

# Bootcamp session 3: Customizing workflows



# Come prepared

- Understand the **fundamentals of tasks, pipelines and jobs**
- See the basics of how **automations and stages** work
- Make a list of your **recurring tasks** to automate them later
- Explore the **basic calendar view** to manage your workflow effectively, ensuring you make the most of TaxDome's features
- Familiarize yourself with the **template library**

# Checklist to recap the session

- Dive into [the basics of managing tasks](#) and see [how you can use tasks in workflow pipelines](#)
- Explore [viewing, searching, filtering, printing and exporting jobs](#)
- Create your [first pipeline with automations in 5 simple steps](#)
- Create [dependencies and make jobs move automatically from stage to stage](#) in a pipeline

# How to find templates

- Pipeline with all the templates can be found in the TaxDome templates library. Look for “BootCamp 2023 - sessions 2,3 - template X” or “Bootcamp 2023 - 1040: individual tax income”
- More information about the TaxDome template library [is here](#)
- Also, you can check out popular templates in the library and [incorporate them into your practice](#)

### Useful resources

- TaxDome Academy Course: [Workflow in TaxDome](#)
- Blog: [accounting tips & TaxDome features updates](#)
- [Daily live webinars](#)

### Got questions?

Reach out to our [Customer Success team](#)  
or check out our [Resources](#) page