Bootcamp session 1: First steps with TaxDome

Come prepared

- Register your firm with TaxDome
- Select your language, time zone, and more in your firm settings

Session recap

- CRM: overview of client profiles and managing access. Set up your clients for a simple, one-login experience
- CRM: different ways to manage your contacts. Edit and 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. Gain an overview of client and team activity

How to find bootcamp templates

- Download the client import sheet and follow the instructions to transfer all you data to TaxDome
- Explore how to add an email template from our template library. You can also 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
- You can find more information about the TaxDome template library here