WebifyTax

Your first hour, first day and first week with WebifyTax

Go through this guide in order. Every step tells you where to click, how long it takes and how to tell it's done. By the end of the week your firm's website is live in your firm's name, tax updates appear on it every day, and enquiries from visitors reach your inbox.

FIRST HOUR

See your site

Choose a design, enter your firm's details and open your website on your own phone.

FIRST DAY

Make it yours, go live

Put in your own wording, services and team. Pay when you're happy with it, and connect your own domain.

FIRST WEEK

Get it found

Share the link, list your firm on Google and directories, answer enquiries, and set up a 10-minute weekly check.

Three things to know before you start

1. **Your website is online from the first minute.** When you finish the sign-up form you get a free preview at **yourfirm.taxpractice.co** with a WebifyTax banner on top. It has no time limit. You pay only when you want to go live, and the banner goes away once you do.
2. **Change the sample wording before you share the link.** Every new site starts with sample figures ("500+ Clients Served", "25+ Years Experience"), a sample photo and standard text. Your institute's rules expect everything on your website to be true, so put in your own figures or take them out.
3. **You don't write the tax updates.** Tax news, case laws and due dates get added to your site every day without you doing anything. You only write about your own firm.

WebifyTax by PracticeGuru · Help: WhatsApp 91-9136667325 (Mon to Sat, 10 AM to 7 PM)
All screenshots use a sample firm with sample details.

DECIDE FIRST

Which web address will your firm use?

Both choices work, and you can begin with either one. Decide before you print the address on visiting cards or letterheads, because that's the address clients will remember.

Choice 1

Your own domain, like yourfirm.com

Clients see your firm's own name in the address bar and in the address you print.

- **Need a new domain?** We register it for you. It's registered in our company's name and we hand it over to you if you ever leave.
- **Already own a domain?** If it's on GoDaddy, give delegate access to **webifytax@gmail.com** and we take care of the rest. On any other registrar, add the three records shown on the Custom Domain page (step 11).
- We set up the secure padlock (https) on our server and renew it for you.
- Your taxpractice.co address keeps working, so links you've already shared still open.

Cost: the Custom Domain add-on, ₹999 a year plus GST. Standard .com and .in domains are covered.

Choice 2

Stay on yourfirm.taxpractice.co

The address you chose during sign-up. It works straight away.

- No extra cost. It comes with the Website Plan.
- Nothing to set up, and no registrar to deal with.
- You can add your own domain later. Your content stays as it is when you do.

Keep in mind: the address carries our name, not only yours. If you plan to print it, decide on a domain first.

Not sure? Go with Choice 1 if clients already know a domain name for your firm, or if you'll print the address. Go with Choice 2 if you want to begin today and decide later.

BEFORE YOU START

Keep these ready

Your preview takes about 10 minutes. It goes faster with these at hand.

- [ ] Your firm's name, city, office phone, email and WhatsApp number.
- [ ] The services you offer, one per line. We fill in common ones for you to edit.
- [ ] Your logo (JPG, PNG or WebP, up to 2 MB) and a professional photo of you or your team.
- [ ] A short "about the firm" paragraph, and true figures for your highlights (years in practice, clients served).
- [ ] Your current website address, if you have one. WebifyTax can copy your details from it.

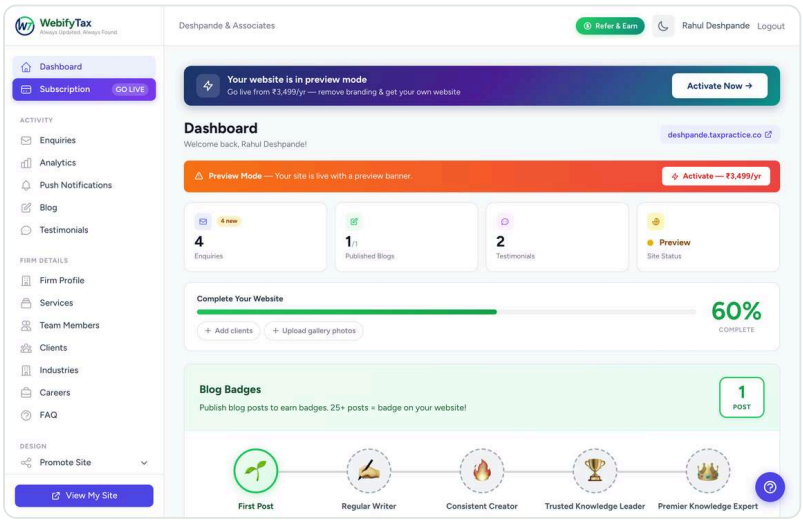
What it costs

What	First year	Each year after
Preview website	Free	No time limit
Website Plan (hosting, SSL, SEO, enquiry forms, WhatsApp button). First year includes Design Setup ₹1,000 and Firm Details Setup ₹1,000.	₹3,499	₹1,499
Tax Updates & Blogs (daily tax news, case laws, due dates, your blog)	₹1,499	₹1,499
Custom Domain (yourfirm.com)	₹999	₹999
Growth Pack (detailed visitor reports and Google search data)	₹1,499	₹999
Design Maintenance and Firm Details Maintenance (making changes after year 1)	Free	₹499 each

Prices are before 18% GST. On the Subscription page, the plan with all three add-ons comes to ₹7,496, plus ₹1,349 GST, for a total of ₹8,845.

The "Complete Your Website" card

When you log in, the **Dashboard** shows how complete your site is and links to what's still missing. This guide covers those items along with everything else a new site needs.



The Dashboard during setup. The purple bar means the site is still a preview.

FIRST HOUR See your website on your own phone

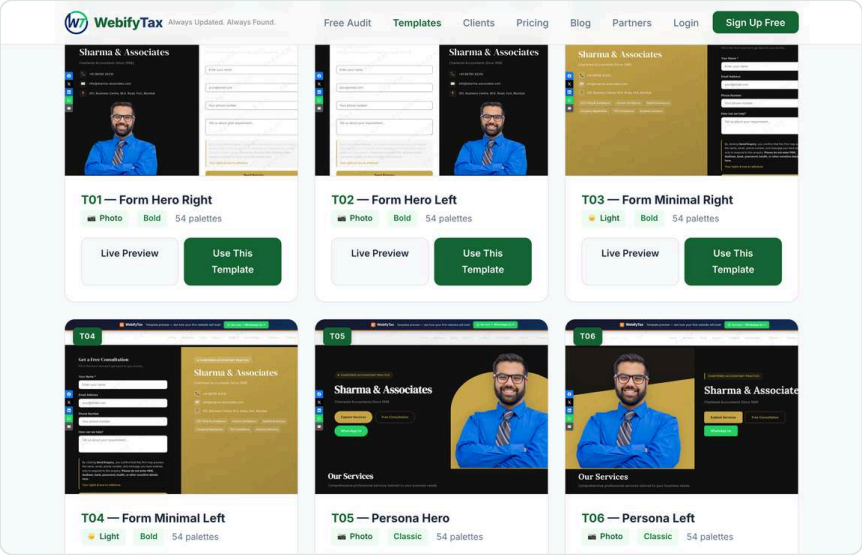
By the end of the hour your preview site is online and you've opened it on your phone the way a client would.

1 Choose a design

5 min

Go to **taxpractice.co/templates**

Look through the templates. Press **Live Preview** to see one as a full website, then press **Use This Template** on the one you like. You can switch templates later without losing any content, so a quick choice is fine.



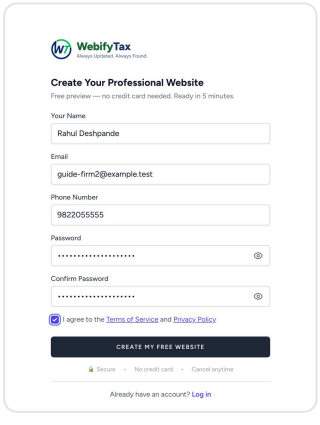
- [ ] The sign-up page opens.

2 Create your account

2 min

Fill in your name, email, mobile number and a password, tick the terms box and press **Create My Free Website**.

You don't need a card. You'll use this email and password to log in to your dashboard at **taxpractice.co/login**.



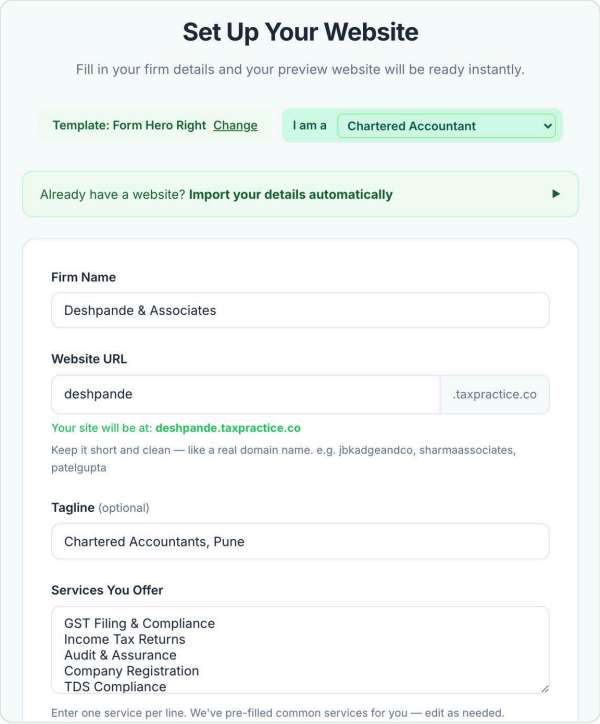
- [ ] You see the "Set Up Your Website" page, step 2 of 2.

3 Enter your firm's details

10 min

Page: **Set Up Your Website**

1. Check **I am a** at the top (Chartered Accountant, Company Secretary and so on). It decides your default services and the compliance rules your site follows.
2. Fill in the firm name, **Website URL**, services (one per line), phone, email, WhatsApp number and city.
3. Press **Create My Website**.



Choose the Website URL carefully. It's your site's address (for example deshpande.taxpractice.co). Changing your firm name later doesn't change it, and changing it means writing to us.

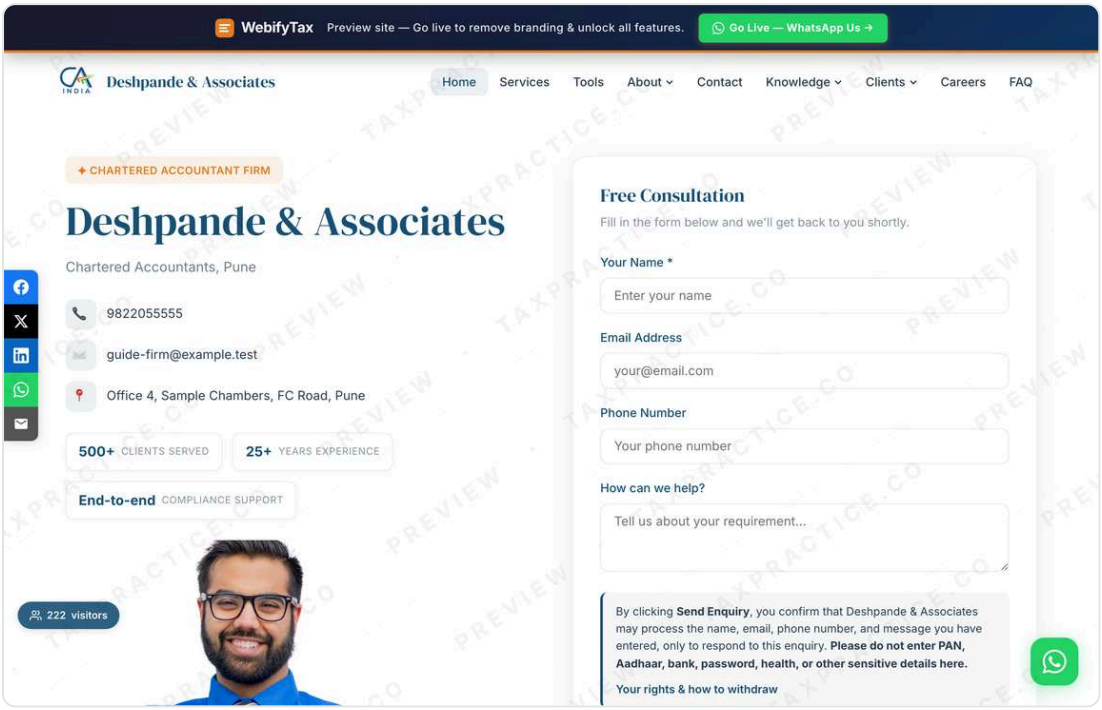
Already have a website? Open **Import your details automatically**, paste your current address and press **Import**. In 5 to 10 seconds it fills in your details, services and team for you to check.

- [ ] The Dashboard opens with the message "Your website is ready!" and the link to your site.

4 Open your site, on your computer and your phone

5 min

Sidebar: **View My Site** (bottom of the menu)



Your site is already online. Click through the pages: Services, About, Contact, the tax news. Then open the same address on your phone, since that's how most clients will see it. The green WhatsApp button opens a chat with your firm's number.

The bar at the top saying **Preview site** and the faint "PREVIEW" mark both disappear once you go live (step 10).

Also check **Enquiries** in the sidebar. You'll find a sample enquiry from the WebifyTax team. That's where real visitor messages will arrive, and each one is also emailed to your firm's email.



The same site on a phone.

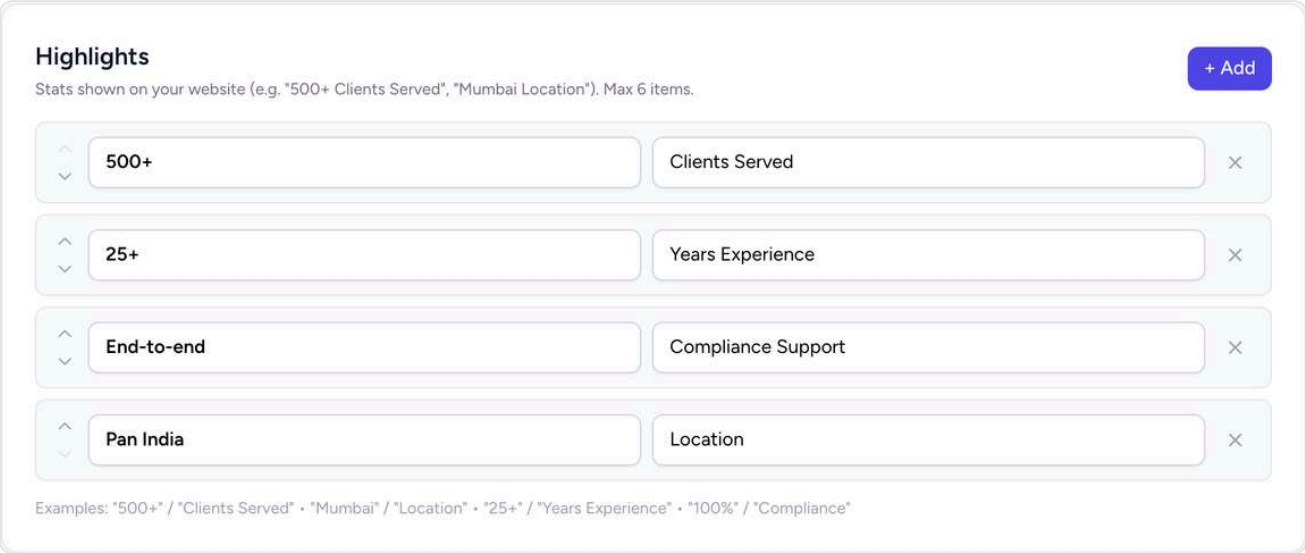
- [ ] You've opened your site on your phone and found the sample enquiry.

5 Replace the sample wording

20 min

Menu: **Firm Details** → **Firm Profile**, then press **Save Changes**

- **Firm Logo:** upload yours. WebifyTax then suggests colour palettes taken from your logo.
- **About Text** and **Tagline:** write two or three lines about your firm in your own words.
- **Highlights:** put in true figures (years in practice, clients served) or remove the ones that don't apply.
- **Photo:** under **Design** → **Hero Image**, swap the sample photo for yours. Some templates use a banner image instead.



The Highlights section. These sample figures appear on every new site until you change them.

- [ ] Your site shows your logo, your photo, your own about text and true highlights.

End of the first hour: check these

- [ ] Preview site online at yourfirm.taxpractice.co
- [ ] Opened on your own phone
- [ ] Logo, photo, about text and highlights are your own

FIRST DAY Make it yours, then go live

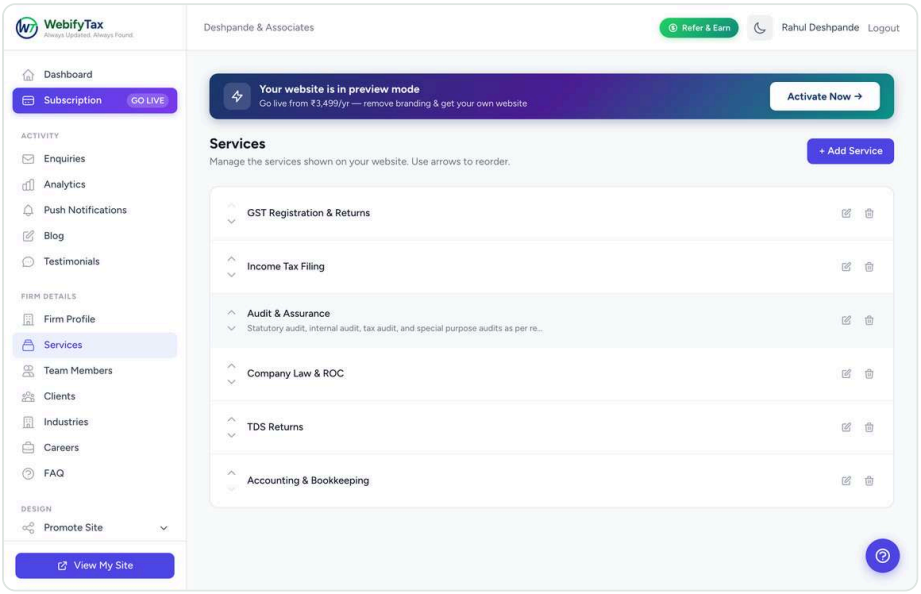
Get the content right while the site is still a preview. Then pay and remove the banner.

6 Check your services and team

20 min

Menu: **Firm Details** → **Services** and **Firm Details** → **Team Members**

Remove services you don't offer, add missing ones and put them in order with the arrows. Click the pencil to add a line or two about each service. Then add your partners and staff with their role, qualification and a photo.



- [ ] Services and team on your site match your firm.

7 Choose colours and pages

15 min

Menu: **Design** → **Appearance** and **Design** → **Website Pages**

On Appearance, pick a colour palette (or one made from your logo) and a font. On Website Pages, turn off pages you don't need, such as Careers or Clients, and change the menu order. Every change shows on your site straight away.

- [ ] Your site's colours suit your logo, and the menu shows only the pages you want.

8 Read your compliance page

5 min

Menu: **Settings** → **ICAI Compliance** (ICSI, ICMAI or BCI, depending on your profession)

It lists what your profession's advertising guidelines allow on your site, such as client showcase, testimonials, Peer Review badge and AQMM level, and what WebifyTax adds for you, such as the link to your institute in the footer.

If you want visitors to accept a disclaimer before they enter, switch on **Show disclaimer popup** under **Settings** → **Settings**. It starts switched off.

> **Your responsibility:** WebifyTax follows the published guidelines, but you are responsible for what your website says. Read your institute's guidelines yourself.

- [ ] You've read the page and decided on the disclaimer.

9 Add testimonials and clients (if your profession allows)

15 min

Menu: **Activity** → **Testimonials**, **Firm Details** → **Clients**

Add two or three testimonials, with each client's consent, and the clients you'd like to show. Each item you add moves the **Complete Your Website** card on the Dashboard forward. If your profession doesn't permit these, the menu items don't appear.

- [ ] The Dashboard card has moved past 20%.

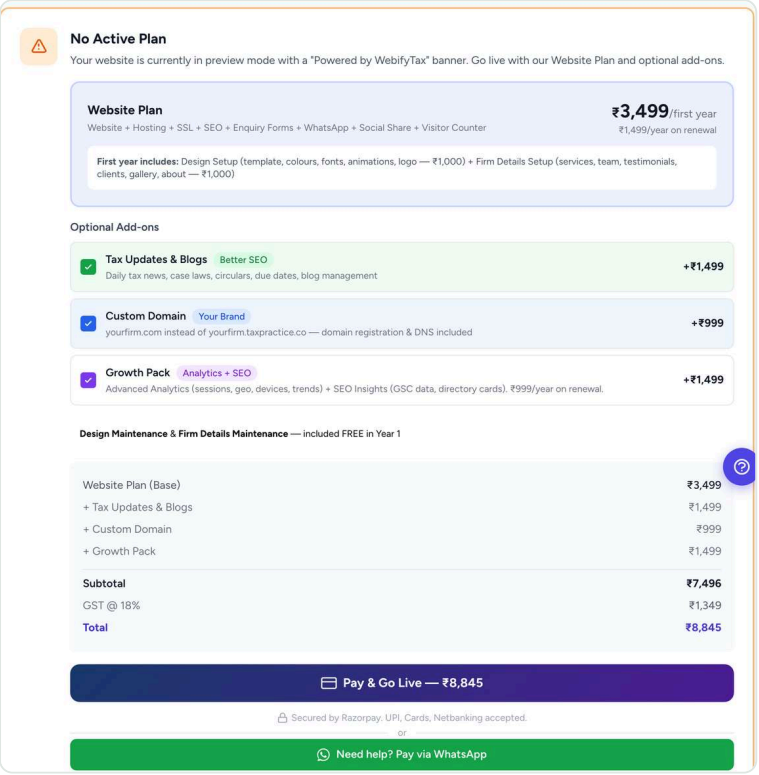
10 Go live

5 min

Menu: **Subscription** (marked GO LIVE), or **Activate Now** on the purple bar

1. Untick any add-on you don't want. All three come ticked.
2. Check the total, which includes 18% GST.
3. Press **Pay & Go Live** and pay by UPI, card or netbanking through Razorpay.

Your site goes live as soon as you pay: the preview banner disappears, your site is sent to Google, and you get an email saying it's live. Want to pay another way? Press **Need help? Pay via WhatsApp**.



- [ ] The Dashboard no longer shows "Preview Mode", and your site has no banner.

11 Connect your own domain (if you chose Choice 1)

10 min for you, then up to a day

Menu: **Settings** → **Settings**, section **Custom Domain**

Easiest: send us your domain on WhatsApp. If you need a new one, tell us the name you'd like. If yours is on GoDaddy, invite **webifytax@gmail.com** as a delegate. We add the records and finish the setup.

Doing it yourself: at your registrar, add the two A records and the _**verify** CNAME exactly as the page shows. Wait 5 to 30 minutes, type your domain, press **Connect Domain**, then tell us on WhatsApp so we can switch on the secure padlock (https).



- [ ] You see "Domain verified and connected!" and https://yourfirm.com opens your site with the padlock.

End of the first day: check these

- [ ] Services, team and colours are right
- [ ] Compliance page read; disclaimer decided
- [ ] Paid, and the preview banner is gone
- [ ] Own domain requested or connected

FIRST WEEK Get found, and build the habit

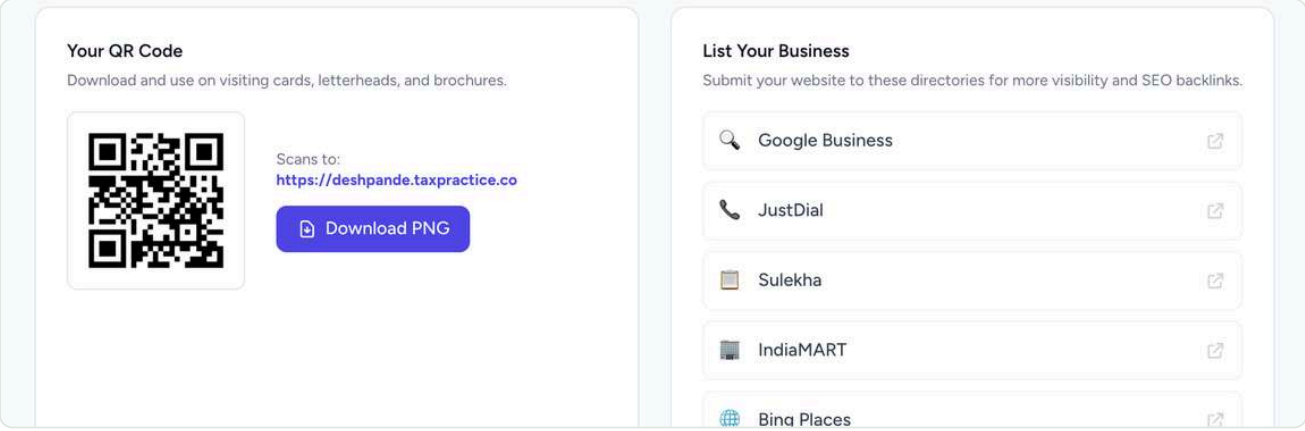
One small job a day. By day 7 people can find your site, and you know where to look for enquiries.

12 Day 2: share your website

10 min

Dashboard: **Your QR Code**, **Share Your Website**; sidebar: **Promote Site**

Download your QR code for visiting cards, letterheads and the office reception. Put your web address in your email signature and WhatsApp Business profile, and share it with clients. **Promote Site** lets you copy the link or post it to several social platforms at once.



- [ ] Your QR code is downloaded and the link is in your email signature.

13 Day 3: list your firm on Google and directories

30 min

Dashboard: **List Your Business** (also under **Settings** → **SEO Status**)

Open each link (Google Business, JustDial, Sulekha, IndiaMART, Bing Places) and add your website address to your listing. Start with Google Business, since that listing appears in Google Search and Maps.

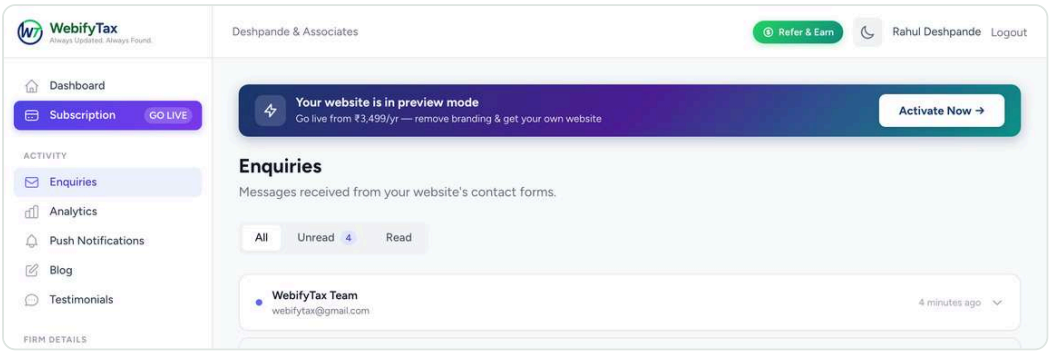
- [ ] Your Google Business listing shows your website address.

14 Days 2 to 7: answer enquiries the same day

5 min a day

Menu: **Activity** → **Enquiries** (the Unread tab shows new ones)

Each visitor message arrives here and goes to your firm's email as well. Click an enquiry to see the name, phone and message, call or WhatsApp the person back, then press **Mark as Read**. Delete the WebifyTax sample enquiry once you've seen it.



No enquiry emails? They go to the email in **Firm Profile**, not to your login email. Check it's correct, and look in spam.

- [ ] No enquiry stays unread past the end of the day.

15 Days 4 and 5: fill the gaps

20 min

Dashboard: **Complete Your Website** card

Work through what the card says is missing: gallery photos (office, events), more team members, and a first blog post, for example on a recent change your clients keep asking about. Firms with the Tax Updates & Blogs add-on can write posts under **Activity** → **Blog**.

- [ ] The card reaches 100% and disappears from the Dashboard.

16 Days 6 and 7: check what Google sees

10 min

Menu: **Settings** → **SEO Status** and **Activity** → **Analytics**

SEO Status shows your score and lists what's done and what's still pending. Most items happen on their own when you sign up and go live. The ones left for you are usually about your profile, such as the logo, about text and social links. Analytics shows visitors and enquiries. The Growth Pack adds sessions, cities, devices and the Google searches that bring people to your site.

- [ ] You know your SEO score and the one or two items still left for you.

After the first week: your 10-minute weekly check

Pick a fixed time, for example Monday at 10 AM.

- [ ] **Enquiries:** anything unread? Reply today.
- [ ] **Dashboard:** visitors this week, and anything left on the Complete Your Website card.
- [ ] **Your site:** open it on your phone. Is the team, address and phone still right?
- [ ] **SEO Status:** any new pending item?
- [ ] **Share:** send the link to one more group of clients, or post it on LinkedIn.

Later, when you're comfortable

Industries, Careers, FAQ, Gallery, Popups, Push Notifications, Privacy Policy and Refer & Earn each have a page in the sidebar. The round **?** button at the bottom right of every page explains that page, and **Help & Guides** has the full list of questions.

QUICK HELP

If this happens, do this

What you see	What to do
Your site says **Preview site** at the top	It's still a free preview. Go to **Subscription** and press **Pay & Go Live**.
You want a different taxpractice.co address	Write to us on WhatsApp. Changing your firm name doesn't change the address.
You don't get enquiry emails	Enquiries go to the email in **Firm Profile**. Check it, and check spam. Every enquiry is also listed under **Enquiries**.
Your domain won't verify	Wait 30 minutes after adding the records, check them against the Custom Domain section, then press **Verify & Save**. Still stuck? Send us your domain on WhatsApp.
You want to change the template	**Design** → **Choose Template**. Your services, team and other content stay as they are.
You're about to change your profession	Changing it in Firm Profile resets your default services and text. Note down your edits first, or ask us.
Blog or tax news pages are locked	They come with the Tax Updates & Blogs add-on. Write to us to add it. The price is pro-rated for the months left.
An amber bar says changes are disabled	After the first year, editing needs Design Maintenance or Firm Details Maintenance (₹499 a year each). Your site keeps working. Write to us to add one.

Still stuck?

Press the round **?** button at the bottom right of any dashboard page, or open **Help & Guides** in the sidebar. You can also message us on WhatsApp at **91-9136667325**, Monday to Saturday, 10 AM to 7 PM. We usually reply within 30 minutes.