



PITBULLTAXSM
S O F T W A R E

Version 7 Tutorial for
Notification System

September 2022

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1. Introduction to the Notification System functionality

Notifications and alerts can further facilitate the use of PitBullTax Software. They will allow you to stay on top of your upcoming events and tasks. This tutorial goes over on the implementation of a **color coded notification tray, alerts, notification dashboard and notification settings** for the Notification System.

	Date	Type	User	Client	Checked	View	Actions
☐	08/10/2022	Zoom Meeting	AO	Vargas, Ronald	☐	Click to View	
☐	08/10/2022	Zoom Meeting	RT	Vargas, Ronald	☐	Click to View	
☐	08/10/2022	Chat Message	AO	Vargas, Ronald	☐	Click to View	
☐	08/10/2022	Chat Message	RT	Vargas, Ronald	☐	Click to View	
☐	08/10/2022	Client Questionnaire Completed	AO	Burns, Ryan	☐	Click to View	
☐	08/10/2022	Client Questionnaire Completed	RT	Burns, Ryan	☐	Click to View	
☐	08/10/2022	Email Received	AO	Mora, Ana	☐	Click to View	
☐	08/10/2022	Email Received	RT	Mora, Ana	☐	Click to View	
☐	08/10/2022	Zoom Meeting	RT	Burns, Ryan	☐	Click to View	
☐	08/10/2022	Zoom Meeting	AO	Burns, Ryan	☐	Click to View	
☐	08/10/2022	Email Received	AO	Mora, Ana	☐	Click to View	
☐	08/10/2022	Email Received	RT	Mora, Ana	☐	Click to View	
☐	08/10/2022	Email Received	AO	Mora, Ana	☐	Click to View	
☐	08/10/2022	Email Received	RT	Mora, Ana	☐	Click to View	
☐	08/10/2022	Upcoming Calendar Event	AO	Vargas, Ronald	☐	Click to View	

2. How to open the notification tray

There is a bell icon at the top left corner of the blue menu bar. This bell icon has a red circle with the number of notifications that are waiting to be opened.

The screenshot displays the PitbullTax Software interface. At the top, a blue menu bar contains various navigation options: Clients, Letters, Email, Files, Case Management, Billing, Settings, and Chat. A bell icon with a red circle and the number '1' is located in the top left corner of the menu bar, indicating one notification. The main content area is titled 'Step-by-Step Workflow' for client 'Vargas, Ronald', showing '1 out of 11 Steps Completed'. The workflow consists of 11 steps, each with a 'Start' button and a status dropdown menu. The steps are: 1. Create a Client or Prospect (Completed), 2. Send or Complete Client Questionnaire (Not Started), 3. File Power of Attorney / Tax Information Authorization (Not Started), 4. Get IRS Transcripts / Generate Transcript Reports (Not Started), 5. Diagnose a Case (Not Started), 6. Evaluate Resolution Options (Not Started), 7. Create Various Scenarios (Not Started), 8. Select Settlement Option (Not Started), 9. Calculate Fee(s) (Not Started), 10. Create Engagement Letter (Not Started), and 11. Request Documents (Not Started). On the right side, there is a calendar for August 2022, a 'TO DO's' section with an 'Add new To Do' button and a 'View all To Do's' button, and a 'News & Updates' section with an 'Archive' button. The left sidebar contains a list of tools and forms, including 'Form 433-A / 433-A (OIC)', 'Form 433-D', 'Form 433-B / 433-B (OIC)', 'Form 433-F', 'Form 656', 'Form 656-L', 'Form 656-PPV', 'Form 13711', 'Form 843', 'Form 911', 'Form 2848', 'Form 4180', 'Form 4506', 'Form 4506-T', 'Form 8379', 'Form 8821', 'Form 8822', 'Form 8857', 'Form 9423', 'Form 9465', 'Form 2159', 'Form 12153', 'Form 12509', 'Form 12277', 'Form 14134', and 'Form 14135'. The bottom of the interface features a blue footer with copyright information, app store links, and a 'W3C' logo.

PITBULLTAX SOFTWARE

Client: **Vargas, Ronald**

Step-by-Step Workflow
Vargas, Ronald
1 out of 11 Steps Completed

Step 1. Create a Client or Prospect [Start] [Completed]

Step 2. Send or Complete Client Questionnaire [Start] [Not Started]

Step 3. File Power of Attorney / Tax Information Authorization [Start] [Not Started]

Step 4. Get IRS Transcripts / Generate Transcript Reports [Start] [Not Started]

Step 5. Diagnose a Case [Start] [Not Started]

Step 6. Evaluate Resolution Options [Start] [Not Started]

Step 7. Create Various Scenarios [Start] [Not Started]

Step 8. Select Settlement Option [Start] [Not Started]

Step 9. Calculate Fee(s) [Start] [Not Started]

Step 10. Create Engagement Letter [Start] [Not Started]

Step 11. Request Documents [Start] [Not Started]

Tools

- Client Questionnaire
- Case Diagnostics
- Resolution Evaluation
- Client Summary
- IRS Transcripts Delivery
- E-Signature
- Bulk 2848/8821
- Fee Calculator
- Scenario Simulator
- Internal Revenue Manual
- IRS Publications
- Client Portal Activity
- Questionnaire Activity

Forms In Use

- Form 433-A / 433-A (OIC)
- Form 433-D

Other Forms

- Form 433-B / 433-B (OIC)
- Form 433-F
- Form 656
- Form 656-L
- Form 656-PPV
- Form 13711
- Form 843
- Form 911
- Form 2848
- Form 4180
- Form 4506
- Form 4506-T
- Form 8379
- Form 8821
- Form 8822
- Form 8857
- Form 9423
- Form 9465
- Form 2159
- Form 12153
- Form 12509
- Form 12277
- Form 14134
- Form 14135

State Forms

California

- Form FTB 3520 PIT
- Form FTB 3520 BE

Illinois

- Form IL-2848
- Form IL-2848A

Calendar
August 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	01	02	03	04	05	06
07	08	09	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	01	02	03
04	05	06	07	08	09	10

TO DO's

Add new To Do View all To Do's

News & Updates

Archive

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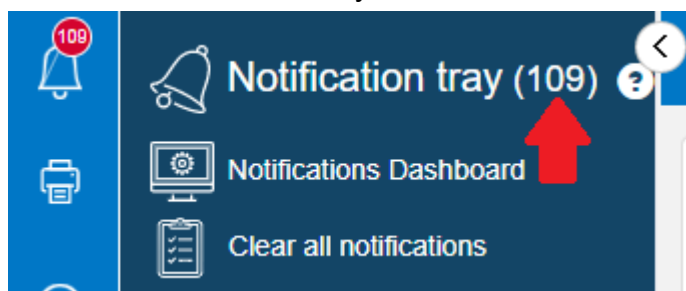
Download on the App Store GET IT ON Google Play

W3C WAI-AAA WCAG 2.1

When the User clicks on the bell icon, the Notification Tray **will open**.

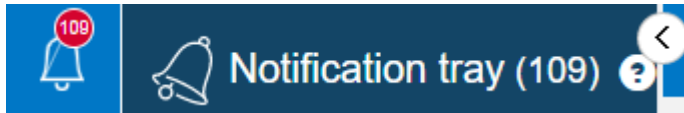
The screenshot displays the software's notification system. On the left, the 'Notification tray (109)' is open, showing a list of notifications categorized by type: 'Upcoming Calendar Event', 'Email Received', 'Client Questionnaire Completed', 'Chat Message', 'Payment Received', and 'Transcript Alert'. Each notification includes a client name and a timestamp. The main workspace features a 'Step-by-Step Workflow' for 'Vargas, Ronald', consisting of 11 steps from 'Create a Client or Prospect' to 'Request Documents'. Each step has a 'Start' button and a status dropdown (e.g., 'Completed', 'Not Started'). The right sidebar contains a calendar for August 2022, a 'TO DO's' section with an 'Add new To Do' button, and a 'News & Updates' section with an 'Archive' button. The bottom of the interface shows copyright information and app store links.

In this example the User has 109 notifications pending. To close the notification tray there is an arrow that points to the left next to the title. When the User clicks on this button the notification tray closes.

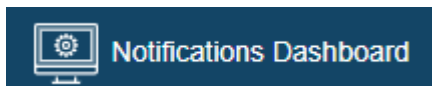


3. How to read the notification tray

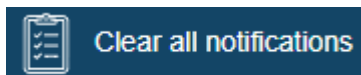
- **1. The notification tray title** has at the right side in parentheses the number of notifications that have arrived and are waiting to be checked (for this example 109 notifications are waiting to be opened).



- **2. Notifications Dashboard:** Clicking on this button will take you to the Notifications Dashboard.



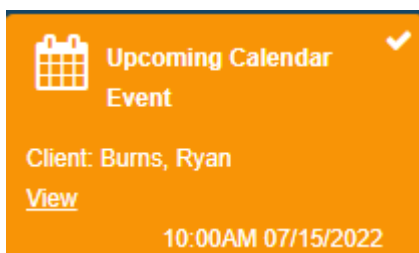
- **3. Clear all notifications:** when you need to remove all notifications just click on this button.



- **4. Filters:** With these filters, you will be able to view the notifications sorted by the newest to oldest or vice versa.



- **5. Upcoming Calendar Event notification type.** It has the “View” option to see the Calendar Event Details.



When you click the “View” button, the Calendar Event Details window is displayed.

Calendar Event Details

Event: *

Test event notification 2

Location:

Office

Start Time: *

07/15/2022

12:00 PM

☐ All Day Event

End Time: *

07/15/2022

1:00 PM

Select Recurring:

Does not repeat

Select color:

Attendees: *

Rebeca Trejos

Clients:

Burns, Ryan

Notes:

Test

Number of characters left: 393

Reminder:

None

☐ Send Reminder By Email

If you click on the Checkmark it will turn green and then will disappear from the Notification Tray.

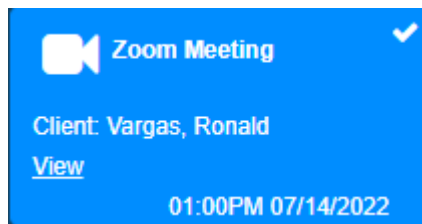
 Upcoming Calendar Event

Client: James, Lebron

[View](#)

08:00PM 08/04/2022

- **6. Zoom Meeting notification type.** It has the “View” option to see the Zoom Meeting Details.

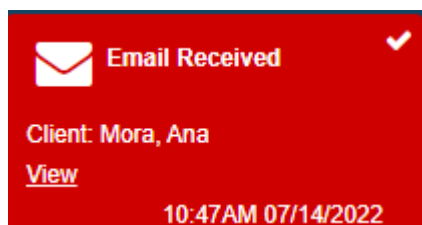


When you click the “View” button, the Zoom Meeting Details window is displayed.

Zoom Meeting Details

Date: 07/15/2022	Client: Vargas, Ronald rebetrecas@gmail.com
Start Time: 1:15 PM	End Time: 2:15 PM
Duration: 1 hour	Billable: \$ No
Case Manager: Adrian Orozco	Record Meeting?: No
Subject: Zoom Meeting Invitation	
Invitation: 	

- **7. Email Receive notification type.** It has the “View” option to see the Email Details.



When you click the “View” button, the Email Details window is displayed, here you can Forward or Reply the email.

Email Details✕

Date: 12:22PM 07/27/2022**Client:** Mora, Ana

From:

rebeca@pitbulltax.com

To:

rebeca@pitbulltax.com

CC:

Subject:

Testing email notification

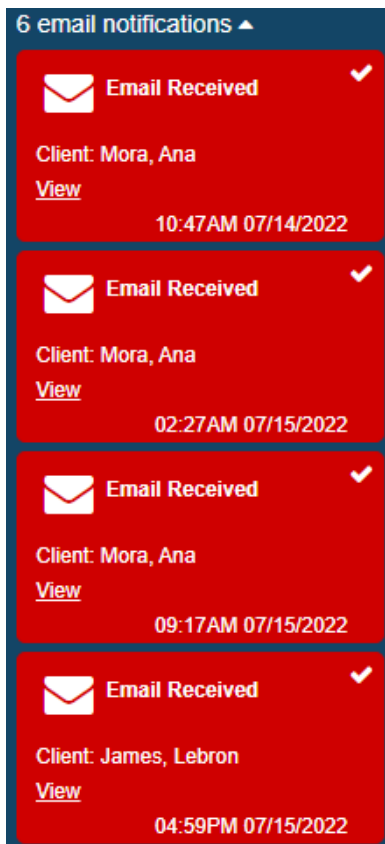
Body:

This is a test for email notifications

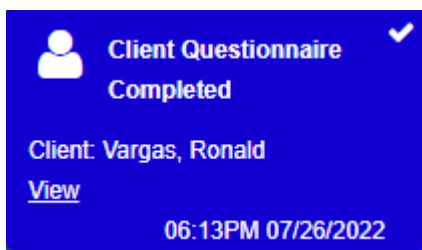
⏪ Reply

⏩ Forward

If there are several nested notifications, they can be displayed by clicking on the title “6 email notifications” (for this example). The User can collapse the nesting and uncollapse by clicking on the title.



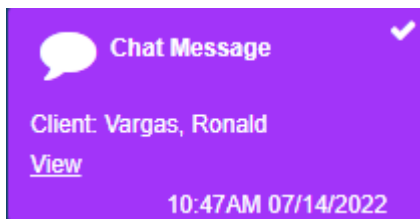
- **8. Client Questionnaire Completed notification type.** It has the “View” option to see the Email Details.



When you click the “View” button, the Client Questionnaire window is displayed.

The screenshot shows the 'Client Questionnaire' window. At the top, there's a navigation bar with tabs: Clients, Letters, Email, Files, Case Management, Billing, Settings, Chat, and a 'RT' status indicator. A notification banner at the top right says 'You have new items assigned' with a 'View' button. The main content area is titled 'Client Questionnaire' and includes a greeting 'Dear Ronald Vargas,' followed by instructions on how to complete the questionnaire. At the bottom right, there are two buttons: 'Verify and Populate to Forms' and 'Next'. The footer contains copyright information and logos for the App Store, Google Play, and WJ3C.

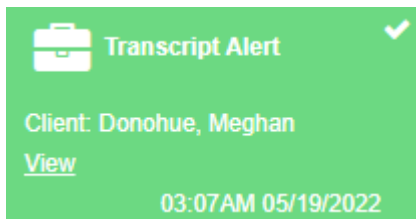
***9. Chat Message notification type.** It has the “View” option to see the Chat Details.



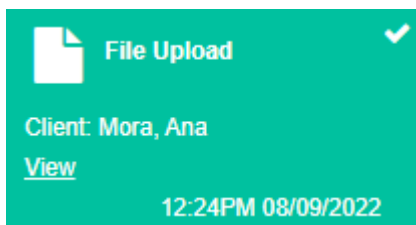
When you click the “View” button, the Chat window is displayed.

The screenshot shows the 'Chat' window. The navigation bar is similar to the previous window, but the 'Chat' tab is active. A 'Back to documents' button is visible. The chat area shows a conversation with 'Vargas, Ronald' who is 'Offline'. The messages are: 'Testing chat message notification 7/12/22' (7/12/2022 12:22 PM), 'Hope this chat notification arrives' (7/12/2022 12:26 PM), 'Testing again chat notifications' (7/12/2022 12:26 PM), 'Testing chat notifications 7/14/22' (7/14/2022 9:36 AM), and 'New chat notification test' (7/14/2022 10:47 AM). At the bottom, there is a text input field with the placeholder 'Type your message', a 'Send' button, and a 'Send File' icon.

***10. Sixth notification type** in the notification tray is: New Transcript received. It has the “View” option to see the new transcript received, the client's name, date and hour when the notification is generated.



- **11. File Upload notification type.** It has the “View” option to see the File Upload details.



When you click the “View” button, the File Details window is displayed where you can Download the File.

File Details

Upload date: 09/08/22

Client: Mora, Ana

File Name: Transcripts video script, 8_02_22

Size: 5.3 MB

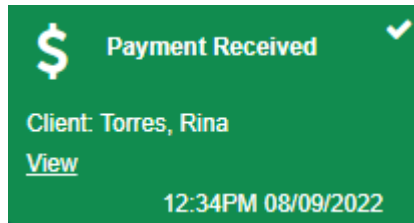
Location: My documents/Shared by Client

Type: Word

Synchronized: No

 **Download File**

-12. **Payment Received notification type.** It has the “View” option to see the Payment Received details.



When you click the “View” button, the Payment Details window is displayed where you can Print the Invoice..

Payment Details

Invoice Number: #23

Client: Torres, Rina

Invoice Total: \$70.40

Invoice Due Date: 08/10/22 (Not due yet)

Balance Pending: \$0.00

Representative: Rebeca Trejos

Payment History

Services Provided

Date	Amount	Payment Method
08/09/22	\$70.40	Cash

 **Print Invoice**

5

1 - 1 displayed , 1 in total

- **13. Notification Settings:** At the bottom of the notification tray there is a button to access the Notification Settings:

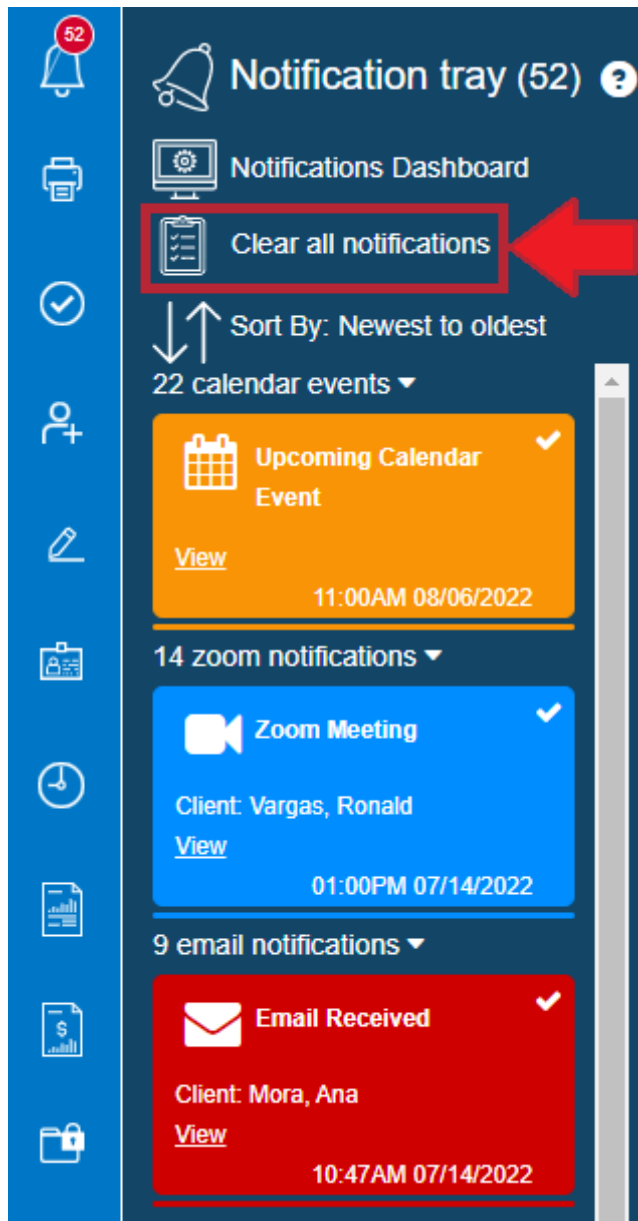


This is how the Notification Tray looks when it has several notifications.

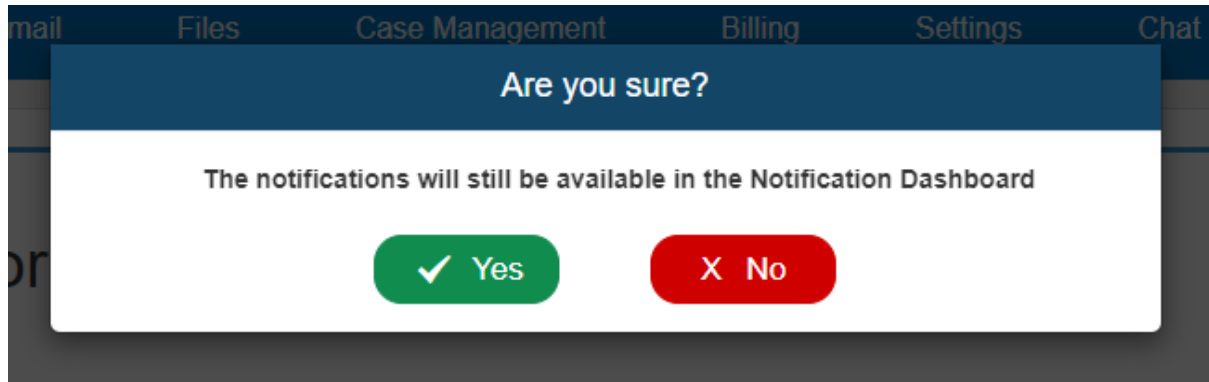
The screenshot shows a software interface with a blue header bar containing navigation links: Clients, Letters, Email, Files, Case Management, Billing, Settings, and Chat. On the far right of the header is a red circular icon with a white 'RT'. Below the header is a 'Notification tray (28)' sidebar on the left, which lists various notifications categorized by type: 'Upcoming Calendar Event' (orange), 'Zoom Meeting' (blue), 'Email Received' (red), 'Client Questionnaire Completed' (purple), 'Chat Message' (green), 'File Upload' (light green), and 'Payment Received' (dark green). Each notification includes a client name and a timestamp. At the bottom of the sidebar is a 'Notification Settings' button with a gear icon. The main content area is titled 'Step-by-Step Workflow' and shows a progress bar for 'Mora, Ana' with '1 out of 11 Steps Completed'. Below this is a list of 11 steps, each with a 'Start' button and a status dropdown menu. The steps are: 1. Create a Client or Prospect (Completed), 2. Send or Complete Client Questionnaire (Sent to Client), 3. File Power of Attorney / Tax Information Authorization (Not Started), 4. Get IRS Transcripts / Generate Transcript Reports (Not Started), 5. Diagnose a Case (Not Started), 6. Evaluate Resolution Options (Not Started), 7. Create Various Scenarios (Not Started), 8. Select Settlement Option (Not Started), 9. Calculate Fee(s) (Not Started), 10. Create Engagement Letter (Not Started), and 11. Request Documents (Not Started). To the right of the workflow steps is a calendar for August 2022, a 'Tomorrow' section showing a 1:00 pm event 'Testing sync from PBT to Outlook', a 'TO DO's' section with a list of tasks and their completion percentages, and a 'News & Updates' section with several news items. At the bottom of the interface is a blue footer bar containing copyright information, app store links for the App Store and Google Play, and a 'W3C' logo.

4. How to clear the Notification Tray

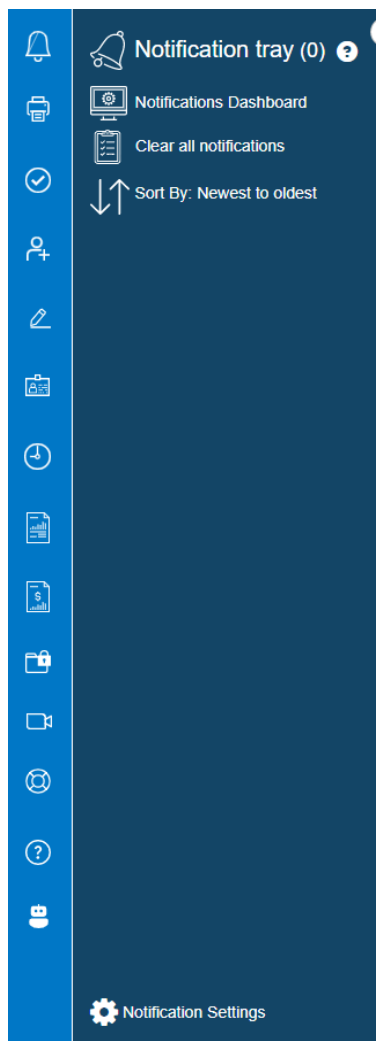
In order to purge the Notification Tray, just click the “Clear all notifications” button located under “Notifications Dashboard” button.



When you click this button, the system displays a confirmation bubble with Yes/No options besides the warning that the **notifications will still be available in the Notification Dashboard**.



Clicking “Yes” will clear all notifications in the Notification Tray.



5. Triggers for each Notification type

1. Upcoming calendar event:

The trigger for the upcoming calendar event happens when the user schedules an event in the calendar. The notification is generated a certain amount of time before the event begins. The User is able to choose how much time of anticipation they want for the notification to be generated in **Notification Settings**.

Create Event

Event: *

Calendar Event for Notification System

Location:

Office

Start Time: *

09/08/2022

10:00 AM

☐ All Day Event

End Time: *

09/08/2022

11:00 AM

Select Recurring:

Does not repeat ▾

Select color:

Attendees: *

Rebeca Trejos ✕

Clients:

Burns, Ryan ▾

Notes:

Calendar events

Number of characters left: 385

Reminder:

None ▾

☐ Email All Attendees

Save

ClientsLettersEmailFilesCase ManagementBillingSettingsChat

RT

You have new items assignedView

Event created

Calendar

Schedule for: All StaffView mode: StaffClientActions: Add EventSchedule Zoom MeetingReports

September 2022dayweekmonthScheduletoday<>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8 10:00 AM - 11:00 AM Rebecca Trepos Calendar Event for Notification S	9	10
11	12	13	14	15	16	17

2. Zoom meeting:

The trigger for the Zoom Meeting happens when the user schedules a Zoom meeting.

ClientsLettersEmailFilesCase ManagementBillingSettingsChat<>RT

You have new items assignedView

Schedule Zoom meeting

Step 2: Schedule Invitation

☒ Client meeting ☐ Internal team meeting

Select the Client for the meeting:

Vargas, Ronald

Send Invitation:

Immediately

Case Manager:

Rebeca Trejos

Meeting Details:

Date: 09/05/2022 Starts: 10:30 AM Ends: 11:30 AM Duration: 1 hour

Billable? \$ Not Billable ☐ Record meeting?

Previous Step Schedule Meeting

ClientsLettersEmailFilesCase ManagementBillingSettingsChat<>RT

You have new items assignedView

Calendar

Schedule for: All Staff View mode: Staff Client Actions: Add Event Schedule Zoom Meeting Reports

September 2022 day week month Schedule today <>

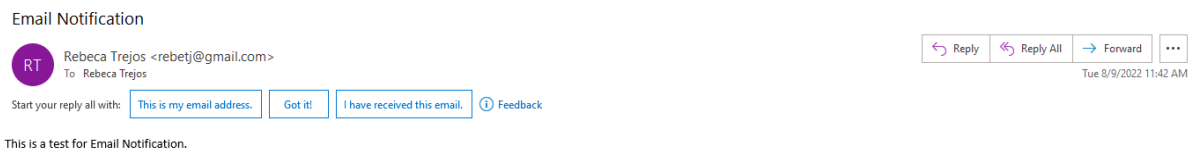
Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17

10:30 AM - 11:30 AM
Client: Ronald Vargas
Zoom Meeting Invitation

10:00 AM - 11:00 AM
Rebeca Trejos
Calendar Event for Notification 5

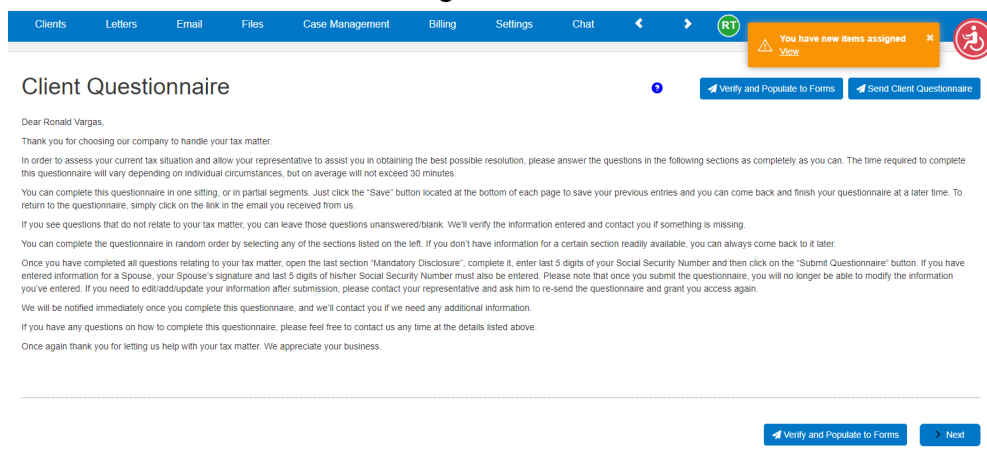
3. Email received:

The trigger for Email received happens when the user receives a new email from a client in the inbox.



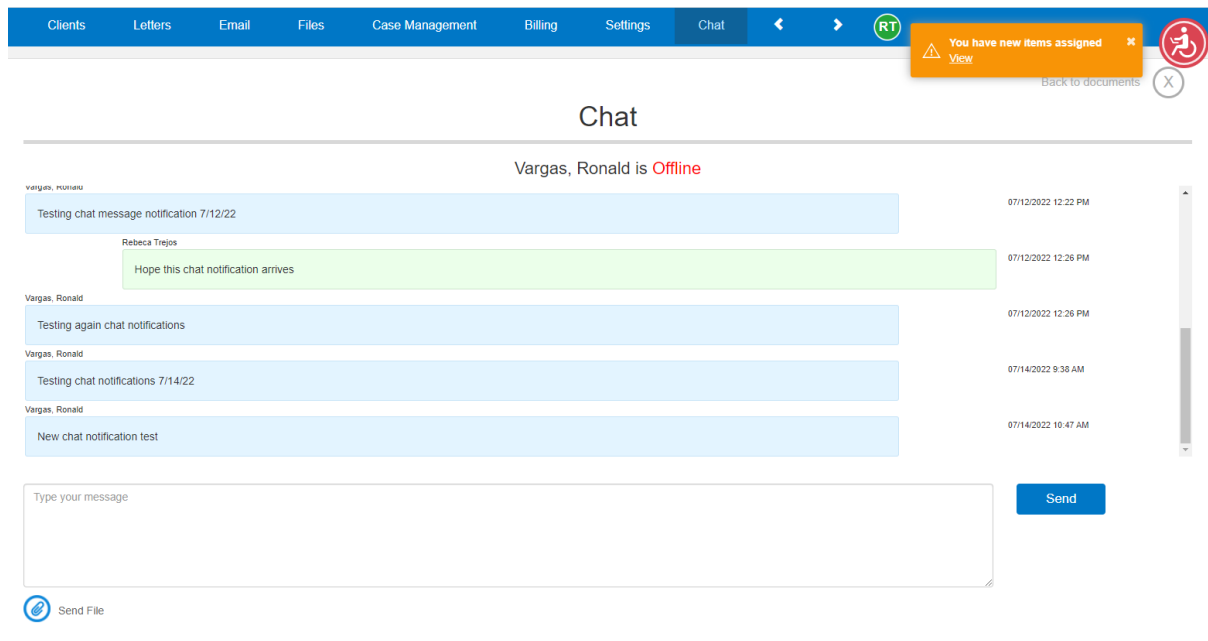
4. Client Questionnaire completed:

The trigger for the Client Questionnaire completed happens when the user's client receives the Client Questionnaire in their mailbox and they have completed the instance of the Questionnaire that was sent. Each time someone completes a Client Questionnaire a Notification is generated.



5. Chat message:

The trigger for the Chat message notification happens when one of the clients sends a message to the user through the client portal and the user has not seen it, therefore this notification is generated.

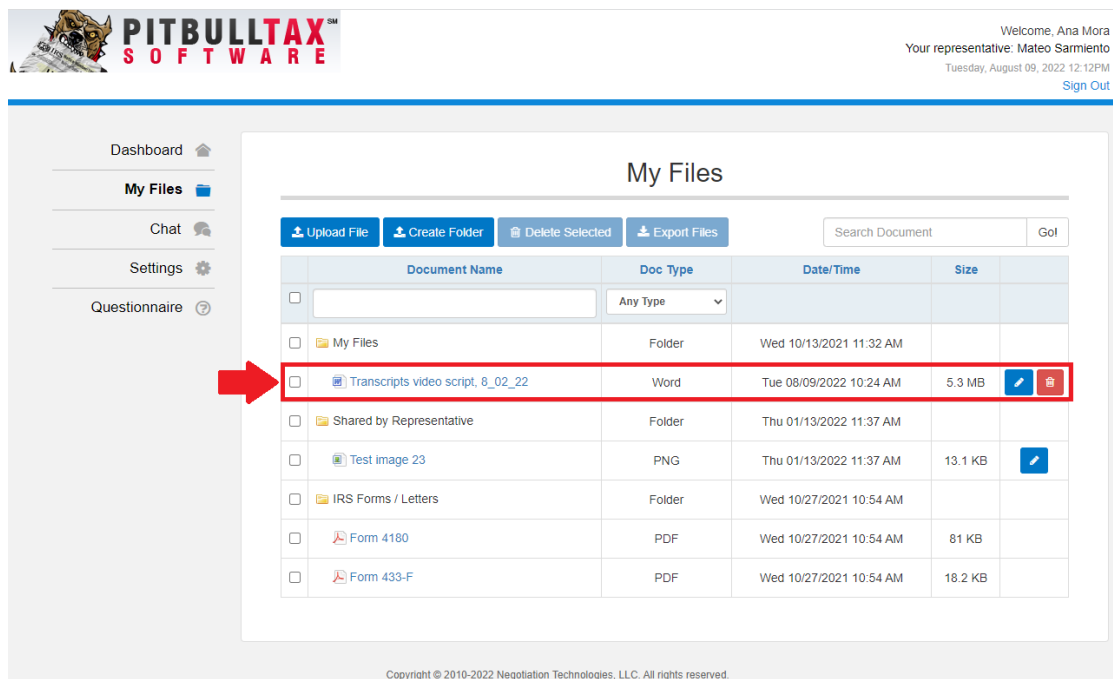


6. New Transcript received:

The trigger for the new transcript received notification happens when the User receives a new IRS Transcript. **(Agregar imagen)**

7. A client has uploaded a file:

The trigger for an uploaded file by the client happens when the client uploads a file through the Client portal.



8. Payment received:

The trigger for the Payment Received notification happens when the PitBullTax system detects that an invoice has received a payment. For each payment registered for any invoice, there will be a notification.

ClientsLettersEmailFilesCase ManagementBillingSettingsChat<>RT

You have new items assignedView

Update Payment

Client:Torres, Rina

Date:08/09/2022

Pmt. Method:CustomizeCash

Invoice #:23

Amount:70.40

Ref #:1258

Memo:Payment

INVOICES AND OUTSTANDING TRANSACTIONS

☒	Type	Due Date	Original Amount	Open Balance	Payment
☒	Invoice #23 (08/09/2022)	08/10/2022	\$70.40	\$0.00	70.40
Totals:				\$0.00	\$70.40

Payment Type:InitialRecurring

Total To Apply:70.40

Amount To Credit:0.00

Cancel

Save

Delete

Print

Email

6. How to read the Notification Dashboard

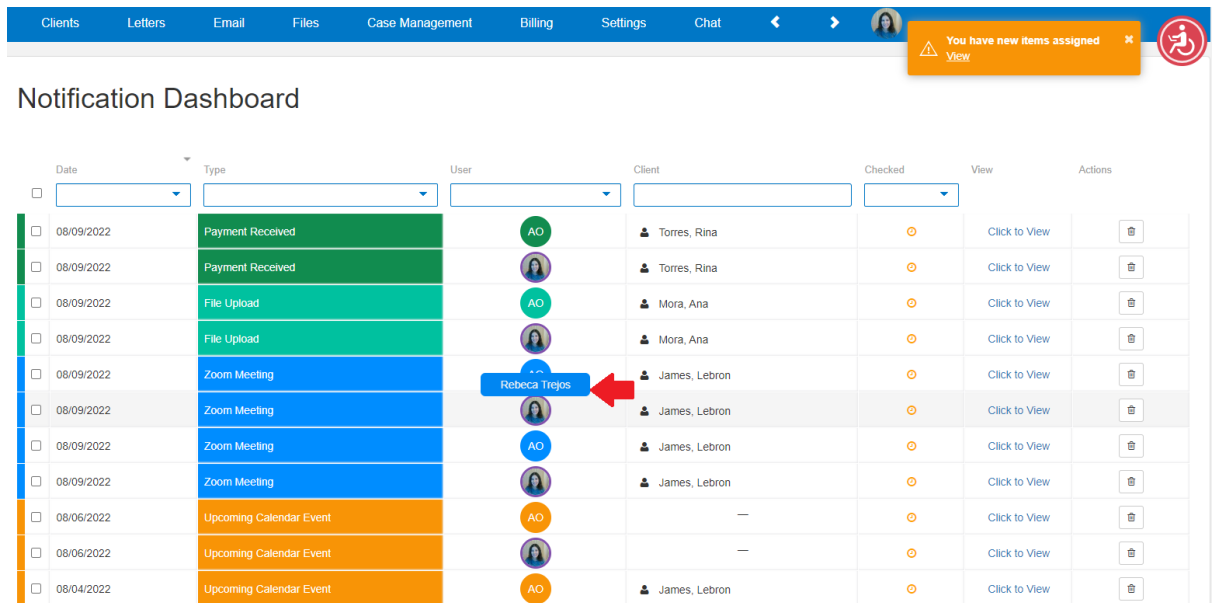
The Notification Dashboard includes the following data and its respective filter:

- **1. Date:** it is the receiving date of the notification.
- **2.Type:** it is the type of notification. This document describes 8 types of notifications. **Notice that the type column color depends on the type of notification. The purpose is to allow color coding for users and improve the readability of the Dashboard.**
- **3. User:** it is the case manager represented by his/her picture, and is who receives the notification. When the User hovers over the User bubble the name of the User appears in a pop up:

Date	Type	User	Client	Checked	View	Actions
☐						
☐ 08/09/2022	Payment Received	AO	Torres, Rina	☐	Click to View	🗑
☐ 08/09/2022	Payment Received		Torres, Rina	☐	Click to View	🗑
☐ 08/09/2022	File Upload	AO	Mora, Ana	☐	Click to View	🗑
☐ 08/09/2022	File Upload		Mora, Ana	☐	Click to View	🗑
☐ 08/09/2022	Zoom Meeting	AO	James, Lebron	☐	Click to View	🗑
☐ 08/09/2022	Zoom Meeting		James, Lebron	☐	Click to View	🗑
☐ 08/09/2022	Zoom Meeting	AO	James, Lebron	☐	Click to View	🗑
☐ 08/09/2022	Zoom Meeting		James, Lebron	☐	Click to View	🗑
☐ 08/06/2022	Upcoming Calendar Event	AO	—	☐	Click to View	🗑
☐ 08/06/2022	Upcoming Calendar Event		—	☐	Click to View	🗑

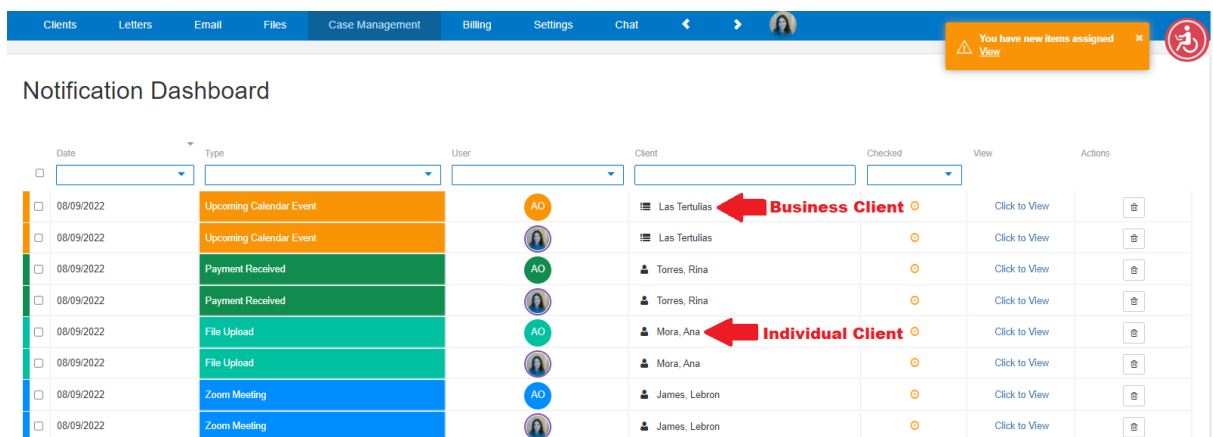
In this example the User doesn't have a profile picture. If this happens the User bubble is represented with the initials of the first and last name of the representative (Adrian Orozco = AO).

In this next example the User has a profile picture, when the User hovers over it looks as the following example:



Date	Type	User	Client	Checked	View	Actions
08/09/2022	Payment Received	AO	Torres, Rina	☐	Click to View	
08/09/2022	Payment Received		Torres, Rina	☐	Click to View	
08/09/2022	File Upload	AO	Mora, Ana	☐	Click to View	
08/09/2022	File Upload		Mora, Ana	☐	Click to View	
08/09/2022	Zoom Meeting	Rebeca Trejos	James, Lebron	☐	Click to View	
08/09/2022	Zoom Meeting		James, Lebron	☐	Click to View	
08/09/2022	Zoom Meeting	AO	James, Lebron	☐	Click to View	
08/09/2022	Zoom Meeting		James, Lebron	☐	Click to View	
08/06/2022	Upcoming Calendar Event	AO	—	☐	Click to View	
08/06/2022	Upcoming Calendar Event		—	☐	Click to View	
08/04/2022	Upcoming Calendar Event	AO	James, Lebron	☐	Click to View	

- **4. Client:** it is the client associated with the notification. Next to the client's name there is an icon representing if it is a Business or an Individual client. For example, the following image shows the Individual and Business clients respective icons:



Date	Type	User	Client	Checked	View	Actions
08/09/2022	Upcoming Calendar Event	AO	Las Tertulias	☐	Click to View	
08/09/2022	Upcoming Calendar Event		Las Tertulias	☐	Click to View	
08/09/2022	Payment Received	AO	Torres, Rina	☐	Click to View	
08/09/2022	Payment Received		Torres, Rina	☐	Click to View	
08/09/2022	File Upload	AO	Mora, Ana	☐	Click to View	
08/09/2022	File Upload		Mora, Ana	☐	Click to View	
08/09/2022	Zoom Meeting	AO	James, Lebron	☐	Click to View	
08/09/2022	Zoom Meeting		James, Lebron	☐	Click to View	

When hovering over the client name, a pop up text appears that indicates this is a shortcut to the Client Summary. The highlight color is the same as the notification type.

Notification Dashboard

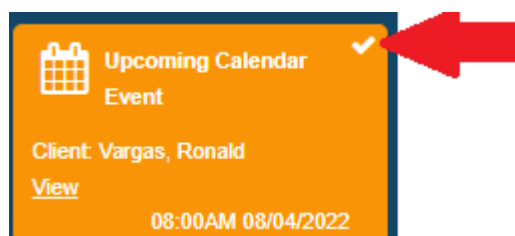
Date	Type	User	Client	Checked	View	Actions
08/09/2022	Upcoming Calendar Event	AO	Las Tertulias	☐	Click to View	
08/09/2022	Upcoming Calendar Event		Las Tertulias	☐	Click to View	
08/09/2022	Payment Received	AO	Torres, Rina	☐	Click to View	
08/09/2022	Payment Received		Torres, Rina	☐	Click to View	
08/09/2022	File Upload	AO	Mora, Ana	☐	Click to View	
08/09/2022	File Upload		Mora, Ana	☐	Click to View	
08/09/2022	Zoom Meeting	AO	James, Lebron	☐	Click to View	
08/09/2022	Zoom Meeting		James, Lebron	☐	Click to View	
08/09/2022	Zoom Meeting	AO	James, Lebron	☐	Click to View	
08/09/2022	Zoom Meeting		James, Lebron	☐	Click to View	
08/06/2022	Upcoming Calendar Event	AO	—	☐	Click to View	

5. Checked: check mark means that the user has already checked the notification, and the clock means that the user hasn't checked the notification.

Notification Dashboard

Date	Type	User	Client	Checked	View	Actions
08/09/2022	Upcoming Calendar Event	AO	Las Tertulias	☒	Click to View	
08/09/2022	Upcoming Calendar Event		Las Tertulias	☒	Click to View	
08/09/2022	Payment Received	AO	Torres, Rina	☒	Click to View	
08/09/2022	Payment Received		Torres, Rina	☐	Click to View	
08/09/2022	File Upload	AO	Mora, Ana	☐	Click to View	
08/09/2022	File Upload		Mora, Ana	☐	Click to View	

Notice that next to each notification box in the Notification Tray, there is a check mark, clicking on this check mark the Checked column updates its value and the notification is removed from the Notification Tray..



The checkmark at the top right corner is the trigger to mark a notification as checked in the Notification Dashboard.

Notification Dashboard

Date	Type	User	Client	Checked	View	Actions
08/09/2022	Upcoming Calendar Event	AO	Burns, Ryan	☐	Click to View	
08/09/2022	Upcoming Calendar Event		Burns, Ryan	✓	Click to View	
08/09/2022	Upcoming Calendar Event	AO	Las Tertulias	✓	Click to View	

6. View: it is the option to view the notification details.

Notification Dashboard

Date	Type	User	Client	Checked	View	Actions
08/09/2022	Upcoming Calendar Event	AO	Burns, Ryan	☐	Click to View	
08/09/2022	Upcoming Calendar Event		Burns, Ryan	✓	Click to View	
08/09/2022	Upcoming Calendar Event	AO	Las Tertulias	✓	Click to View	
08/09/2022	Upcoming Calendar Event		Las Tertulias	✓	Click to View	
08/09/2022	Payment Received	AO	Torres, Rina	✓	Click to View	

7. Actions: clicking the Delete icon you can remove the notification from Notification Dashboard..

Notification Dashboard

Date	Type	User	Client	Checked	View	Actions
08/09/2022	Upcoming Calendar Event	AO	Burns, Ryan	☐	Click to View	

8. Available buttons:

Export Button: to export the selected notifications into an Excel report.

Print button: to print the selected notifications into a PDF report.

Marked checked: to mark checked the selected notifications.

Marked unchecked: to mark unchecked the selected notifications.

The screenshot displays a software interface with a top navigation bar containing tabs: Clients, Letters, Email, Files, Case Management, Billing, Settings, and Chat. Below the navigation bar is a table of notifications. Each row includes a checkbox, a date, a notification type (e.g., Upcoming Calendar Event, Email Received, Zoom Meeting), a status icon (AO or a person icon), a name (e.g., James, Lebron, Vargas, Ronald, Donohue, Meghan, Burns, Ryan), a status indicator (green checkmark or orange circle), and a 'Click to View' link. An orange notification banner at the top right states 'You have new items assigned View'. Below the table, there are four buttons: 'Export', 'Print', 'Mark Checked', and 'Mark Unchecked', each with a red arrow pointing down to it. At the bottom right, a pagination bar shows '50' items per page, '1' of 2 pages, and '1 - 50 displayed, 320 in total'.

	Clients	Letters	Email	Files	Case Management	Billing	Settings	Chat			
☐	07/16/2022		Upcoming Calendar Event				AO	James, Lebron	✓		
☐	07/16/2022		Upcoming Calendar Event					James, Lebron	✓	Click to View	
☐	07/15/2022		Email Received					James, Lebron	○	Click to View	
☐	07/15/2022		Email Received				AO	James, Lebron	✓	Click to View	
☐	07/15/2022		Zoom Meeting				AO	Vargas, Ronald	✓	Click to View	
☐	07/15/2022		Zoom Meeting					Vargas, Ronald	○	Click to View	
☐	07/15/2022		Zoom Meeting					Donohue, Meghan	○	Click to View	
☐	07/15/2022		Zoom Meeting				AO	Donohue, Meghan	✓	Click to View	
☐	07/15/2022		Zoom Meeting				AO	Vargas, Ronald	✓	Click to View	
☐	07/15/2022		Zoom Meeting					Vargas, Ronald	○	Click to View	
☐	07/15/2022		Upcoming Calendar Event				AO	Burns, Ryan	✓	Click to View	
☐	07/15/2022		Upcoming Calendar Event					Burns, Ryan	○	Click to View	
☐	07/15/2022		Zoom Meeting				AO	Vargas, Ronald	✓	Click to View	
☐	07/15/2022		Zoom Meeting					Vargas, Ronald	○	Click to View	

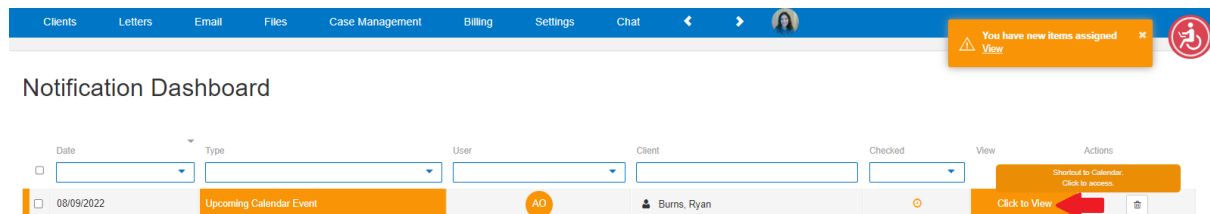
50 « 1 2 ... » 1 - 50 displayed, 320 in total

Export Print Mark Checked Mark Unchecked

7. Click to View Details on Notification Dashboard for each notification type

1. Calendar Event:

When the user clicks on “Click to view” in Notification Dashboard



This pop up is going to be displayed with the following information:

A screenshot of the "Calendar Event Details" pop-up form. The form has an orange header with the title "Calendar Event Details" and a close button. The fields are as follows: "Event:" with a text input containing "Testing Individual Calendar Event"; "Location:" with an empty text input; "Start Time:" with date and time pickers set to "08/09/2022" and "5:30 PM", and an "All Day Event" checkbox; "End Time:" with date and time pickers set to "08/09/2022" and "6:00 PM"; "Select Recurring:" with a dropdown menu set to "Does not repeat"; "Select color:" with a red color swatch; "Attendees:" with a dropdown menu containing "Rebeca Trejos"; "Clients:" with a dropdown menu containing "Burns, Ryan"; "Notes:" with a large text area containing "Test" and a character count "Number of characters left: 396"; and "Reminder:" with a dropdown menu set to "None" and a "Send Reminder By Email" checkbox.

- ***Event:** where the user is able to see the name of the event.
- ***Location:** at which location the event will be held.
- ***Start time:** the specific hour for the beginning of the event.
- ***All day event:** is a checkbox to select if it is an all day event.
- ***End time:** the specific hour for the end time of the event.
- ***Select Recurring:** daily, weekly, monthly, annually, every weekday or custom.
- ***Attendees:** the names of the attendees of the event.
- ***Client:** the client's name.
- ***Notes:** if it is necessary the user is able to add some notes.
- ***Reminder:** before starting the event, the user is able to get a reminder.

2. Zoom Meeting

When the user clicks on “**Click to view**” on Notification Dashboard.

[Clients](#)
[Letters](#)
[Email](#)
[Files](#)
[Case Management](#)
[Billing](#)
[Settings](#)
[Chat](#)

You have new items assigned

[View](#)

Notification Dashboard

	Date	Type	User	Client	Checked	View	Actions
☐	08/10/2022	Upcoming Calendar Event	AO	Vargas, Ronald		Click to View	
☐	08/10/2022	Upcoming Calendar Event		Vargas, Ronald		Click to View	
☐	08/09/2022	Upcoming Calendar Event	AO	Burns, Ryan		Click to View	
☐	08/09/2022	Upcoming Calendar Event		Burns, Ryan		Click to View	
☐	08/09/2022	Upcoming Calendar Event	AO	Las Tertullias		Click to View	
☐	08/09/2022	Upcoming Calendar Event		Las Tertullias		Click to View	
☐	08/09/2022	Payment Received	AO	Torres, Rina		Click to View	
☐	08/09/2022	Payment Received		Torres, Rina		Click to View	
☐	08/09/2022	File Upload	AO	Mora, Ana		Click to View	
☐	08/09/2022	File Upload		Mora, Ana		Click to View	
☐	08/09/2022	Zoom Meeting	AO	James, Lebron		Click to View	
☐	08/09/2022	Zoom Meeting		James, Lebron		Click to View	
☐	08/09/2022	Zoom Meeting	AO	James, Lebron		Click to View	

Shortcut to Zoom

Click to access

This pop up is going to be displayed when the Zoom Meeting has been already held, includes the following information:

Zoom Meeting Details

Date: 08/09/2022	Client: James, Lebron lbjintech@gmail.com
Start Time: 12:00 PM	End Time: 1:00 PM
Duration: 1 hour	Billable: \$ Billable
Case Manager: Adrian Orozco	Record Meeting?: Yes
Subject: Zoom Meeting Invitation	
Invitation: Dear Lebron James.Adrian Orozco is inviting you to a scheduled Zoom meeting.Topic: Zoom Meeting Invitation Date: 08/09/2022 12:00 PMJoin Zoom Meeting https://us02web.zoom.us/j/89642834783?pwd=RVJNVEQxYVBua29uNmNudnhzazVnZz09 Meeting ID: 89642834783Passcode: B6JHEg	

***Date:** is the date on which the Zoom Meeting is going to be held.

***Client:** Client's name and under it the email.

***Start time:** meeting start time.

***End time:** meeting end time.

***Duration:** the time spent in the Zoom meeting.

***Case Manager:** the representative in charge of the case.

***Record Meeting:** yes/no.

***Subject:** is the purpose of the meeting.

***Invitation:** it is the invitation that the client gets in his email, with all the details to join the zoom meeting.

When the Zoom Meeting has not been held, the next pop up will be displayed:

Zoom Meeting Details

Date: 08/10/2022	Client: Vargas, Ronald rebetrecas@gmail.com
Start Time: 4:00 PM	End Time: 5:00 PM
Duration: 1 hour	Billable: \$ No
Case Manager: Rebeca Trejos	Record Meeting?: No

Subject: Zoom Meeting Invitation

Invitation:

Dear Ronald Vargas.

Rebeca Trejos is inviting you to a scheduled Zoom meeting.

Topic: Zoom Meeting Invitation

Date: 08/10/2022 04:00 PM

Join Zoom Meeting

<https://zoom.us/j/92674425992?pwd=Tm9Tc1pjam03M1loWkFET1pqK3U1Zz09>

Meeting ID: 92674425992

Passcode: 7eaTJG

 Reschedule Meeting

It has the same information and the **Reschedule Meeting button**. This button is useful when you need to reschedule the Zoom Meeting, clicking on this button the system will take you to the calendar in order to select another date for the Zoom meeting.

[Clients](#)
[Letters](#)
[Email](#)
[Files](#)
[Case Management](#)
[Billing](#)
[Settings](#)
[Chat](#)

You have new items assigned
View

Schedule Zoom meeting

Step 1: Please select date and time for the meeting

September 2022

day
week
month
Schedule

today
<
>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1 12:00 PM - 1:00 PM Rebecca Trejos Upcoming Business Calendar Event	2 10:00 AM - 11:00 AM Rebecca Trejos Business Client Event	3
4 12:30 PM - 1:30 PM Client: Ronald Vargas Zoom Meeting Invitation	5	6	7 12:00 PM - 1:00 PM Rebecca Trejos Calendar Event for Notification System	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24

3. Email

When the user clicks on “Click to view” in the Notification Dashboard

Date	Type	User	Client	Checked	View	Actions
08/10/2022	Zoom Meeting	AO	Vargas, Ronald	☐	Click to View	View
08/10/2022	Zoom Meeting		Vargas, Ronald	☐	Click to View	View
08/10/2022	Zoom Meeting		Burns, Ryan	☐	Click to View	View
08/10/2022	Zoom Meeting	AO	Burns, Ryan	☐	Click to View	View
08/10/2022	Email Received	AO	Mora, Ana	☐	Click to View	View
08/10/2022	Email Received		Mora, Ana	☐	Click to View	View

This pop up is going to be displayed with the following information:

Email Details

Date: 08/10/2022 **Client:** Mora, Ana

From: rebeca@pitbulltax.com

To: rebeca@pitbulltax.com

CC:

Subject: [Zoom meeting reminder] Zoom Meeting Invitation

Body:

PitBullTax Software, 1-877-4 PITBULL, <https://www.pitbulltax.com>

Dear Ryan Burns.

Rebeca Trejos is inviting you to a scheduled Zoom meeting.

Topic: Zoom Meeting Invitation

Date: 08/10/2022 11:15 AM

Join Zoom Meeting [95197267336](https://zoom.us/j/95197267336) [Call](#)

<https://zoom.us/j/95197267336?pwd=UGkyamkxekxhaEh0Vm9OdDRyaXZHUT09>

Meeting ID: 95197267336

Decoded: Not a...

[Reply](#) [Forward](#)

- ***Date:** Shows the date when the email was received.
- ***Client:** the client's name.
- ***From:** indicates the client's email address.
- ***To:** indicates the User's email address that received the email.
- ***CC:** Shows the email addresses that were CC'd in the email message.
- ***Subject:** The subject of the email is shown.
- ***Body:** Shows the body of the email that was received.

***Reply:** When the user clicks on **Reply**, the following window will appear, in order to answer the email. The sender will be able to edit the body of the email. They select the address to send the email with the From dropdown. The options shown in this dropdown are the emails that are synched with the User's PBT account.

Email Reply
✕

Date: 08/10/2022
Client: Mora, Ana

From:

Office 365
▼

To:

rebeca@pitbulltax.com ✕
+

CC:

+

Subject:

Re: [Zoom meeting reminder] Zoom Meeting Invitation
✎

Body:

↶ ↷
B *I* U
14
☰ ☱ ☲
T
☐
—

↶ Reply

When the User clicks on the plus icon the add email prompt is the following:

Email Reply

Date: 08/10/2022 **Client:** Mora, Ana

From: Office 365

To: rebecca

CC:

Subject: Re: [Zoom meeting reminder] Zoom Meeting Invitation

Body:

Add Email Address

Type the email address and click on add.

Textbox that validates email address

+ Add

Reply

***Forward:** When the user clicks on the **Forward** button

Email Details



Date: 08/10/2022

Client: Mora, Ana

From:

rebeca@pitbulltax.com

To:

rebeca@pitbulltax.com

CC:

Subject:

[Zoom meeting reminder] Zoom Meeting Invitation

Body:

 PitBullTax Software, 1-877-4 PITBULL, <https://www.pitbulltax.com>

Dear Ryan Burns.

Rebeca Trejos is inviting you to a scheduled Zoom meeting.

Topic: Zoom Meeting Invitation

Date: 08/10/2022 11:15 AM

Join Zoom Meeting

<https://zoom.us/j/95197267336?pwd=UGkyamkxekxhaEh0Vm9OdDRyaXZHUT09>

Meeting ID: 95197267336

Decoded: Net4us



← Reply

→ Forward

The following window will appear, in order to forward the email to another email address.

Email Forward ✕

From:

Forward to:

Subject:

Body:

B *I* U 14 **T!**

-----Begin Forwarded Message-----

PitBullTax Software, 1-877-4 PITBULL, <https://www.pitbulltax.com>

Dear Ryan Burns.

Rebeca Trejos is inviting you to a scheduled Zoom meeting.

Topic: Zoom Meeting Invitation

Date: 08/10/2022 11:15 AM

Join Zoom Meeting

Forward

Includes the next details:

From: it is the sender of the email.

Forward to: to resend the email to another receiver. Clicking the plus icon, you will be able to add another email address.

Email Forward ✕

From:

Forward to:

Subject:

Body:

Add Email Address ✕

Type the email address and click on add.

Add

Subject: The subject of the email is shown, and using the pencil icon, the user will be able to edit the subject.

Body: Shows the body of the email that was received. The body of the email can be edited as well.

4 .Client Questionnaire

When you click on the “Click to view” option in the Notification Dashboard

Date	Type	User	Client	Checked	View	Actions
08/10/2022	Zoom Meeting	AO	Vargas, Ronald	☐	Click to View	
08/10/2022	Zoom Meeting		Vargas, Ronald	☐	Click to View	
08/10/2022	Client Questionnaire Completed	AO	Burns, Ryan	☐	Click to View	
08/10/2022	Client Questionnaire Completed		Burns, Ryan	☐	Click to View	
08/10/2022	Email Received	AO	Mora, Ana	☐	Click to View	

The Client Questionnaire window is displayed, there you can click on “Verify and Populate to Forms”.

Client Questionnaire

Dear Ryan Burns,

Thank you for choosing our company to handle your tax matter.

In order to assess your current tax situation and allow your representative to assist you in obtaining the best possible resolution, please answer the questions in the following sections as completely as you can. The time required to complete this questionnaire will vary depending on individual circumstances, but on average will not exceed 30 minutes.

You can complete this questionnaire in one sitting, or in partial segments. Just click the “Save” button located at the bottom of each page to save your previous entries and you can come back and finish your questionnaire at a later time. To return to the questionnaire, simply click on the link in the email you received from us.

If you see questions that do not relate to your tax matter, you can leave those questions unanswered/blank. We'll verify the information entered and contact you if something is missing.

You can complete the questionnaire in random order by selecting any of the sections listed on the left. If you don't have information for a certain section readily available, you can always come back to it later.

Once you have completed all questions relating to your tax matter, open the last section “Mandatory Disclosure”, complete it, enter last 5 digits of your Social Security Number and then click on the “Submit Questionnaire” button. If you have entered information for a Spouse, your Spouse's signature and last 5 digits of his/her Social Security Number must also be entered. Please note that once you submit the questionnaire, you will no longer be able to modify the information you've entered. If you need to edit/add/update your information after submission, please contact your representative and ask him to re-send the questionnaire and grant you access again.

We will be notified immediately once you complete this questionnaire, and we'll contact you if we need any additional information.

If you have any questions on how to complete this questionnaire, please feel free to contact us any time at the details listed above.

Once again thank you for letting us help with your tax matter. We appreciate your business.

Verify and Populate to Forms Next

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WCAG 2.1

5. Chat Message

When you click on the “Click to view” option in the Notification Dashboard

Clients Letters Email Files Case Management Billing Settings Chat < > 							
Notification Dashboard							
Date	Type	User	Client	Checked	View	Actions	
☐							
☐ 08/10/2022	Zoom Meeting		 Vargas, Ronald	☐	Click to View		
☐ 08/10/2022	Zoom Meeting		 Vargas, Ronald	☐	Click to View		
☐ 08/10/2022	Chat Message		 Vargas, Ronald	☐	Click to View		
☐ 08/10/2022	Chat Message		 Vargas, Ronald	☐	Click to View		
☐ 08/10/2022	Client Questionnaire Completed		 Burns, Ryan	☐	Click to View		

The system will open Chat conversations.

Clients
Letters
Email
Files
Case Management
Billing
Settings
Chat
<
>


You have new items assigned
View


Chat

Vargas, Ronald is Online

Vargas, Ronald
Testing chat message notification 7/12/22

Rebeca Trejos
Hope this chat notification arrives

Vargas, Ronald
Testing again chat notifications

Vargas, Ronald
Testing chat notifications 7/14/22

Vargas, Ronald
Testing chat notification test

Type your message
Send

 Send File

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*6. Transcript Alert

When you click the “**Click to view**” option in Notification Dashboard

Notification Dashboard

	Date	Type	User	Client	Checked	View	Actions
☐		Transcript Alert					Shortcut to transcript details. Click to access.
☐	05/26/2022	Transcript Alert	RT	Donohue, Meghan			Click to View
☐	05/26/2022	Transcript Alert	RT	Donohue, Meghan		Click to View	

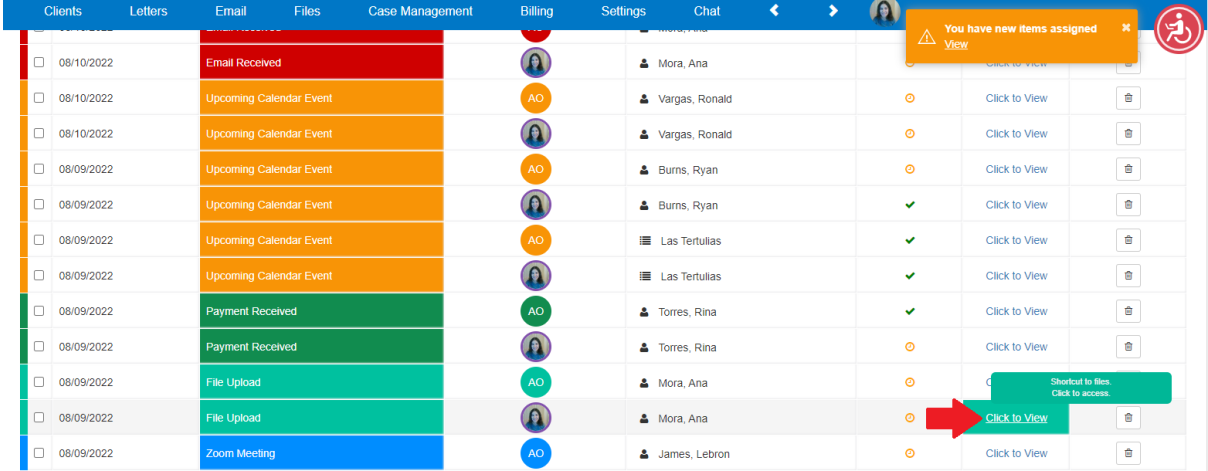
The system will open the Transcript Alert. Clicking the “View” button the Transcript will be open.

Transcript Alert

Transcripts for Adam Sherry have been downloaded. [View](#).

7.File

When you click on the “Click to view” option in Notification Dashboard.



Clients	Letters	Email	Files	Case Management	Billing	Settings	Chat
☐	08/10/2022	Email Received					
☐	08/10/2022	Upcoming Calendar Event					
☐	08/10/2022	Upcoming Calendar Event					
☐	08/09/2022	Upcoming Calendar Event					
☐	08/09/2022	Upcoming Calendar Event					
☐	08/09/2022	Upcoming Calendar Event					
☐	08/09/2022	Upcoming Calendar Event					
☐	08/09/2022	Upcoming Calendar Event					
☐	08/09/2022	Payment Received					
☐	08/09/2022	Payment Received					
☐	08/09/2022	File Upload					
☐	08/09/2022	File Upload					
☐	08/09/2022	Zoom Meeting					

The next pop up is going to be displayed with the following information:

File Details

Upload date: 09/08/22 **Client:** Mora, Ana

File Name: Transcripts video script, 8_02_22

Size: 5.3 MB

Location: My documents/Shared by Client

Type: Word

Synchronized: No

[Download File](#)

***Upload date:** is the date when the file has been uploaded.

***Client:** the client's name.

***File Name:** is the name of the uploaded file.

***Size:** is the size of the uploaded file.

***Location:** it corresponds to the location in the User's PBT storage of the uploaded file.

***Type:** is the type of file.

***Synchronized:** if the User has synchronized an online storage account (Dropbox, OneDrive or Google Drive) to the file, the details are shown in the File Details.

Download File button: if you need to download the file, click on this button.

8. Payment Received.

When you click on the “Click to view” button

Clients	Letters	Email	Files	Case Management	Billing	Settings	Chat	
☐	08/10/2022	Upcoming Calendar Event				Vargas, Ronald		
☐	08/09/2022	Upcoming Calendar Event			AO	Burns, Ryan		Click to View
☐	08/09/2022	Upcoming Calendar Event				Burns, Ryan		Click to View
☐	08/09/2022	Upcoming Calendar Event			AO	Las Tertulias		Click to View
☐	08/09/2022	Upcoming Calendar Event				Las Tertulias		Click to View
☐	08/09/2022	Payment Received			AO	Torres, Rina		Click to View
☐	08/09/2022	Payment Received				Torres, Rina		Click to View
☐	08/09/2022	File Upload			AO	Mora, Ana		Click to View

A pop up is going to be displayed with the following information:

Payment Details

Invoice Number: #23

Client: Torres, Rina

Invoice Total: **\$70.40**

Invoice Due Date: 08/10/22

Balance Pending: **\$0.00**

Representative: Rebeca Trejos

Payment History Services Provided

Date	Amount	Payment Method
08/09/22	\$70.40	Cash

Print Invoice

5

1 - 1 displayed , 1 in total

***Invoice Number:** to identify which invoice received the payment.

Clicking the shortcut to invoice in the Invoice number, the user will see the Update Invoice.

Payment Details

Invoice Number: #23

Invoice Total: \$70.40

Balance Pending: \$0.00

Client: Torres, Rina

Invoice Due Date: 08/10/22

Representative: Rebeca Trejos

Shortcut to invoice.
Click to access



Payment History Services Provided

Date	Amount	Payment Method
08/09/22	\$70.40	Cash

Print Invoice

5

1 - 1 displayed , 1 in total

[Clients](#) [Letters](#) [Email](#) [Files](#) [Case Management](#) [Billing](#) [Settings](#) [Chat](#)

Update Invoice

Payments: Paid

RECEIVED PAYMENTS

Date	Ref #	Status	Payment Amount	Amount Applied
08/09/2022	1258	Received	\$70.40	\$70.40

Client:

Torres, Rina

Bill To:

Rina & John Torres
FL

Date:

08/09/2022

Terms:

Customize

Due 1

Invoice #:

23

Due Date:

08/10/2022

Sales Representative:

Rebeca Trejos

UNBILLED ITEMS

#	Description / Notes	Date	Hours	Rate	Amount	Apply	Hide
1	Zoom Meeting Invitation / Rebeca Trejos	08/10/2022	0.5	\$0.00	\$0.00		

Unhide all

50

1 - 1 displayed , 1 in total

- ***Invoice Total:** indicates the total amount of the invoice.
- ***Balance Pending:** indicates the missing amount of the payment.
- ***Client:** it is the client's name that the invoice is associated with.
- ***Invoice Due Date:** indicates the invoice due date or if it is not due yet.
- ***Representative:** it is the client's representative name.

In the payment details there are two tabs to open:

- **Payment History:** to view a payment history for the invoice.

Payment Details

Invoice Number: #23

Client: Torres, Rina

Invoice Total: \$70.40

Invoice Due Date: 08/10/22

Balance Pending: \$0.00

Representative: Rebeca Trejos

Payment History

Services Provided

Date	Amount	Payment Method
08/09/22	\$70.40	Cash

Print Invoice

5

1 - 1 displayed , 1 in total

- ***Date:** The date when the payment was received is shown in the first column.
- ***Amount:** The amount that was paid by the client is shown.
- ***Payment Method** indicating if it was paid via Cash, Paypal or Credit Card. In the Credit Card option, the last four digits of the credit card are going to be shown under the credit card text.

At the bottom of the **Payment Details** section there is a button to **Print** the invoice.

- **Services Provided:** to view the services provided for the invoice.

Payment Details 

Invoice Number: #23

Client: Torres, Rina

Invoice Total: **\$70.40**

Invoice Due Date: 08/10/22

Balance Pending: **\$0.00**

Representative: Rebeca Trejos

Payment History

Services Provided



Date	User	Description	Qty/Hrs	Rate	Amount
07/11/22		Zoom Meeting	0.08	\$800.00	\$64.00

 **Print Invoice**

5

▼

1 - 1 displayed , 1 in total

Inside Services Provided tab, you will find the following information:

***Date** of the provided service.

***User** or users in charge of the service, including his/her picture or initials. The circles with the user's pictures will be overlapping in case there are more than 2 users that provided the service.:

Description of service provided.

Quantity/Hours spent in the service.

Rate per hour that the user establishes.

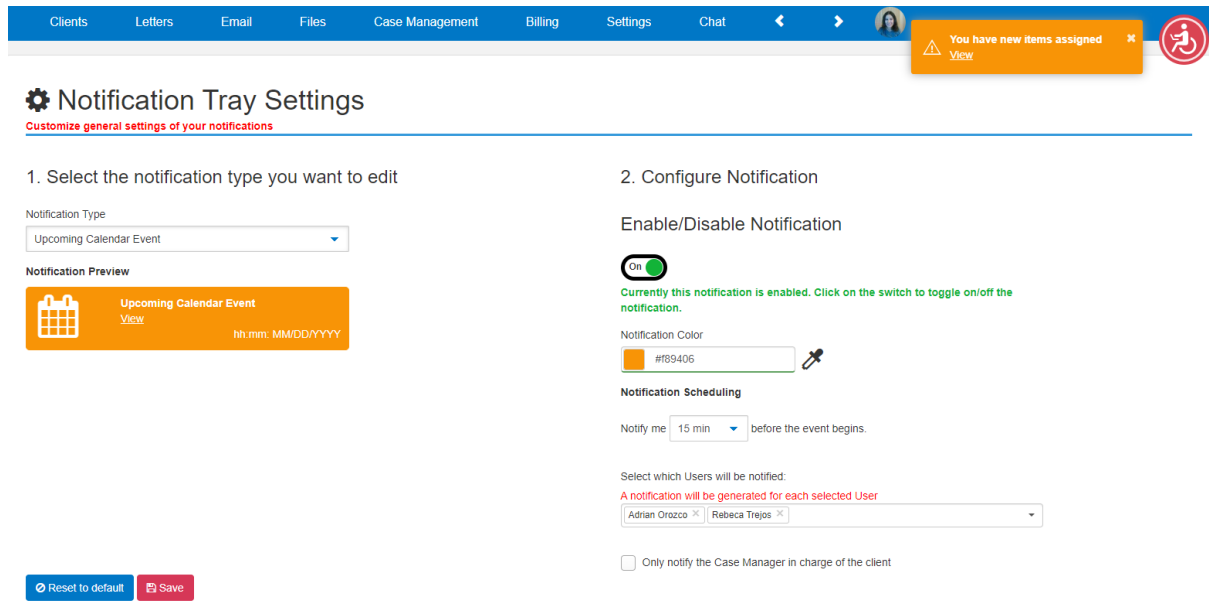
Amount billed per service.

8. Notification Settings

At the bottom of the **Notification Tray** you can find the **Notification Settings** button.



Clicking on the Notification Settings button, the **Notification Tray Settings** will be displayed.

The screenshot shows the "Notification Tray Settings" page within a software application. At the top is a blue navigation bar with links: Clients, Letters, Email, Files, Case Management, Billing, Settings, and Chat. To the right of the navigation bar is a user profile icon and a yellow notification banner that says "You have new items assigned" with a "View" link. Below the navigation bar, the page title "Notification Tray Settings" is displayed with a sub-link "Customize general settings of your notifications". The page is divided into two main sections. Section 1, "Select the notification type you want to edit", contains a "Notification Type" dropdown menu set to "Upcoming Calendar Event". Below this is a "Notification Preview" section showing a calendar icon, the text "Upcoming Calendar Event", a "View" link, and a date/time placeholder "hh:mm, MM/DD/YYYY". At the bottom of this section are two buttons: "Reset to default" and "Save". Section 2, "Configure Notification", contains an "Enable/Disable Notification" toggle switch set to "On", with a green message stating "Currently this notification is enabled. Click on the switch to toggle on/off the notification." Below this is a "Notification Color" section with a color picker set to "#f89406". The "Notification Scheduling" section includes a "Notify me" dropdown set to "15 min" and the text "before the event begins." Below this is a section for selecting users to be notified, with a message "A notification will be generated for each selected User" and a dropdown menu showing "Adrian Orozco" and "Rebeca Trejos". At the bottom of this section is a checkbox labeled "Only notify the Case Manager in charge of the client".

In the Notification Tray, you can select the notification type you want to edit or configure.

Notification Tray Settings

Customize general settings of your notifications

1. Select the notification type you want to edit

Notification Type

Upcoming Calendar Event ▼

This is a **dropdown** that allows the User to select which notification type is going to be configured among 8 different types of notifications.

This type of notifications are:

- Upcoming Calendar Event
- Upcoming Zoom Meeting
- Email Received
- Client Questionnaire
- Chat Message
- File Uploaded
- Payment Received
- Transcript Alert

Notification Type

Upcoming Calendar Event ▼

Upcoming Calendar Event

Upcoming Zoom Meeting

Email Received

Client Questionnaire

Chat Message

File Uploaded

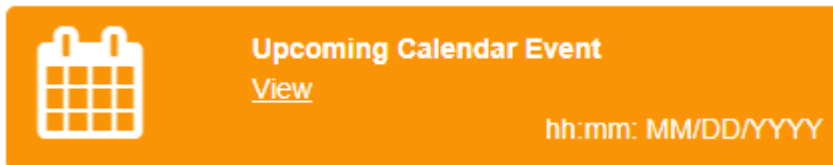
Payment Received

Transcript Alert

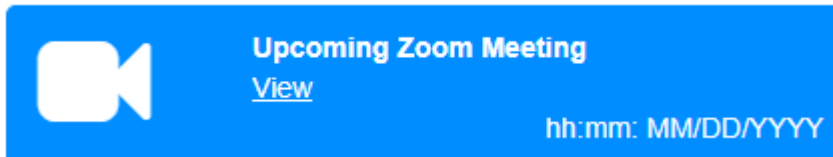
Each type of notification has the same items to be configured.

-1. Notification Preview: to check the features of the notification bubble and how it has been configured.

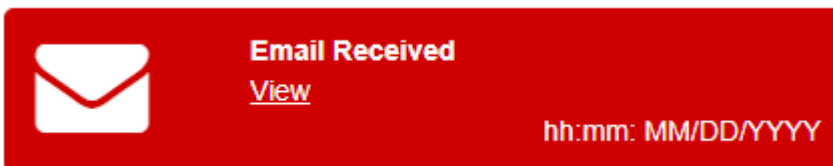
Notification Preview for Upcoming Calendar Event



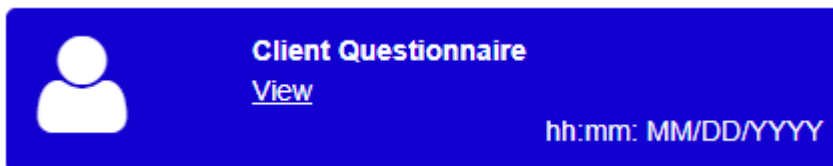
Notification Preview for Upcoming Zoom Meeting



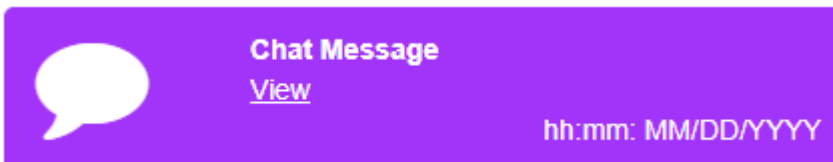
Notification Preview for Email Received



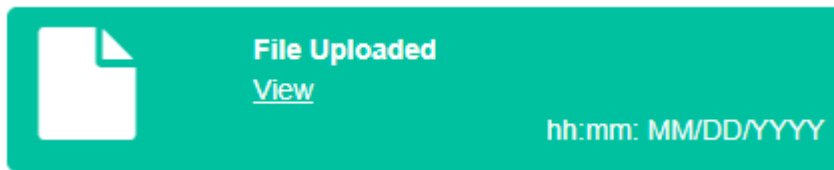
Notification Preview for Client Questionnaire



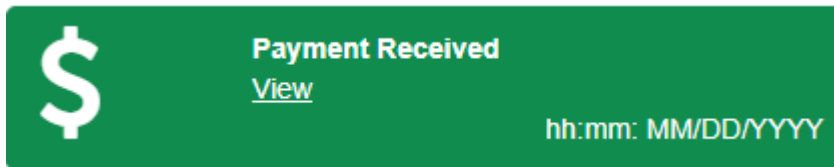
Notification Preview for Chat Message



Notification Preview for File Uploaded



Notification Preview for Payment Received



Notification Preview for Transcript Alert



- 2. Configure Notification:

Enable: allow the system to send the user notifications. In this case the switch will be in green color when it is on.

Enable/Disable Notification



Currently this notification is enabled. Click on the switch to toggle on/off the notification.

Disable: not allow the system to send the user notifications. In this case the switch will be in gray color when it is off.

Enable/Disable Notification



Currently this notification is disabled. Click on the switch to toggle on/off the notification.

In the **Configure Notification for Transcripts**, there are 4 options:

- Success type
- Error Type
- Warning Type
- Info Type

Each one can be customized.

Enable/Disable Notification



Currently this notification is enabled. Click on the switch to toggle on/off the notification.

Success Type



Error Type



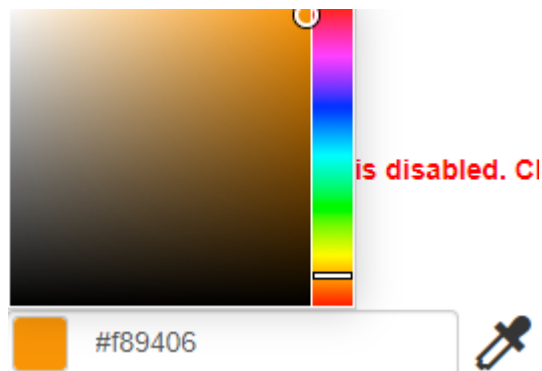
Warning Type



Info Type

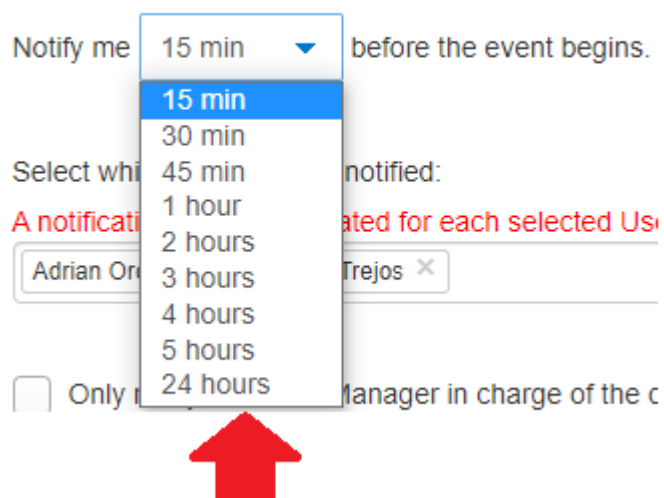


***Notification Color:** to configure the color of the notification bubble. You will see the hex value colors by default in the respective slot. A color picker appears to allow the user to input any color. If the user wants to come back to the original color should click on the **Reset to Default** button.

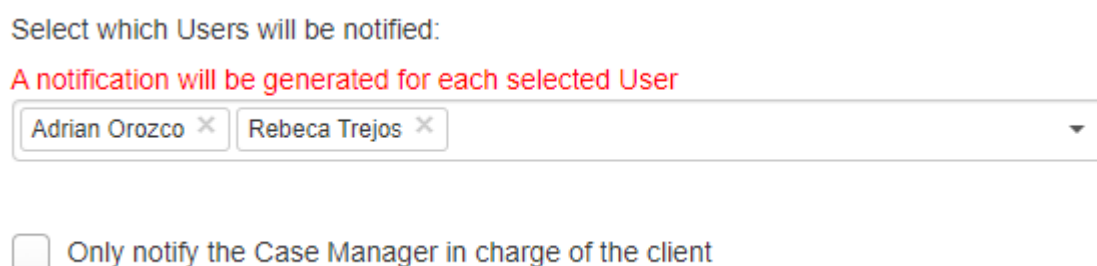


***Notification Scheduling:** Dropdown that is going to set the time in which the user wants to receive the notification before the event begins, it could be: 15,30,45 minutes or 1,2,3,4,5 or 24 hours before the event begins.

Notification Scheduling



***Select which Users will be notified:** This dropdown allows users to choose which Users will receive the notification. This is intended for multi user licenses where more than 1 User should receive the notification.



It is also available the option to only notify the Case Manager in charge of the client. This causes the dropdown to gray out.

Select which Users will be notified:

A notification will be generated for each selected User

Adrian Orozco Rebeca Trejos ▼

☒ Only notify the Case Manager in charge of the client



Also you will be able to **Reset to default**, in order to **come** back to the default colors, or click on **Save** button to save all changes, then the system will bring you to the Step by Step Workflow of PitBullTax Software.

