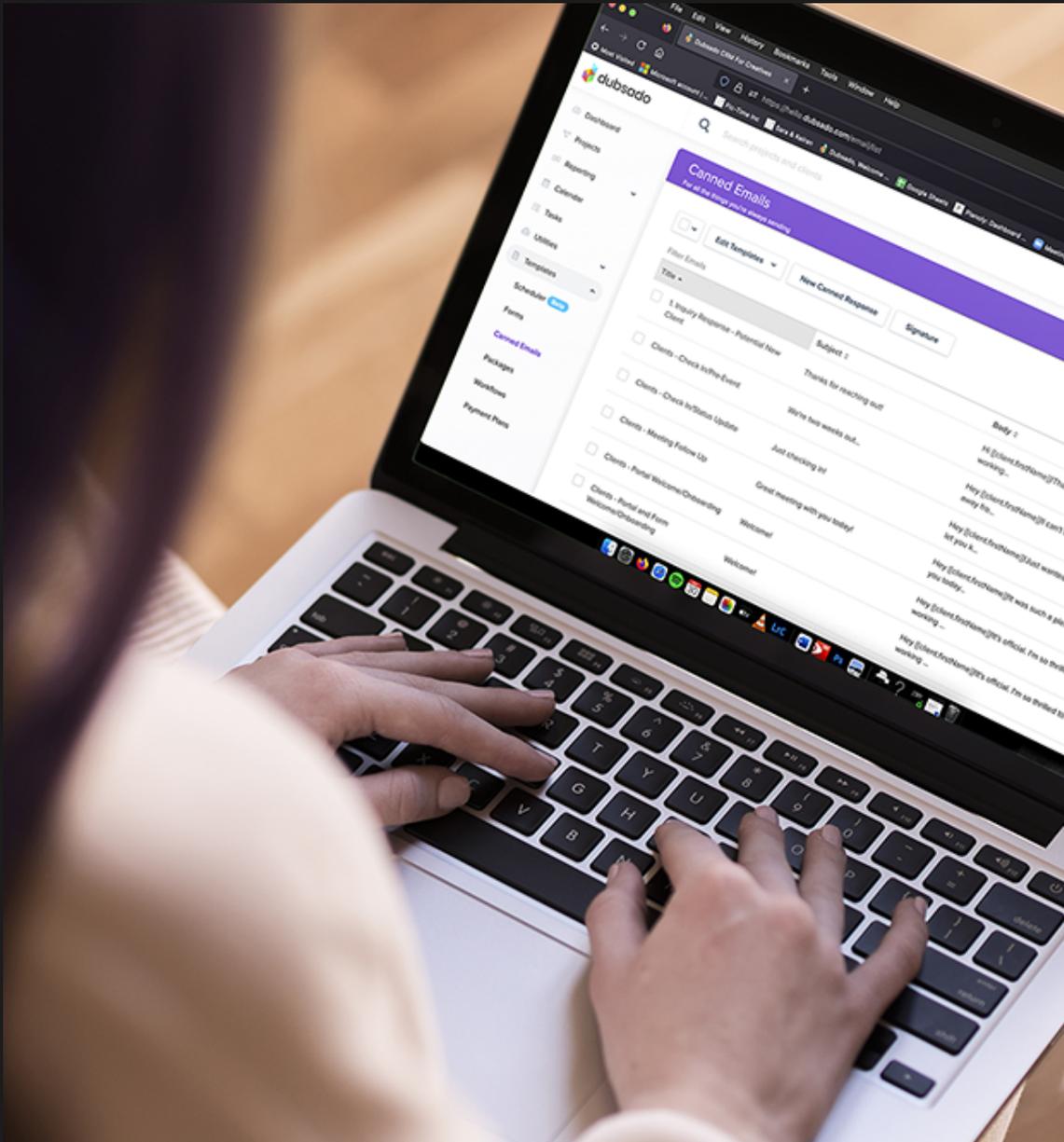


# STEP-BY-STEP DUBSADO SETUP GUIDE

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# WELCOME

Dubsado is an all-in-one Customer Relationship Management system that helps streamline your business and stay on track.

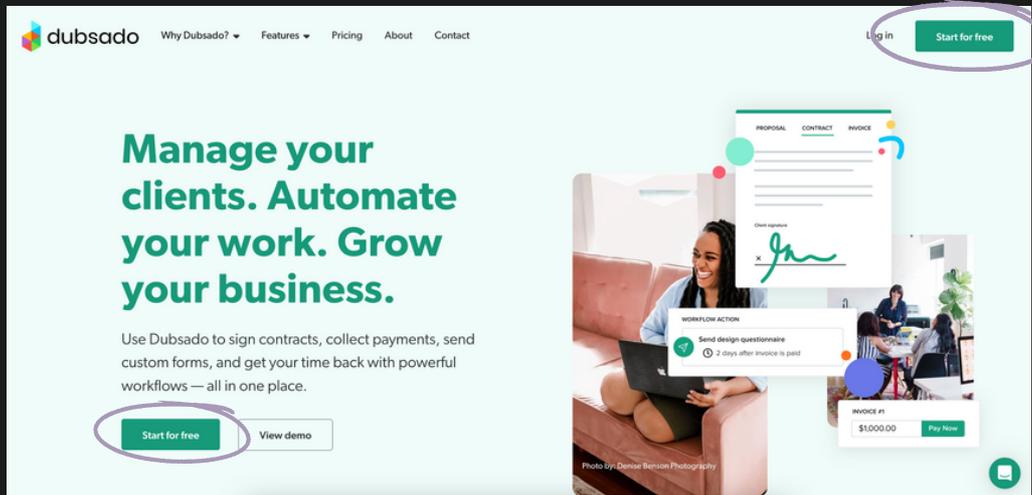
You will be able to send important forms, invoices, emails and more, automating your business to the max and saving you valuable time and your sanity knowing everything is in one place, working together behind the scenes.

This checklist will help you set up your account, as well as navigate and understand the different sections of Dubsado.

All you need for this setup is a Dubsado account. Don't worry it's free for the first three clients and you can use the sample client provided for all your testing.

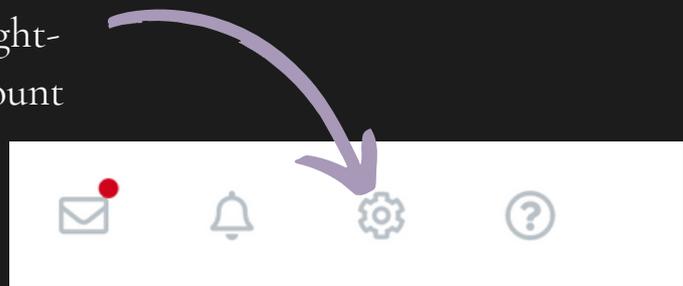
If you find this setup to be too much, I offer a variety of Dubsado setup and support services designed to help you bring out Dubsado's full potential.

# Setting up your Dubsado account



<https://www.dubsado.com/>

Once you have created an account, head over to the gearshift at the top right-hand corner of your dubsado account



On the next page, I will have a checklist to complete all the tasks in this section to set the elements you need in Dubsado so your account is ready to go.

I have also provided a useful guide so you understand what you are doing each step in more detail and so it's not too overwhelming!

I hope you enjoy setting up your Dubsado account!

# Dubsado Set-Up Checklist

## Brand Settings

- Branding
- Dashboard (optional)
- Portal Multi-user (optional)
- International Settings
- Receive money (optional)
- Emails
- Integrations
- Domain names (optional)
- Custom-mapped fields (optional)
- General settings

## Account settings

- Login settings
- Billing
- Notifications (optional)
- Affiliate dashboard

## Dashboard

- Scheduler
- Forms
- Canned Emails
- Packages
- Workflows



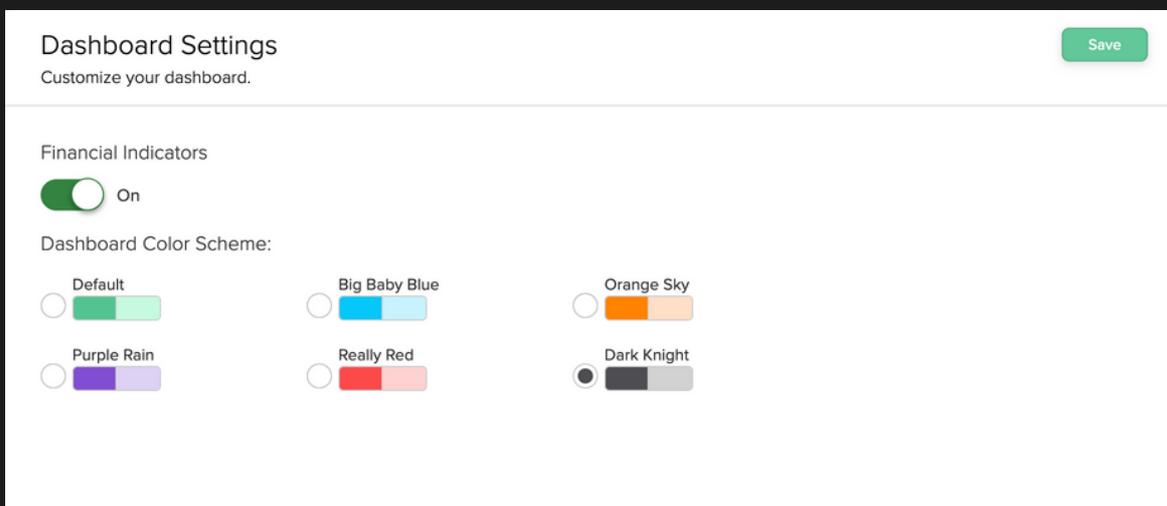
# Brand Specific Settings

- **Upload Logo**
- **Colour** - Pro Tip: Try to make the button colour a darker one in your branding palette as buttons will have white text. The dark colour will help the text stand out.
- **Name** - Add your company name here
- **Business Email** - Add your preferred company email address
- **Phone** - Add the phone number that you use for work
- **Send email as** - Emailing as your own name is always more personal than emailing from a business
- **Address** - Add your address/work address

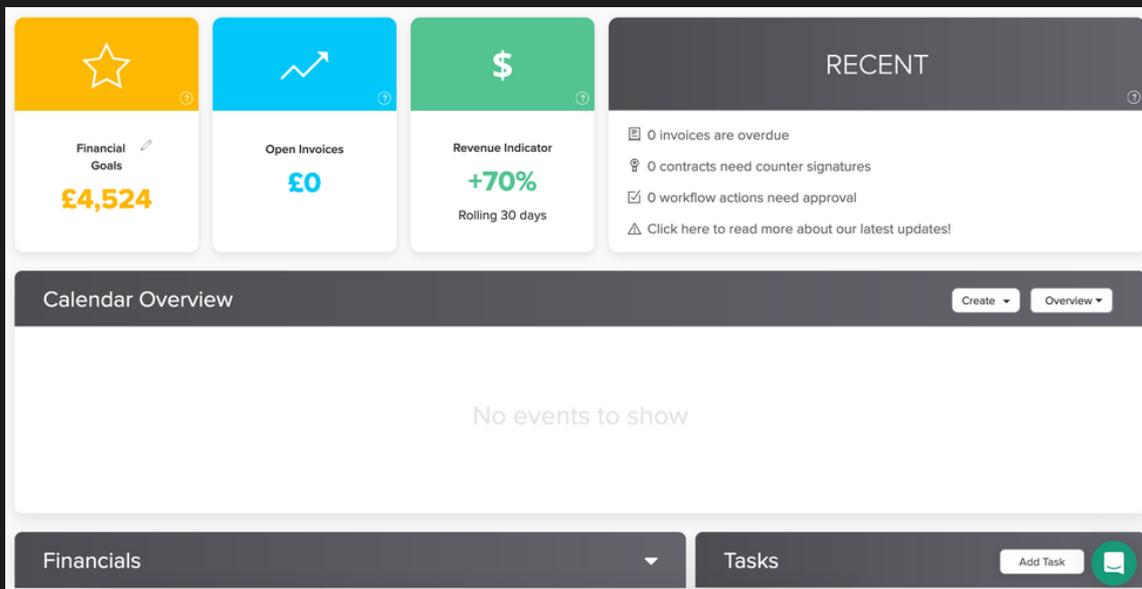
# Dashboard Settings

From here, you can choose whether you would like to have visible financial indicators on your main Dashboard as you log into your account.

You can also change the colour of the Dashboard to suit you. There aren't many options so just choose which one is the closest to your branding or go with a neutral grayscale.



Example of what your dashboard will look like with financial indicator on



# Portal Settings

In this section, you can play around with the settings and look at your client portal which is what your clients will see when you provide access.

- Welcome Portal Message - Keep the general or come up with your own
- Portal Projects Label Override - You can change the label for 'Projects' to another word of your choice
- Portal-Specific Logo - You can choose to hide the logo if you have one on your banner already or if it doesn't fit with your banner aesthetic
- Portal codes - You can share a portal with a client who already has access to this code. There is also an option to embed this onto your website.
- Banner - Upload banners for desktop and phone view (There are banner templates available online)
- Portal Colours - Select your preferred brand colours



# International Settings

It's important to set your time zone in this section. You will also be able to change your currency in these settings.

## Time Zone

Change the time zone to your area. This is vital as it will link with your calendar to ensure all your emails are sent at the correct times depending on your location.

## Changing currency

Select the Locale Settings (English, United Kingdom for example) and find the area you are based in.

This will change the symbols and currency settings shown in the example output.

### International Settings

Adjust your time, location, and currency settings.

[Save](#)

<p>Time Zone</p> <input type="text" value="Europe/London"/>	<p>Example Output</p> <p><b>Date:</b> Thursday, 17 August 2023</p> <p><b>Currency:</b> £5,000.24</p>
<p>Locale Settings</p> <p>This will affect date formatting and currency symbols. We do not presently allow for billing in multiple currencies.</p> <input type="text" value="English (United Kingdom)"/>	
<p>Override the default currency symbol from the provided from above</p> <input type="text"/>	

# Receive Money

So here is the thing. Dubsado uses third-party payment methods to process money within its system. This however doesn't mean you have to use one. You can choose to not select one and you can manually process all paid invoices once the payment has come through as "cash payments".

If you would like to use one of the third-party payment processors here is the time to set one up. Dubsado integrates with Stripe, Square and PayPal.

*(You can only connect Stripe or Square, not both. PayPal can be used on its own or in addition to Stripe or Square.)*

They all have their own payment processing fees, which are worth looking up.

The plus side is that this makes it very easy for your clients to pay your invoices with a click of a button.

**Invoice settings**

**The "Bill to" name shown on invoices**

Client name  
 Company name  
 Client name and company name

---

**Show taxes on each line item**  No

If turned off, only the total tax will be shown

---

**Invoice terms**

Edit the terms appearing at the top and bottom of your invoice.

**Top**

Type something

Smart Field A Font Family 12

**Bottom**

Type something

Smart Field A Font Family 12

If you prefer to opt-out of third-party payment processors and prefer to have your clients pay you through bank transfers (which means you have to manually process payments within Dubsado as cash payments) it is a good idea to add your banking details to your invoice using these Invoice Terms section

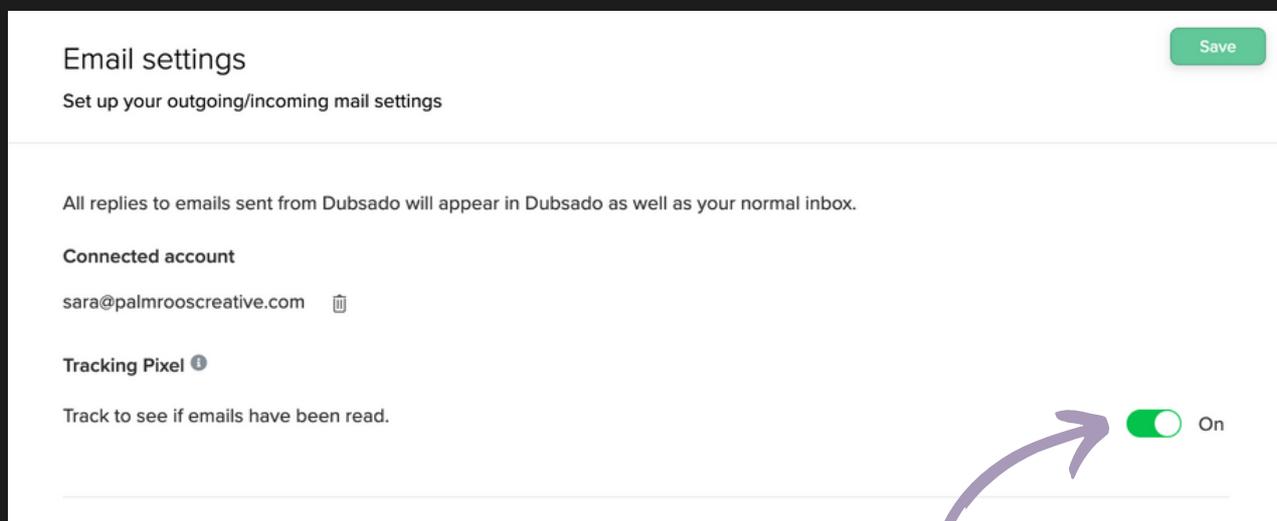
# Email Settings

Connect your email account in this section, so Dubsado can send follow-ups, proposals, forms, contracts, invoices and other emails from your account.

You will have the option to integrate your Google email address or your Microsoft email address. Or you can use SMTP to connect if you use any other email address provider.

Please note: Dubsado will only show emails from addresses that are integrated into the system, so your Dubsado inbox won't receive any non-dubsado-related emails you might receive on your official email account.

Use the prompts from your email service provider and once you're sorted, your email will be linked and look like the below!



There is also a handy button that you can choose to track to see if the emails you have sent have been received by the recipient.

This is especially great when you're not sure if your email has gone to spam or if your email is just being ghosted.

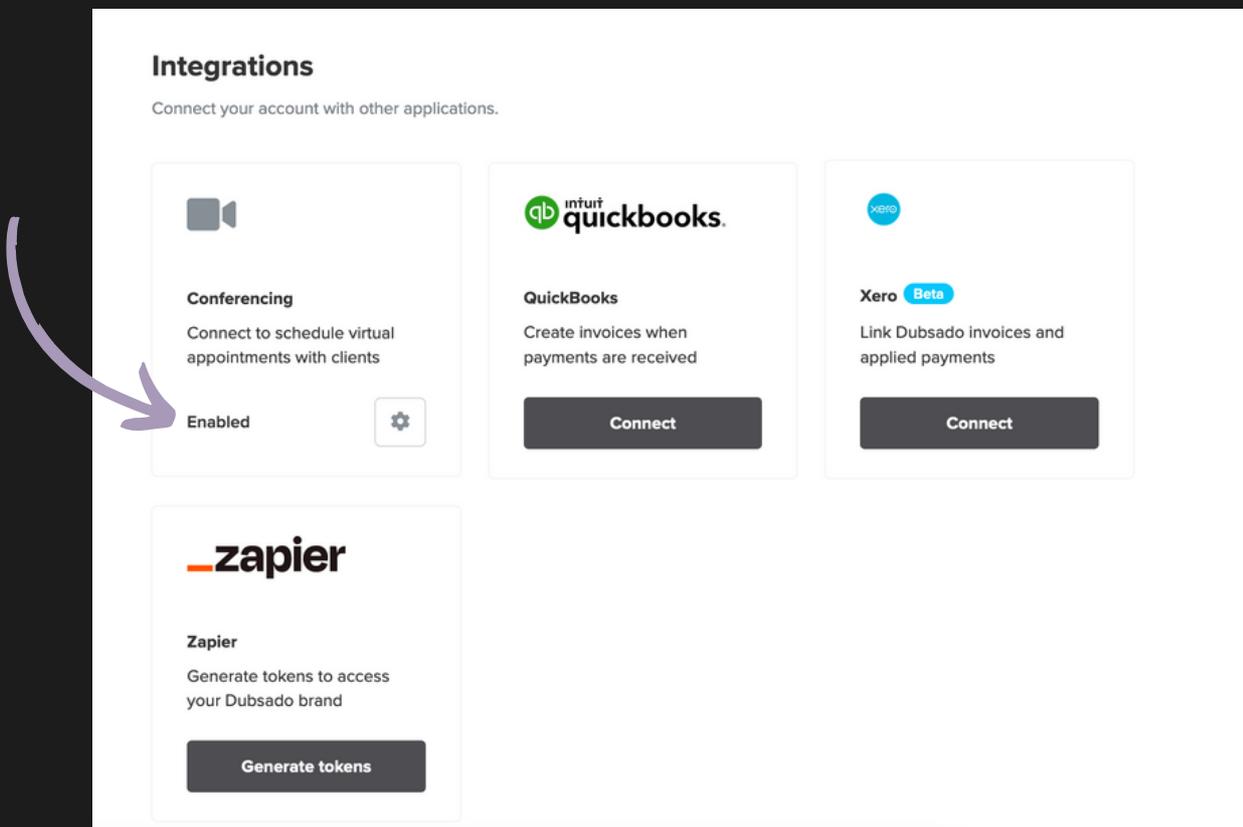
# Integrations

Here you can easily integrate other apps you use for the day-to-day running of your business like your bookkeeping accountancy software along with other apps such as Zapier which helps you create even more automations!

One important integration is your preferred conferencing app. Google Meets or Zoom are great examples and it's super easy to connect. This means Google Meets and Zoom links are automatically created when Dubsado sends out your appointments, so you don't have to worry about doing this manually every time.

Please note: You will need to sync a calendar before enabling conferencing.

Once your preferred conferencing has been connected it will show as enabled as shown below



# Domain Dames (optional)

By default, links in Dubsado use the URL `hello.dubsado.com`. This includes links to invoices, forms, schedulers, or client portals. Creating a custom-mapped URL lets you change the Dubsado URL to your own domain name.

For example, `hello.dubsado.com` will become `portal.yourdomain.com` or `hello.yourdomain.com`.

So if you have a claimed domain name and you would like your links to be branded, you can connect it here.

Setting up a Custom URL Mapping is a two-step process of 1. Creating the base URL and 2. Verifying the URL. You can find tutorials on how to do this.

## Domain Names

Personalize your domain name for your brand.

---

### Custom URL Mapping

[Reset](#)

### URL Meta Information

The below will determine how your forms and portals are labeled in your clients' browsers and when sharing socially.

**Page Title**  
Appears in the top of the browser for your portals and forms.

**Description**  
Appears in the preview when sharing to certain social sites.

**Preview Image**  
The main image that appears when sharing a link to certain social sites.

**Favicon Image**  
The small icon that appears next to the page title in the browser. Must be 16x16 pixels in .jpg or .png format. Use [this site](#) to create one



# Custom Mapped Fields

Mapped fields help you to input/link information automatically when your client completes forms. These could be fields e.g. wedding date, that will apply to the client project.

You don't have to worry about this yet at the beginning of your account setup, but once you start to know what sort of mapped fields you want, like first name, last name etc. this is the area where you will go back and add them.

Custom Mapped Fields  
Create your custom mapped fields here.

Client Project

Client Mapped Fields  
Client mapped fields are directly in the client's profile. This will follow the client on any project they are assigned to.

Create

Name Type

Select Type Save Cancel

# General Settings

This section allows you to toggle your conflicting dates against your calendar when creating new events.

Scheduler conflicts filter available times based on selected brands.

General Settings

Date Conflicts  On  
If this setting is turned on, Dubsado will check all conflicting dates when creating a new event.

Appointment Scheduler Conflicts  On  
If this setting is turned on, appointment schedulers will filter available times based off conflicts across selected brands.

Palmroos Creative

# Account Settings

## Login Settings

You can change any of your login settings in this section, this includes your password, email and name.

There is also an option to toggle on "BCC me on all outgoing emails" which means that every email that goes out to your clients will also be sent to your email as blind copies.

This comes in handy if you want to know what all emails look like going to your clients but I personally recommend connecting one of the free test accounts to your personal email to test everything on your system.

If you choose to toggle this on in the beginning, this can easily be turned off whenever you feel you don't need it anymore.

### Login settings

**Name** [Change name](#)  
Sara Palmroos

---

**Email**  
This Google account is used to log in to Dubsado. To change your email, disconnect this account.

 **Google**  
sara@palmrooscreative.com [Disconnect](#)

---

**Bcc me on all outgoing email**

Note: If you open a BCC'd email outside of Dubsado, it will mark as read within Dubsado

# Billing

Billing will show you the plan (monthly/early) that you have with dubsado once you sign up for the paid plan.

Here you can also change your payment card and see your billing history.

---

# Affiliate Dashborad

You can set up an affiliate link to receive the perk of \$35 (about £27) towards your next billing. The link user will receive 20% off their first month or year.

**Affiliate dashboard**

**Thank you for helping the family grow.**



With the Dubsado affiliate program, every time someone uses your code or link to sign up for a paid subscription, you'll both receive benefits.



 <p><b>What you'll receive</b></p> <p>\$35 in affiliate credit.</p>	 <p><b>What they'll receive</b></p> <p>20% off their first month or year.</p> <p>Find out more about the affiliate program <a href="#">here</a>.</p>
--	---

Remember: Using my code Palmrooscreative20 you can also get 20% off your First year or month when you sign up.

---

# Notification Settings

Here you can choose how you would like to be notified of each action as it's happening on Dubsado.

You can choose to have a push notification show up on your dashboard or you can just have Dubsado notify you via email and /or Dubsado Dashboard.

Scroll down this page and you can separate notifications for individual actions

## Notifications

Customize your notification preferences so you're always up-to-date (or not)! Save changes

### Types of notifications

 **Push**  
You will receive a push notification via the browser. [Subscribe](#)

 **Dashboard**  
You will be notified via the bell icon in the top navigation bar.

 **Email**  
Receive notifications to your preferred email address.

### Set notification email

By default this is your login email address. You can change the email for this brand here.

### Turn notifications on/off

CONTRACTS

Alert me when a contract is signed  Push  Dashboard  Email

INVOICES

Alert me when an automatic payment has failed  Push  Dashboard  Email

Alert me when a payment is submitted  Push  Dashboard  Email

FORMS

Alert me when a form is submitted  Push  Dashboard  Email

Alert me when a form draft is submitted  Push  Dashboard  Email

Alert me when a lead capture form is submitted  Push  Dashboard  Email

SCHEDULER ⓘ

Alert me when a scheduled appointment is confirmed  Push  Dashboard  Email

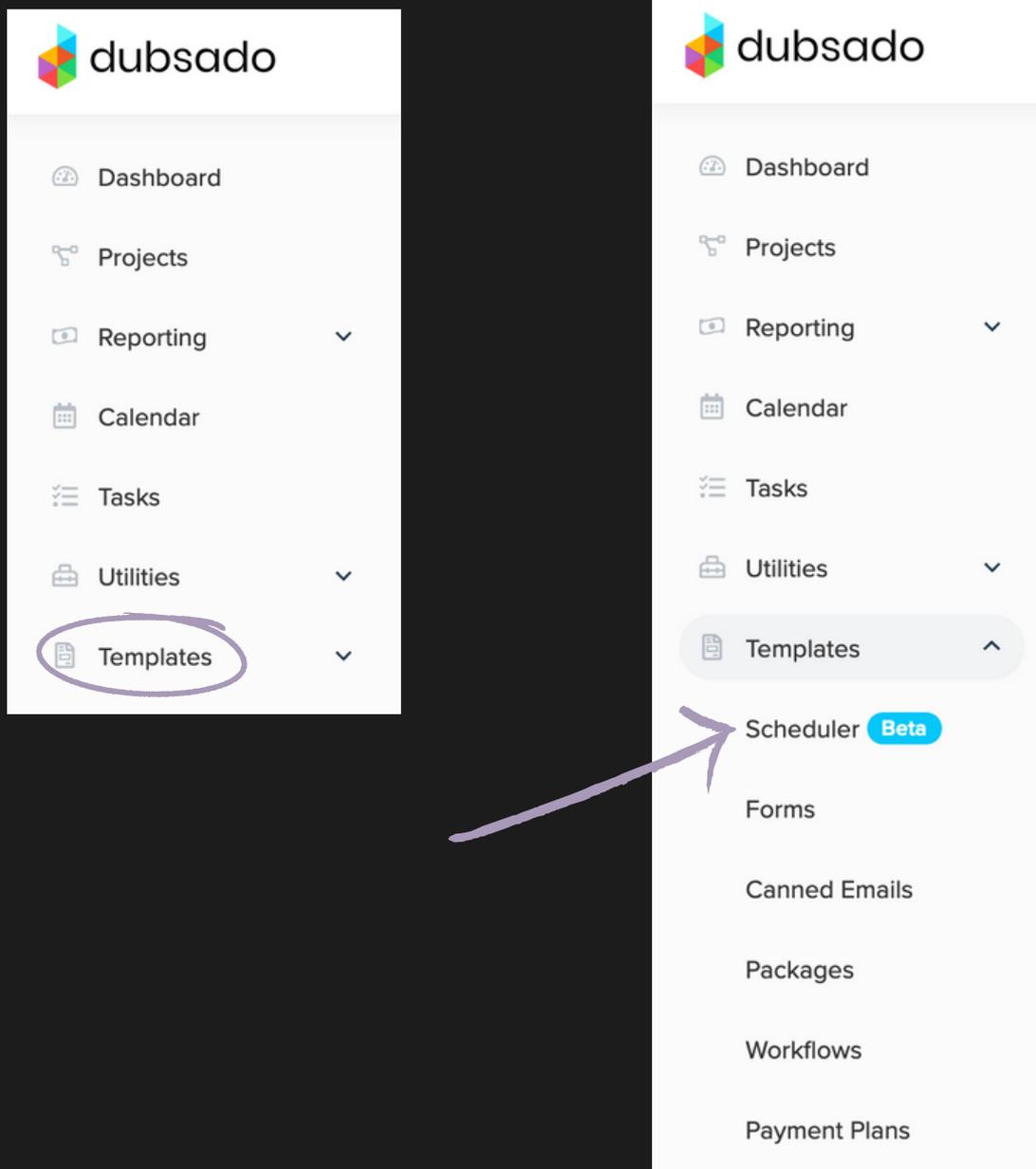
Alert me when a scheduled appointment is rescheduled  Push  Dashboard  Email

# Dashboard Settings

Now that all the account setup is completed we will quickly have a look at how the rest of Dubsado works and go through the settings on the dashboard section that you need to run your Dubsado successfully.

I recommend you start looking into all these features on the Dashboard column in more detail and get used to the elements in each one.

In this section, I will go over Templates which is circled here and we will start from the top with Scheduler



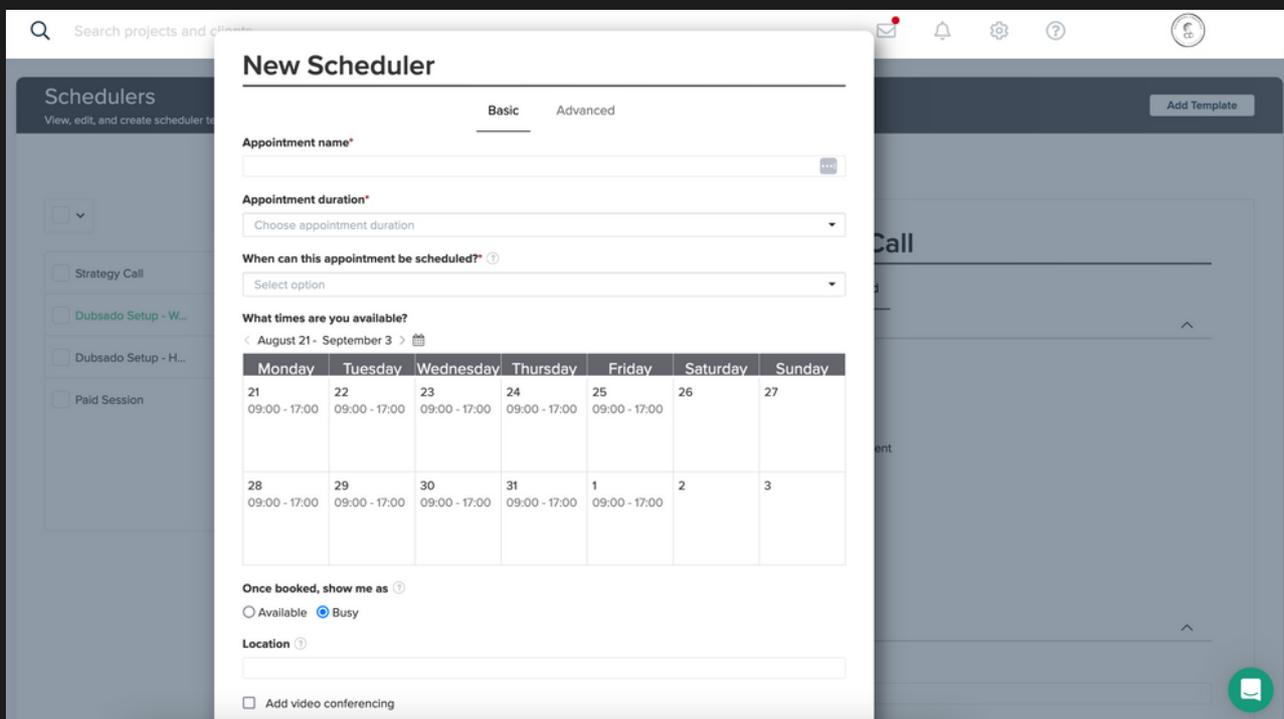
# Scheduler

Add in your schedulers which will allow leads and clients to select times to meet you when you share them. The Dubsado scheduler works just like Calendly and other scheduling tools except it is more powerful as you can add automatic reminders.

Even better, Dubsado will automatically use your conferencing software to create virtual meeting links for you.

Here you can set all your different meeting templates with durations, Locations (Google Meets), as well as canned emails for appointment confirmations and reminders.

From the advanced settings you can set up buffer time before and after meetings and determine how many meetings you will allow to be booked per day.



# Forms

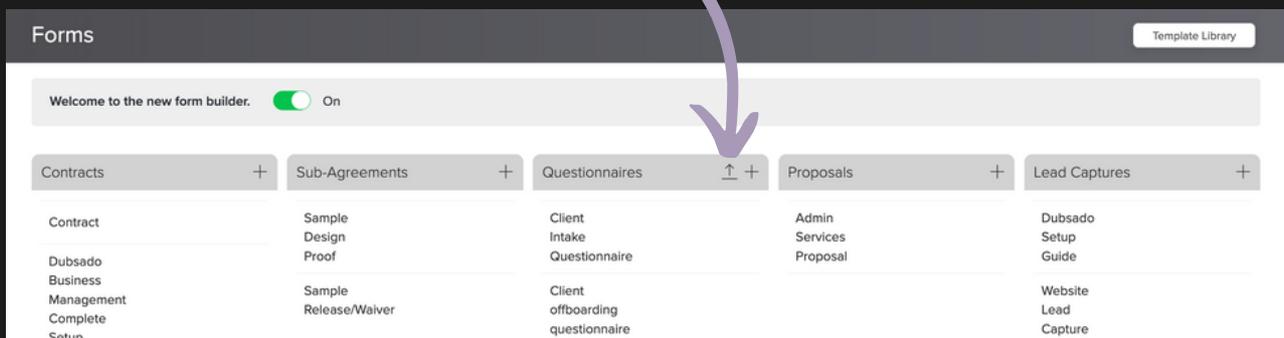
This is where the magic of dubsado starts to form into an automation goldmine.

You can create beautiful forms that correlate with your branding to go to your clients automatically from contacts, questionnaires, proposals, welcome packages...and anything else you want to send to your clients!

You can create a lead capture form to pull leads straight from your website, Instagram etc. and this will not only create a client (as a new project) to Dubsado but also pull all the needed information that you need linked to your project, like wedding dates, clients name, address, email, phone number and so much more! This information will then be mapped into contracts and other forms that will need this information.

How amazing is that?!

You can also download PDF files (like your existing client guides etc.) through the Questionnaires section.



# Canned Emails

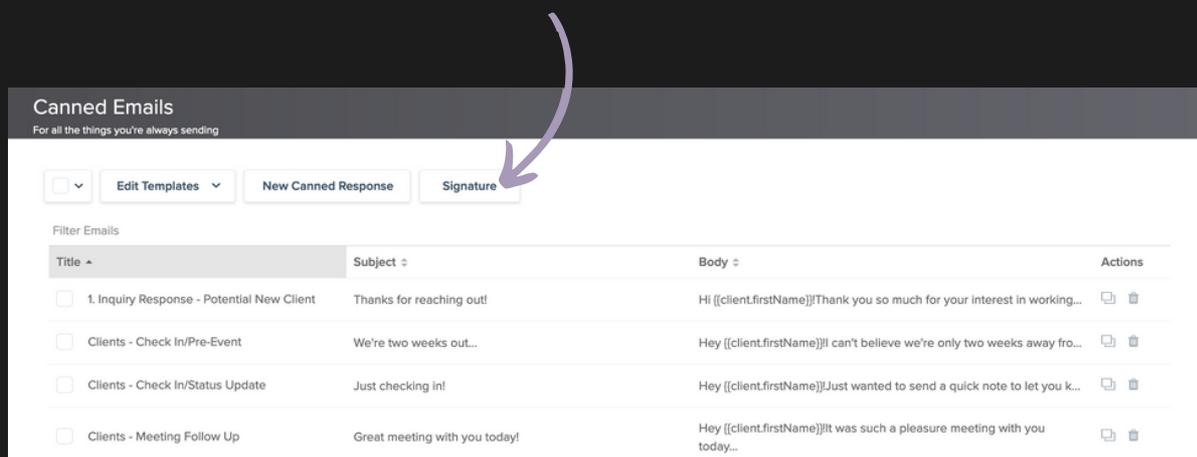
Have a look through your current emails and note down everything you tend to send over and over again to clients.

Perhaps it's follow-up emails, payment reminders, questionnaires, or sending a proposal to your client.

All these emails can be typed into Dubsado as canned emails and sent automatically to your clients so you don't have to keep writing them out, saving you so much time.

Make the emails personal by adding smart fields that are provided. Here is where the mapped fields are automatically pulling information from the lead capture form and questionnaires and such.

**Pro Tip:** Remember to add an email signature so all emails match your brand!

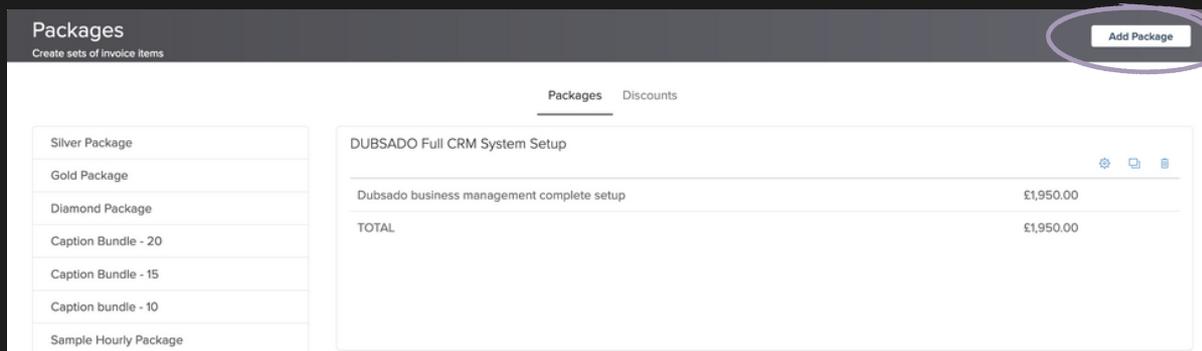


Dubsado provides a large variety of possible canned emails that you can edit to best suit your brand or you can start completely new and create everything from scratch.

# Packages

Packages will allow Dubsado to pull info for your workflows and forms, creating invoices and proposals for your leads and clients to select.

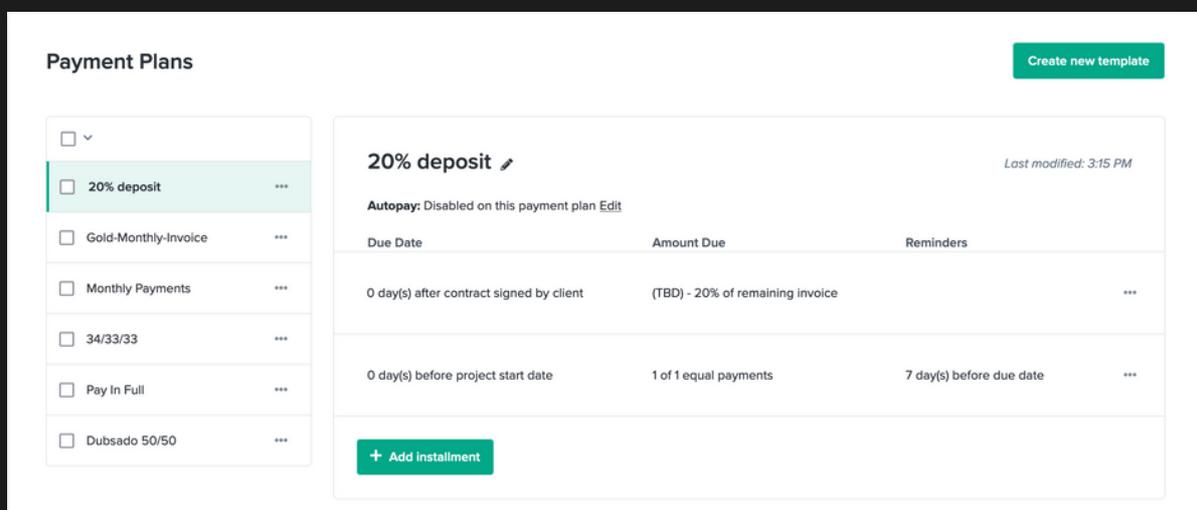
Simply add all the packages you want to offer (add TAX if applicable) and you are good to go!



# Payment Plans

Use this to create payment plans that best work for the services that you are offering whether it is paid in full, with a deposit or in multiple instalments.

Use this to set up payment reminders using the canned emails you created.



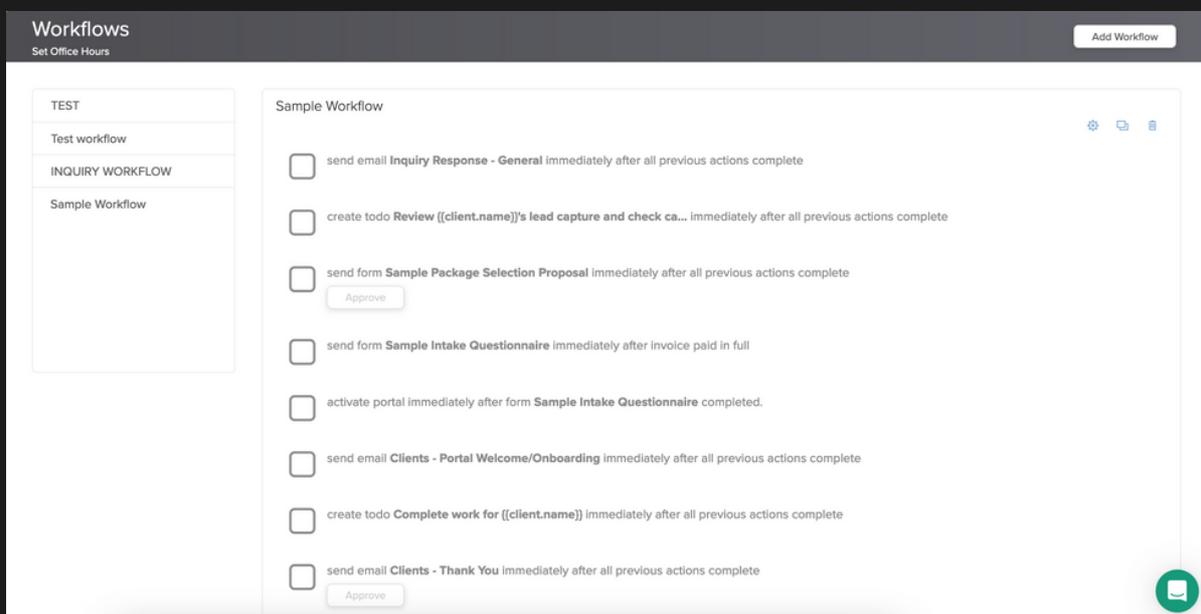
# Workflows

Now that you have everything else set up, it is time for the full benefits of automation.

Make a step-by-step list of your client process, what is the first thing that happens when a client fills in your contact form? What happens next, and after that and after that? Write these steps down all the way to their offboarding and archiving of their project.

This will give you more of an idea of how to start creating your own workflow.

I would recommend taking a look at the sample workflow that Dubsado provides in this section and taking a look at the types of actions and triggers it includes.



This is quite a long process and includes a lot of planning and testing to make it perfect but this is exactly where the magic happens in Dubsado - workflows automate your business and all the hard work that's gone into setting up your account!



I hope this Dubsado Set up Guide  
has become in handy to you

---



I'm Sara

I help wedding photographers and other creative entrepreneurs run the back end of their business through Admin and Social Media tasks.

If this Dubsado setup proves to be too much or too time-consuming I offer a variety of Dubsado setup and support services to help you get the absolute best out of this amazing CRM system.

Don't hesitate to contact me if you at any point feel like you could use a helping hand.

Learn more →

*Thank you!*



[sara@palmrooscreative.com](mailto:sara@palmrooscreative.com)

[www.palmrooscreative.com](http://www.palmrooscreative.com)

# Dubsado Set-Up Checklist

## Brand Settings

- Branding
- Dashboard (optional)
- Portal Multi-user (optional)
- International Settings
- Receive money (optional)
- Emails
- Integrations
- Domain names (optional)
- Custom-mapped fields (optional)
- General settings

## Account settings

- Login settings
- Billing
- Notifications (optional)
- Affiliate dashboard

## Dashboard

- Scheduler
- Forms
- Canned Emails
- Packages
- Workflows

# Brand Specific Settings

**Brand Specific Settings**  
Adjust how your brand appears to your clients.

---

**Upload Logo**



**Brand Info**

**Color (form/link buttons)**

**Name**

**Business Email**  
Email that's displayed on public invoices and in the client portal

**Phone**

**Send email as:**

Your name: **Sara Palmroos**

Your business: **Palmroos**

**Creative**

**Address**

**Street**

**City**

**State/Prov.**  **Zip/Postal**

**Country**



## Upload Logo

**Colour** - Pro Tip: Try to make the button colour a darker one in your branding palette as buttons will have white text. The dark colour will help the text stand out.

**Name** - Add your company name here

**Business Email** - Add your preferred company email address

**Phone** - Add the phone number that you use for work

**Send email as** - Emailing as your own name is always more personal than emailing from a business

**Address** - Add your address/work address

# Portal Settings

In this section, you can play around with the settings and look at your client portal which is what your clients will see when you provide access.

Portal Settings  
To preview a portal click view from a client. Save

**Portal Welcome Message** ⓘ  
Welcome to your client portal  
 Hide welcome message

**Portal Projects Label Override** ⓘ  
Projects

**Portal Specific Logo** ⓘ  
  
 Hide logo in your portals

**Portal Banner** ⓘ  
  
**Portal Banner Color**  
E8E9EF

**Portal Mobile Device Banner** ⓘ  
  
**Portal Banner Font Color**  
2E2E2E

**Portal Summary Header Color**  
EFF1F4

**Portal Summary Header Font Color**  
2E2E2E

**Links and Embed Code**  
Any client with an active portal and password set can access their portal through this link.

**Portal Link**  
Any client with an active portal and password set can access their portal through this link.

**Portal Embed Code** ⓘ  

```
<script type="text/javascript" src="//cdnjs.cloudflare.com/ajax/libs/frame-resizer/3.5.14/frameResizer.min.js"></script><iframe src="https://portal.palmrooscreative.com/public/client/portal/60af9b77789f0f8df3f2bae9?frame=true" frameBorder="0" width="100%" height="750"></iframe><script type="text/javascript">setTimeout(function(){FrameResize({checkOrigin: false});},30);</script>
```

- Welcome Portal Message - Keep the general or come up with your own
- Portal Projects Label Override - You can change the label for 'Projects' to another word of your choice
- Portal-Specific Logo - You can choose to hide the logo if you have one on your banner already or if it doesn't fit with your banner aesthetic
- Portal codes - You can share a portal with a client who already has access to this code. There is also an option to embed this onto your website.
- Banner - Upload banners for desktop and phone view (There are banner templates available online)
- Portal Colours - Select your preferred brand colours