TD TAXDOME

Session 1: Build Your First Automation

Come prepared

- **Register your firm with TaxDome**

Click here

- Select your language, time zone, and more in your **firm settings**

- **Export your clients list** if you haven't imported your clients into TaxDome

Key steps and explanations

- **Live automation setup**

  - Download a **pipeline template** and adjust it to your needs
  - Learn **how stage automation works** and automation examples:
    - **Send email**
    - **Auto-upload documents**
    - **Update account tags**
    - **Update account access**
    - **Update job assignees**
    - **Apply folder templates**
    - **Update client-facing status**

- **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: Build Your First Automation

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. Follow **these instructions** if your export has multiple contacts listed in the same row
  4. Include all information you might need in the future
  5. 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: Smart CRM Setup & Client Onboarding

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 and repeat the same import steps for the spouse contact if they're listed in the same row - Alternatively, use this **macro sheet**..

● **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: Smart CRM Setup & Client Onboarding

Key steps and explanations

- **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

- **Organizers** - Use TaxDome's smart forms to collect information and documents from your clients.

  1. Copy or create an organizer
  2. Add various **types of questions** depending on your needs
  3. Set up **conditional logic** in the form for a more tailored client experience
  4. **Sync answers** to the CRM
  5. **Enable pre-filling** answers for future organizers

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.

- **Bulk actions**. See all available bulk actions and learn how to use them to save yourself time.

- **Organizers**. Prepare smart forms for easy data collection-

Session 3: Create a Scalable Workflow Pipeline

Come prepared

Click here

- 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

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Session 3: Create a Scalable Workflow Pipeline

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.

- **Reports.** View premade reports and create custom reports & dashboards to track your firm's efficiency and profitability.