

Dubsado

Basic Setup Checklist

- Add Branding Customizations (Logo, Business info)
- Setup Payment Accounts (Stripe, Square, PayPal) & setup taxes
- Sync Google Calendar & Email Account with Dubsado
- Draft Canned Emails & Save them as Templates
- Add income & expense categories
- Make Product Packages, Forms, and Contract Templates
- Create Payment Schedules & Customize Invoices
- Create Contact Form via Lead Captures & Embed on Website
- Create Workflows (This helps to write out your process first!)

This is a very basic checklist to get you started. Dubsado has so many great features and they are always updating to add even more fantastic features. Don't hesitate to reach out to them if you need help.