! We're excited to introduce a new online client portal that we hope will make the daunting

Insert Email Template

→ Insert Project Link

Send Test Email	Sending as this user
Emails per day Defaults to 200, up to 500	E-signature only
Select change to update	Insert template
Edit Projects	Insert link if needed
Choose a new date	Update body of email
	Update

21 / 23

SCHEDULE A MESSAGE

Edit or delete a scheduled send.

Adjust or pull a queued send before it goes out.

Select Engagement Type

What is the status of the schedule

Delete the schedule

Edit the schedule

Scheduled

Emails

1

Scheduled Emails

Subject: Tax Season is Here! *Your Personal Checklist*

unsent

2

Scheduled to send Tue, Jun 9, 2026, 9 AM PDT

Projects waiting to send: 1940 projects (2369 total emails)

3

4

Subject: Tax Season is Here! *Your Personal Checklist*

sent

Scheduled to send Fri, Jan 23, 2026, 7 AM PST

Sent projects: 1 project

Subject: Document Request - 2024 Taxes

sent

Scheduled to send Thu, Jan 15, 2026, 7 AM PST

Sent projects: 229 projects

Batch size: 200 emails / day

Subject: Completed Return

sent

Scheduled to send Wed, Jan 14, 2026, 7 AM PST

Sent: 103 projects (211 emails)

Waiting: 126 projects (208 emails)

Batch size: 210 emails / day

Subject: Document Request - 2024 Taxes

sent

Scheduled to send Wed, Nov 26, 2025, 7 AM PST

Sent projects: 1 project

Subject: Tax Season is Here! *Your Personal Checklist*

sent

Scheduled to send Wed, Sep 10, 2025, 9 AM PDT

Sent projects: 3 projects

Subject: Tax Season is Here! *Your Personal Checklist*

sent

Scheduled to send Wed, Jan 29, 2025, 7 AM PST

Sent projects: 1 project

Subject: Tax Season is Here! *Your Personal Checklist*

sent

Scheduled to send Tue, Jan 21, 2025, 3 PM PST

Sent projects: 1 project

SEE YOU NEXT TIME

Thank

Thank you for being part of the **Truss**

Tribe.

you.