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TaxDome

[Taxdome.com](https://taxdome.com)

From the 2020 reviews of [professional tax systems](#).

TaxDome is an all-in-one tax practice workflow solution that includes CRM, a Client Portal, Workflow, Email Sync, Bills & Payments, Unlimited E-Signature, Document Storage, Customizable Organizer, Time Tracking, and Secure Document Storage. TaxDome is web-based for anytime access and includes a mobile app that supports both iOS and Android devices.

The Firm Owner screen in TaxDome is intuitively designed, with a navigation bar to the left offering access to frequently used program areas while the menu bar at the top of the screen offers easy access to all system functions. The main part of the interface provides users with a nice overview of ongoing tasks for each particular customer, conveniently divided into multiple sections, including Documents, which displays a list of recently accessed documents and Tasks, which provides a handy list of current tasks, who is assigned to the task, the current status of each task, and what priority each task holds. Also available is an Email section along with Pipelines, Requests, and Unpaid Bills.

Staff can track time using the online timesheet function which includes a built-in

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with clients securely and the customizable organizer lets users create custom organizers for each client. Workflow management is also available in TaxDome, with management able to assign tasks, receive status alerts, and even reassign tasks if necessary.

TaxDome integrates with QuickBooks applications, and a Xero integration in the works. TaxDome also offers a free, 14-day trial for those who want to try out the application.

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