TAXDOME

Bootcamp session 1: First steps with TaxDome

Come prepared

- **Register your firm with TaxDome**
- Select your language, time zone and more by adjusting your **firm settings**

Session recap

- **CRM: overview of client profile and managing access**. How to set up your clients for a simple, one-login experience
- **CRM: different ways to manage your contacts**. Edit, export contact lists from TaxDome, search and filter your contacts
- **CRM: bulk actions**. Add tasks, and send organizers, emails and invoices in bulk
- **Firm insights dashboard**. Client activity and team overview

How to find templates

- You can download the **client import sheet** and follow **instructions** to transfer all you data to TaxDome
- Explore how to **add an email template** from our library. Also, you can check the following popular templates and **incorporate them into your practice**: Welcome to the Portal, Status Update Emails, E-signature Request, Ask for Review and Monthly Document Request
- More information about TaxDome template library **is here**

Useful resources

- **TaxDome Academy Course: Implementation: setting up your TaxDome account**
- **Blog: Accounting tips & TaxDome features updates**
- **Daily live webinars**

Got questions?

Reach out to our **Customer Success team** or check out our **Resources** page