

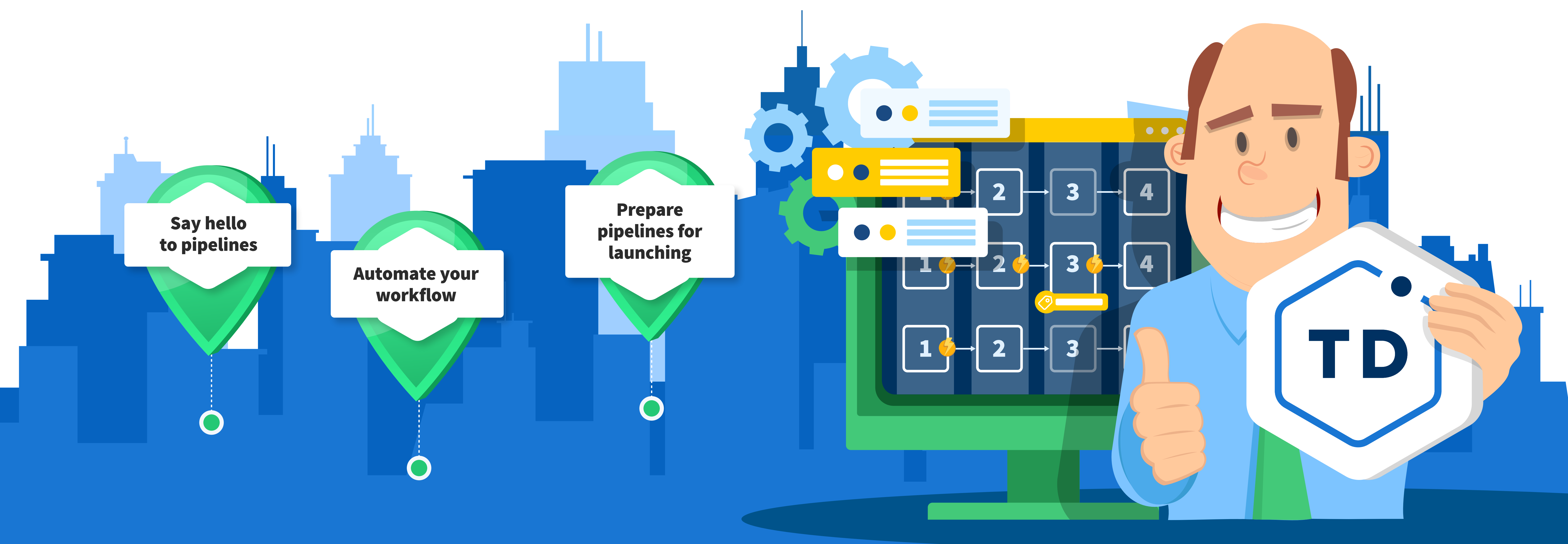
# Workflow in TaxDome:

## A simple checklist



What if you could save an average of 40 hours per employee per month on routine tasks? It's well within your reach with automations. Here is a step-by-step checklist for setting up your company workflow with TaxDome

More on this in the [Workflow in TaxDome](#) course in our Academy



### 1. Say hello to pipelines

**Map your processes** by determining what they are and what steps they contain, then get acquainted with TaxDome pipelines's structure and create your first pipeline

**Configure your first pipeline** by adjusting its settings, creating a job template and adding your first job to it

### 2. Automate your workflow

**Create automations** in the pipeline for the repeated tasks related to communication both with your clients and your team

**Automove jobs** to make automations trigger actions without you lifting a finger

**Set up conditional logic** to handle different processes and clients in a single pipeline

**Schedule job recurrence** to ensure that all repetitive jobs are created automatically and on time

### 3. Prepare pipelines for launching

**Give access to pipelines and jobs** to the right team members to distribute the workload

**Foolproof your pipeline** to ensure that everything works as intended both for the clients and for team members

Speed up setting TaxDome up by **copying templates from our library** and editing them according to your needs

## More questions?

Here are the top three ways to find answers:

1. Visit the [TaxDome Help Center](#), and use the search bar to find the desired topic.
2. Check out the resources on the [Get Help Page](#).
3. Reach out to our [Customer Success](#) team by email.

