



VA SOP: How to Use Karbon for Client's Business

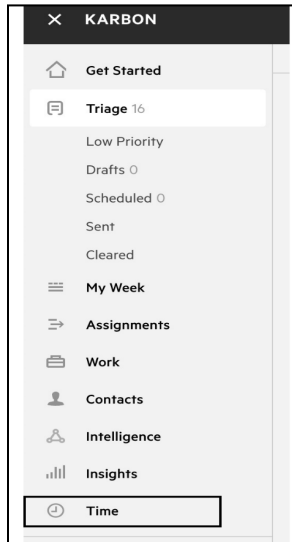
Click on the topics below to proceed

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Getting To Know Karbon

Karbon is a project management platform for accounting firms that enables them to connect their email addresses to be able to manage and collaborate with the team.

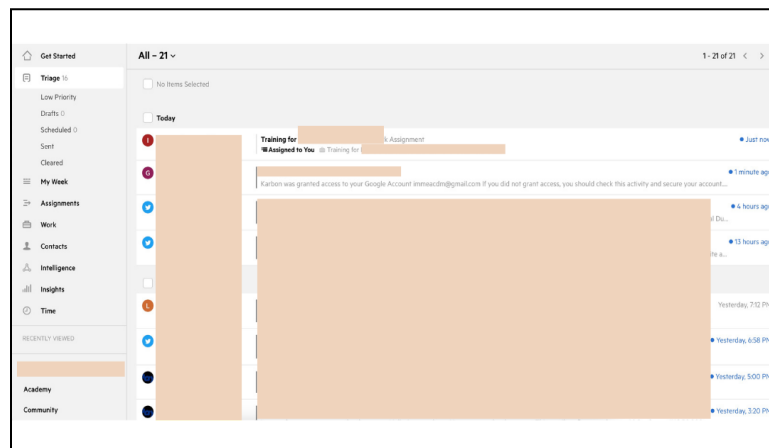


In the Dashboard, you can see the **Triage**. This serves as the inbox in Karbon. All of the emails are being redirected to the triage.

Under Triage, there are sections such as **Low Priority**, **Drafts**, **Scheduled**, **Sent** and **Cleared** all of those are classifications of your email priority and status.

- **Low Priority:** Tasks and Emails that have no due date indicated.
- **Drafts:** Tasks and Emails that are unfinished.
- **Scheduled:** Tasks and Emails where you set a time when it will be sent.
- **Cleared:** Tasks and Emails that have been done and cleared.

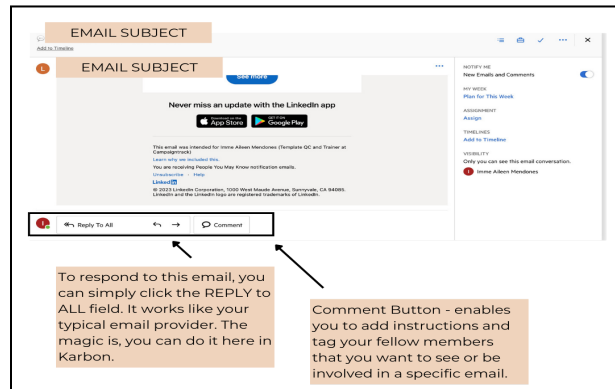
In Karbon, your email will look like the screenshot below.



It is convenient and user-friendly, instead of having so many procedures and explanations, you can just do it in a simple but detailed manner such as tagging colleagues or teammates, assigning them to tasks, etc.

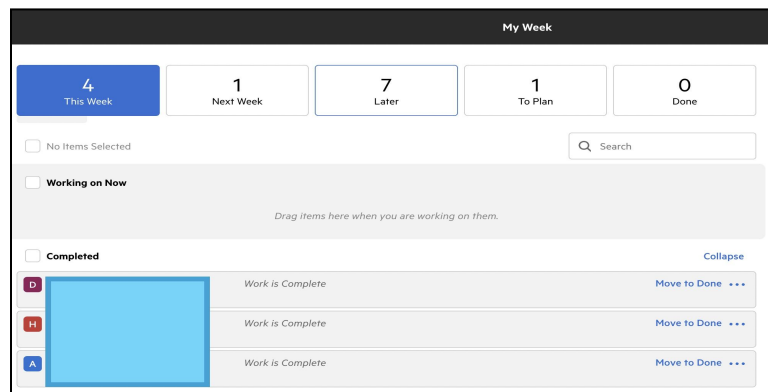


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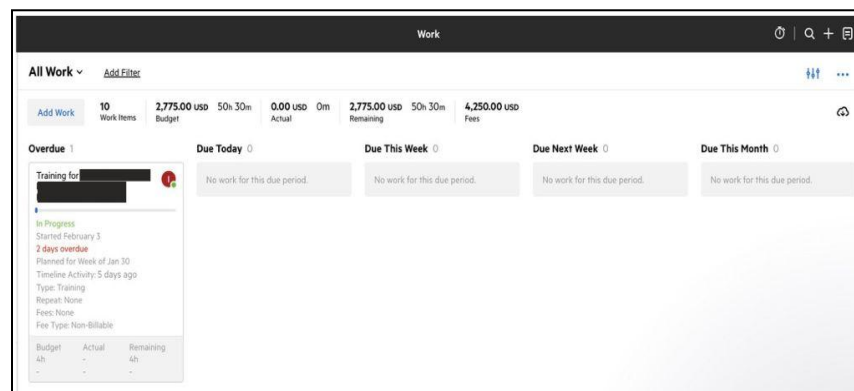


Dashboard Tabs

My Week: All of the Work Items that are assigned to you will appear in this section.



Work Tab: All of the emails and work created by your team members will be seen there. You can also create your own template in a specific process.



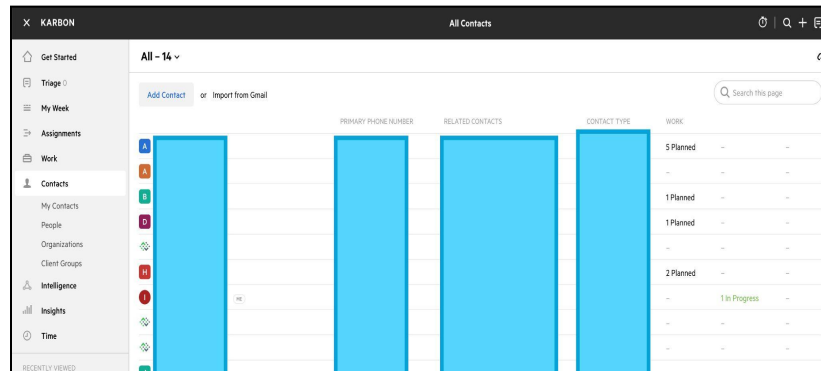


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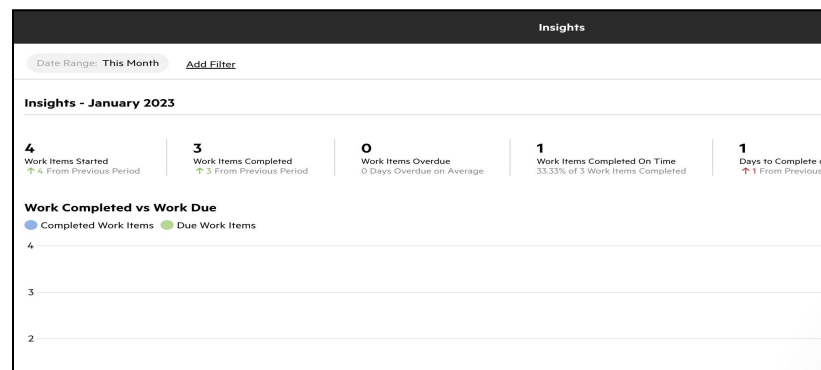


Example, a colleague wants you to accomplish a task, they will then add you in the thread of the said email. Once entered, it will now prompt you on your triage that you have tasks that need to be accomplished.

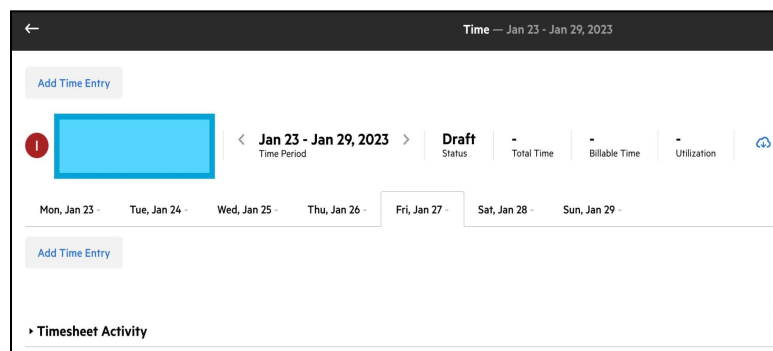
Contacts: All of the clients, prospects, leads and even colleagues' data will be saved here.



Insights: In this section, you can track the progress of your team because you can see how every email is being handled, how each work item is being actioned and you can also identify those work items that have been overdue for a specific number of days.



Time: This is where each team member's working hours are stored.





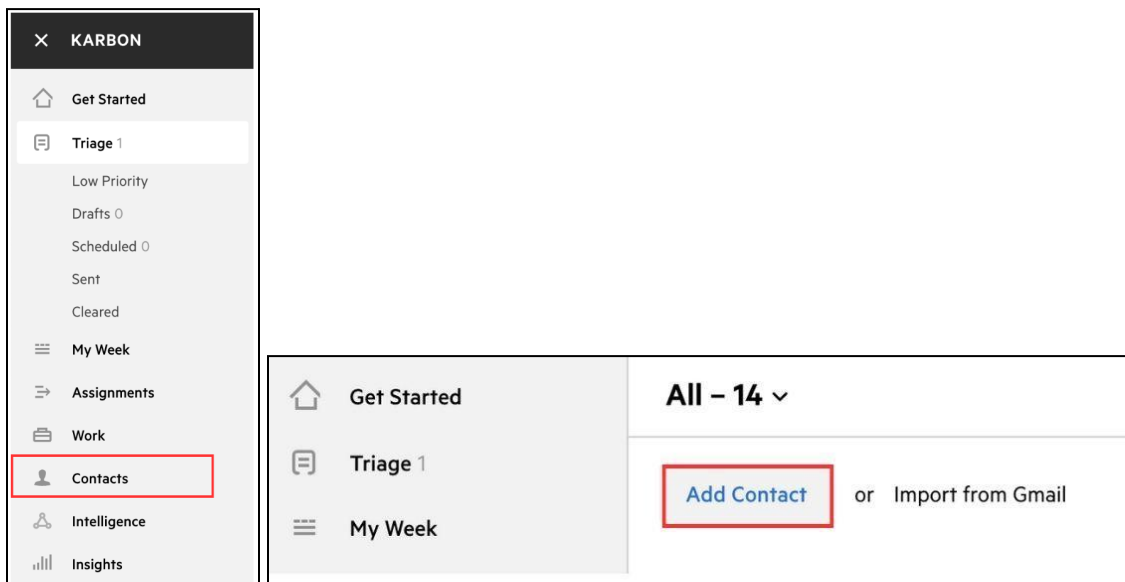
Client Onboarding

Onboarding means you will assist your client in uploading their data to your end, share folders with each other, and share logins and passwords.

First, you should be able to get the information of your client. This will help us input their data smoothly, and prevent the back and forth of the process.

- Company Name
- Company Email
- Owner
- Phone Numbers (Active)
- Mobile Phones
- Business ID

Now, open your Karbon Account and proceed to **Contacts**, then select **Add Contacts**.



You can select one of the 3 Options:

- **Add Person:** If your client is working by themselves or individually.
- **Add Organization:** If your client is under a company.
 - Tip: This is used when you are managing leads or prospects and you have no idea of a contact person yet.
- **Add Client Group:** If you classify your client according to their structure.
 - Tip: Trucking companies, IT companies, etc. falls under this category.



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Add Person
Individuals and Sole Traders

Add Organization
Companies, Family Trusts, Nonprofits

Add Client Group
Group of people and organizations that are related by ownership or financial structure

CANCEL

Add Person

If you choose **Add Person** option, fill in the form below:

- **Client Name:** Double-Check the spelling, and if possible provide the complete name
- **Email Address:** Use the most active email address since you will send tasks and reminders.
- **Phone Number:** Use cell phone number and double-check the country.
- **Company Details:** More than one position is fine, but the first one mentioned should be the most recent.

New Person

CLIENT'S NAME

FULL NAME [Add Preferred Name](#)

First

Middle

Last

CLIENT'S EMAIL ADDRESS

EMAIL ADDRESS

Your email communication with this address will be shared on related timelines – [Turn Off Sharing](#)

CLIENT'S ACTIVE PHONE NUMBER

PHONE NUMBER

+63 000 000 0000

Work

COMPANY'S DETAILS

CONTACT TYPE

None

ORGANIZATION

Organization Name

Role in Organization (e.g CEO, Director, Owner)

[Cancel](#) [Create](#)



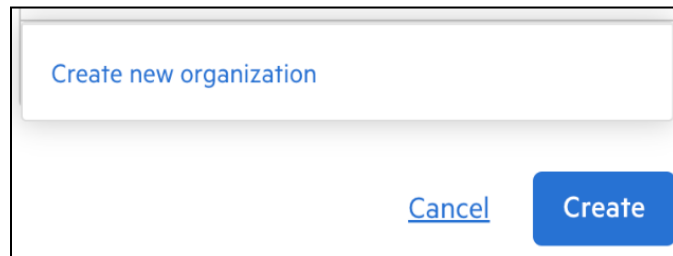
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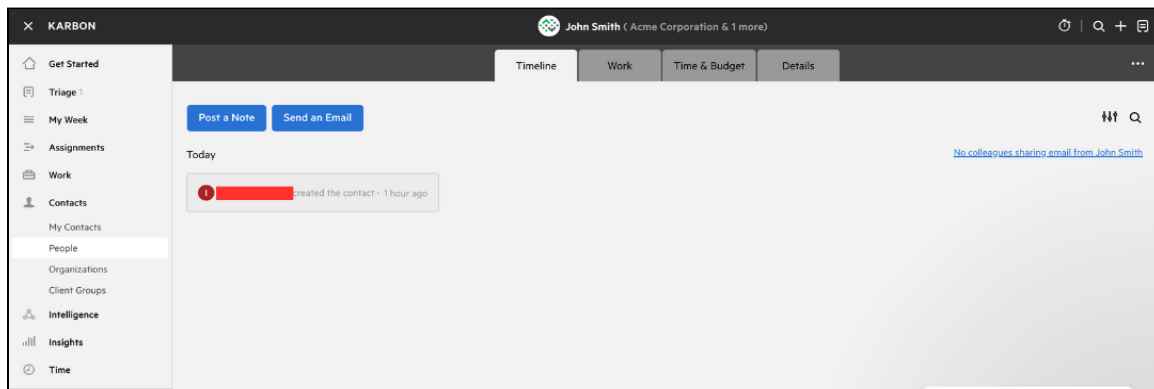
Add Organization

Organization signifies their company's name, this is important to be more focused on handling this as we will connect the organization to the client's name.

If you choose **Add Organization**, this will give you an option to **Create New Organization**. Click **Create** to continue.

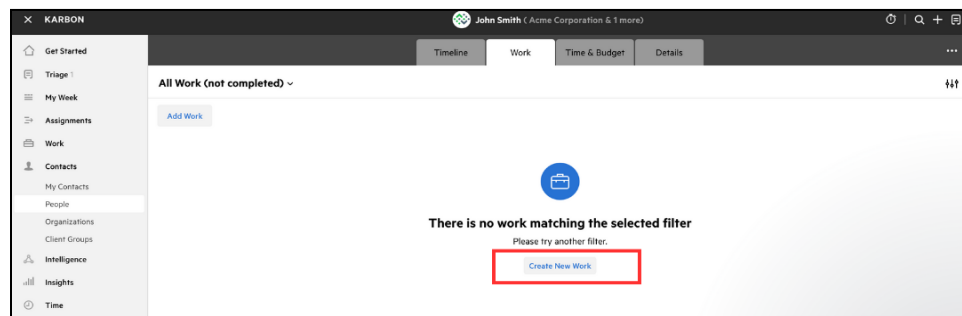


Once the contact is created, it will redirect you to the page below.



Create Work Task

Since you've already added your client, you can **Create New Work**.





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Fill out the form below:

Tip: Be specific and direct to the point with the work title to avoid duplication and confusion, it doesn't have to be a very long title

	Create Work
WORK NAME	WORK TITLE Use a Template Onboarding John Smith
	Don't start with a blank canvas. Explore and download best-practice templates from the Karbon Template Library .
	WORK TYPE Client onboarding
	ASSIGNED TO Imme Mendones
	CLIENT John Smith
TYPE OF WORK UNDER THE CLIENT	RELATED CLIENT GROUP Smith Family Group
TEAM MEMBER ASSIGNED	START March 7, 2023
CLIENT NAME	DUE March 17, 2023
CLIENT GROUP	Show Description Cancel Create
WORK TIMELINE	

We are creating a Work Item to make sure every task that runs in the firm is monitored, stored and recorded. This will prevent us from missing any important information and to make sure we have something to look behind if needed.

Once all of the fields have been filled in, click **Create**. Below is the Newly Created Work.

Onboarding John Smith — John Smith

CLIENT
John Smith

ASSIGNED TO
[Redacted]

STATUS
Ready To Start

REPEATS
Setup Repeating Work

DUE
Mar 17, 2023 (10 Days)

TASKS
Add Tasks

Timeline

Tasks

Time & Budget

Documents

Details

[Post a Note](#) [Send an Email](#)

Today

1 [Redacted] changed the work due date from March 17, 2023 to March 17, 2023 - Just now

1 [Redacted] changed the work start date from March 7, 2023 to March 7, 2023 - Just now

1 [Redacted] assigned the work to Imme Mendones - Just now

1 [Redacted] created the work - Just now



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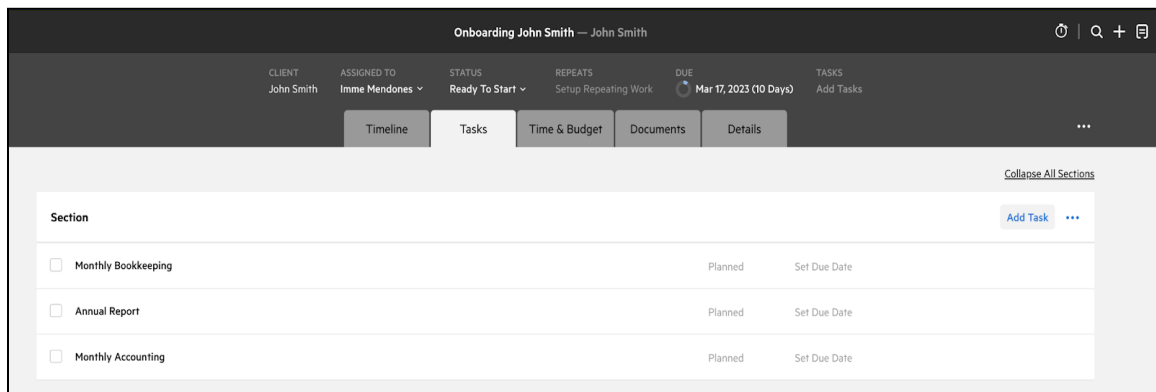


After that, proceed to **Tasks**.

Adding Tasks

The good thing in adding tasks is that you can organize and compile tasks based on who your client is. You will no longer lose any information if you want to back track, just simply find your client and all the data you need is there. Now, you can identify the series of tasks that a team member should do under this client.

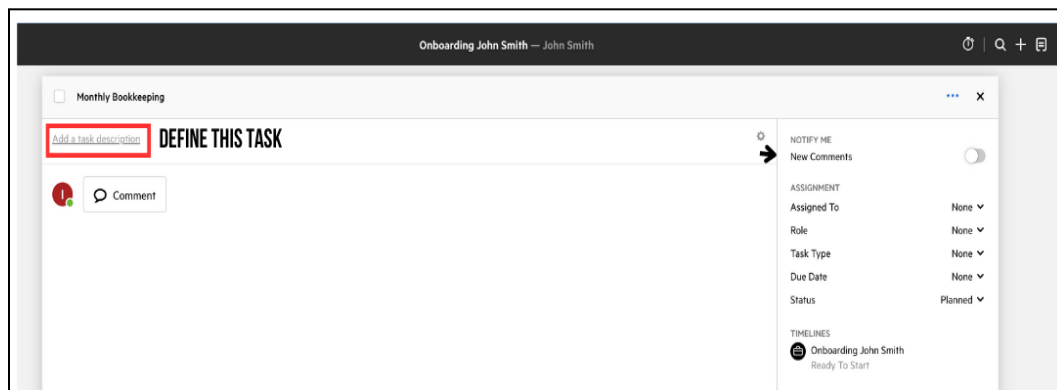
Below are the sample tasks for a client. In this part, your role will be easier as you can monitor your team members performance and hours delegated for a specific client.



Onboarding John Smith — John Smith			
CLIENT	ASSIGNED TO	STATUS	TASKS
John Smith	Imme Mendones	Ready To Start	Add Tasks
Timeline Tasks Time & Budget Documents Details			
Collapse All Sections			
Section Add Task ...			
☐	Monthly Bookkeeping	Planned	Set Due Date
☐	Annual Report	Planned	Set Due Date
☐	Monthly Accounting	Planned	Set Due Date

Defining and Specifying Tasks

Click the **Title** of the task (Monthly Bookkeeping in this example) and you will be directed to the window below. The **Comment** button on the right is where you can click if you will collaborate with your team member.



☐ Monthly Bookkeeping

Add a task description

DEFINE THIS TASK

Comment

NOTIFY ME

New Comments

ASSIGNMENT

Assigned To

Role

Task Type

Due Date

Status

TIMELINES

Onboarding John Smith

Ready To Start

Click **Comment** to customize or update the details.



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NOTIFY ME
New Comments ☐

ASSIGNMENT
Assigned To None ▼
Role None ▼
Task Type None ▼
Due Date None ▼
Status Planned ▼

TIMELINES
 Onboarding John Smith
Ready To Start

- **New Comments:** If you want to be updated and be the first one to know if a specific work is being updated, enable this section. Best to always enable this to receive notifications if a comment is made.
- **Assigned To:** There are two options, you can assign it to yourself or to a colleague.
- **Role:** Choose the specific role in relation to the “Assigned To”.

ASSIGNMENT
Assigned To None ▼

Assign to Me
Assign to Colleague

Role None ▼
None ✓
Accountant
Admin
Analyst
Associate
Bookkeeper
Client Manager
New Hire
Onboarding Specialist
Operations Manager

- **Task Type:** Choose the type of task from the drop-down. The more specific the task type, the better it will be for filtering and searching.
- **Due Date:** This is the estimated finish date of the said work or task. Add a due date that is achievable. If a client says 2 weeks, provide yourself an allowance (1 week and 3 days for example) with the timeline to have spare time for Quality Assurance.



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The screenshot shows two parts of the Karbon interface. On the left, a 'Task Type' dropdown menu is open, displaying a list of options: None (selected), Accounting, Admin, Annual leave (NON-BILLABLE), Auditing, Bookkeeping, Business Advisory, Compliance, Consulting, and Financial Planning. On the right, the 'New Comments' section is visible, showing fields for 'ASSIGNMENT' (Assigned To, Role, Task Type) and 'Due Date'. The 'Due Date' dropdown is open, showing options: Tomorrow (Mar 8, 2023), End of this week (Mar 10, 2023), End of next week (Mar 17, 2023), End of the month (Mar 31, 2023), and End of next month (Apr 30, 2023).

- **Timeline:** This is the selection where you can add a specific email or work for a contact or client.

Let's say there is an email related to Client John Doe, you can hover your mouse in the timeline and select the specific task under John Doe, whether it is Monthly Accounting, Onboarding or Annual Report. So once you go over the Monthly Accounting you can find that email you newly added in.

- **Visibility:** This indicates who can see the work item. Customize it in a way that only people involved in the task can see it, this provides security if the task is confidential.

The screenshot shows the 'New Comments' section of the Karbon interface. It includes fields for 'ASSIGNMENT' (Assigned To, Role, Task Type, Due Date, Status) and 'TIMELINES'. The 'Status' dropdown is set to 'Planned'. The 'TIMELINES' section shows a task titled 'Onboarding John Smith' with a status of 'Ready To Start'. Below this, the 'VISIBILITY' section indicates that '2 colleagues can see this task:' and lists the users: 'I' (Karbon Support) and 'K' (Karbon Support).

Once done with the specific task, you can tick the checkbox in front of it.



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[Collapse All Sections](#)

Section		
☒ Monthly Bookkeeping	Completed	
☐ Annual Report	Planned	Set Due Date
☐ Monthly Accounting	Planned	Set Due Date

[Add Task](#) [...](#)

Task Delegation to Client

Now, let's proceed in delegating your client a task to do on their end.

Those are the information, files and access that you will be needing in their end. Instead of emailing them a list of requirements, we will use Karbon to send them tasks so that they can be reminded until they submit all that we need.

Click **Add Client Section**.

[Onboarding John Smith](#) — John Smith

CLIENT
John Smith

ASSIGNED TO
[Redacted]

STATUS
Ready To Start

REPEATS
Setup Repeating Work

DUE
Mar 17, 2023 (10 Days)

TASKS
1 of 3 completed (33%)

[Timeline](#) [Tasks](#) [Time & Budget](#) [Documents](#) [Details](#)

[Collapse All Sections](#)

Daily Task		
☒ Monthly Bookkeeping	Completed	
☐ Annual Report	Planned	Set Due Date
☐ Monthly Accounting	Planned	Set Due Date

[Add Task](#) [...](#)

[Add Section](#) [Add Client Section](#)

[Onboarding John Smith](#) — John Smith

CLIENT
John Smith

ASSIGNED TO
[Redacted]

STATUS
Ready To Start

REPEATS
Setup Repeating Work

DUE
Mar 17, 2023 (10 Days)

TASKS
1 of 3 completed (33%)

[Timeline](#) [Tasks](#) [Time & Budget](#) [Documents](#) [Details](#)

[Collapse All Sections](#)

Daily Task		
☒ Monthly Bookkeeping	Completed	
☐ Annual Report	Planned	Set Due Date
☐ Monthly Accounting	Planned	Set Due Date

[Add Task](#) [...](#)

CLIENT REQUEST

Name your section...

[Add Section](#) [Add Client Section](#)



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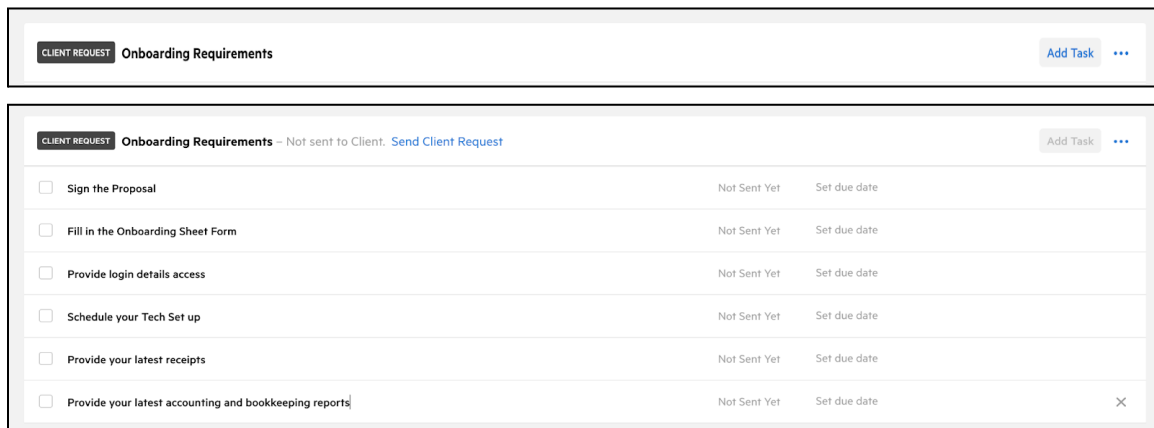


This will prompt you to create a **Section Name**. In this example, we can call it Onboarding Requirements.

- You can rename the Section Name by hovering your mouse to the three dots on your right hand side.



Click **Add Task**. Once you add a task, you can click enter so that you can proceed on adding more tasks.



Sending Requests to Client

This is one of the Karbon features that is the best for firm owners as they can set a particular setting based on when to follow up your client. Go to the three dots and select **Send Client Request**.



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CLIENT REQUEST Onboarding Requirements - Not sent to Client. [Send Client Request](#)

Task	Status	Due Date
☐ Sign the Proposal	Not Sent Yet	Set due date
☐ Fill in the Onboarding Sheet Form	Not Sent Yet	Set due date
☐ Provide login details access	Not Sent Yet	Set due date
☐ Schedule your Tech Set up	Not Sent Yet	Set due date
☐ Provide your latest receipts	Not Sent Yet	Set due date
☐ Provide your latest accounting and bookkeeping reports	Not Sent Yet	Set due date

[Add Section](#) [Add Client Section](#)

Add Task [...](#)

- Send Client Request
- Set due date
- Add Automator
- Rename
- Copy (6 items)
- Delete (6 items)
- Add Section Above
- Add Section Below
- Add Client Section Above
- Add Client Section Below

A pop-up will appear to ask you for details:

Sending Settings

SEND TO

SUGGESTIONS

John Smith
john@company.com

[Create Contact](#)

☒ Send Request now

☐ Schedule Request to Auto Send Later

[Edit Email](#)

[Cancel](#) [Next](#)

- **Send To:** This is where you will input the email address. It will provide you suggestions, but it is best to use the email address to a specific team member of the company.
- **Send Request:** This provides two options, sending the request now or auto-send at a later date.

Once you select your preferences, you will also have an option to **Edit Email**.



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Sending Settings

SEND TO: John Smith (john@company.com)

FROM: Work assignee

Work assignee ✓

Client owner

Other colleague

[Edit Email](#)

[Cancel](#) [Next](#)

Client Task Email

EMAIL SUBJECT: <%preferred_name> - Please complete this checklist - <%work_name> - <%client_name>

EMAIL BODY: Hi <%preferred_name>, Please complete this checklist. Click on any item to open the full checklist, comment or ask questions and upload files. Once you have completed an item please tick it off so we know it has been done.

Available placeholders: <%preferred_name> <%work_name> <%client_name> <%contact_name> <%reminder_number>

[Cancel](#) [Save](#)

- Make sure the Email Subject provides enough information such as “Name of Member - Name of Task - Work Name - Client Name” so that if the client sees the subject name, similar to a Quick Summary of the Email Body.
- The Email Body should be formal, and it is best to address the client by their first name (to make the email feel more ‘personal’ and not ‘spammy’).

Then, you will proceed to the **Sending Settings**, where you can customize your sending options. Below is how the gentle reminder works.

Sending Settings

SEND TO: John Smith (john@company.com)

FROM: Work assignee

Work assignee ✓

Client owner

Other colleague

[Edit Email](#)

[Cancel](#) [Next](#)

Sending Settings

AUTO REMINDERS

☒ Automatically send **gentle reminders**

- ⌚ Reminder 7 days before task due
- ⌚ Reminder on task due date
- ⌚ Daily reminder when overdue until all tasks are complete (or 5 reminders have been sent)
- 👤 Reminders will be sent from Work assignee

‘Gentle’ reminders are based off due dates. Please add due dates to all client tasks, or use ‘Urgent’ reminders instead.

[Edit Reminder Email](#)

[Back](#) [Cancel](#) [Send](#)

Sending Settings

AUTO REMINDERS

☒ Automatically send **custom reminders**

- ⌚ Send a reminder every **2** days
- ⌚ Until all tasks are complete (or 5 reminders have been sent)
- 👤 Reminders will be sent from Work assignee

[Edit Reminder Email](#)

[Back](#) [Cancel](#) [Send](#)

On the third screenshot above, this is the most convenient reminder setting you can do since you can adjust the number of days based on your preference and urgency.



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You can also add and edit the **Reminder Email** here. You can make it short but detailed, to make sure your client will get your thought upon reading the email.

Client Task Reminder Email

EMAIL SUBJECT

Reminder #<%reminder_number> - Please complete these items - <%work_name> - <%client_name>

EMAIL BODY

Hi <%preferred_name>,

A quick reminder that some of your checklist items still need to be completed.

Available placeholders: <%preferred_name> <%work_name> <%client_name> <%contact_name> <%reminder_number>

Cancel Save

Other Tabs

Time and Budget

If there is a need to record working with your client, you can go for this specific tab.

Onboarding John Smith — John Smith

CLIENT John Smith ASSIGNED TO [Red Box] STATUS Ready To Start REPEATS Setup Repeating Work DUE Mar 17, 2023 (10 Days) TASKS 1 of 9 completed (11%)

Timeline Tasks Time & Budget Documents Details

Add Budget Estimate Add Expense Add Time Entry Start Timer

Budget Overview (Hours) [Fee Settings](#)

0.00 USD 0m Budget 0.00 USD 0m Actual 0.00 USD 0m Remaining 0.00 USD Fees - Time & Materials

MAR 6 MAR 7

To start the recording of the time entry, click the **Start Time (blue button)**. And once it's done, click the **Stop Time (red button)** or the **small stop button** at the upper right corner.



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Onboarding John Smith — John Smith

John Smith 0:00:12

CLIENT: John Smith

ASSIGNED TO: [Redacted]

STATUS: Ready To Start

REPEATS: Setup Repeating Work

DUE: Mar 17, 2023 (10 Days)

TASKS: 1 of 9 completed (11%)

Timeline Tasks Time & Budget Documents Details

Add Budget Estimate Add Expense Add Time Entry **Stop Timer**

Budget Overview (Hours)

0.00 USD 0m Budget

0.00 USD 0m Actual

0.00 USD 0m Remaining

0.00 USD Fees + Time & Materials

MAR 6 MAR 7

John Smith 0:03:48

Pause Stop Search Plus Menu

A form will pop up once the stop button has been clicked. Fill up the form and indicate the details needed for documentation and easy-search when filtered.

Confirm Time Entry

CLIENT: John Smith

WORK: Onboarding John Smith - John Smith

ROLE: None

TASK TYPE: None

DATE: Today

DURATION: 5 m

NOTES:

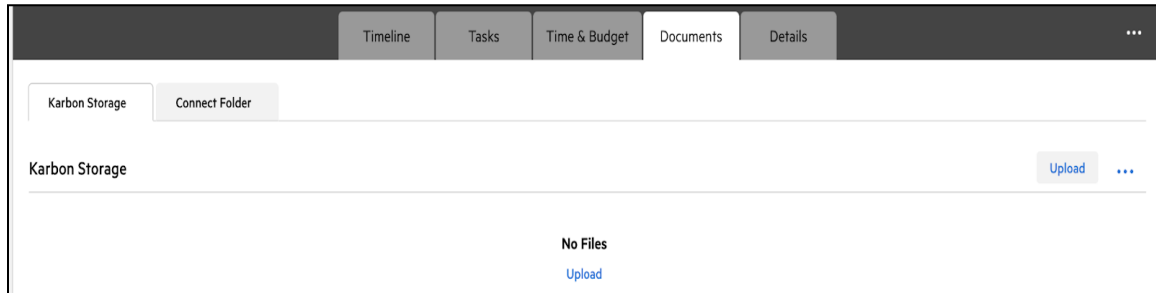
Delete Cancel Confirm

Documents

Any files, documents, and receipts related to this client should be stored here so that you can find it easily once you need to create a report of if the client wants their data. Click **Upload** to add the client's documents for storing.



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Details

Lastly, all of the client information will be stored under **Details**, including the specific team member working on that specific client. Click **Edit** if there is a need for update on the client's details or description.

