Bootcamp session 2: Importing your clients

Come prepared

- Get ready for a smooth transition to TaxDome by **exporting your client list from your current software**
- Familiarize yourself with the **client import process on TaxDome and prepare a CSV file**
- Explore **account list functionalities**, such as the status of documents, invoices, tasks, emails and filters
- Read the **instructions** and install the desktop app

Checklist for a session recap

- Check out the **import guide** to discover all ways to move your clients to TaxDome
- Gain a solid understanding of **client account profiles** to serve clients effectively
- Explore the **TaxDome Windows application** to upload prepared forms, private client files or entire folders directly to TaxDome. Check **system requirements** to ensure your setup is compatible with the application
- Dive into using **internal account notes** for streamlined communication
- Set up **system-generated emails**, explore the **types and templates of emails** you can customize for your needs

How to find templates

- You can download the **client import sheet** and follow the **instructions** to transfer all your data to TaxDome
- Pipeline templates can be found in the TaxDome templates library. Look for “Bootcamp 2023 - 1040: individual tax income”
- More information about the 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