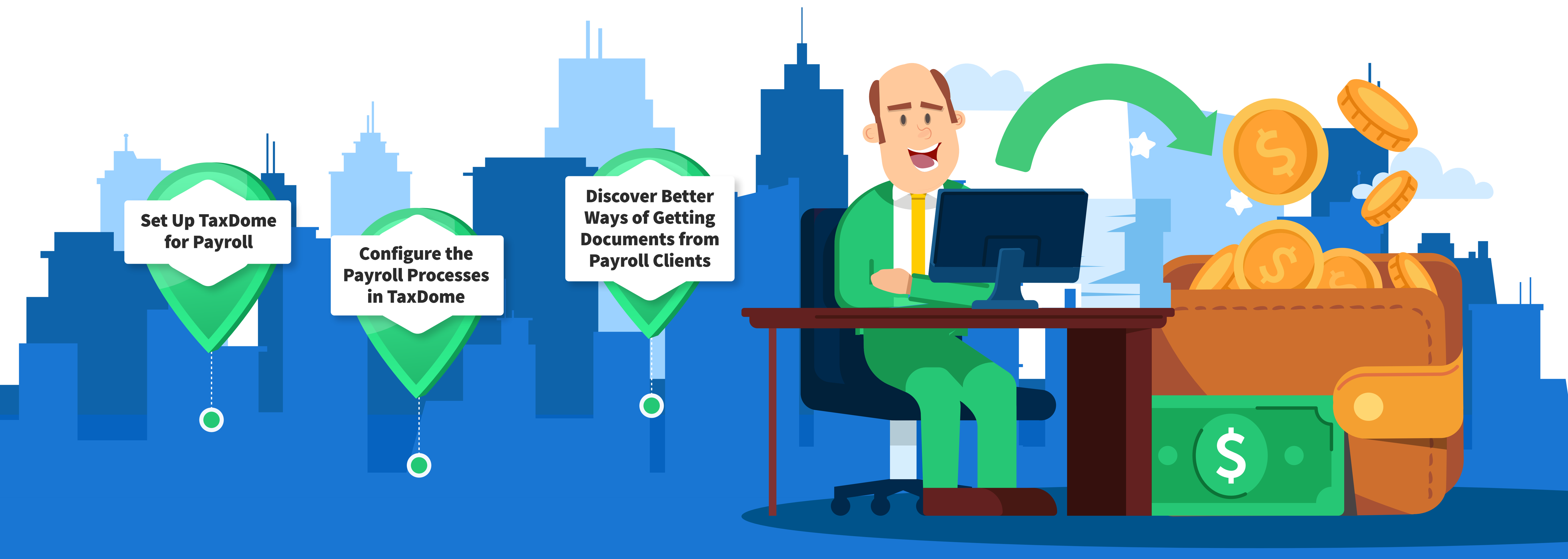
TaxDome for Payroll: a Simple Checklist

It's the time to simplify your payroll processes with TaxDome.

Welcome to the TaxDome Payroll cheat sheet! Here we have collected everything you should know to expand your knowledge base and speed up your payroll practice with TaxDome.

More on this in the **TaxDome for Payroll** course in our Academy.



1. Set Up TaxDome for Payroll

- [ ] **Assign payroll tags** to differentiate accounts by type
- [ ] **Create different folder structures** for your payroll clients and learn how to apply them in bulk
- [ ] **Use custom fields** to include any custom data you need when working with your clients
- [ ] **Create separate spreadsheets** for each client group and import them to TaxDome with different settings

2. Configure the Payroll Processes in TaxDome

- [ ] Use **recurring tasks** to process regular payrolls
- [ ] Learn **how to use TaxDome pipelines** to digitize your payroll processes
- [ ] Set up a **schedule for recurring payroll jobs** to handle repeating processes
- [ ] **Accommodate payroll clients** with different pay schedules inside pipelines
- [ ] Adjust your payroll processes and **add automations for different client types**
- [ ] Set up the **onboarding pipeline** for new payroll clients

3. Discover Better Ways of Getting Documents from Payroll Clients

- [ ] Learn how to **request payroll hours** via automated messages
- [ ] Discover how to **deal with timesheets** sent by email and link them to jobs
- [ ] Find out how to **edit and upload payroll timesheets from your desktop** without having to open the portal
- [ ] **Request documents** from different people related to your business clients in an easy way, no portal access needed
- [ ] **Use organizers** to get the W-4 forms and the hours-worked spreadsheets from clients

More questions?

Here are the top three ways to find answers:

1. Visit the **TaxDome Help Center**, and use the search bar to find the desired topic.
2. Check out the resources on the **Get Help Page**.
3. Reach out to our **Customer Success** team by email.