Onboarding Checklist

TAXDOME

We're excited to join you on the great journey of powering your practice for years to come.

Welcome to your TaxDome cheat sheet! Here, we guide you through the step-by-step process of getting your practice up and running on TaxDome. Although automating your workflow may take some time, it will save you up to 40 hours per employee per month.

Check the TaxDome **Quick Guide course** in our Academy for more detailed information.

1. Getting Started With TaxDome WorkFlow

- [ ] **Create a test client in TaxDome** with your non-work email to check all the system features on your own.
- [ ] **Copy the sample template** from our library. This template will have many automations, so you can see how all the features tie in together.
- [ ] **Add a first job for your sample client.** As both firm and client, experience the magic of the automated workflow.
- [ ] Free up your time for proper work by **automating the jobs creation**.

2. Set Up Your CRM

- [ ] Export your data from existing software.
- [ ] Review the flexibility of the **TaxDome Accounts and Contacts** system. You're going to work for accounts and talk to contacts.
- [ ] **Prepare a client list for Import** to ensure the smooth transfer of your data.
- [ ] Deploy our user-friendly wizard to **import your client data** to TaxDome (T We suggest **scheduling a quick call** with one of our Success Team experts to go over this step with you).
- [ ] **Send client invitations** (if you didn't do so during the import process).

3. Client Communication Essentials

- [ ] **Discover how docs work** and upload your first document to TaxDome.
- [ ] Learn **how to request signatures** and so cut spending on E-signing software.
- [ ] **Sync your email with TaxDome** to be directly notified about new emails while working in TaxDome.
- [ ] **Start using secure messaging** to get free of tons of messengers.

4. Invite Your Team

- [ ] Ready to grow your team and delegate tasks? **Add your team members to TaxDome**.
- [ ] Distribute your workload by **assigning team members to clients**.
- [ ] Integrate your team to firm workflows by **giving access to Pipelines and jobs**.

5. Utilize TaxDome Resources to Speed Up Implementation

- [ ] **Discover bootcamp sessions** to set up your portal as you are watching them.
- [ ] **Watch in-depth webinars** to find the quickest way through exploring TaxDome functionality.
- [ ] Enroll in the **TaxDome Academy** to get deeper understanding of all features.
- [ ] Find detailed explanations of any TaxDome feature you are interested in our **Help Center**.
- [ ] Subscribe to our **YouTube channel** and never miss new tutorials, client stories, and more.
- [ ] Connect with the **TaxDome Community** and share your experiences.

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.