



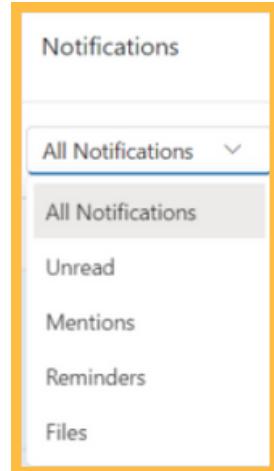
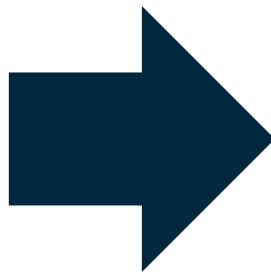
Managing Notifications & Reminders

How to View Notifications

From the dashboard, you will receive notifications of updates or questions. If an update or question is posted, you will notice a red number on top of the “bell” icon on the top-right corner of the screen. Click that to view your notifications.



Click the “bell” icon to view all notifications, unread, mentions, reminders, or files.



Search Notifications

Type into the “search notifications” text box to search for a specific notification.

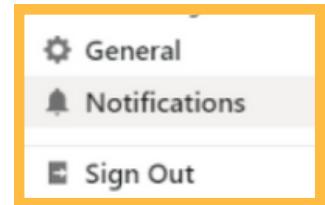
Search Notifications



Managing Email Notifications & Preferences

Set Email Notification Preferences

In the top right corner, next to your name, click on the drop-down arrow and select “notifications” to update your email notification preferences.

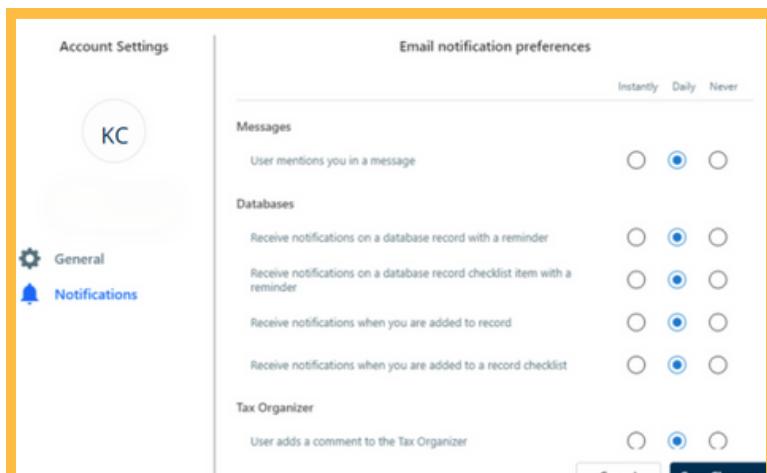


Choose from the following:

- **Instantly:** Receive notifications as soon as they occur.
- **Daily:** Receive a daily summary of notifications.
- **Never:** Turn off notifications. We ask that you do not select this option as “Never” eliminates all notifications, including posting of your return and estimates.

Once complete, click “Save Changes.”

Users can also customize which types of notifications you receive based on categories (Messages, Databases, Tax Organizer).





Managing Email Notifications & Preferences

Email Notifications Guide

Notifications

All Notifications ▼

Search Notifications

Mark all as read · Delete All

If you would like to receive only select You can organize your notifications by clicking the dropdown arrow next to "All Notifications." From there, choose the category you want to view: All, Unread, Mentions, Reminders, or Files.

Notifications

All Notifications ▼

All Notifications

Unread

Mentions

Reminders

Files

Search Notifications

Notifications

All Notifications ▼

Search Notifications

Unread

Mark all as read · Delete All