



Zoom Integration

Documentation

2022

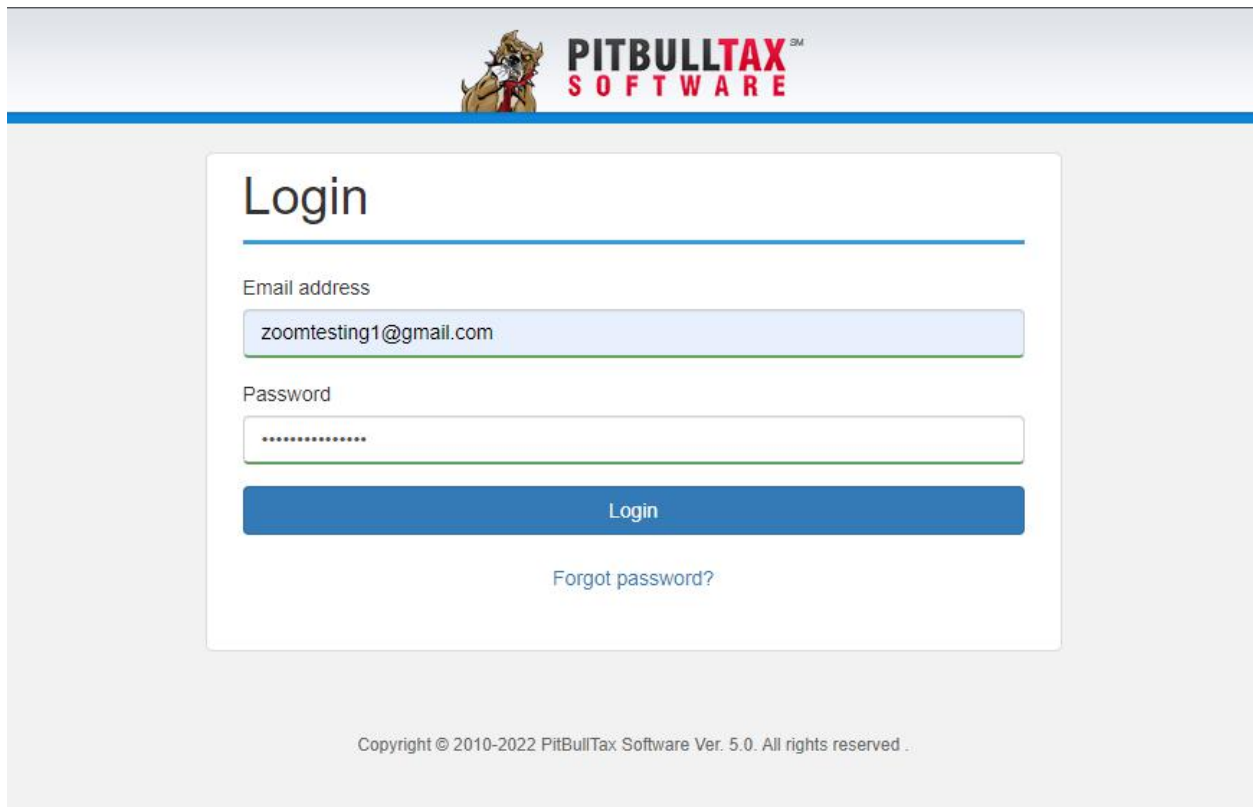
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How to install Zoom application on PitBullTax Software

To integrate the zoom app in PitBullTax Software start by logging into PitBullTax Software:

<https://application.pitbulltax.com/login.html>



The image shows the login page for PitBullTax Software. At the top, there is a header with a logo of a pit bull and the text "PITBULLTAX SOFTWARE". Below the header, the word "Login" is displayed in a large font. Underneath, there are two input fields: "Email address" with the value "zoomtesting1@gmail.com" and "Password" with a masked value "*****". A blue "Login" button is positioned below the password field. A link for "Forgot password?" is located below the login button. At the bottom of the page, a copyright notice reads: "Copyright © 2010-2022 PitBullTax Software Ver. 5.0. All rights reserved .".

Click on Login and you will be taken to the home page of the software:

PITBULLTAX™ SOFTWARE

Welcome, Zoom Test Account 1
Wednesday, January 19, 2022 11:10AM

Clients Letters Email Files Case Management Billing **Settings** Chat Help Support

Client: Test, Zoom

Individuals
Businesses
IRS Contacts
Tools
Client Questionnaire
Case Diagnostics
Resolution Evaluation
Client Summary
IRS Transcripts Delivery
E-Signature
Fee Calculator
Scenario Simulator
Internal Revenue Manual
IRS Publications
Client Portal Activity
Forms In Use
No forms in use
Other Forms
Form 433-A / 433-A (OIC)
Form 433-B / 433-B (OIC)
Form 433-D
Form 433-F
Form 656
Form 656-L

CLICK

We noticed you're still not using our IRS Transcript Delivery & Reporting feature ... With Automatic Daily Alerts?

HERE'S 3 REASONS YOU SHOULD INTEGRATE THIS FEATURE RIGHT AWAY:

- 1 You can obtain IRS Transcripts and import them directly into PitBullTax Software.
- 2 You can create easy-to-read reports showing Tax Liabilities, Penalties & Interest, Federal Tax Liens, estimated CSED Dates, First Time Penalty Abatement Eligibility and much more!
- 3 You can receive daily notifications of changes affecting your clients' accounts: OIC received/accepted/withdrawn/denied, bankruptcies, liens, levies, tax court petitions, etc. And you'll get these automatic alerts even before the IRS places the notices in the mail!

[Click here](#) to add this revolutionary feature and streamline your case like never before!

[Don't show this message anymore](#)

Step-by-Step Workflow

Test, Zoom
1 out of 11 Steps Completed

Step 1. Create a Client or Prospect

Start

Completed

PitBullTax News

Important Update about Your PitBullTax Software Account

Then click on Zoom Integration:

The screenshot displays the PitBullTax Software interface. At the top, the logo "PITBULLTAX SOFTWARE" is visible alongside a bulldog mascot. The user is logged in as "Zoom Test Account 1" on Wednesday, January 19, 2022, at 11:11 AM. The main navigation bar includes tabs for Clients, Letters, Email, Files, Case Management, Billing, Settings, Chat, Help, and Support. The "Settings" tab is currently active, and its dropdown menu is open, listing various configuration options. A red arrow points to the "Zoom Integration" option at the bottom of this menu. The left sidebar contains sections for "Individuals", "Businesses", "IRS Contacts", "Tools", "Forms In Use", and "Other Forms". The main content area features a promotional message about IRS transcript integration, a "Step-by-Step Workflow" section showing "Step 1. Create a Client or Prospect" as "Completed", and a "PitBullTax News" section with an update about a software account.

PITBULLTAX SOFTWARE

Welcome, Zoom Test Account 1
Wednesday, January 19, 2022 11:11AM

Clients Letters Email Files Case Management Billing **Settings** Chat Help Support

Client: Test, Zoom

Individuals
Businesses
IRS Contacts
Tools
Forms In Use
Other Forms

We noticed you're still not using our IRS Transcript Integration!

Automatic

HERE'S 3 REASONS YOU SHOULD INTEGRATE:

- 1 You can obtain IRS Transcripts and import them directly into PitBullTax Software.
- 2 You can create reports showing Penalties & Interest, Tax Liens, estimated Dates, First Time Abatement Eligibility, etc.

[Click here](#) to add this revolutionary feature.

Step-by-Step Workflow

Test, Zoom
1 out of 11 Steps Completed

Step 1. Create a Client or Prospect

PitBullTax News

Important Update about Your PitBullTax Software Account

Proceed to click on "Synchronize":

The screenshot shows the PitBullTax Software interface. At the top, there's a navigation bar with links: Clients, Letters, Email, Files, Case Management, Billing, Settings, Chat, Help, and Support. Below this is a client selection bar showing 'Client: Test, Zoom'. The main content area is titled 'Zoom Integration'. It includes a 'Download' button, a 'Synchronize' button (highlighted with a red arrow and the word 'CLICK'), and a 'Configurable Schedule Availability' section with a calendar icon, 'From' and 'To' time pickers (8:00 AM to 6:00 PM), and 'Cancel' and 'Save' buttons. The left sidebar contains various tool links like 'Client Questionnaire', 'Case Diagnostics', 'Resolution Evaluation', etc. The bottom section shows 'Forms In Use' and 'Other Forms'.

Then proceed to input your Zoom account login credentials and click on login:

The screenshot shows the Zoom login page. It has a dark header with links like 'REQUEST A DEMO', '1.888.799.9666', 'RESOURCES', and 'SUPPORT'. Below the header is a navigation bar with 'zoom' logo and links: SOLUTIONS, PLANS & PRICING, CONTACT SALES, JOIN A MEETING, HOST A MEETING, SIGN IN, and a 'SIGN UP, IT'S FREE' button. The main content area is a login form with fields for 'Email Address' (v.luchkin@gmail.com) and 'Password' (masked with dots). There's a 'Forgot password?' link. Below the fields is a blue 'Sign In' button (highlighted with a red arrow and the word 'CLICK') and a checked 'Stay signed in' checkbox. At the bottom, there are links for 'Or sign in with' using SSO, Google, or Facebook. A footer note states: 'Zoom is protected by reCAPTCHA and their Privacy Policy and Terms of Service apply.'

You will see the Zoom installation prompt for PitBullTax:



You are about to install PBT **BETA**

① App can access and manage this information even when not using the app.
This app may enable an in-meeting notification to participants if the app is used to access real-time video, audio, chat, or meeting files. [Learn more](#)

App can view information

Associated with you

⚙ Settings >

🔍 Profile & Contact Information >

☐ Allow this app to use my shared access permissions. [Learn more](#)

By clicking Authorize, you give permission to this app to use your information in accordance with their [Terms](#) & [Privacy Policy](#). You can remove this app at any time in [My Apps](#)

Decline

Authorize

← CLICK

After you click on Authorize the installation process has been completed. You will see the following success screen back on PitBullTax Software:

The screenshot displays the PitBullTax Software interface. At the top, the logo features a bulldog and the text "PITBULLTAX SOFTWARE". Below the logo is a navigation bar with tabs: Clients, Letters, Email, Files, Case Management (selected), Billing, and Settings. Under the "Case Management" tab, the client name "Adrian, Adrian" is shown, followed by a row of icons for various actions. On the left side, there is a sidebar menu with categories: Individuals, Businesses, IRS Contacts, and Tools. The "Tools" category is expanded, showing a list of options: Client Questionnaire, Case Diagnostics, Resolution Evaluation, Client Summary, IRS Transcripts Delivery, E-Signature, Fee Calculator, Scenario Simulator, Internal Revenue Manual, IRS Publications, and Client Portal Activity. The main content area is titled "Zoom Meetings" and contains a message: "Your Zoom account is connected to PitBullTax" with a green checkmark icon. Below this message are three buttons: "Start a Zoom meeting" (green), "Schedule a Zoom meeting" (light blue), and "Meetings Log" (dark blue).

Schedule a Zoom Meeting in PitBullTax

To schedule a meeting, first click on Case Management:

PITBULLTAX SOFTWARE

Welcome, Adrian TestAccount
Thursday, January 20, 2022 11:50AM

Client: Adrian, Adrian

Case Management

- Calendar
- Activities
- To Do's
- Case Tracking
- Time Tracking
- Dashboard
- History
- Zoom Meetings**

Step-by-Step Flow
Adrian, Adrian
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]

January 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	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

Then click on Schedule a Zoom Meeting:

PITBULLTAX SOFTWARE

Welcome, Adrian TestAccount
Thursday, January 20, 2022 11:52AM

Client: Adrian, Adrian

Zoom Meetings

Your Zoom account is connected to PitBullTax ✓

[Start a Zoom meeting]

[Schedule a Zoom meeting]

[Meetings Log]

You will have to choose the date for the meeting:

Schedule a Zoom meeting

Step 1: Please select date and time for the meeting

January 2022

dayweekmonthSchedule

today<>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3 9:00 AM - 9:45 AM Client: Adrian Adrian Schedule Zoom Meeting	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Meeting
Details:

Date:
N/A

Starts:
N/A

Ends:
N/A

Duration:
N/A

Then, you will have to choose the time for the meeting:

Schedule a Zoom meeting

Step 1: Please select date and time for the meeting

January 21, 2022

day

week

month

Schedule

today

<

>

	Friday
2pm	
2:15pm	
2:30pm	
2:45pm	
3pm	
3:15pm	
3:30pm	
3:45pm	
4pm	
4:15pm	
4:30pm	
4:45pm	
5pm	
5:15pm	
5:30pm	
5:45pm	
6pm	
6:15pm	
6:30pm	
6:45pm	
7pm	
7:15pm	
7:30pm	
7:45pm	
8pm	

Meeting Details:

Date:

Starts:

Ends:

Duration:



The Zoom Calendar Event is added to the user's calendar:

Schedule a Zoom meeting

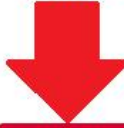
Step 1: Please select date and time for the meeting

January 21, 2022 day week month Schedule today < >

	Friday
2pm	
2:15pm	
2:30pm	
2:45pm	
3pm	
3:15pm	
3:30pm	
3:45pm	
4pm	Zoom meeting: 4:00 PM - 5:00 PM Client: Adrian Adrian
4:15pm	
4:30pm	
4:45pm	
5pm	
5:15pm	
5:30pm	
5:45pm	
6pm	
6:15pm	
6:30pm	
6:45pm	
7pm	
7:15pm	
7:30pm	
7:45pm	
8pm	

Meeting Details: Date: 01/21/2022 Starts: 4:00 PM Ends: 5:00 PM Duration: 1 hour

[Reschedule](#)

CLICK

[Next Step](#)

After clicking on Next Step, you can set up reminders and extra details used in PitBullTax Software.

Schedule a Zoom meeting

Step 2: Schedule Invitation

Select the Client for the meeting:

Adrian, Adrian ▼

Send Invitation:

5 minutes before start ▼

Representative:

Adrian TestAccount ▼

Meeting Details:

Date:

01/21/2022

Starts:

4:00 PM

Ends:

5:00 PM

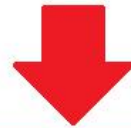
Duration:

1 hour

Billable? \$ Not Billable

Previous Step

CLICK



Schedule Meeting

Click on Schedule Meeting to save the meeting in the PitBullTax Account. Then you will also set the email notification and meeting subject:

Schedule Zoom Meeting

Step 3: Set email notification

From	arljones1709@gmail.com	Cc	
To *	orezto99@gmail.com	Bcc	
Subject *	SHOWING ZOOM INTEGRATION		
Select template	Zoom Default Template		

B I [List Icon] [List Icon]

Dear @client_name@.

@rep_name@ is inviting you to a scheduled Zoom meeting.

Topic: @subject@

Date: @mm/dd/yyyy@

Join Zoom Meeting

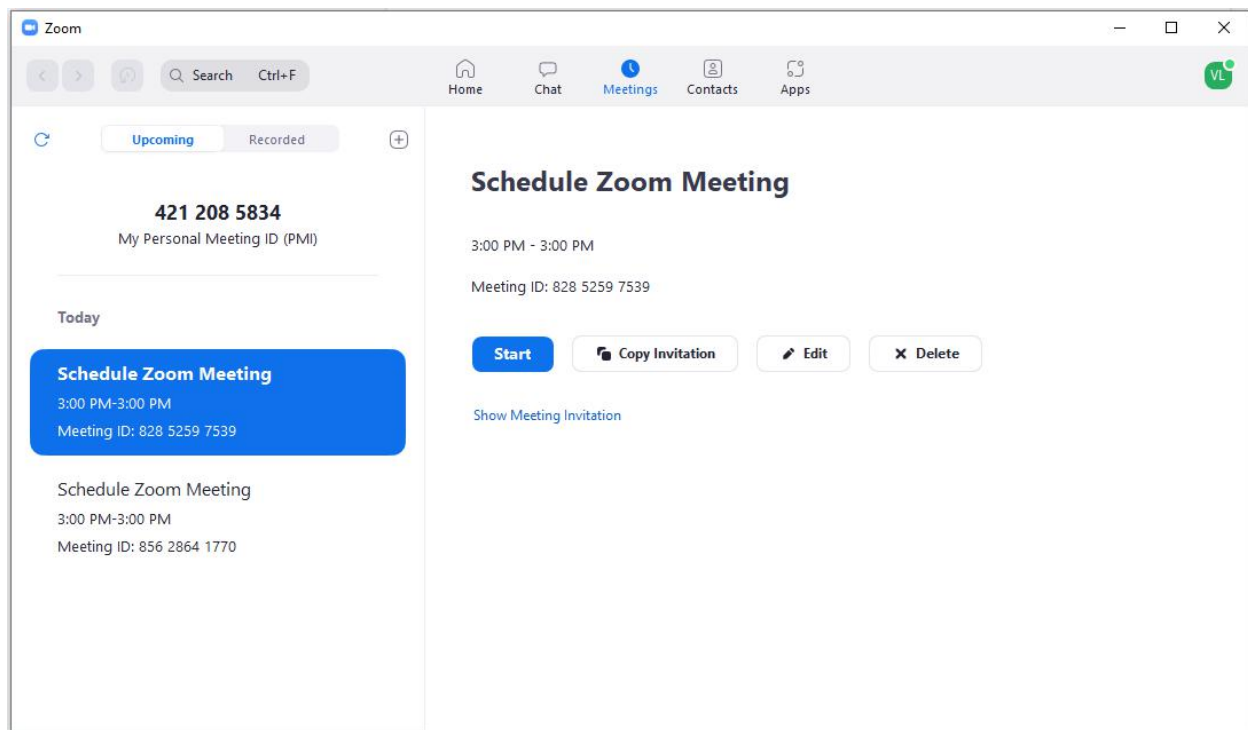
[@join_url@](#)

Meeting ID: @meeting_ID@

Passcode: @password@

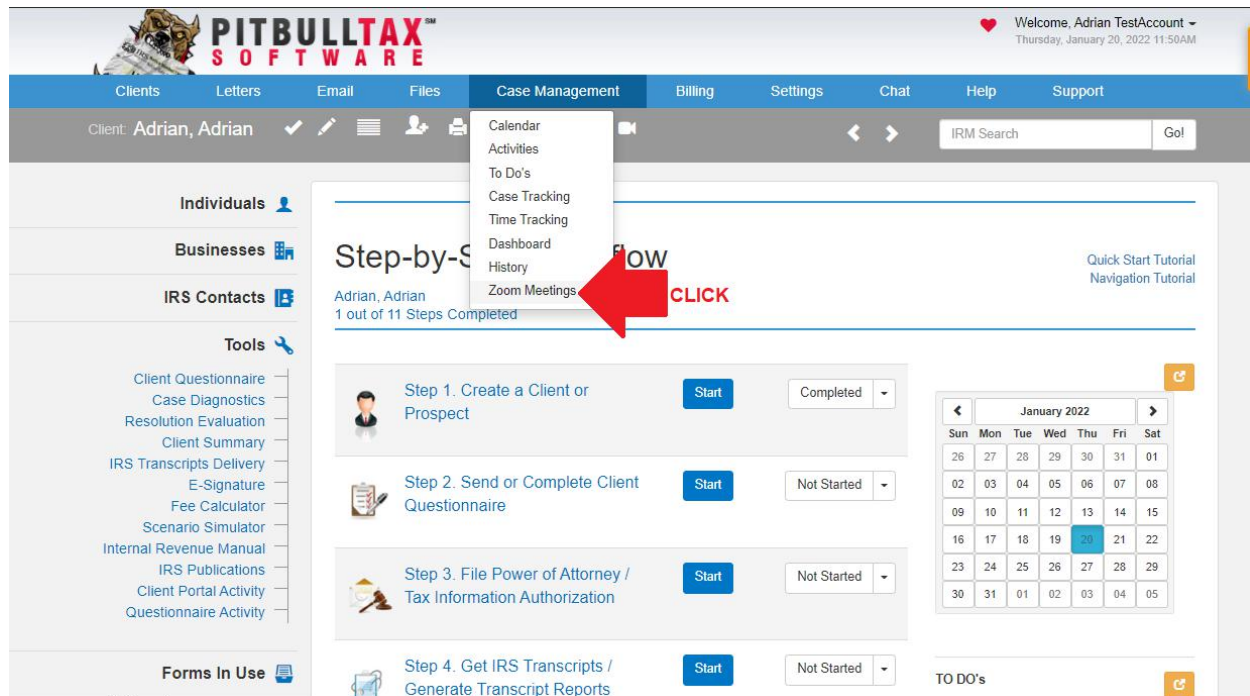


It is also saved on the synchronized Zoom account. The following screenshot depicts the event in the Zoom application:



Start a Zoom Meeting in PitBullTax

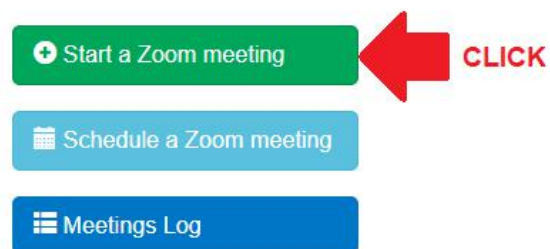
Zoom Meetings can be started for instant use in PitBullTax. First, click on the Case Management Menu option and select Zoom Meetings:



Then click on Start a Zoom Meeting:

Zoom Meetings

Your Zoom account is connected to PitBullTax



The next screen will allow you to decide if the meeting will be recorded, billed, duration, client that will receive the zoom meeting invitation and the subject of the meeting.

Zoom Meetings

Start a Zoom meeting

Select the Client for the meeting:

Adrian, Adrian

☒ Record meeting?

\$ Billable

Duration 5 min

From

arlijones1709@gmail.com

Cc

To *

orezto99@gmail.com

Bcc

Subject *

ZOOM TEST PLAN

Select template

Zoom Default Template

B I [List Icon] [List Icon]

Dear @client_name@:

@rep_name@ is inviting you to a scheduled Zoom meeting.

Topic: @subject@

Date: @mm/dd/yyyy@

Join Zoom Meeting

[@join_url@](#)

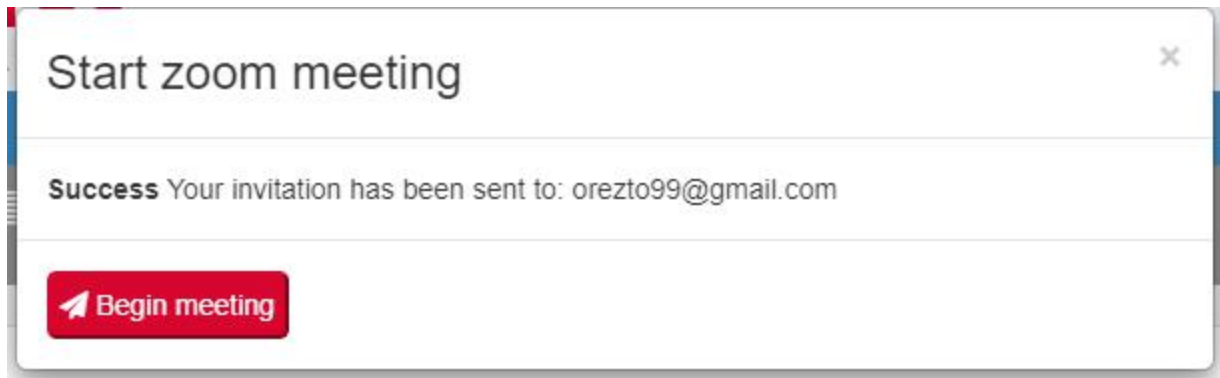
Meeting ID: @meeting_ID@

Passcode: @password@

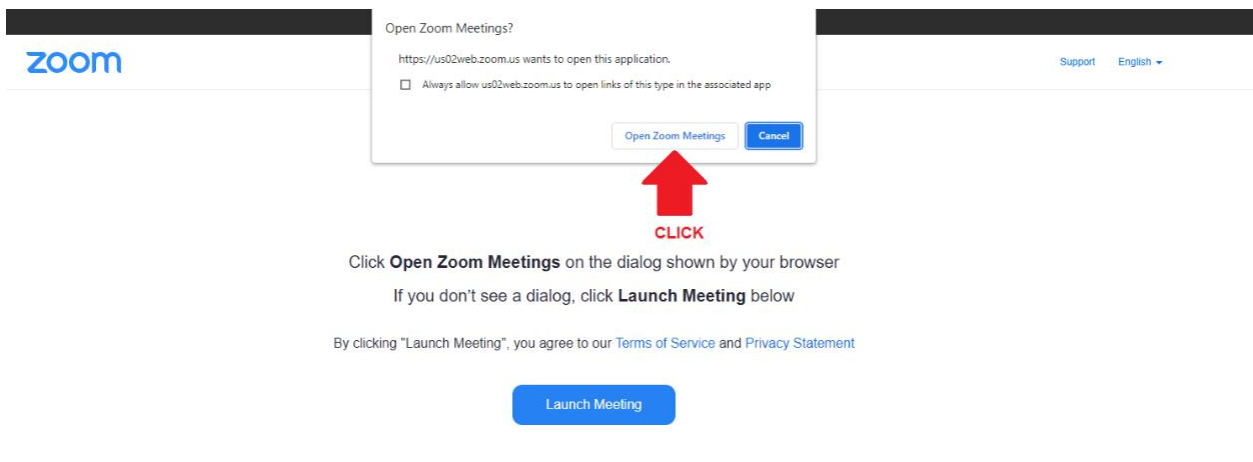
 **CLICK**

[Send Invitation](#) [Back](#)

When you click on send invitation, the zoom meeting link will be shown a prompt to begin the meeting:



Click on Start Zoom meeting to open the zoom meeting:



Click on the button to launch the meeting and the zoom application will be opened and ready to use.



How to uninstall the Zoom application on PitBullTax Software

First, click on Settings and select the Zoom Integration option:

The screenshot displays the PitBullTax Software interface. The top navigation bar includes tabs for Clients, Letters, Email, Files, Case Management, Billing, Settings, Chat, Help, and Support. The 'Settings' tab is currently selected, and its dropdown menu is open, showing various configuration options. The 'Zoom Integration' option is highlighted with a red arrow and the word 'CLICK' next to it. The main content area shows a 'Step-by-Step Workflow' for client Adrian, with steps 1 through 5 visible. The left sidebar contains sections for Individuals, Businesses, IRS Contacts, Tools, Forms In Use, and Other Forms. The right sidebar shows a calendar for January 2022 and a 'News & Updates' section.

PITBULLTAXSM SOFTWARE

Welcome, Adrian TestAccount
Friday, January 21, 2022 3:05PM

Client: Adrian, Adrian

Settings

- Activity Settings
- API Management
- Billing Settings
- Bulk Request Settings
- Calendar Settings
- Case Tracking
- Client Portal
- Client Questionnaire Greeting
- Business Questionnaire Greeting
- Customizable Alerts
- Customizable Transcripts Reports
- Customized Letters
- Files
- Email Templates
- Email Settings
- Fee Calculator
- General Settings
- IRS Contacts Settings
- IRS Transcripts
- Logo Settings
- Payment Processing
- Representative(s)
- Security Settings
- Time Tracking
- To Do Settings
- White Labeling
- Zapier Integration
- Calls
- Zoom Integration**
- Online Storage Settings

Step-by-Step Workflow

Adrian, Adrian
1 out of 11 Steps Completed

Step 1. Create a Client or Prospect [Start]

Step 2. Send or Complete Client Questionnaire [Start]

Step 3. File Power of Attorney / Tax Information Authorization [Start]

Step 4. Get IRS Transcripts / Generate Transcript Reports [Start]

Step 5. Diagnose a Case [Start]

Step 6. Evaluate Resolution [Start]

Tools

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

Forms In Use

No forms in use

Other Forms

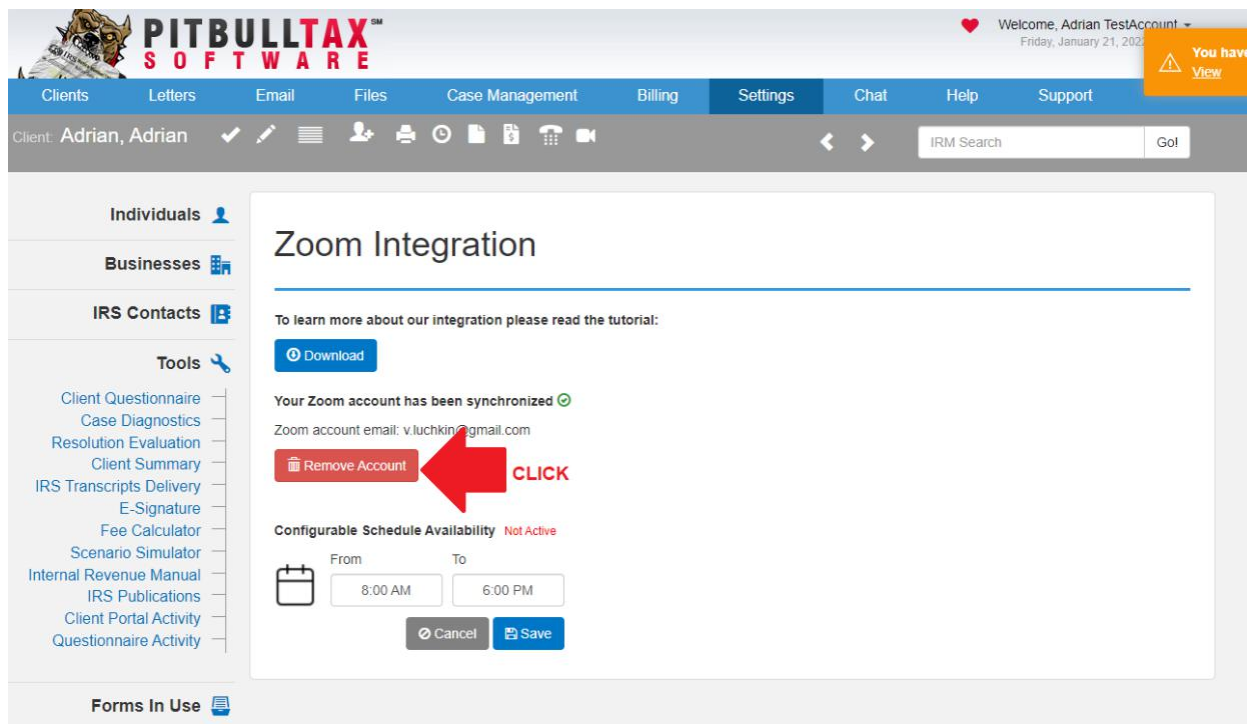
- Form 433-A / 433-A (OIC)
- Form 433-B / 433-B (OIC)
- Form 433-D

January 2022

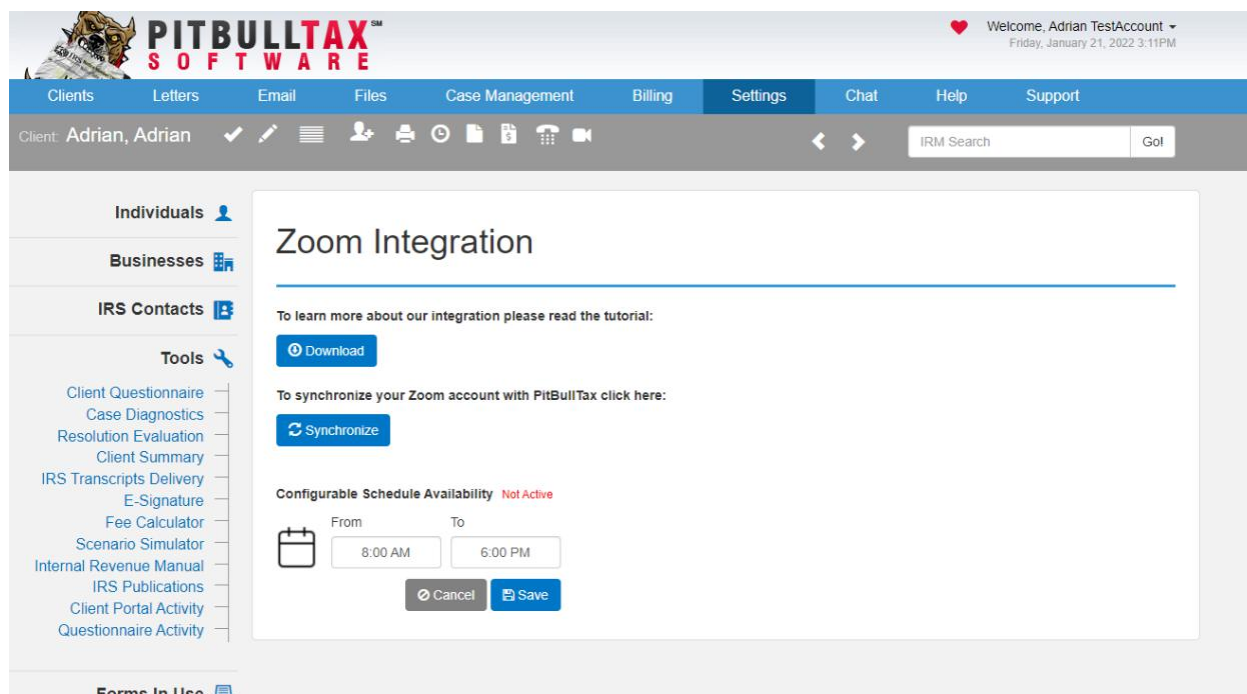
Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	01
03	04	05	06	07	08
10	11	12	13	14	15
17	18	19	20	21	22
24	25	26	27	28	29
31	01	02	03	04	05

News & Updates

Then click on Remove Account to disconnect PitBullTax from the Zoom Account:



After clicking the button PitBullTax will be disconnected from the Zoom Account:



Full Uninstalling the PitBullTax App

1. Login to your Zoom Account and navigate to the Zoom App Marketplace
2. Click **Manage > Installed Apps** or search for the **PitBullTax** app.
3. Click the **PitBullTax** app.
4. Click **Uninstall**.

Troubleshoot

This implementation is very straightforward. The most common issues are:

1. How do I connect my Zoom Account to PitBullTax?
For instructions of this troubleshoot head to page 2 of this document.
2. How do I schedule Zoom Meetings using PitBullTax?
For instructions of this troubleshoot head to page 7 of this document.
3. How do I start Zoom Meetings using PitBullTax?
For instructions of this troubleshoot head to page 14 of this document.
4. How do I disconnect my Zoom Account?
For instructions of this troubleshoot head to page 18 of this document.

Frequently Asked Questions

These are the most common questions for the usage of Zoom IM in PitBullTax Software.

1. How do I connect my Zoom Account to PitBullTax?
For instructions of this troubleshoot head to page 2 of this document.
2. How do I schedule Zoom Meetings using PitBullTax?
For instructions of this troubleshoot head to page 7 of this document.
3. How do I start Zoom Meetings using PitBullTax?
For instructions of this troubleshoot head to page 14 of this document.
4. How do I disconnect my Zoom Account?
5. **For instructions of this troubleshoot head to page 18 of this document.**

Contact Support

Description of what customers can expect when engaging your support team, such as:

- Our users have several methods to contact our support team. The first method is via phone call, users can call during business hours and talk with a representative immediately.
- The second method is via the chat bot in our website, users indicate to the bot that they need a representative and the bot routes the conversation.
- The third method is to file a support ticket in PitBullTax Software.

Hours of Your Support Team (if not follow-the-sun)

OFFICE HOURS:

WE'RE OPEN MONDAY - FRIDAY

9AM - 6PM EST. GIVE US A CALL!

All our contact information can be found here:

<https://www.pitbulltax.com/contact-us.html>

1st Response SLA (Maximum time a customer should expect to wait until they receive their 1st HUMAN response from your Customer Support Team)

By phone: Immediately

By chat: 5 minutes

By ticket: Up to 24 hrs depending on the ticket.

Link to create a support case

Only software users can create support cases.

<https://application.pitbulltax.com/#/tickets/list>

Link to email support

Write an email to:

info@pitbulltax.com

Link to your KB/Forums

<https://www.pitbulltax.com/service/faq>

Link to your Zoom IM - Live Customer Support
Channel Users that need support with Zoom IM can file
a ticket: <https://application.pitbulltax.com/#/tickets/list>

Write a detailed email of the issue to:
adrian@pitbulltax.com

Support Phone Number (if available)

PH. 1-877-474-8285