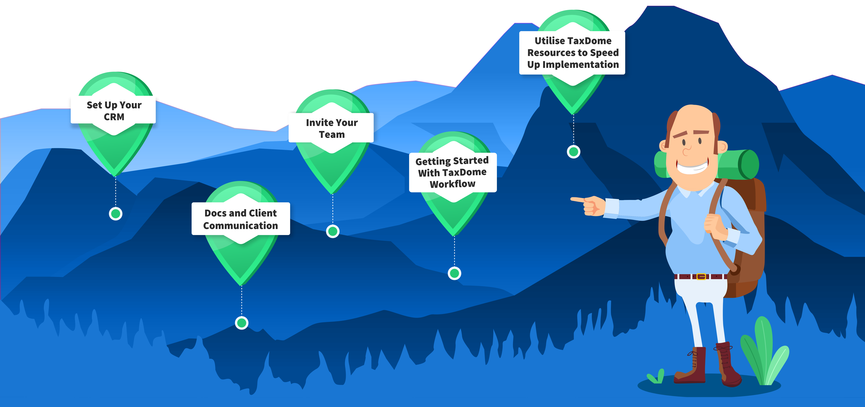
Onboarding Checklist

TD TAXDOME

Thank you for downloading our checklist. Together, we'll help you get TD-MTD ready in no time!

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. 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 (💡 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).

2. Docs and Client Communication

- [ ] **Discover how docs work** and upload your first document to TaxDome.
- [ ] Learn **how to request signatures** for single or multiple signers.
- [ ] **Sync your email with TaxDome** to be directly notified about any incoming emails.
- [ ] **Start using secure messaging** to learn how you can send client tasks.

3. 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.**

4. Getting Started With TaxDome Workflow

- [ ] **Create a test client in TaxDome** with your non-work email and test all the system features.
- [ ] **Copy the 'EN (UK) TaxDome Sample Onboarding Workflow'** from our Pipeline Library. This template will have many automations, so you can see how all the features tie in together.
- [ ] **Add your sample client to the workflow.** See the magic of our automations from the perspective of the firm and client.
- [ ] Free up your time for proper work by **automating the jobs creation**.

5. Utilise TaxDome Resources to Speed Up Implementation

- [ ] Enroll in the **TaxDome Academy**
- [ ] **Watch in-depth webinars**
- [ ] Review detailed explanations of all TaxDome features in our **Help Center**
- [ ] Subscribe to our **YouTube channel** and never miss videos on new features and tutorials
- [ ] Connect with the **TaxDome Community** and share your experiences
- [ ] **Introduce TaxDome to your clients**: templates and best practices

Still not enough?

Book a **one-on-one call** with our team.
Feel free to reach out to our Customer Success team and check out all the other resources on our **Get Help Page**.