

Session 1: First steps with TaxDome

Come prepared

- [Register your firm with TaxDome](#)
- Select your language, time zone, and more in your [firm settings](#)



Key steps and explanations

- **Firm settings** - Visit the firm settings page in the settings tab to enter all your firm details and customize various aspects of it.
 1. Add your firm details, description and logo
 2. Add all your social media links
 3. Set your [language preferences](#)
 4. Choose your default options for:
 - Contact name formatting
 - Signatures
 - Account access
 - Folder templates
 5. Customize your [system generated emails](#)
 6. Connect a [custom domain](#) (can be done at a later point)
- **Account settings** - Have full control of your personal details as well as functions individual to your account.
 1. Enable [2-factor authentication](#) for increased security
 2. Customize your [notification preferences](#) to determine what you'll be notified about and where
 3. Enable [email synchronization](#) to view and send emails through your portal
 - Enter your email address
 - Go through the steps to authenticate the authentication
 - Enable the newly displayed toggles in the email sync section for added functionality

Session 1: First steps with TaxDome

Key steps and explanations

- **Accounts & contacts** - Accounts are the entities you interact with (personal, family, business accounts, etc.), while contacts are the individuals linked to those accounts (John Doe, Jane Doe)
 1. To create a new test client, click on the **NEW** button at the top of the page
 2. Select **account**
 3. Enter the account details and select the client type
 4. Create a new contact in the next step and use an email address you have access to
- **Import preparation** - You can prepare a list of all your clients and migrate them all into TaxDome at once.
 1. Follow the formatting instructions in [this guide](#)
 2. Download the sample sheet from your portal by opening the import menu (optional)
 3. Include all information you might need in the future
 4. Save the spreadsheet as a .csv file

Session recap

- **Firm settings.** Enter your basic firm details, select default options and connect a custom domain.
- **Account settings.** Control your notification preferences and enable email synchronization.
- **Accounts & contacts.** Learn the difference between Accounts and contacts within TaxDome.
- **Client tags.** Create custom labels for categorizing your clients by service, plan, or anything else.
- **Prepare your clients list.** Follow TaxDome's formatting guide and get ready to import your clients.
- **Documents & Folders.** Learn about TaxDome's folder privacy settings, and also how to create folder templates.

Session 2: Importing your clients

Come prepared

- Export your clients list
- Format it following [these steps](#)



Key steps and explanations

- **Importing clients** - Migrate all your clients into TaxDome at once by importing the spreadsheet with all their details.
 1. Go to the Clients page and click on the **import** button
 2. Upload your spreadsheet (max. file size 300kb)
 3. Select the account name field and the account type
 4. Map all the relevant **account** details
 - Create custom fields for any information you don't have fields for in TaxDome by using the **new field** option in the list of fields
 5. Continue to the next step and enable all three toggles
 - Do not tick the **send invitations** box unless you're certain you want to do it right away. **Invitations can be sent at any time.**
 6. Select tags or leave the field empty if you have them listed in the spreadsheet
 7. Select a folder template or leave the field blank
 8. Continue to the next step and map all **contact** details
 9. Start the import
- **Duplicate contacts** - If you have duplicates in your spreadsheet or import multiple sheets which contain the same clients, you can merge their duplicate contacts in TaxDome.
 1. Go to the Contacts page
 2. Click on the three dots next to the search bar and select **Merge duplicates** to automatically merge all of them
 3. Alternatively, if there are slight differences, manually select the contacts and use the **Merge selected** function

Session 2: Importing your clients

Key steps and explanations

- **Archiving and deleting** - Accounts and contacts can be deleted at any point.
 1. Select accounts, click on **More Actions** and select **Archive accounts**
 2. From the archived tab, follow the same steps but select **Delete accounts**
 3. Contacts cannot be archived, so you can delete them right away
- **Filters and bulk actions** - After importing your clients, you will be able to interact with them in bulk and narrow down the displayed lists to specific client groups.
 1. Select various filters to see clients based on service, status and more
 2. Save filter presets by clicking on the **Edit** button after applying filters
 3. Select client accounts by ticking the boxes next to their names
 4. Click any of the actions in the new menu that appears above the list and then enter the details relevant to the action
- **Communication methods** - There are various ways to get in touch with your clients. Learn which suits your needs the most.
 1. **Email** - Sync your email address to view and send emails through your portal
 2. **Secure messages** - Keep all communication securely within the portal
 3. **SMS** - Traditional and reliable method to quickly reach out to unresponsive clients

Session recap

- **Importing clients.** Migrate your existing clients into TaxDome by using our import function.
- **Duplicate contact management.** Clean up your contacts list after importing everyone by ensuring there are no duplicates.
- **Archiving and deleting accounts.** Find out how to remove unnecessary accounts and contacts within a couple of clicks.
- **Filters and presets.** Use filters to narrow down your clients list and make working with specific client groups much easier.
- **Bulk actions.** See all available bulk actions and learn how to use them to save yourself time.

Session 3: Automating workflows

Come prepared



- Create a **test client account**

Key steps and explanations

- **Workflow terminology** - Learn what the key terms related to TaxDome's workflow system mean and refer to.
 1. Pipelines - The entire work process done for a specific service.
 2. Stages - The steps required to complete the process for a service. Pipelines are segmented into multiple stages.
 3. Jobs - An entry representing the client you're completing the service for. Jobs always have to be in a pipeline and you track their progress by seeing which stage they're in.
 4. Tasks - The individual actions needed to be completed by your team in order to move the related job forward. This can be anything ranging from calling the client to e-filing their return.
- **Building pipelines** - You can either copy existing pipelines & templates from the marketplace or create new ones from scratch. These are the main points you want to keep in mind when building pipelines:
 1. Break down your existing processes into the individual steps
 2. Create stages for each step or phase of your process - if there are multiple actions that can be done simultaneously, group them into one stage
 3. **Add automations** to your stages (most automation types require templates, so create or copy them)
 4. Identify bottlenecks in your process and use automations to fix them
 5. Determine who from your team should have access to the pipeline
 6. Customize the pipeline settings to change the appearance and order of jobs

Session 3: Automating workflows

Key steps and explanations

- **Automations** - Speed up your processes by automatically completing repetitive tasks through your pipeline settings.
 1. Create templates for the needed elements (tasks, emails, proposals, etc.)
 2. Open the pipeline settings and use the add/edit automation button
 3. Select the type of automation you want to add and then select the template
 4. Add important automations to each stage of your process to ensure a smooth workflow
- **Adding Jobs** - After creating your pipeline, you need to add your clients to it in order to track your progress. Your clients will enter the pipeline as jobs and those jobs will move through the stages of the pipeline. There are several ways to add jobs.
 1. Open the **NEW** menu and select **Job**
 2. Open the pipeline or jobs page and use the **Add Job** button
 3. Set up **recurring jobs** to automatically add them
 4. Automatically add jobs for clients **upon sign-up**

Session recap

- **Workflow terminology**. Prepare for the next session by familiarizing yourself with the workflow-relevant terminology used throughout TaxDome.
- **TaxDome marketplace**. Learn more about our template marketplace.
- **Using automations**. Read more about the various types of automations and how they're used.
- **Adding jobs**. See how to create jobs in order to test your new pipelines.
- **Recurring jobs in pipelines**. Create custom schedules for your repeating jobs to automatically add them to your pipelines.

Session 4: Testing workflows and advanced functions

Come prepared

- Copy the pipeline shown in session 3 or create your own from scratch.

Key steps and explanations

- **Conditional automations** - You can add *if/then* conditions to every **automation** inside your pipeline to improve the flexibility of your process, cut down on manual corrections and streamline your processes by managing them from a single pipeline. There is no limitation to the number of conditions you will add.
 1. Create **tags** and apply them to your clients
 2. Open the pipeline settings you want to customize
 3. Click on the **Edit automations** button inside any stage where you want to **add conditional automations**
 4. Add an automation and then click the **Add condition** button
 5. Select the required tag(s) for triggering the automation (If multiple tags are selected, the client must have all of them to trigger an automation)
 6. Save the changes
 7. Do the same to other automations or **entire stages** with the **Add conditions** button below the stage name
- **Recurring jobs** - Create schedules for entire processes to recur based on a selected schedule. TaxDome will automatically create jobs and add them to the beginning of the correct pipelines. Recurring jobs will function the same way as regularly jobs, except that they will require no effort to start the process. Depending on your needs, you can either:
 1. Open the **Job recurrences page**
 2. Use the **New job recurrence** button and add all clients you need recurring jobs for
 3. Select which pipeline you want to their jobs to be added to
 4. Enter all the schedule details

Session 4: Testing workflows and advanced functions

Key steps and explanations

- **Optimizing pipelines** - After fully setting up your pipeline & its automations, it is recommended to complete a test run in order to ensure everything works as you envisioned it. Use a test client for these purposes.
 1. Add a job for the test client into the new pipeline
 2. Complete all pending actions from the firm & client sides
 3. Ensure the automove works correctly
 4. Pay attention to steps which could be streamlined further
 5. Test conditional stages/automations and whether they trigger for the intended client groups
 6. After completing a full test run, note down areas for improvement and make changes
 7. Once the pipeline works as intended, add your real clients

Session recap

- **Workflow terminology**. Prepare for the next session by familiarizing yourself with the workflow-relevant terminology used throughout TaxDome.
- **TaxDome marketplace**. Learn more about our template marketplace.
- **Using automations**. Read more about the various types of automations and how they're used.
- **Setting up conditional automations**. Add **if/then** conditions to your automations in order to trigger specific actions for the appropriate client groups.
- **Adding jobs**. See how to create jobs in order to test your new pipelines.
- **Recurring jobs in pipelines**. Create custom schedules for your repeating jobs to automatically add them to your pipelines.

Session 5: Billing, reports and Q&A

Come prepared

- [Connect a payment processor.](#)

Key steps and explanations

- **Billing** - TaxDome allows you to connect a payment processor in order to handle all your billing needs through your portal and keep all the information in one place.
 1. Create [invoices](#) for test clients
 2. Create and apply [manual payments](#)
 3. [Track your time](#) while working on real tasks/jobs and then [create invoices out of those](#)
 4. Learn about [recurring invoices](#)
- **Reports** - Set up your reports ahead of the tax season to have all the information you could potentially need ready and available for review after your peak season is over. Find room for growth, weak areas and more by seeing all the detailed reports you need. Learn about:
 1. [Dashboards](#)
 2. [Reports](#)
 3. [The report designer](#)

Useful resources

- [In-depth 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