KARL J. STRUBE, CPA
ACCOUNTING AND TAX SERVICES

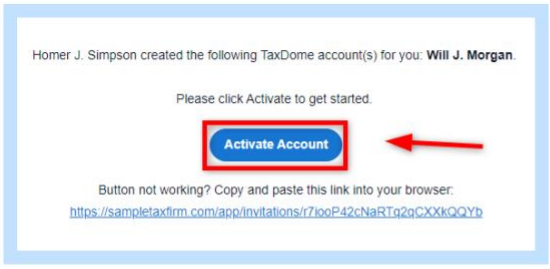
TAXDOME CLIENT PORTAL

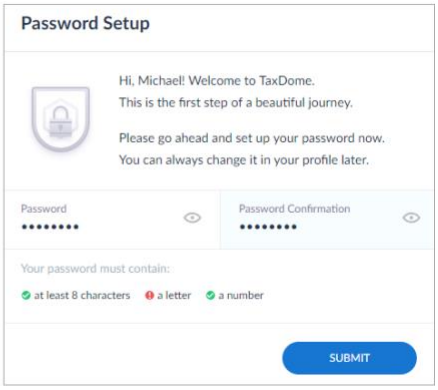
I am moving over to a new secure client portal: TaxDome!
You have been sent an email invitation to TaxDome. The email subject line will read "*Karl J Strube CPA invites you to their client portal and mobile app*".
If you don't see this email, first check your "spam" or "updates" folder, then contact hello@strubecpa.com.

Please follow the following steps to get started on TaxDome:

Step 1: Activate Account

a)





b) Click "Activate Account" from your email and you will be brought to strubecpa.taxdome.com where you can choose a password (8 characters, a letter, and a number) and then click "Submit."
    a. Please **never** share your personal password with anyone
c) Once you see "Success! The password for your account was successfully set!" click "OK." You are now at the secure portal where you can **view & upload** documents, **see open items and tasks** and we can **message** each other back and forth securely.

Step 2: View To-Dos and Tasks

The first page you see is your dashboard with notifications about important updates, such as pending tasks, unseen messages, pending organizers, and unread documents. You'll also find the contact info for my firm here.

Step 3: Explore the Main Menu in the Left Sidebar

From the sidebar, you'll be able to easily go wherever you need to on your portal.

- ***Documents*** is where you upload, e-sign, and download documents.
- ***Chats & Tasks*** is where you can ask me any questions or respond to any of my requests.
- ***Organizers*** is where you fill out your questionnaire.

Visit the portal anytime by visiting strubecpa.taxdome.com

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TAXDOME CLIENT APP

If you have a smartphone, please either use your camera to scan the QR code below or go to the app store and download (blue icon) "TaxDome Client Portal."

Phone App for Apple Users	Phone App for Android/Google Users

The app is free and will give you full access to my secure portal from your smartphone.
The app also has a built-in SCANNER so you can SCAN documents with your cellphone camera and UPLOAD them for me to review.

After downloading the "**TaxDome Client Portal**" app, you will be prompted to enter your **email address** and the **password** that you previously set up. You will be prompted to create a 4-digit PIN for more security or you may SKIP this step.

Now you can use the Tax Dome Client Portal from your smartphone to **upload** documents, send me secure **messages**, and to **view** documents.

Visit the portal anytime via the app "TaxDome Client Portal" from your smart phone!

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HOW TO UPLOAD AND SIGN DOCUMENTS

Scan and upload PDF documents from TaxDome Client Portal smartphone app

- Place your paper documents on a **flat surface** (preferably with a dark background)**.**
- In your "TaxDome Client Portal" app, tap “Upload Documents” under Quick Links
- Tap "Scan document" from drop down menu.
- Cell phone camera will open. Hold camera over document.
- Camera will automatically frame the document and highlight it in orange.
- Tap button to take the PDF image. Image will turn blue in color.
- Tap "done."
- Tap image in bottom right of screen.
- Tap "+" sign to add more pages to this document.
- Tap "Upload" when done adding pages to this document.

To create an additional document, tap "Add more" at the top of the screen and create another PDF with one or more pages.

Check box to "Notify firm if you are done uploading" ONLY if this is your final document to upload for tax preparation. I will be notified every time you upload a document. Please do NOT check this box with every upload.

Tap "Save" to complete upload of document(s).

Instructions to e-sign documents in TaxDome

- Open email with signature request
- Click on ‘sign document”
- This brings you to the sign in page of the TaxDome portal
- Look under “To Do” tab for document pending signature
- Click “Start”
- Click on “My Signature” bubble
- Choose “type” or “draw”
- Touch signature box
- Click “insert
- Click “finish”