

TRUSS TRIBE LIVE SERIES

EPISODE 02 · SETTINGS



Settings. *Part Two.*

Power moves and pro tips for templates, scheduled messages, file sharing, payments, and everything else hiding in the settings menu.

● LIVE WEBINAR

Hosted by the Truss Team

All ten sessions. Pick your favourites.

 Settings: Build Your Foundation Part 1		 Settings: Power Moves & Pro Tips Part 2 — today	<u>TODAY</u>
 Contacts, Entities & Drive The Truss backbone	<u>REGISTER →</u>	 Meet Max AI Your new sidekick	<u>REGISTER →</u>
 New Client Intake & Recurring Tasks	<u>REGISTER →</u>	 Organizers, Reimagined	<u>REGISTER →</u>
 Workpapers Made Simple	<u>REGISTER →</u>	 Assembly & Delivery	<u>REGISTER →</u>
 Client Experience Next-level experience	<u>REGISTER →</u>	 File Sharing & E-Signatures	<u>REGISTER →</u>

Agenda

01 Question of the day

02 Live Series overview

03 Templates

04 Upload Scanned PDF

05 Scheduled Messages

06 Forms

07 File Shares

08 Client Invites

09 Contact Support

10 Manage & Update Payments

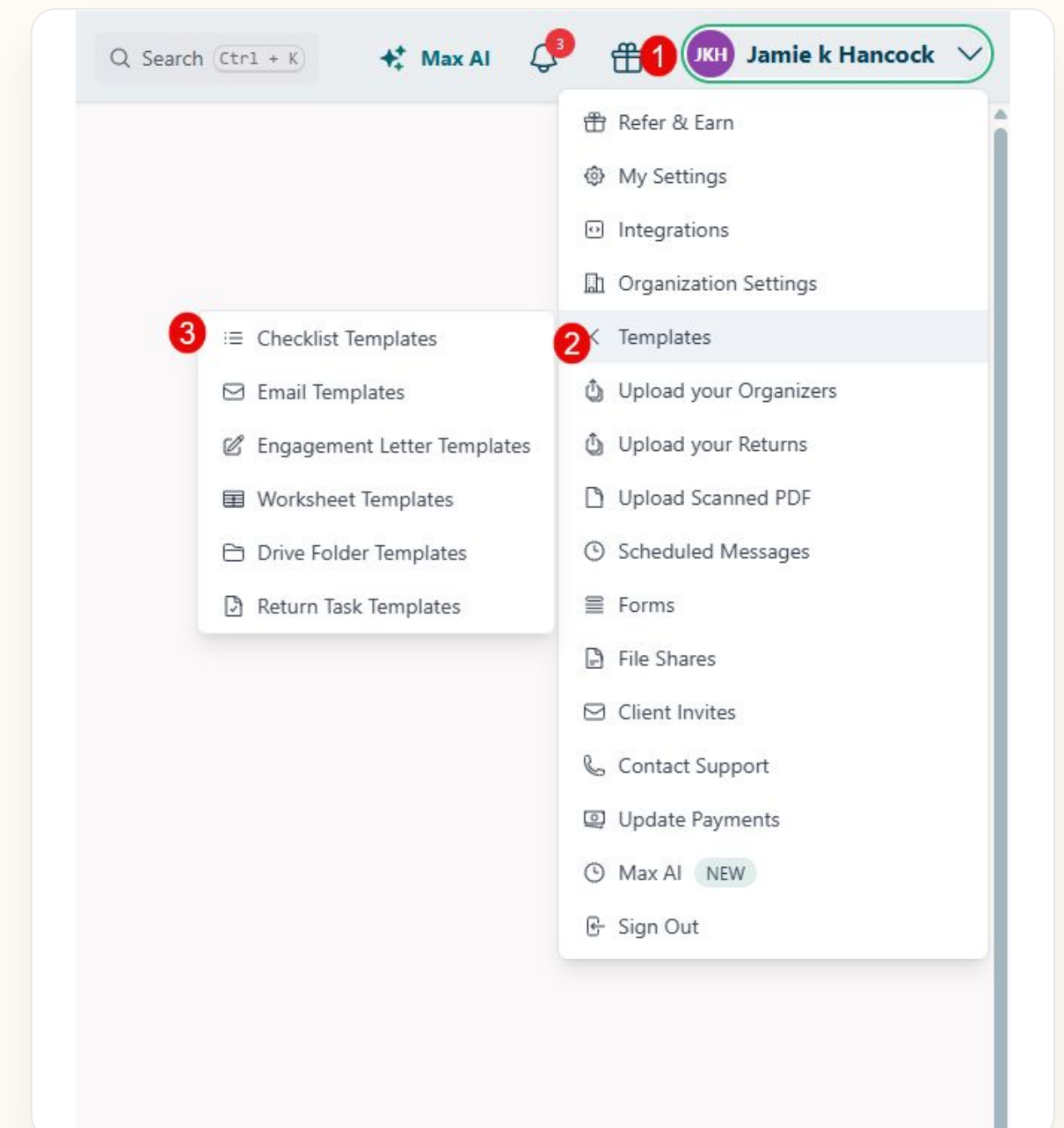
SECTION ONE

Templates.

Checklist, Email, Engagement Letter, Worksheet, Drive Folder, Return Task — the reusable building blocks behind every project.

Navigating to Templates

- 1** Click on your name
 Top-right of any Truss screen opens your account menu.
- 2** Select Templates
 Opens the templates panel beside the account menu.
- 3** Pick a template type
 Checklists, Emails, Engagement Letters, Worksheets, Drive Folders, Return Tasks.



Checklist Templates

- 1

Click a template name to edit

Open and update tasks, ordering, and titles.
- 2

Delete a checklist

Removes the template from the library.
- 3

Duplicate a checklist

Spin up a variant without rebuilding from scratch.
- 4

Create new checklist

Start a fresh template from a blank canvas.

Checklist Templates

1

1040

2

3

1065 / 1120 Business Return

990 (QB)

Accounting Onboarding

Entity Formation

Financial Plan

Offer In Compromise

R&D Claim

S-Corp Return

Trust Return

4

+ New Template

Create a Checklist Template

- 1

Name your checklist

Use a name that reads cleanly in the project picker.
- 2

Add new tasks

Each task can be reordered and reused across projects.
- 3

Save

Template is immediately available to attach to projects.

1

Entity Formation

Request for name of entity

B I S

Provide the name of the entity and comments below - exact spelling and entity type (Inc, Corp, LLC, Ltd Partnership...)

Please provide full name below (exact spelling and capital or lower case letters)

Request name of incorporating responsible party

B I S

Who will be responsible for the entity (legal and Tax)? who is managing member?

Please provide full details in comments below

2

+ Add New Task

3

Save

Email Templates

- 1

Click a template name

Edit the subject, body, and merge fields.
- 2

Delete

Removes the template from the library.
- 3

Add new template

Start a fresh email from scratch.

Email Templates

Email templates can be used when creating a **New Project** from the dashboard. They are shared firm-wide. We may add them in other places too!

1

Template Name

Action Required: Your Return is Complete!

Client Request

Getting Started

New Client Portal

Tax Deadline is approaching! *Your Personal Checklist*

Tax Season is Here! *Your Personal Checklist*

Update on Your Tax Return

Welcome to the firm!

2

Actions

3

+ New Template

Editing an Email Template

- 1
- Name the email template
- 2
- Review how to use merge fields
- Personalise with client, project, and firm fields.
- 3
- Compose the email body
- 4
- Set as default for client invites
- Auto-applied whenever a new client is invited.
- 5
- Set defaults for File Share & K-1 File Share
- 6
- Set as default for Assembly client summaries
- 7
- Save

<

EDITING TEMPLATE

Action Required: Your Return is Complete!

Email Template Name

Action Required: Your Return is Complete!

Default Subject Line (optional)

Template (body of email)

How To Use Mail-Merge Fields

B

I

Good news - your Return is complete

Your return cannot be filed until you eSign the eFile Authorization

Please use the link below to:

1. Access and download a copy of your return.

2. eSign your eFile Authorization ***Please eSign Today***

[link: View Your Return]

Set as Default for Client Invite Emails:

1040 Invites

Business Invites

Trust / Estate Invites

Set as Default Email Template for:

File Shares

K-1 File Shares

Set as Default for Assembly Client Summary Emails:

Default Assembly Client Summary Email (the default if no entity type specific template is set below)

Select Default for Entity Types:

Select entity types...

Save

Engagement Letter Templates

- 1 Click a template name
Edit the letter body and signing requirements.
- 2 Duplicate template
- 3 Delete template
- 4 Create new template

Engagement Letter Templates

Engagement Letter templates are esignature documents that can be added to a project for signature. They are shared firm-wide.

1

2024 1040 Engagement Letter

Auto-Added to Organizers

2

3

Independent Contractor Agreement

Truss Prep

4

+ New Template

Editing an Engagement Letter

- 1 Name the template
- 2 Require both Taxpayer & Spouse to sign?
Check when joint signatures are required.
- 3 Auto-attach on "Upload Organizers"
Adds this letter to every project created via that flow.
- 4 Write the template body
- 5 Add Yes / No questions
Capture client confirmations alongside the signature.
- 6 Save

< EDITING: Engagement Letter Template - 1040 Engagement Letter

1

☐

Everyone must sign to complete the document (default: only one person needs to sign)

2

☒

Automatically add this when projects are created using the "Upload your Organizer" feature.

Template Name

1040 Engagement Letter

Template Body

Copy/paste your signature document below.

How To Use Mail-Merge Fields

B I

Dear {first_name}:

Save

This letter is to confirm and specify the terms of our [my] engagement with you and to clarify the nature and extent of the services we [I] will provide.

4

We [I] will prepare your 2024 joint federal income tax return, and the mutually agreed-upon income tax returns for the states (collectively, the "returns"). This engagement pertains only to the [Year] tax year, and our [my] responsibilities do not include preparation of any other tax returns that may be due to any taxing authority. Our [my] engagement will be complete upon the delivery of the completed returns to you. Thereafter, you will be solely responsible to file the returns with the appropriate taxing authority.

Please note that any person or entity subject to the jurisdiction of the United States (includes individuals, corporations, partnerships, trusts, and estates) having a financial interest in, or signature or other authority over, bank accounts, securities, or other financial accounts having a value exceeding \$10,000 in a foreign country shall report such a relationship. Although there are some limited exceptions, filing requirements also apply to taxpayers that have direct or indirect control over a foreign or domestic entity with foreign financial accounts, even if the taxpayer does not have foreign account(s). For example, a corporate-owned foreign account would require filings by the corporation and by the individual corporate officers with signature authority. Failure to disclose the required information to the U.S. Department of the Treasury may result in substantial civil and/or criminal penalties.

If you and/or your entity have a financial interest in any foreign accounts, you are responsible for providing our firm with all the information necessary to prepare FinCEN Form 114 (formerly Form TD-F-90-22.0) required by the U.S. Department of the Treasury on or before June 30 of each tax year. If you do not provide our [my] firm with information regarding any interest you may have in a foreign account, we [I] will not be able to prepare any of the required disclosure statements.

Your returns may be selected for review by one or more than one taxing authority. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we [I] will be available upon your written request to represent you during the examination and/or during any appeal. Any such representation will be the subject of, and governed by, a separate engagement letter.

We [I] will prepare the returns from information which you will furnish to us [me]. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. We [I] will furnish you with questionnaires and/or worksheets as needed to guide you in gathering the necessary information. Your use of such forms will assist us [me] in keeping our [my] fee to a minimum. To the extent we [I] render any accounting and/or bookkeeping assistance, it will be limited to those tasks we [I] deem necessary for preparation of the returns.

The timeliness of your cooperation is essential to our [my] ability to complete this engagement. Specifically, we [I] must receive sufficient information from which to prepare your returns within a reasonable period of time prior to the applicable filing deadline. Accordingly, if we [I] do not receive information from you, as noted above, by _____, it may be necessary for us [me] to pursue an extension of the due date of your returns, and we [I] reserve the right to suspend our [my] services or withdraw from this engagement.

We [I] will not audit or otherwise verify the data you submit. Accordingly, our [my] engagement cannot be relied upon to disclose errors, fraud, or other illegal acts that may exist. However, it may be necessary to ask you for clarification of some of the information you provide, and we [I] will inform you of any material errors, fraud, or other illegal acts that come to our [my] attention.

You are responsible for maintaining an adequate and efficient accounting system, for safeguarding assets, for authorizing transactions, and for retaining supporting documentation for those transactions, all of which will, among other things, help assure the preparation of proper returns. Furthermore, you are responsible for evaluating the adequacy and results of the services we [I] provide.

The law provides various penalties and interest that may be imposed when taxpayers underestimate their tax liability. You acknowledge that any such understated tax, and any imposed interest and penalties, are your responsibility, and that we [I] have no responsibility in that regard. If you would like information on the amount or circumstances of these penalties, please contact us [me].

5

Add Question

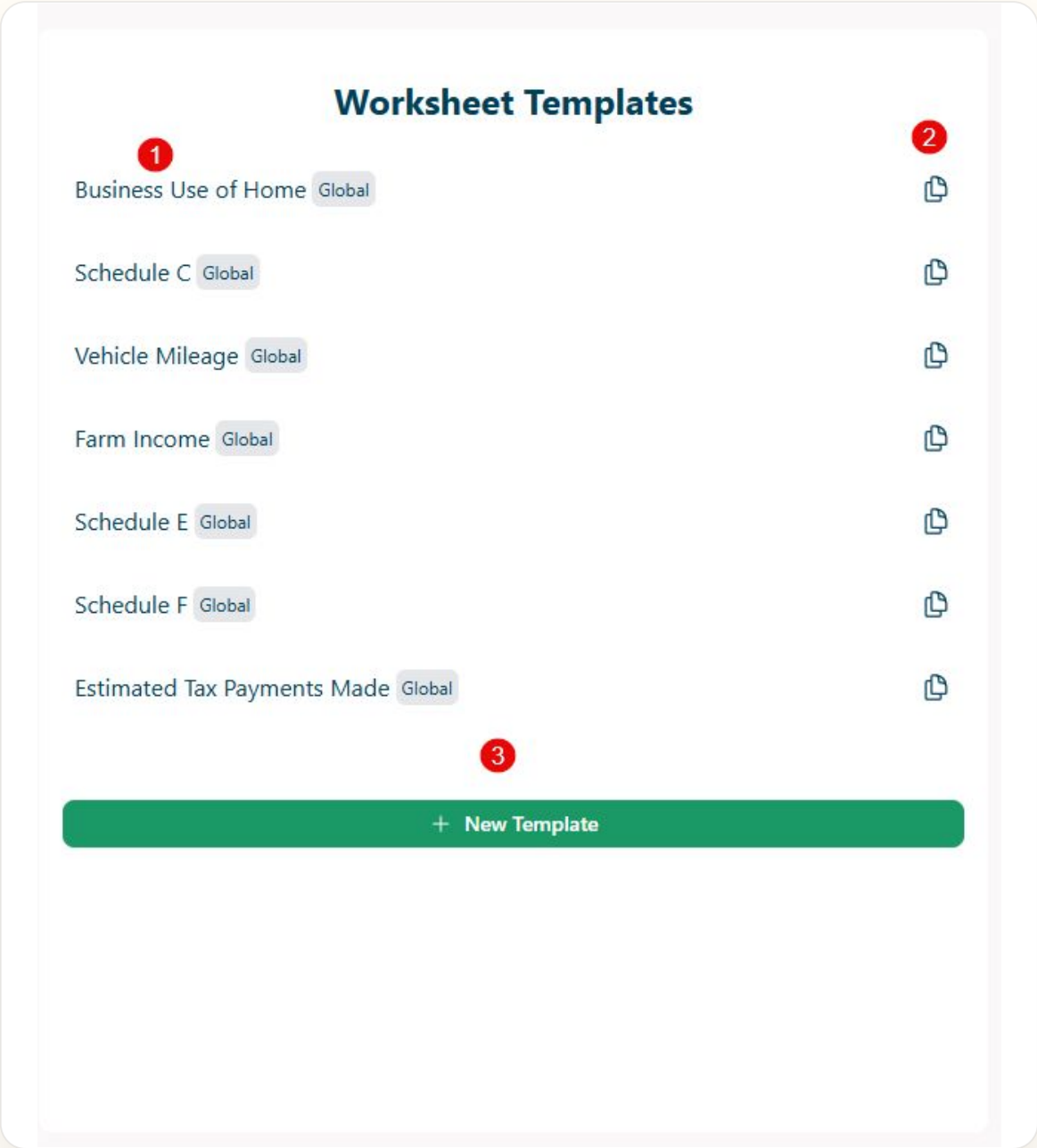
✓ Update ALL of the following: (1) the yes/no questions, (2) Engagement Letter task names, and (3) the Engagement Letters bodies on any **existing, unsigned** Engagement Letters created with this template.

Save

6

Worksheet Templates

- 1 Click a template name to edit
- 2 Duplicate template
- 3 Create new template



Editing a Worksheet

- 1

Duplicate worksheet

Fast-fork an existing structure.
- 2

Itemization rows

Define the line items collected from the client.
- 3

Previous-year data

Surface last year's figures for reference.
- 4

Current-year columns

The fields the client completes this season.

< Business Use of Home

Duplicate

1

2	Previous Year 3	Current Year 4
Business use area (square footage)		
Total area of home (square footage)		
Total hours of facility used (for daycare facilities only)		
Total hours available (if not 8,760)		
Area of home included above used exclusively for daycare business, if any (sq ft)		
% (.xx) or amount of gross income from home if not 100% (-1 if none)		
% (.xx) or amount of expenses from home if not 100% (-1 if none)		
Indirect Expenses - Mortgage interest		
Indirect Expenses - Real estate taxes		
Indirect Expenses - Casualty losses		
Indirect Expenses - Insurance		
Indirect Expenses - Miscellaneous		
Indirect Expenses - Rent		
Indirect Expenses - Repairs and maintenance		
Indirect Expenses - Utilities		
Indirect Expenses - Excess mortgage interest		
Indirect Expenses - Excess real estate taxes		

Drive Folder Templates

- 1 Click a name to view or edit
- 2 Update existing Drive folders
Push structural changes to projects already in flight.
- 3 Delete template
- 4 Edit template
- 5 Add new Drive folder template

Drive Folder Templates

Household Default for: Household

1120-S Default for: S-Corp

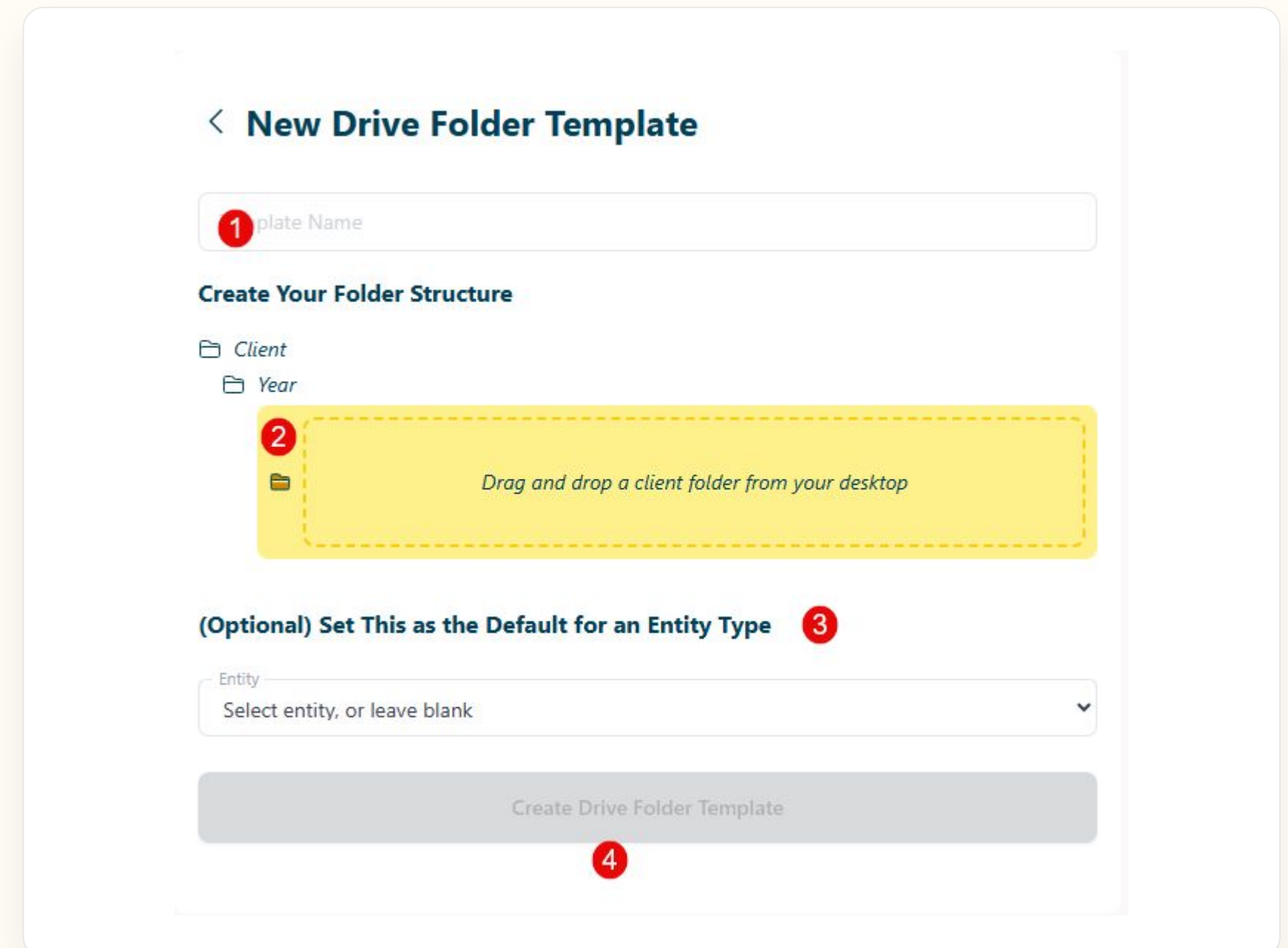
1065 Default for: Partnership

Update Existing Drive Folders

+ New Drive Folder Template

Editing a Drive Folder Template

- 1 Template name
- 2 Add folder structure
Nest folders as deep as you need.
- 3 Set as default by entity type
1040, business, trust / estate — match the structure to the return.
- 4 Create Drive folder template (save)



The screenshot shows the 'New Drive Folder Template' form. It includes a back arrow and the title '< New Drive Folder Template'. Below the title is a text input field for the template name, labeled '1' and 'Template Name'. Under the heading 'Create Your Folder Structure', there are two folder icons labeled 'Client' and 'Year'. A large yellow dashed box, labeled '2', contains the text 'Drag and drop a client folder from your desktop'. Below this is an optional section labeled '(Optional) Set This as the Default for an Entity Type' with a red '3' next to it. This section contains a dropdown menu labeled 'Entity' with the text 'Select entity, or leave blank' and a downward arrow. At the bottom is a large grey button labeled 'Create Drive Folder Template' with a red '4' next to it.

Return Task Templates

- 1 Template name
- 2 Delete
- 3 Create new template

Return Task Templates

Return task templates use GPT to generate customized task descriptions for payment-related tasks in tax return processing. Create templates for regular payments, refunds, and estimated payments. Templates are shared firm-wide.

1

Template Name

2

Actions

No return task templates yet!

3

+ New Template

Editing a Return Task Template

- 1

Name the template
- 2

Review placeholder usage

How merge fields drop into AI-generated prompts.
- 3

Read prompt overview

Understand how prompts steer Max AI's output.
- 4

Write your AI prompts
- 5

Select task types

Payment Due · Refund · Estimate
- 6

Save

< New Return Task Template

About Return Task Templates:

 These templates are used to generate AI-powered task descriptions for payment-related tasks. Select one or more payment types (Payment, Refund, Estimated Payment), then write a GPT prompt template. When processing tax returns, GPT will use your prompt along with document information to create clear, customized instructions for each task.

Template Name

e.g., Payment Task Instructions Template

1

Prompt Template

How To Use Placeholders

2

Write a prompt to generate task descriptions. Use placeholders to insert dynamic data from the assembly upload.

All prompts begin with the following text, your prompt should add to this text:

You are a tax CPA providing instructions to your clients on how to pay their tax return related payments. Generate instructions for each of the following payment tasks: payment vouchers, refund, estimated payment. Follow these rules:
Rule 1. Generate a JSON response in our standard format.
Rule 2. Use HTML rich-text formatted fields:

- bold any due dates, mailing addresses and amounts using tags
- for any lists, use and
- website links should be formatted with <a> tags
- amounts should be bolded and include a "\$" in front of it
- for mailing addresses, add new lines
 above and below the address, and format the mailing address using the USPS delivery address format with
 after each address line.

Rule 3. Instructions should be quoted verbatim from the transmittal letter text wherever possible.
Rule 4. Use the following format and structure guidelines for generating the instructions:

B

I

↺

↻

4

Unless it's a refund, the instructions should be organized into two sections: "Instructions for this Payment" (including when to pay and the amount), and "How to Pay".

"Instructions for this Payment" should include when to pay and the amount.

"How to Pay" should include the USPS-formatted mailing address if pay by mail is permitted, and any instructions to pay online if applicable and mentioned in the instructions.

Each section should contain bullet points.

Put a newline
 between each section.

If the payment is a special type of payment such as an LLC tax payment, do not include instructions related to paying estimated payments or vouchers.

Select Payment Types:

5

This template will be used to generate task descriptions for the selected payment types

☐ Voucher Payment

☐ Refund

☐ Estimated Payment

6

Save Template

SECTION TWO

Upload Scanned PDFs.

Bring batches of paper organizers and scans into Truss in one drag-and-drop.

Uploading Scanned PDFs

- 1

Read the instructions first

Cover-page rules matter — get them right before you start.
- 2

Drag-and-drop or browse

Upload completed scanned PDFs in bulk.
- 3

Track each upload

Name, status, uploaded-on, project link, details.
- 4

Download PDF cover pages in-project

Print the pre-filled cover sheets when you need them.

Scanned PDFs with PDF Cover Pages

1

How do I Use This Feature?

Upload a scanned PDF that includes cover pages for each task. If you need to download cover pages, go to the project, click on the chevron next to the project name, and click "Export PDF Cover Pages".

[You can learn more here](#)

2

Drag your scanned pdf here

OR

Browse Files

3

4

PDF Name

5

5

Status

Error

Complete

In Progress

Action Needed

6

6

Uploaded at

7

7

Project Link

8

8

View Detail

19 / 36

SECTION THREE

Scheduled Messages.

Plan your sends. Truss handles the cadence, the daily caps, and the weekend rules.

Your Scheduled Messages

- 1

Scheduled emails queue

See everything queued to send, when, and to whom.
- 2

Delete schedule
- 3

Edit schedule
- 4

Reporting

Send rates, open rates, delivery status.

Scheduled Emails 1

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

unsent

Scheduled to send Sun, May 31, 2026, 9 AM PDT

Projects waiting to send: 75 projects (87 total emails)

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

sent

Scheduled to send Mon, May 4, 2026, 9 AM PDT

Sent projects: 1 project

Scheduled

Emails

Actions

2

3

4

Editing a Scheduled Send

- 1 Edit project
- 2 Choose a date
- 3 Sending as — email or text
- 4 E-signature only
- 5 Subject & insert template
- 6 Insert project link
- 7 Save

<

EDITING

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

> Send Test Email

Scheduled to send to: 75 projects (87 total emails).

Edit Projects

1

Scheduled to send on: Sun, May 31, 2026, 9 AM PDT

Choose a new date

2

Sending as this user: Jamie k Hancock

This email will be sent "via Truss no-reply@gettruss.io"

3

☐ E-signature only

4

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*

5

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 task of gathering your 2023 tax documents easy and secure for you.

[link: YOUR CHECKLIST]

Here are some things to note about this new online client portal:

- **Easy and Secure:** EASY because you will be able to easily upload documents to this link **without a login!** SECURE because to download anything you'll need to go through a verification step.
- **Your very own Checklist:** When you click the link above, you will find your very own checklist of tax documents that we will need (based on 2023).
- **Snap photos:** You will be able to take photos of them right in the checklist or drag and drop them from your computer.
- **Leave Comments:** Each checklist item has a place for comments where you may provide us with additional information about that item (or about your tax situation in general).
- **Bookmark the link:** As the year progresses, we will use this same unique-to-you link to upload additional relevant forms, invoices, IRS payment links, payment vouchers, etc. for you to access securely, at any time.

Thank you so much for your continued business and friendship over the years. We look forward to a wonderful year with you!

[email_signature]

6

Insert Email Template

7

Insert Project Link

8

Update

HELPFUL TO KNOW

- Default cap: **250 sends / day** — can be raised to **500**.
- Truss auto-splits sends across days.
 - Weekend & text-message sending are opt-in.

SECTION FOUR

Forms.

Questionnaires and intake forms — private to a project, or public via shareable URL.

Forms: Private vs Public

- 1

Questionnaire library

All your reusable client questionnaires.
- 2

Automations

Wire form completion to next-step actions.
- 3

Private vs Public

Private forms travel inside a project. Public forms have their own URL.
- 4

View responses

See what's come back, by client and project.

Tilton & Radomski Accounting Forms

< Prev

1

Next >

25 / page

1

Tax Questionnaire

built-in form

57 automations

2

Client Intake Form

built-in form

2 automations

Business Intake - New Clients

built-in form

10 automations

Business Tax Questionnaire - Returning Clients

built-in form

13 automations

Trust & Estate Onboarding

built-in form

3 automations

Bank Account Info

built-in form

0 automations

Bank Confirmation

built-in form

0 automations

1041 Questionnaire

built-in form

0 automations

Trump Accounts

built-in form

0 automations

Tax Questionnaire (Demo) - Miles

0 automations

Corporate Filing Form

built-in form

0 automations

3

Private Form

View Responses

Copy Public Link

View Responses

Copy Public Link

View Responses

Private Form

View Responses

Copy Public Link

View Responses

Private Form

View Responses

Private Form

View Responses

Private Form

View Responses

Private Form

View Responses

Private Form

View Responses

Private Form

View Responses

Private Form

View Responses

Form Responses

- 1 Search bar
Find a response by client, project, or date.
- 2 Client name
- 3 Project
- 4 Date completed

<

FORM

Client Intake Form

Form Responses

1

Search by project name...

Search

< Prev

1

Next >

Response	Project	Date
Response from John Doe	Doe, John Onboarding	Tue, Mar 10, 06:51 AM PDT
Response from Charles Utesch	Utesch, Charles Onboarding	Wed, Jan 14, 12:58 PM PST

< Prev

1

Next >

SECTION FIVE

File Shares.

Encrypted links, MFA, expiring access, and a separate K-1 hub. Built in, not bolted on.

Sharing Files Securely

- 1

File name, shared-by, dates, recipient, MFA

Every share, every detail, at a glance.
- 2

Actions: reset expiration, add / remove files

Stay in control after the link goes out.
- 3

Security settings & copy share link
- 4

Change emails & resend

Invalidates the previous link.
- 5

Delete share

Revokes access immediately.
- 6

Share a file

Kick off a new secure share from anywhere.

File Shares

15

Filters: File Shares K-1 Shares

16

Share Files

< Prev 1 2 Next >

1

File Name

2

Shared By

3

Dates

4

Files

5

Recipient

6

MFA

7

Actions

8

9

10

11

12

13

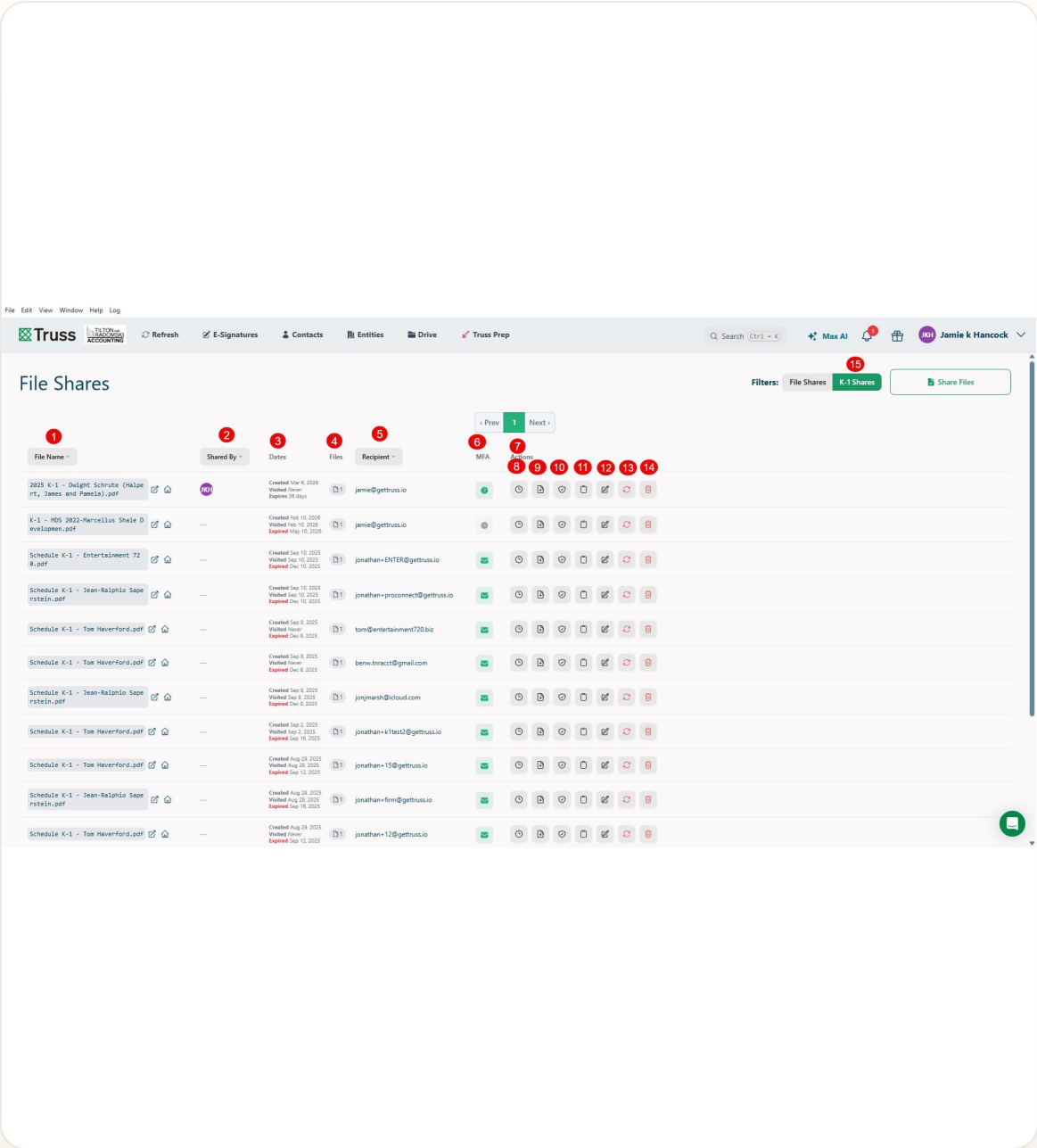
14

Claude for Accountants 4.27.26.mp4		Created Apr 27, 2026 Visited Apr 27, 2026 Expires 1 day	D1	luke.modernwell@gmail.com										
Claude for Accountants 4.27.26.mp4		Created Apr 27, 2026 Visited Never Expires 1 day	D1	—										
Human Prep - Entity Checklist Template.xlsx		Created Apr 14, 2026 Visited Apr 15, 2026 Expired Apr 28, 2026	D1	—										
Michael Harper ID.pdf		Created Apr 13, 2026 Visited Apr 14, 2026 Expired Apr 27, 2026	D1	jonmarsh@icloud.com										
Client Copy Return for 18204-1.pdf		Created Mar 26, 2026 Visited Never Expired Apr 9, 2026	D1	—										
img-47f0e957-1202-4f6a-b69a-27c1bdf06b7e (+1 more)		Created Feb 17, 2026 Visited Never Expired Mar 3, 2026	D2	andy@mouseratmusic.example.com										
2024 Tax Return_DRAFT COPY FOR REVIEW (FILED OLIVER K - Preparer Copy).pdf		Created Feb 6, 2026 Visited Never Expired Feb 20, 2026	D1	—										
img-47f0e957-1202-4f6a-b69a-27c1bdf06b7e (+4 more)		Created Jan 28, 2026 Visited Never Expired Feb 11, 2026	D5	andy@mouseratmusic.com										
Gas Receipts.pdf (+4 more)		Created Jan 28, 2026 Visited Never Expired Feb 11, 2026	D5	andy@mouseratmusic.com										
Gas Receipts.pdf (+3 more)		Created Jan 28, 2026 Visited Never Expired Feb 11, 2026	D4	andy@mouseratmusic.com										
Music Equipment.pdf (+4 more)		Created Jan 28, 2026 Visited Never	D5	andy@mouseratmusic.com										



K-1 File Shares

- 1
- File name & search
- Filter by partnership, entity, or recipient.
- 2
- Shared by · date · files · recipient · MFA
- 3
- Reset expirations & add / remove files
- 4
- Security · copy link
- 5
- Change & resend email
- 6
- Invalidate link · delete



+ *bonus*



BONUS

Client Invites.

Track every invite — by entity type, by status, by who opened what.

Tracking Client Invites

- 1

Search bar & invite-type filter

1040 · Business · Trust / Estate · Clear filters.
- 2

Sent to · sent as · sent on · subject
- 3

Status

Sent · Opened · Project created.
- 4

Actions

View email sent · delete.

Client Invites

1

2

3

4

5

6

7

8

9

10

11

Invite Type	Sent To	Sent As	Sent On	Subject	Status	Actions
1040	jonathan+tilton@gettruss.io	Ben Wyatt	Tue, Mar 10, 06:49 AM PDT	Client Request	Sent	View Details
business	smorgan@cmp.cpa	Jamie k Hancock	Fri, Jan 16, 03:56 PM PST	Welcome to Tilton & Radomski Accounting	Sent	View Details
1040	sam.utesch.karbon@gmail.com	Sam Utesch	Wed, Jan 14, 12:54 PM PST	Client Request	Sent	View Details
1040	jonjmarsh@icloud.com	Ben Wyatt	Wed, Aug 20, 2025, 05:52 PM PDT	Tax Season is Here! *Your Personal Checklist*	Sent	View Details
1040	marshjh@mail.uc.edu	Ben Wyatt	Wed, Aug 20, 2025, 05:51 PM PDT	Tax Season is Here! *Your Personal Checklist*	Sent	View Details
business	benw.tnracct@gmail.com	Ben Wyatt	Thu, Aug 14, 2025, 03:13 PM PDT	Welcome to Tilton & Radomski Accounting	Sent	View Details

+ *bonus*



BONUS

Manage

Invoices, payments received, balance, and Stripe — one ledger for the whole firm.

Payments.

Invoices

- 1

Invoice search

By name, project, or recurring task.
- 2

Amount · status · payment method

Paid · Unpaid · Pending.
- 3

Project · received-on · due-on
- 4

Mark as paid (manual)

Card · Bank account · Check · Other.
- 5

Export

All · Paid & pending · Unpaid.

Manage Payments

1

Invoices

Payments

Balance

Account

2

Project or Task Name*

Type to Search

3

Invoice Name

4

Recurring?

5

Amount

6

Status

7

Payment Method

8

Project

9

Payment Received Date

10

Due Date

11

Mark as Paid

Pay Invoice

Invoice

\$1,500.00

Unpaid

Jamie

Mar 31, 2026

Test

\$23,375.00

Unpaid

zach test

Nov 22, 2024

Nov 22, 2024

12

All

Paid & Pending

Unpaid

Export

Card

Bank Account

Check

Other

32 / 36



Payments Received

- 1 Amount paid
- 2 Email used & date received
- 3 Status & payment method
- 4 Export

Manage Payments

Invoices

Payments

Balance

Account

Amount

Email

Date

Status

Payment method

Export

No transactions yet

From here, you'll be able to manage, filter, and refund transactions.



Balance & Details

- 1

Balance of received payments
Your running total at a glance.
- 2

See payment details
Drill into any transaction for full context.

Manage Payments

Invoices

Payments

1

Balance

Account

Total balance

\$0.00

Available to pay out

\$0.00

Next payout scheduled for

May 11

Update

See details

2

Stripe & Account Settings

- 1

Click on Account

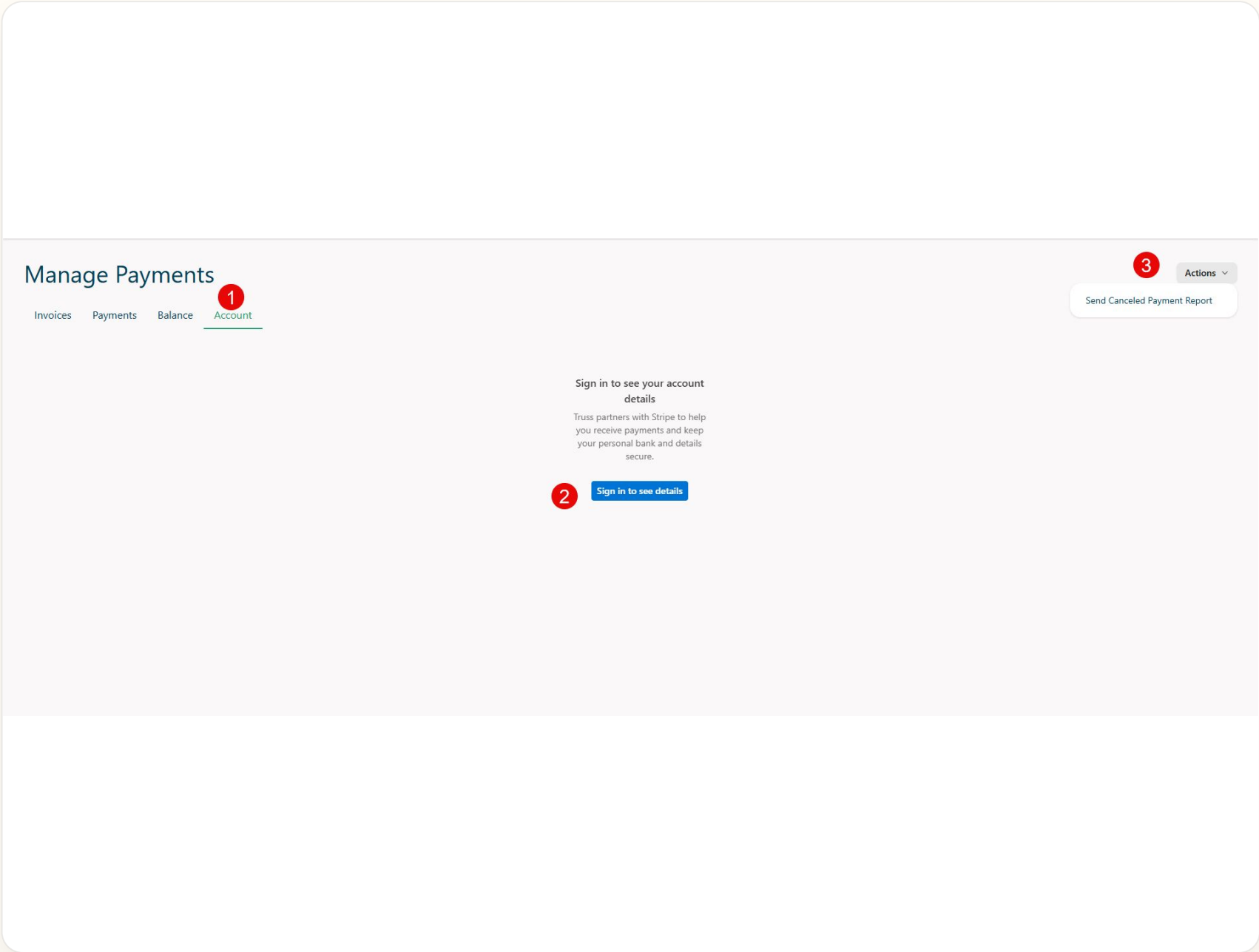
Opens your payments-account configuration.
- 2

Log in to Stripe

Manage payouts, dispute, refunds in Stripe directly.
- 3

Send cancelled-payment report

Stay on top of failed and cancelled charges.



TRUSS TRIBE LIVE SERIES · SETTINGS: PART TWO

Thanks
for
joining
us.

If you have 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*

