

Perfect Dubsado Setup

Reduce your time spent on admin tasks



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Phoebe Emma - Bespoke Feeds

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Getting Started

**You don't need to be a tech expert to make
Dubsado work for you.**

What you do need is a solid starting point one that helps you feel confident navigating the platform, supporting clients, and setting up systems that actually stick (without getting lost in Google for hours).

This beginner-friendly, clarity-boosting Dubsado checklist gives you the foundation you need to set your account up the right way before you even think about building a workflow or automating a thing.

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Hey, I'm Phoebe

WHY AM I SO PASSIONATE ABOUT SYSTEMS?

Back in September 2022, I hit a wall. I had clients. I had results. I knew the work I was doing was making a difference.

But behind the scenes? It was chaos.

There were no real systems. Every new client felt like a manual mountain to climb.

And the thought of scaling or bringing in more leads or launching new offers felt impossible because I was already maxed out just trying to manage what I had.

I wasn't using tools like Dubsado. Not because I didn't want to... but because I had no idea how to set them up in a way that worked for me.

That frustration became the turning point.




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STEP 1: SETTING UP YOUR BRANDING


No	BRAND SETTINGS	
1	Upload your logo	
2	Set your brand colors & fonts	
3	Add your email signature	
4	Add your contact information	
5	Add your brand name	

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STEP 2: CONFIGURE YOUR CALENDAR


No	CALENDAR SETTINGS	
1	Connect your calendar	
2	Sync your calendar	
3	Import & Export calendar	
4	Create your availability	
5	Set time buffers	
6	Set appointment types	

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STEP 3: CONNECT YOUR PAYMENT PROCESSOR


No	PAYMENT SETTINGS	
1	Enter your currency & country	
2	Connect Stipe / Paypal	
3	Edit your invoicing template	
4	Test your invoices	

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STEP 4: CONNECT EMAIL INTERGRATIONS


No	EMAIL SETTINGS	
1	Connect Gmail/Outlook/ SMTP	
2	Set up your templates	
3	Connect domain to Dubsdao	
4	Test branding & emails	

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STEP 5: OTHER CUSTOM FEATURES

No	OTHER SETTINGS	
1	Customize your dashboard	<input type="checkbox"/>
2	Branding of client portal	<input type="checkbox"/>
3	Connect to video software	<input type="checkbox"/>
4	Add your multiple users	<input type="checkbox"/>
5	Connect any other integrations	<input type="checkbox"/>

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BRANDING

- Branding in Dubsado isn't just about looking good it builds trust, creates consistency, and makes every client touchpoint feel intentional and professional.

PAYMENT

- Connecting your payment gateway to Dubsado lets you get paid faster, automate invoices, and create a smooth, professional checkout experience for your clients.

CALENDAR

- Connecting your calendar to Dubsado keeps your schedule in sync, prevents double bookings, and makes booking calls seamless for both you and your clients.

EMAILS

- Integrating your email with Dubsado keeps all communication in one place, and every client interaction feels seamless and on-brand.

Start taking action today

Let's chat more about what systems you need to reduce overwhelm

[CLICK TO CHAT NOW](#)
