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

TAXDOME

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 in 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

Session recap

- Check out the **import guide** to discover the different ways you can 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
- Learn more about **our mobile app**

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 template library. Look for "Bootcamp 2024 - Tax Prep" or "Bootcamp 2024 - Client onboarding"
- You can find more information about the TaxDome template library **here**

TAXDOME

Bootcamp session 3: Customizing workflows

Come prepared

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

Session recap

- Dive into **the basics of managing tasks** and see **how you can use tasks in workflow pipelines**
- Explore how to **view, search, filter, print, and export jobs**
- Create your **first pipeline with automations in five simple steps**
- Create **dependencies and make jobs move automatically from stage to stage** in a pipeline

How to find templates

- Pipelines containing all relevant templates can be found in the TaxDome template library. Look for "Bootcamp 2024 - Tax Prep" or "Bootcamp 2024 - Client onboarding"
- You can find more information about the TaxDome template library **here**
- Check out popular templates in the library and **incorporate them into your practice**

TAXDOME

Bootcamp session 4: Testing workflows and setting up payments

Come prepared

- Explore the **process of accepting payments** (Stripe, CPACharge)
- Dive into **payment processing fees**, ensuring transparency and accuracy in your financial transactions

Session recap

- Take a look at the **options for default payment provider**
- Learn how to set up **payments** to streamline the process of getting paid and enhance the client experience

How to find templates

- Invoice templates can be found in the TaxDome templates library. Look for "Bootcamp 2024 - Tax Prep" or "Bootcamp 2024 - Client onboarding"
- You can find more information about the TaxDome template library **here**
- Check out popular templates in the library and **incorporate them into your practice**

Useful resources

- **Live webinars about TaxDome**
- **TaxDome Academy Courses:**
  - **TaxDome Quick Guide**
  - **Setting up your TaxDome account**
  - **Workflow in TaxDome**

Got any questions?

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

TD TAXDOME

Bootcamp session 5: Final steps, best practices and Q&A

Come prepared

- Build your **custom website using TaxDome** without programming skills or extra fees
- Go through the step-by-step guide on **setting up a custom domain or landing page**
- Explore how to seamlessly **integrate TaxDome login links into your website** for easy client access to the portal
- Familiarize yourself with effective **strategies for introducing TaxDome to your clients**
- Gain insights into **managing your subscription** to ensure you make the most of TaxDome's features
- Check out the **frequently asked questions** about TaxDome pricing

How to find templates:

- You can copy all the templates for emails, invoices, organizers, and more by copying pipelines from the TaxDome template library. Look for "Bootcamp 2024 - Tax Prep" or "Bootcamp 2024 - Client onboarding"
- You can find more information about the TaxDome template library **here**
- You can also check out a range of popular templates in **TaxDome marketplace**

Useful resources

- **Live webinars about TaxDome**
- **TaxDome Academy Courses:**
  - **TaxDome Quick Guide**
  - **Setting up your TaxDome account**
  - **Workflow in TaxDome**

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