

Truss Tribe Live Series

Settings: Part One

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Open Office Hours

Truss Tribe Live Series

 **Settings: Build Your Foundation (Part 1):**
https://us06web.zoom.us/webinar/register/WN_oMHb4M2JSgW5AKrpOJ0a4Q

 **Settings: Power Moves & Pro Tips (Part 2):**
https://us06web.zoom.us/webinar/register/WN_G87aiql6QIW26SJjZbK31g

 **Contacts, Entities & Drive: The Truss Backbone:**
https://us06web.zoom.us/webinar/register/WN_72xVhEt3SU2WB5hQ8GtpYQ

 **Meet Max AI: Your New Sidekick:**
https://us06web.zoom.us/webinar/register/WN_UCxx2bnZQHKxldN5zYcgmA

 **New Client Intake & Recurring Tasks:**
https://us06web.zoom.us/webinar/register/WN_CSnUr-G8TGiX4C9oiqxNUA

 **Organizers, Reimagined:**
https://us06web.zoom.us/webinar/register/WN_6J-eTMXNRBSj-fgEgFID1w

 **Workpapers Made Simple:**
https://us06web.zoom.us/webinar/register/WN_TBha9RR7TC-0mXbBSr8a1Q

 **Assembly & Delivery:**
https://us06web.zoom.us/webinar/register/WN_SfAVDXcVSTiX6M4iTETv2Q

 **Client Experience: Next-Level Experience:**
https://us06web.zoom.us/webinar/register/WN_QRjipZhbTrWdrv6g9aw0iA

 **File Sharing & E-Signatures:**
https://us06web.zoom.us/webinar/register/WN_nQmGAM5XS-WNRGt6Pcyh2A

Notifications

Notification Settings

Notification Options

Daily Notification Digest Email	Summary of all your Truss Activity emailed once a day at 8:30 AM EST
Auto-Forward Notifications To	Colleague that should receive notifications instead of yourself

Notification Options

OPTION	PREFERENCE
Daily notifications digest email Notification summary of all your Truss activity emailed once per day at 8:30am ET	☒
Auto-forward notifications to: Firm user that should receive notifications instead	None ▾

Users can pick to receive a notification to your email, in app or both

Notification Preferences: Tasks

Tasks Sent for Review	Sent when the client clicks to send for review on the project
Task Submitted for Review	Sent when a task is completed after the project has already been sent for review
New Files Uploaded to Projects	Sent when any file is added to a task or project. Will Only start when the client has clicked to send something for review
Email Notification Frequency	How often we will send updated notifications
Send Even if Project Not Sent for Review	If selected, Truss will send a notification anytime the taxpayer uploads a document. *a lot of notifications*

Notification Preferences
Control email and in-app notifications from Truss. You can change these settings at any time.

NOTIFICATION TYPE	IN-APP	EMAIL
Tasks		
Tasks Sent For Review Triggered when a client clicks "Send for Review" after completing all tasks	☒	☒
Task Submitted For Review Triggered when a task is completed after a project has already been sent for review	☒	☐
New Files Uploaded to Projects Triggered when any file is added to a task or project. Only starts sending once a project is sent for review.	☒	☐
Email Notification Frequency ☐ 10 minutes		
Send Even if Project Not Sent for Review ☐		

Notification Preferences

File Drop-Offs	Notification when a client uses the secure file link, outside of a project
Comments	When taxpayers add a comment to a task
Client Questions Answered	If you ask a question as a task, and the client has responded to it
Document E-signed	Sent when all E-signatures have been received by all responsible signers
Invoice Paid	Notification to advise that the client has paid their invoice
Invoice Payment Failed	Sent if a client's payment fails or times out (example: ACH)
Return Ready for Review	Internal notification to advise that the project is ready for review
Reassign Project	Advises if a project has been assigned to you
Contact Information Updates	Sent if the client updates their personal contact information, (portal, verification, intake)
Engagement Letter Signed	If engagement letters are sent through Truss we will notify when signed
KBA Failed	If any client fails KBA after 4 attempts *anyone with this selected will be advised for all clients*
Packet Scanned	Sent when a full packet is scanned for a project

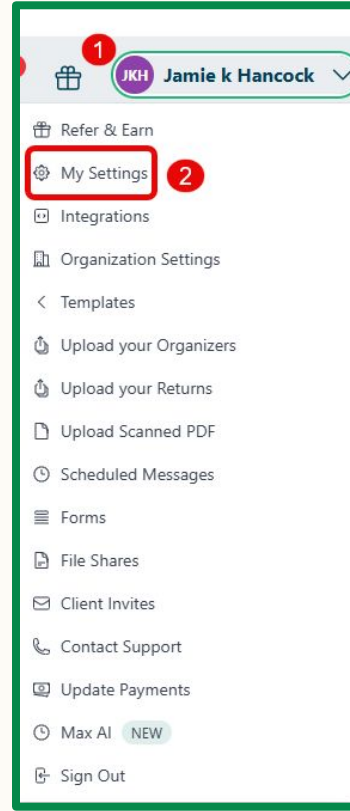
Notification Preferences

File Drop Offs Notification when files are uploaded to an email signature link or website link outside of a project	☒	☒
Comments Notification when someone adds a comment to a task	☒	☒
Client Questions Answered Notification when a client answers a question on a task	☒	☐
Document E-Signed Notification when an E-Signature is signed by all assignees	☒	☒
Invoice Paid Notification when a client pays an invoice	☒	☒
Invoice Payment Failed Notification when a client's invoice payment fails (e.g. ACH timeout)	☒	☒
Return Ready For Review Notification when another firm user requests a review of a return	☒	☒
Reassign Project Notification when a project is reassigned to you	☒	☐
Contact Information Updates Notification when a client updates their contact information through the client portal or intake form	☒	☐
Engagement Letter Signed Notification when a client signs an engagement letter	☐	☐
KBA Failed Notification when a client fails Knowledge-Based Authentication (KBA) after 4 attempts	☐	☐
Packet Scanned	☒	☐

My Settings

Navigation

1. Click on your name
2. Select My settings



My Profile

1. Change Photo
 - a. Update your photo for others to see who is the Project Owner at a glance
2. Email
 - a. Where all email notifications will go to
 - b. The email address you will use to login to
3. First & Last Name
4. Save Settings
5. Change Password

The screenshot shows a 'My Profile' settings page with a light gray background and a green border. At the top, the text 'Profile Picture' is displayed. Below it is a purple circular profile picture with the initials 'JKH' and a green 'Change Photo' button with a pencil icon. A red circle with the number '1' is positioned above the button. Below the profile picture is the 'Email' field with a lock icon and a red circle with the number '2'. The email address 'humbertjamie@gmail.com' is entered in the field. Below the email field are two input fields for 'First name' and 'Last name'. The 'First name' field contains 'Jamie k' and has a red circle with the number '3' above it. The 'Last name' field contains 'Hancock'. Below these fields are two buttons: a dark blue 'Save Settings' button with a red circle with the number '4' above it, and a green 'Change Password' button with a red circle with the number '5' above it.

Profile Picture

JKH

Change Photo

Email

humbertjamie@gmail.com

First name

Jamie k

Last name

Hancock

Save Settings

Change Password

Two Factor Authentication (MFA)

Each user is able to enable MFA in their system.

1. Click Enable Two Factor Authentication
2. Follow the steps outlined in Truss

Two Factor Authentication (MFA)

Two factor authentication is NOT enabled.

1 Enable Two Factor Authentication

Setup: Two Factor Authentication (MFA)

1. Scan QR Code

Please scan the below QR code using an 2FA app such as Google Authenticator, Microsoft Authenticator, or Authy:



If you cannot scan, please enter the following code manually: `EWAECMYN7ESI3S3XTLDQLCIZ7Q72GQP`

2. Confirm OTP Code

After you've scanned the QR code, enter a generated code below:

Enter 6-digit code

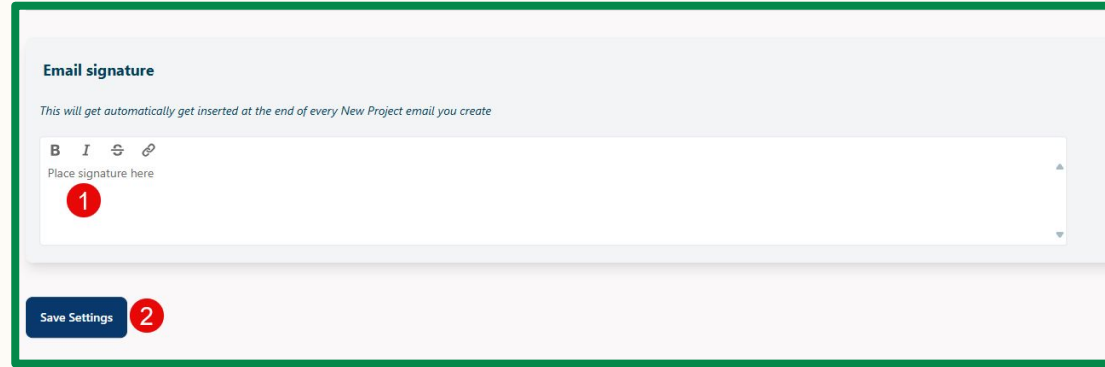
Enter your current password

Confirm and Enable Two Factor

Email Signature

Add your email signature for all emails sent by your or on your behalf. ***Currently, images cannot be used***

1. Add signature
2. Save



The screenshot shows a web interface for setting an email signature. At the top, the heading "Email signature" is displayed. Below it, a note states: "This will get automatically get inserted at the end of every New Project email you create". The main area is a text editor with a toolbar containing icons for bold (B), italic (I), link (chain), and unlink (chain with slash). The text area contains the placeholder "Place signature here" and a red circle with the number "1" indicating where to add the signature. At the bottom left, there is a blue button labeled "Save Settings" with a red circle and the number "2" next to it, indicating the save step.

Email Signature Link (Drop-Off Link)

1. Default Firm Recipient
 - a. Who in the firm should be the default.
Please check with Admin to select if not yourself
2. Copy Link to add to your email signature in Outlook or Google
3. Choose color of Button
4. Change Text Color
5. Customize what the button will state
6. Generate the button for preview

The screenshot shows the 'Email Signature Link' configuration page. It includes a dropdown for the default firm recipient (annotated with a red 1), a section for the personal link with instructions and a copy button (annotated with a red 2), and an 'Advanced' section for customizing the button's appearance (annotated with a red 3). The advanced section has fields for button color, text color, and button text, each with a corresponding preview button (annotated with red 4, 5, and 6 respectively). The preview area shows a green button with the text 'Send files to me securely'.

Email Signature Link

Personal Link for Email Signature

- Use in your email signature, share privately
- Email is not validated

→

1 This link's default firm recipient will be: Jamie k Hancock

2 Highlight the text below and copy/paste this into your email signature:
[Send files to me using this secure link](#) OR Copy the link directly:

Advanced: Add Signature Link As a Button

Button Color: 3

Text Color: 4

Button Text: 5

6 Generate Button

Send files to me securely

Outlook can have issues with formatting the different colors

Send as Authorization

Allows users to authorize specific users to send email updates on your behalf.

1. Authorize users to send on your behalf
2. See who has authorized your to send on their behalf.

Send As Authorization

Authorize other users in your firm to send emails on your behalf. They will be able to use your email signature when composing emails.

Users who can send as me:
No users authorized yet.

Authorize a new user:

1

Select a user... ▾

Authorize

I can send as: 2

- Ben Wyatt (benw.tnraact@gmail.com)

Email Never Sync List (Personal)

- ★ New Feature, to opt into this feature please contact Support.
- ★ Set up email addresses or domains that you would like us not to sync with Truss.
- ★ If you have a contact, and that contact's email is an employee email, you won't want that synced into Truss.
- ★ Available on a personal level and as a Global setting as well.

Email Never Sync List (Personal)

Emails from these addresses or domains will not be synced for your account. This is in addition to your firm's never sync list.

Pattern

Default Project View

Select how you would like to see your project tasks.

Default Project View

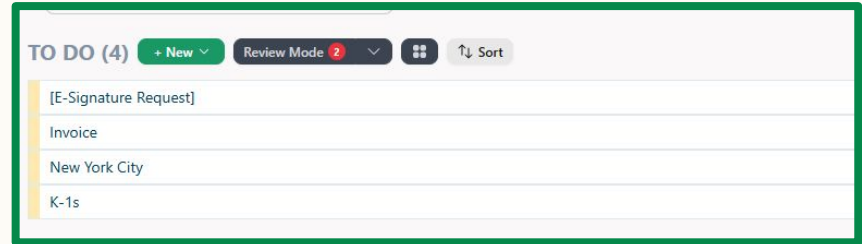
Choose the default view for your projects

☐ Default to list view (otherwise the card view will be default)

Card View



List View



Integrations

API Key

What is an API?

- ★ Application Programming Interface

How does it work?

- ★ An API is the messenger between apps
 - Like a waiter between you and the kitchen
- ★ APIs are everywhere
 - Payments, maps, weather, login, social sharing, and more
- ★ They work by taking request, fetching the answer, and returning it-in milliseconds
- ★ APIs are what make the modern internet seem seamless and connected

API Key

This API key will give you access to your firm's data via REST API. You can also use this with Zapier!

Note: generating a new API key will invalidate the previous API key, which could temporarily disconnect your API connections (ex. Zapier).

Generate API Key

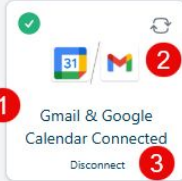
Email & Calendar

Email integration allows users to have their emails for projects to come from you. No more no-reply emails. [Email integration in Truss](#)

1. Whether you use Google or Outlook click to integrate email and calendar
 - a. When you click to integrate a login screen will appear.
 - b. Please add your credentials
2. Refresh icon
3. Disconnect
4. Email address that is hooked for outgoing emails
5. Select if you would like to have reminders go from your email address
6. Save changes

Email & Calendar

View recent emails and upcoming events on your Contact page. Schedule & send custom email to your clients.



1 Gmail & Google Calendar Connected 2
Disconnect 3



Office 365
Office 365 Email & Calendar

Gmail & Google Calendar Settings

Currently connected as: [jamie@gettruss.io](#) 4

☒ Use this integration to send email reminders to your clients with your email account. 5

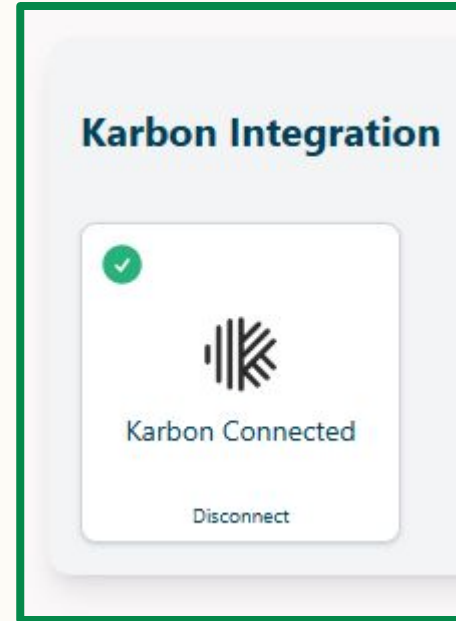
Scopes: <https://www.googleapis.com/auth/gmail.modify> <https://www.googleapis.com/auth/calendar.events>

Save Email & Calendar Settings 6

Karbon

Truss Integrates seamlessly with Karbon to simplify your client management and workflow, from syncing contact data to creating automatic work items when clients complete their uploads.

- ★ [How to Integrate Karbon with Truss](#)
- ★ [How It Works: Karbon Integration](#)
- ★ [Karbon Integration: Truss Integrated Task Guide](#)

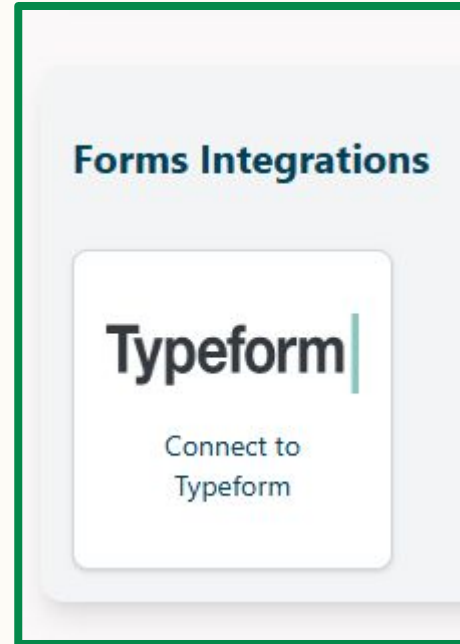


Typeform

Truss uses Typeform for our Questionnaires. If you would prefer to create your own templates, you are able to integrate Typeform with your account.

[How to set up Typeform Integration](#)

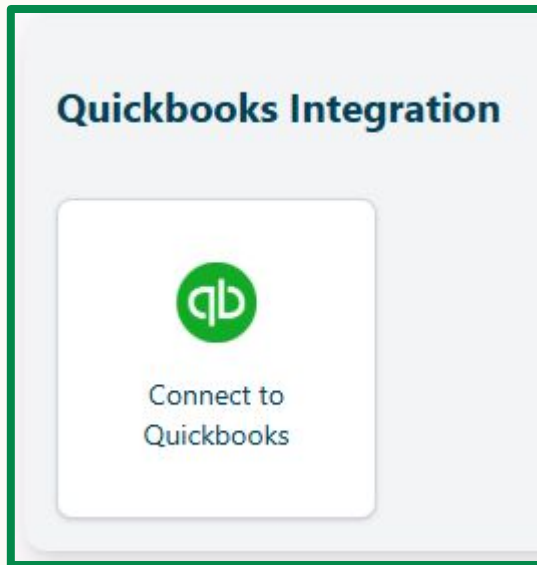
****Please note: Requires a Typeform subscription****



Quickbooks

★ NEW Integration

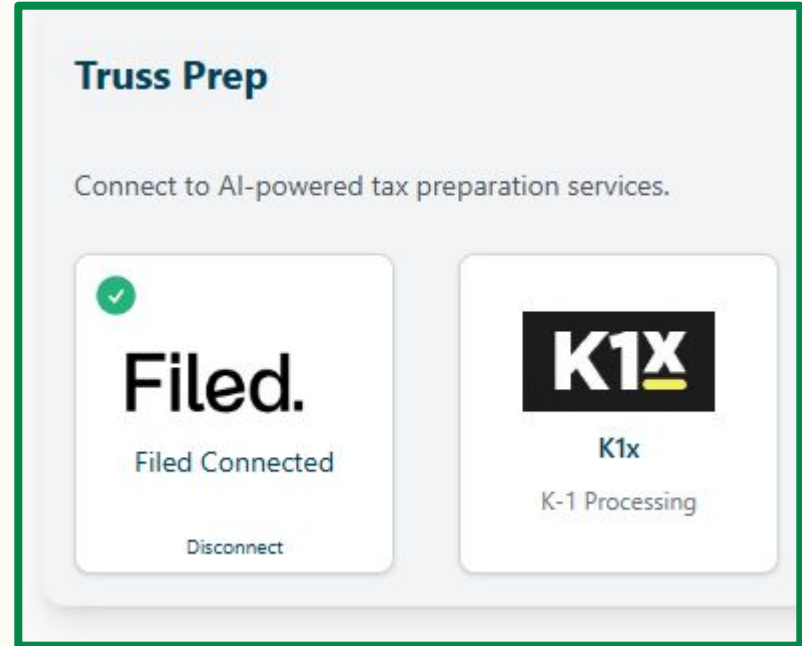
- ★ QuickBooks Online integration so your firm and your clients can sync invoices and payments automatically with Truss.
- ★ *Client-level connections*: Under **Client QuickBooks Connections**, you can link each client entity to its own QBO company.
- ★ *Auto-invoice creation*: When you create a “payment” task (invoice type) in Truss, we’ll attempt to create the corresponding invoice in QBO. You can manually link a customer if the automatic match fails.
- ★ *Task cards*: Invoice tasks now show a QuickBooks icon you can click to view the invoice in QBO. Error indicators will pop up if there’s a customer-matching issue.
- ★ *Payment sync*: Payments made in QBO will hit our new webhook endpoint and mark the related Truss tasks as paid. Truss-processed payments also create QBO payments and attach receipts back into Truss.



Truss Prep

We will be doing a webinar with each of the Truss Prep companies.

If you have any questions please feel free to reach out to support and we can help you!



Advanced: O365 Settings

Outlook Users: Firms may need to disable their consent prompt to allow for users to integrate.

Advanced: O365 Settings

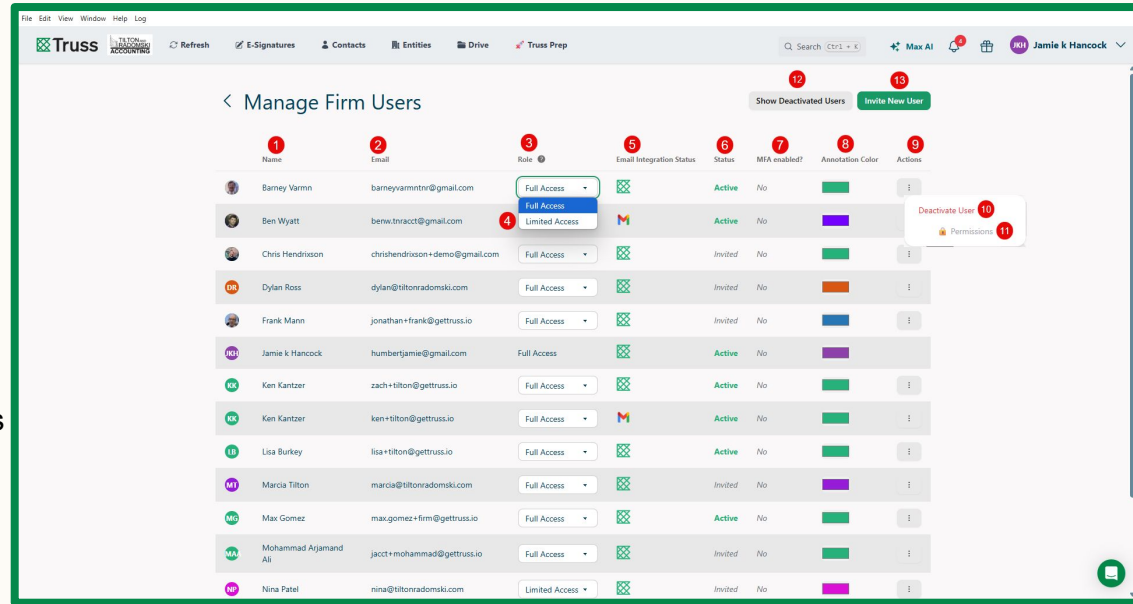
☒ Disable O365 admin consent prompt for users (only use if you are experiencing issues with the default)

Save Advanced Setting

Organization Settings

Manage Firm Users

1. User Name
2. Email Address
3. Role
4. Access Option
 - a. Full Access
 - b. Limited
5. Email Integration Status
6. Status
 - a. Active
 - b. invited
7. MFA Enabled
8. Annotation Color
 - a. Color code each user for Workpapers
9. Actions
10. Deactivate User
11. Permissions
 - a. See next page
12. Show Deactivated Users
13. Invite New User



Edit Permissions

Users can be restricted on what they can do in Truss.

Limited access will restrict users from accessing:

- ★ Organization settings
- ★ Manage Payments
- ★ Selected items

<

Edit Permissions

Nina Patel (nina@tiltonradomski.com)

☒

Restrict making files visible to clients

☐

Restrict downloading files

☐

Restrict editing projects

☐

Restrict creating projects

☐

Restrict generating reports (Excel downloads for Contacts, Entities, and Projects)

☐

Restrict access to only projects (and those project's contacts/entities/drive folders) that the user is owner of.

☐

Restrict deleting files

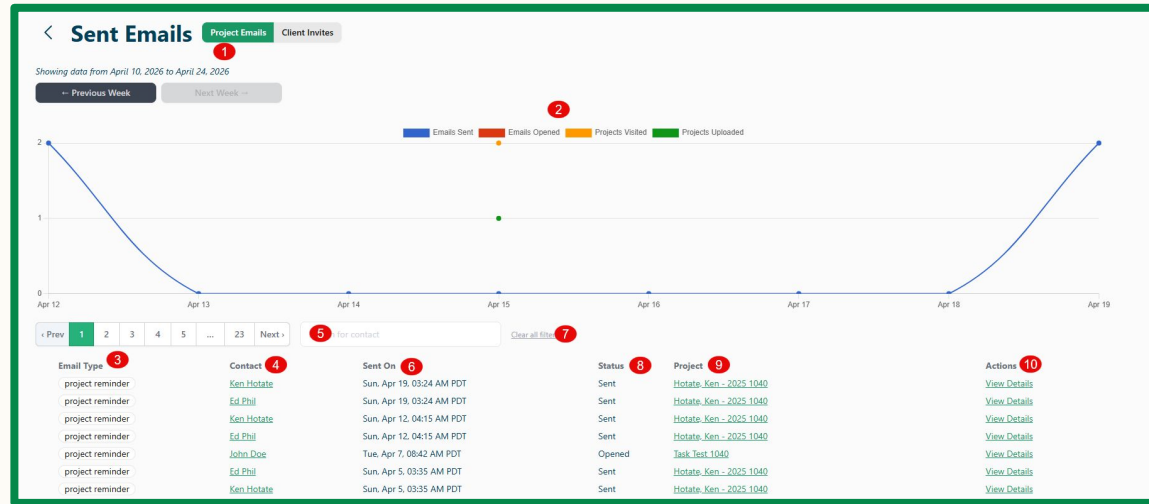
☐

Restrict deleting projects, contacts, and entities

Update Permissions

View Sent Emails- Project Emails

1. Project Emails
2. Review Data Reports
3. Email Type
 - a. Project reminder
 - b. Update Email
 - c. Schedule Email
4. Contact
5. Search for Contact
6. Sent On
 - a. Date email was delivered
7. Clear Filters
8. Status
 - a. Sent
 - b. Opened
9. Project
10. Actions
 - a. View the Email Sent



View Sent Emails- Client Invites

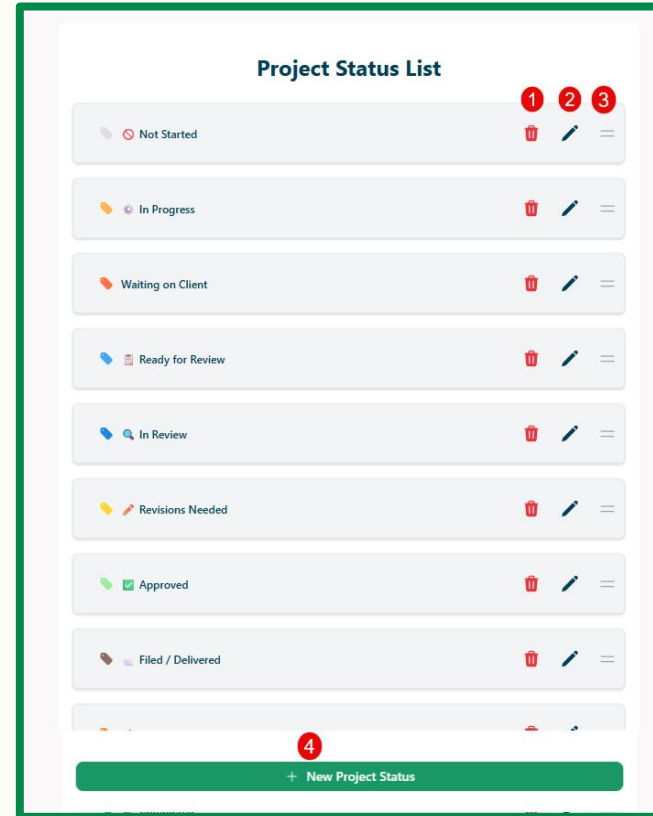
1. Client Invites
2. Reporting Data
3. Email Type
 - a. Client Invite
4. Search for Contact
5. Sent on
6. Clear Filters
7. Status
 - a. Open
 - b. Sent
8. Actions
 - a. View Email Details



Manage Project Statuses

Create or edit Project Statuses

1. Delete Status
2. Edit Status
3. Move Order of Status
4. Add New Project Status



View Client Feedback

Truss asks Clients what they think of our product. See what your clients think of the system.

1. Email any feedback containing comments to the Project Owner
2. Filter by week
3. Feedback from
4. Feedback on Project
5. Rating
6. Message
7. Feedback Date

< Client Feedback

☐ Email any feedback containing comments to the project owner

Showing data from April 10, 2026 to April 24, 2026

-- Previous Week

Next Week --

No data

< Prev 1 Next >

Feedback From	Feedback On Project	Rating	Message	Feedback Date
John Doe (jonathan+tilton@gettruss.io)	Doe, John Onboarding	👍		Tue, Mar 10, 06:53 AM PDT
Jean-Ralpho Saperstein (jr@sapersteinventures.example.com)	Saperstein, Jean-Ralpho - 2024-1040 (facete)	👍		Fri, Dec 19, 2025, 12:40 PM PST
Andy Dwyer (andy@mousetrammusic.example.com)	Dwyer, Andy, Ludgate, April 1040 2024	👍	yay	Tue, Dec 16, 2025, 10:29 AM PST
Donna Meagle (donna@treatyoself.example.com)	Meagle Motor 1065 2024	👍	the best	Wed, Dec 3, 2025, 07:13 AM PST
Nick Newport Jr. (nicknewportjr@newtumscomp.co)	test	👍	love it!	Fri, Oct 24, 2025, 11:09 AM PDT
Jean-Ralpho Saperstein (jr@sapersteinventures.example.com)	Entertainment 720 - 1065 2024	👍	this is great	Wed, Aug 20, 2025, 06:25 AM PDT

Company Profile

Verify Your Company Details

1. Organization Name
2. Upload Logo
3. Save Changes
4. Remove Logo

Company profile



Organization name **1**

Tilton & Radomski Accou

3 Save changes

2 Upload logo

4 Remove

Customize your Experience

Select your services for features for specific items in Truss.

1. Select options
2. Save Changes

Customize Your Experience

Select your services to show you features specific to that service in the app!

1

☒

 Tax

☒

 Audit

☒

 Bookkeeping

☒

 Payroll

☒

 Wealth Management

☒

 Estate Planning

☒

 Family Law

2

Save changes

Firm Wide Links

1. Default Fallback Firm Drop-off User
 - a. For any drop offs that come from a deactivated user's link.
2. Select firm user that is the default
3. Customize the Color
4. Text Color
5. Enter the Button Text
6. Save Changes.

Outlook can have issues with certain colors

Firm-wide Links

You can find your personal signature link in "My Settings."

Default Fallback Firm Drop Off User: None 1 *This is the fallback user if the client visits a drop off link that is associated with a deactivated user.*

This link's default firm recipient will be: Jamie k Hancock 2

Link for Website

- Requires email validation before upload
- Use on your website

→

Highlight the text below and copy/paste this into your email signature:
[Send files to me using this secure link](#)

OR

Copy the link directly:

Customize Upload Button

Button Color: Green 3

Text Color: White 4

Button Text: YOUR CHECKLIST 5

Link Color: Green

Previews:

YOUR CHECKLIST

[This is a sample link](#)

Save changes 6

Customize your Client Portal Name

Customize your Portal Name

- ★ Allows firms to add to their websites
- ★ Can be added to your email signature

Customize Your Client Portal Name

`https://app2.gettruss.io/client-portal/`

Save changes

Notifications

These are firm wide settings

1. Receive a Daily summary of documents uploaded to your projects
2. Notify client on Project Comments
 - a. If this is checked, when you click submit on a comment the client will get an email.

Notifications

- 1 ☒ Receive a daily summary of documents uploaded to your projects
- 2 ☐ Notify clients on project comments

Reminders

1. Default Project Reminders
2. Payment Reminder Schedule
3. Custom Message to client in reminder email.
 - a. This is a place to add a blurb to the beginning of your reminder email we send.
4. Save Changes
5. Test Reminder Email

Standard ⓘ 1

Off ✓

Daily

Every other day

Every 4 days

Weekly

Every other week

Every 3 weeks

Monthly

Custom...

Off ⓘ 2

No reminders

Minimal

Sends 2 reminders: 7 days before the payment, and on the due date.

Standard ✓

Sends 4 reminders: 14, 7, and 1 day before the payment, and on the due date.

Frequent

Sends 4 reminders: 14, 7, and 1 day before the payment, and on the due date.

Default project reminder schedule: Off ⓘ 1

Payment reminder schedule: Standard ⓘ 2

Custom message to client in reminder email

Add a custom message from the firm to the beginning of all reminder emails to your clients. You can use [first_name], [last_name], [nickname] and [email] as placeholders as well.

3

B I [link icon] [unlink icon]

Place message to include here, and click 'Save Changes'

4 5

Save changes Test reminder email

Security

1. Disallow email for One-Time-Passcodes
 - a. Clients can only access their projects with a SMS text code.
2. Require One-Time-Passcode for all Projects
 - a. Requires that the client has to have a code to access their project.
 - b. The codes allow for a 2-week access before having to re-authenticate.
 - c. Please reach out to support if you would like to change the time-out for codes.

Security

- 1 Disallow email for One-Time-Passcodes
- 2 Require One-Time-Passcode for all projects

Default Invoice Description

- ★ Customize what the invoice task states.
- ★ If you have an payment URL you can add that here.
- ★ The AI will read and add a task during the assembly and delivery step, as long as there is a bookmark 'invoice'

Default Invoice Description

Default description for invoice instructions when you upload returns.

B *I*  

Type description to include here, then click 'Save Changes'

Save changes

Default Refund Description

- ★ If you would like to use your own refund description, you can customize it here.
- ★ Please be sure to use the merge field outlined.

Default Refund Description

Default description for refund instructions when you upload returns.

You can use **[refund_amount]** as a placeholder for the amount of the refund.

B *I*  

Type description to include here, then click 'Save Changes'

Save changes

E-Signature Options

- ★ Avoid emailing the completed document to the client after e-signing
 - Select this option if you do not want Truss to email a completed signed document.
 - It will still show in their Project.
- ★ Default E-signature ERO
 - Select the default ERO, this is if you require that the signer signs the return through Truss.
 - Will be the person who is defaulted when no signer is added.

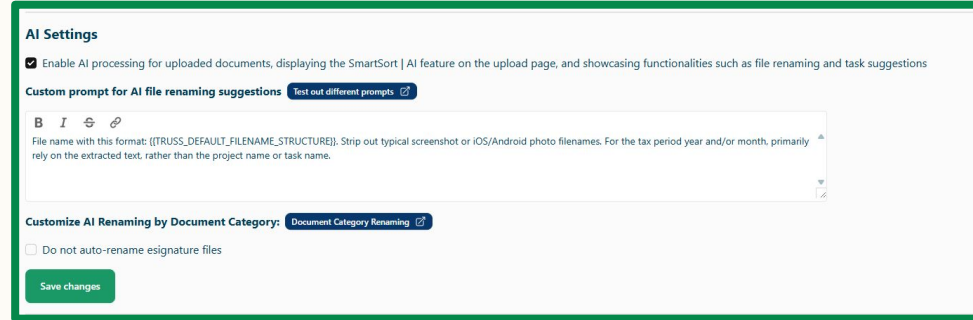
E-Signature Options

☐ Avoid emailing the completed document to the client after E-Signing.

Default E-Signature ERO: Ben Wyatt ▼

AI Settings

- ★ Enable AI processing for Uploaded documents.
 - When selected the AI will read all documents uploaded and then it will sort and add the the right Task.
- ★ Custom prompt for AI file renaming suggestions
 - Tell our AI what you would like the naming convention should do. This can be very detailed or simple.
 - Please double check that you have all the correct items needed.
- ★ Customize AI renaming by Document Category
 - Detail how you would like us to name the files you uploaded.
- ★ Do not auto- rename e-signature files
 - Truss will rename the E-sign items when they get signed and combined. If you would like us not to rename, please check this button

A screenshot of the 'AI Settings' configuration page. The page has a white background with a green border. At the top, the title 'AI Settings' is followed by a checked checkbox for 'Enable AI processing for uploaded documents, displaying the SmartSort | AI feature on the upload page, and showcasing functionalities such as file renaming and task suggestions'. Below this is a section for 'Custom prompt for AI file renaming suggestions' with a 'Test out different prompts' button. A rich text editor contains a sample prompt: 'File name with this format: {{TRUSS_DEFAULT_FILENAME_STRUCTURE}}. Strip out typical screenshot or iOS/Android photo filenames. For the tax period year and/or month, primarily rely on the extracted text, rather than the project name or task name.' Below the editor is a section for 'Customize AI Renaming by Document Category' with a 'Document Category Renaming' button. A checkbox for 'Do not auto-rename esignature files' is present and unchecked. A green 'Save changes' button is at the bottom.

AI Settings

☒ Enable AI processing for uploaded documents, displaying the SmartSort | AI feature on the upload page, and showcasing functionalities such as file renaming and task suggestions

Custom prompt for AI file renaming suggestions [Test out different prompts](#)

B I S P

File name with this format: {{TRUSS_DEFAULT_FILENAME_STRUCTURE}}. Strip out typical screenshot or iOS/Android photo filenames. For the tax period year and/or month, primarily rely on the extracted text, rather than the project name or task name.

Customize AI Renaming by Document Category: [Document Category Renaming](#)

☐ Do not auto-rename esignature files

[Save changes](#)

Tax Software - Organizer Uploads

- ★ Select your software
- ★ Only one Software can be selected at a time

Tax Software - Organizer Uploads

Choose your tax software (if it's not on this list, please contact us):

Axcess



Firm Automation

★ Please communicate with your team if you plan to use this feature.

★ When all project tasks are completed

- If the client has submitted or marked complete
- If the firm user moves all of the tasks to pending or approved.
- This will not be instant, it does happen in the morning.

★ When a project becomes incomplete.

- If anything gets added to the project in the To-do
- Includes returns

★ Skip adding 'ready' tag to a project when all tasks are completed.

- The ready tag lets you know that it has been marked completed by the taxpayers.

Firm Automation

Automatically change project status when all tasks are completed or when a project becomes incomplete again.

When all project tasks are completed: Ready for Review ▼

When project becomes incomplete: Waiting on Client ▼

☐ Skip adding "ready" tag to a project when all tasks are completed

Disable Client Access

- ★ DO NOT USE unless you need to.
- ★ Will disable ALL access to client portals, projects, or files.
- ★ Best recommended if you are doing any maintenance to your data or a security measure.

Disable Client Access

This setting will temporarily disable ALL client access to portals, project pages, file share, etc. This is useful for when you are doing maintenance or as a security measure while investigating an incident.

☐ Disable ALL client access

PROCEED and disable

Email Never Sync List (Firm Wide)

- ★ Set up email addresses or domains that you would like us not to sync with Truss.
- ★ If you have a contact, and that contact's email is a firm users email, you won't want that synced into Truss.
- ★ Global Setting, but available on personal as well.

Email Never Sync List (Firm-wide)

Emails from these addresses or domains will never be synced for any user in this firm.

Pattern

e.g. *@example.com or user@company.com

Add



Ask us anything!

thank you

Thank you for joining us today!

If you have any questions, don't hesitate to reach out — we're always happy to help.

Until next time, we wish you all the best!

The Truss Team!

