

Invoices & Contracts Cheat Sheet



It's time to take your invoicing to the next level. Here, discover surefire ways to make it easy for clients to pay you—and do it promptly!

Welcome to your invoicing cheat sheet. This friendly guide will help you learn how to use TaxDome's **Services**, **Contracts** and **Invoices** features to your advantage.

Want to become a total invoicing pro? Check out our fun [TaxDome Invoicing Guide](#) course at TaxDome Academy



1. Invoices: Where to Start

Visit our **blog** for expert tips on what to know before you start to invoice your clients.

Connect TaxDome to your preferred payment-service provider: **Stripe**, **CPACharge**—or both.

Sync your TaxDome account with QuickBooks Online.

Itemize invoices and contracts with the **services you perform**. You can create or grab service names from our library or from your QuickBooks.

Add a default tax rate to automate calculating the tax.

2. Work Contracts

Create at least one contract template so you always have it on hand for new jobs.

Avoid potential issues getting contracts signed by understanding **how e-signing contracts works**.

Speed up your workflow by **automating your contracts** so that they go out to clients as soon as they're supposed to—and all on their own.

Use Reminders to ensure clients don't forget to e-sign contracts.

3. Invoicing Essentials

Automate your invoices so that they go out to the client as soon as jobs are completed—without you having to click a button.

Track the time you spend on each client to better understand your work patterns.

Lock documents to invoices so that clients can download them only once they've made a payment for the work.

Know how to **send a professional-looking PDF invoice**.

4. Solve Common Invoicing Problems

Learn how to **handle overdue invoices** and promptly resolve payment issues.

Know **how to edit unpaid invoices** to avoid having to provide refunds.

Offer clients who are uncomfortable paying online ways to **pay offline**.

Know **how to give a refund**.

More questions?

Here are the top three ways to find answers:

1. Visit the [TaxDome Help Center](#), and check out our [Invoicing](#) page.
2. Check out the resources on the [Get Help Page](#).
3. Reach out to our [Customer Success](#) team.

