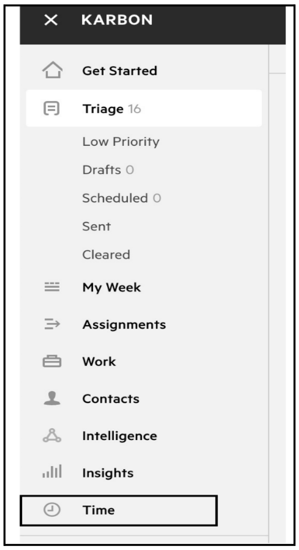
VA SOP: How to Use Karbon for Client's Business

Click on the topics below to proceed

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.



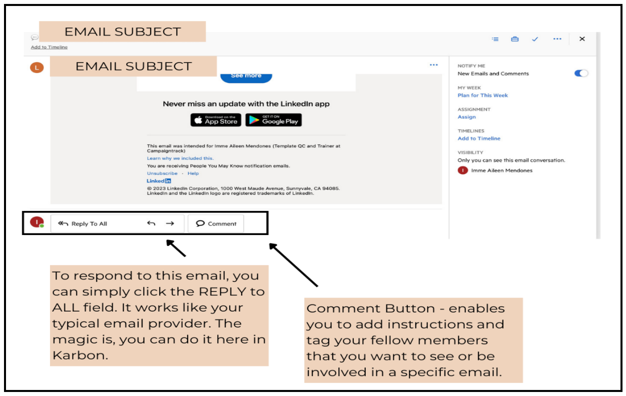
In the Dashboard, you can see the **Triage.** This serves as the inbox in Karbon. All of the emails are being redirected to the triage.

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.

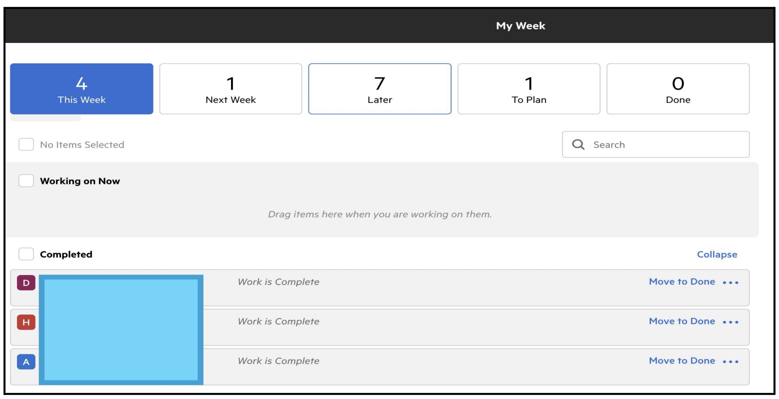
In Karbon, your email will look like the screenshot below.

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.

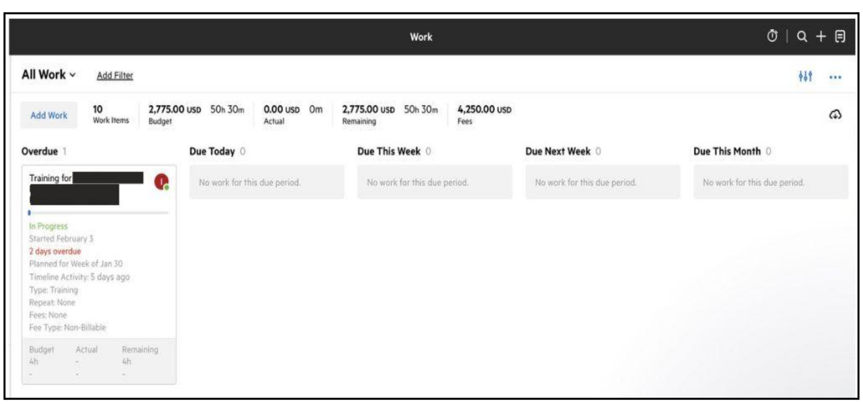


Dashboard Tabs

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

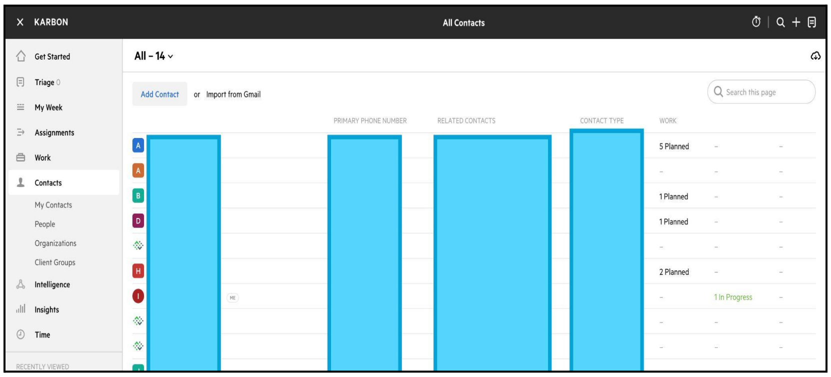


Work Tab: All of the emails and work created by your team members will be seen there. You can also create your own template in a specific process.

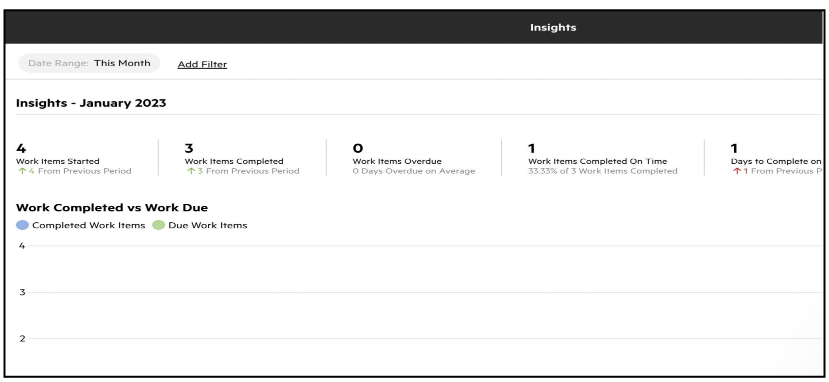


Example, a colleague wants you to accomplish a task, they will then add you in the thread of the said email. Once entered, it will now prompt you on your triage that you have tasks that need to be accomplished.

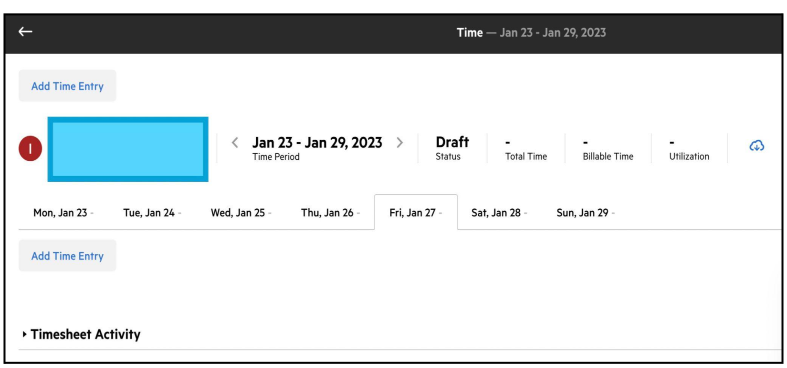
Contacts: All of the clients, prospects, leads and even colleagues' data will be saved here.



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.



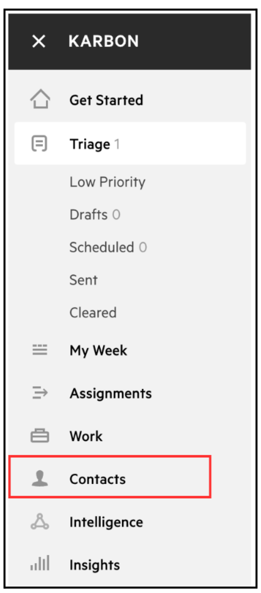
Client Onboarding

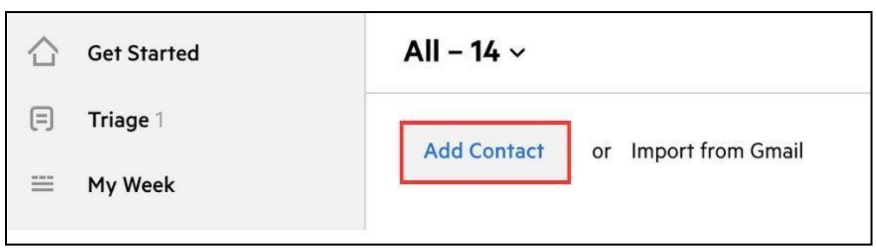
Onboarding means you will assist your client in uploading their data to your end, share folders with each other, and share logins and passwords.

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

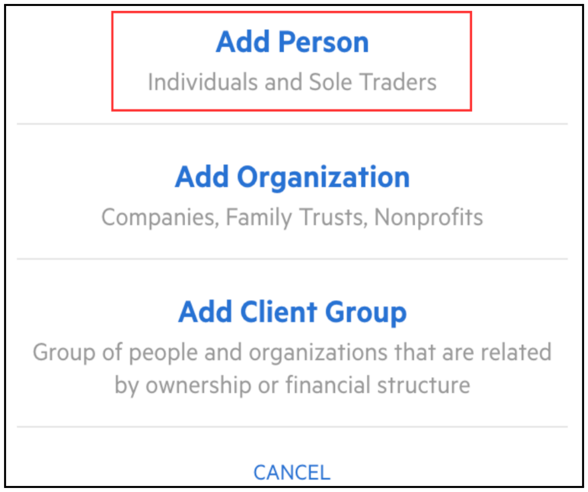
Now, open your Karbon Account and proceed to **Contacts**, then select **Add Contacts**.





You can select one of the 3 Options:

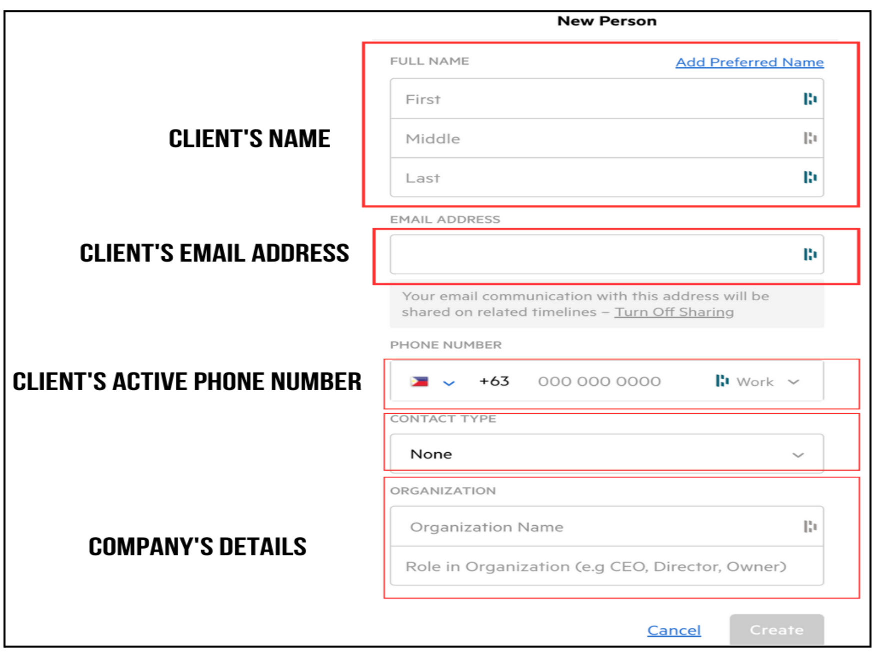
- **Add Person:** If your client is working by themselves or individually.
- **Add Organization:** If your client is under a company.
  - Tip: This is used when you are managing leads or prospects and you have no idea of a contact person yet.
- **Add Client Group:** If you classify your client according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



Add Person

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

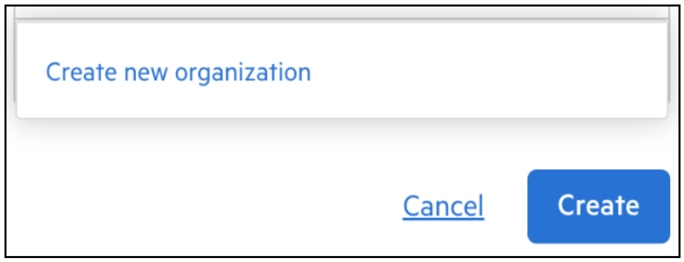
- **Client Name:** Double-Check the spelling, and if possible provide the complete name
- **Email Address:** Use the most active email address since you will send tasks and reminders.
- **Phone Number**: Use cell phone number and double-check the country.
- **Company Details**: More than one position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



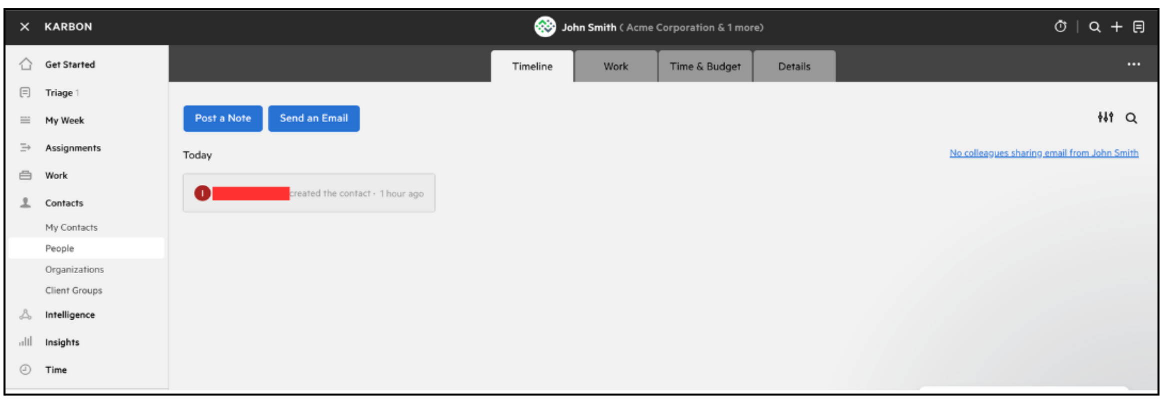
Add Organization

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.

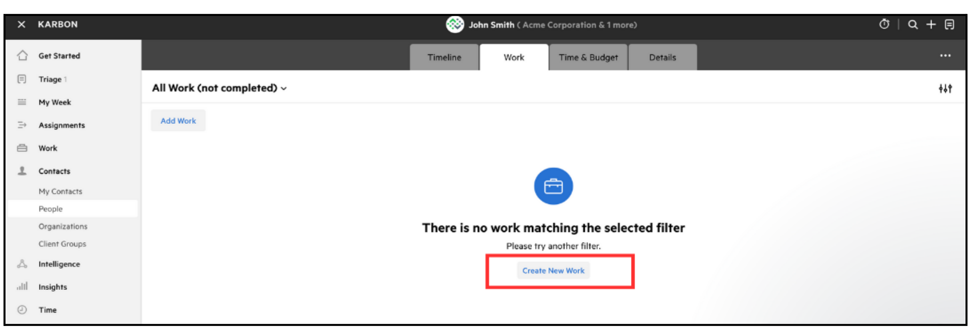


Once the contact is created, it will redirect you to the page below.



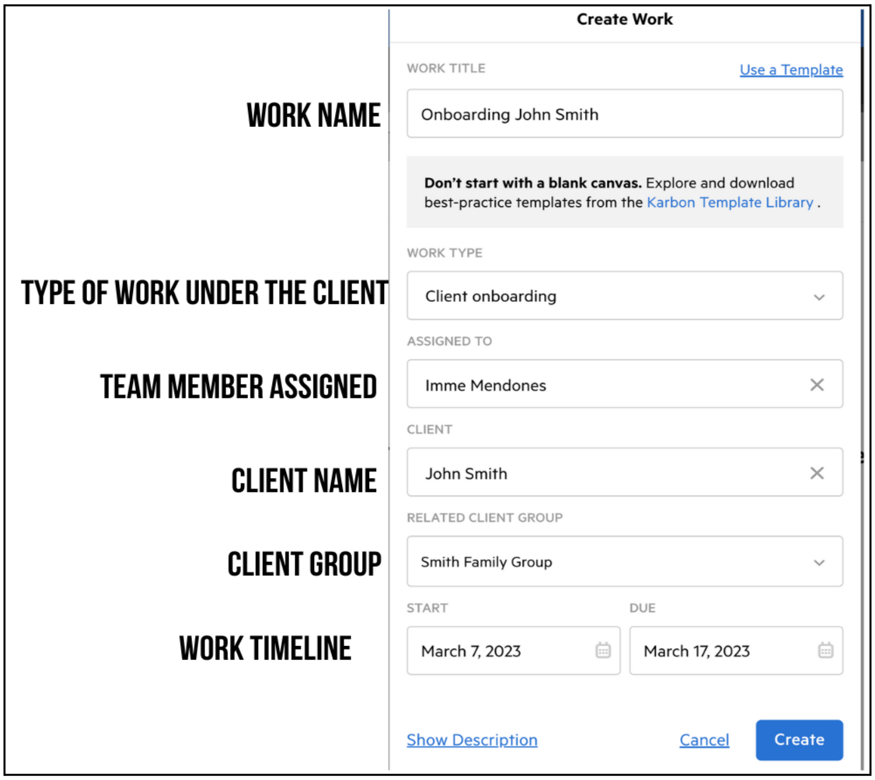
Create Work Task

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



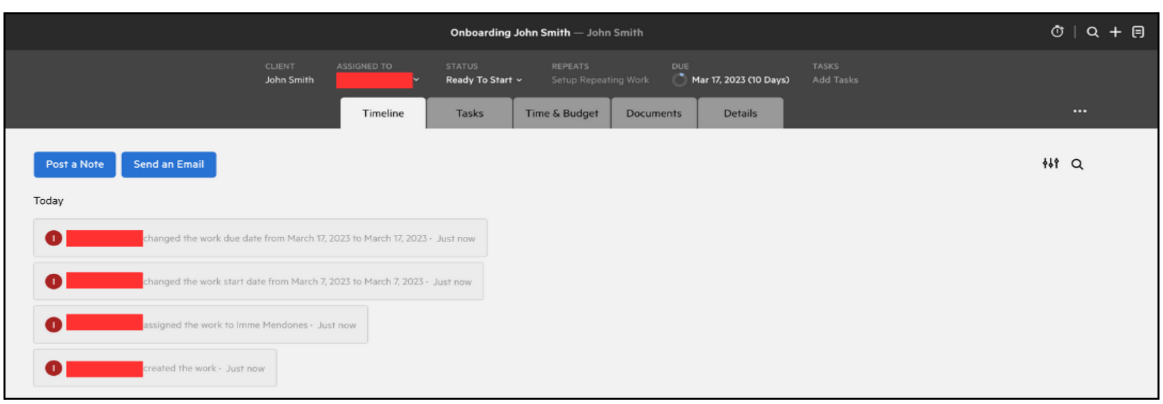
Fill out the form below:

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



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.

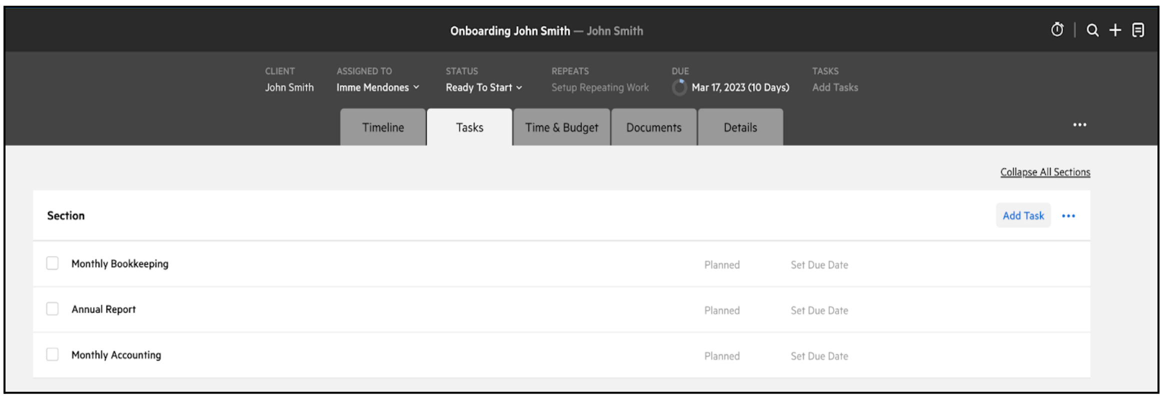


After that, proceed to **Tasks**.

Adding Tasks

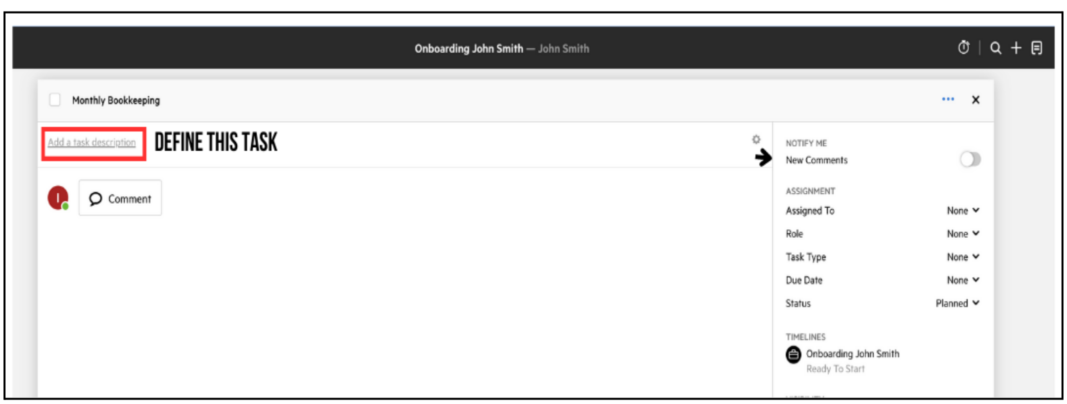
The good thing in adding tasks is that you can organize and compile tasks based on who your client is. Youwill no longer lose any information if you want to back track, just simply find your client and all the data you need is there. Now, you can identify the series of tasks that a team member should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

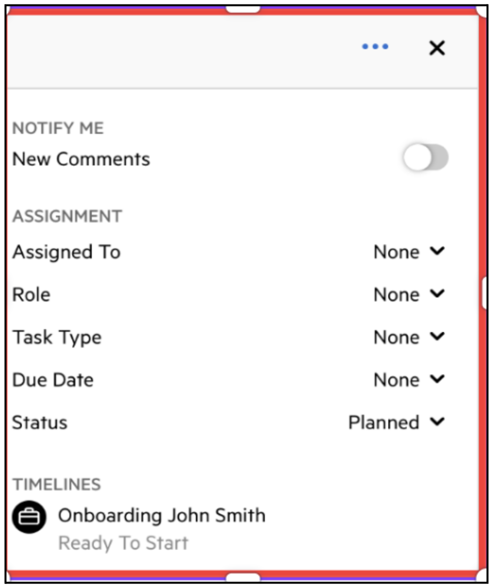


Defining and Specifying Tasks

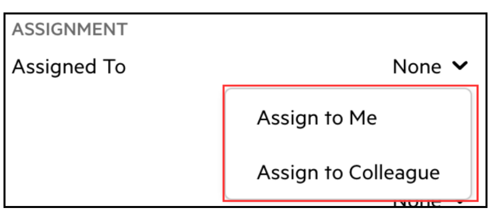
Click the **Title** of the task (Monthly Bookkeeping in this example) and you will be directed to the window below. The **Comment** button on the right is where you can click if you will collaborate with your team member.

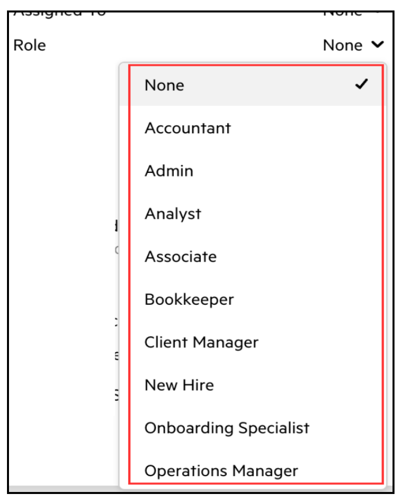


Click **Comment** to customize or update the details.

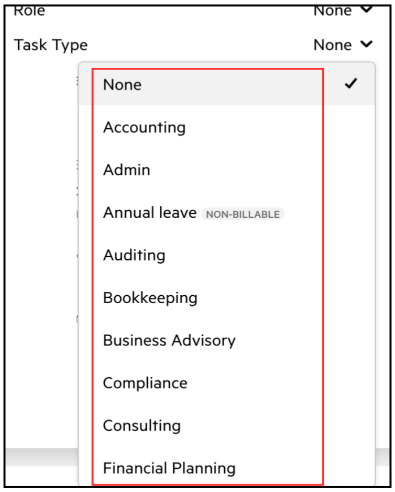


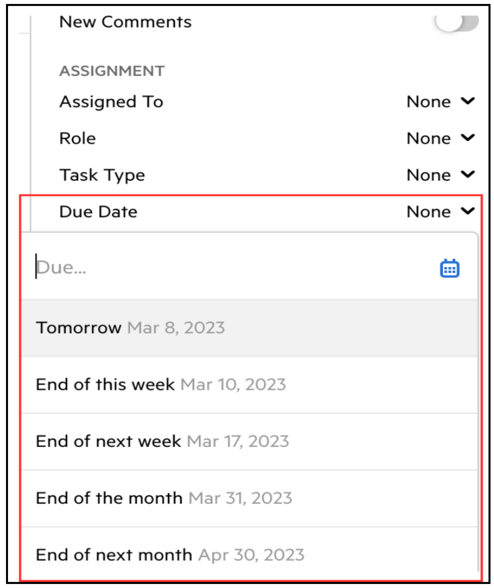
- **New Comments:** If you want to be updated and be the first one to know if a specific work is being updated, enable this section. Best to always enable this to receive notifications if a comment is made.
- **Assigned To:** There are two options, you can assign it to yourself or to a colleague.
- **Role:**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





- **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.

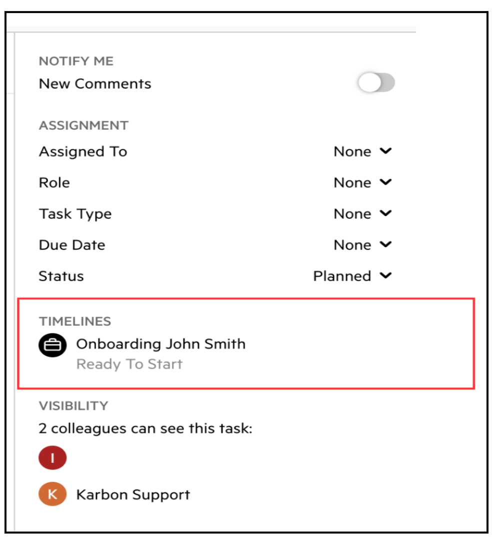




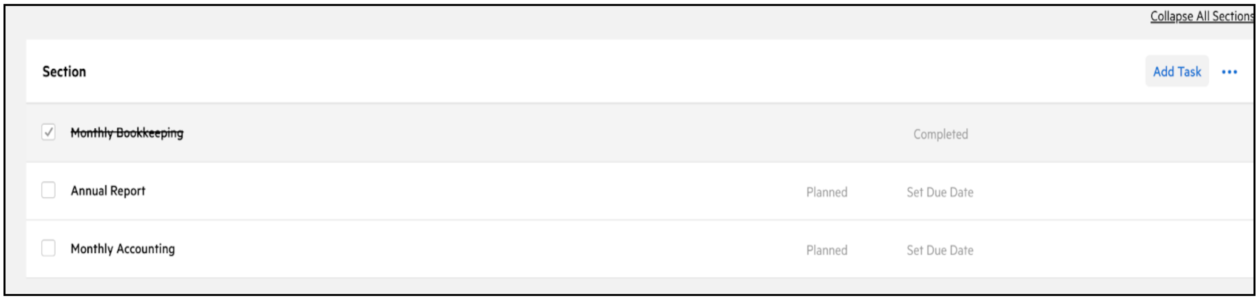
- **Timeline:** This is the selection where you can add a specific email or work for a contact or client.

  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.



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

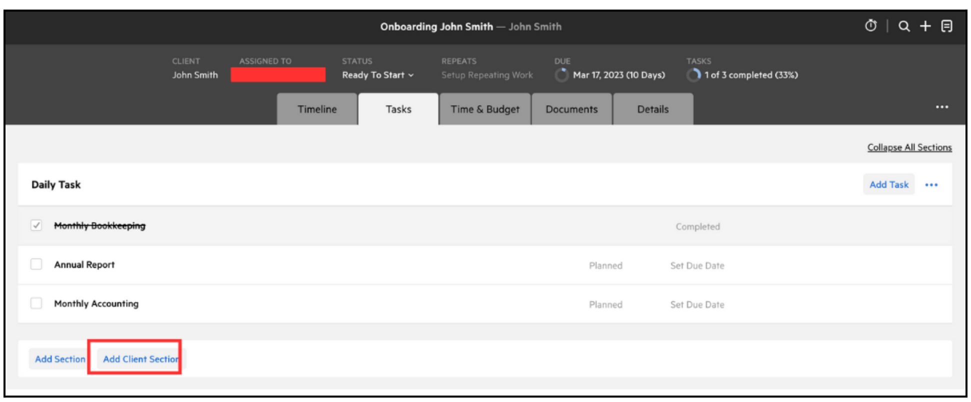


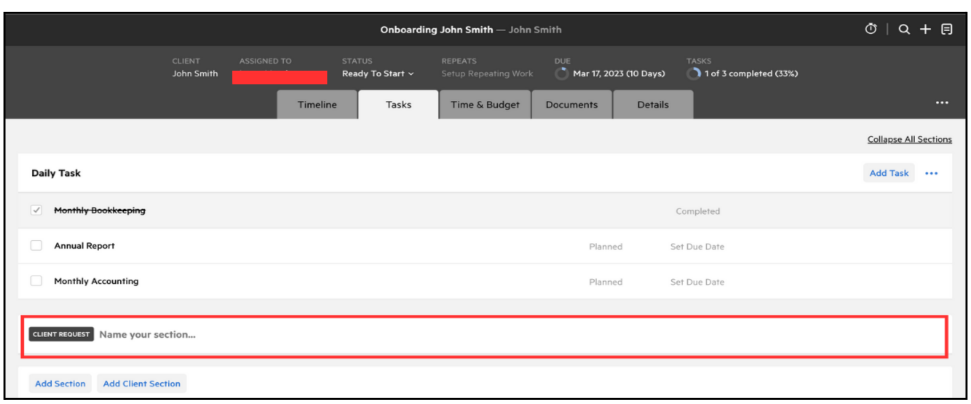
Task Delegation to Client

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.**

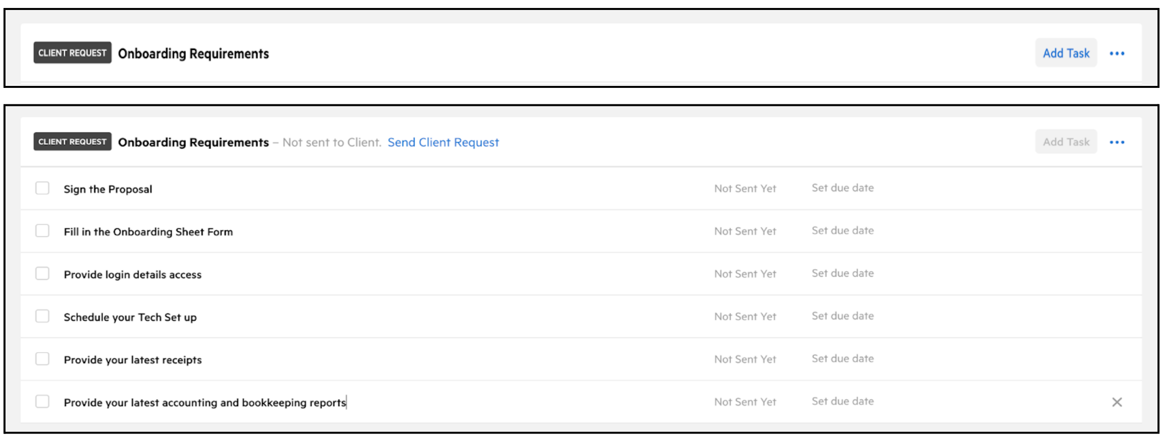




This will prompt you to create a **Section Name.** In this example, we can call it Onboarding Requirements.

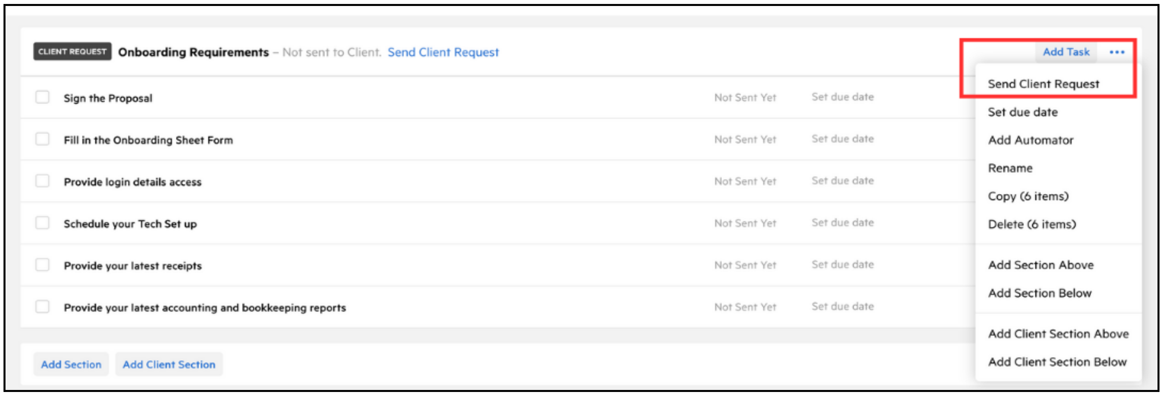
- You can rename the Section Name by hovering your mouse to the three dots on your right hand side.

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

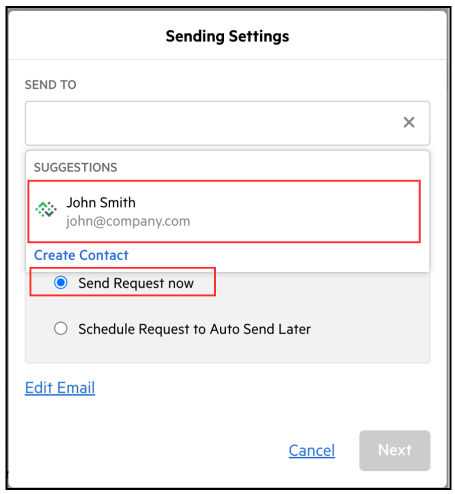


Sending Requests to Client

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**.

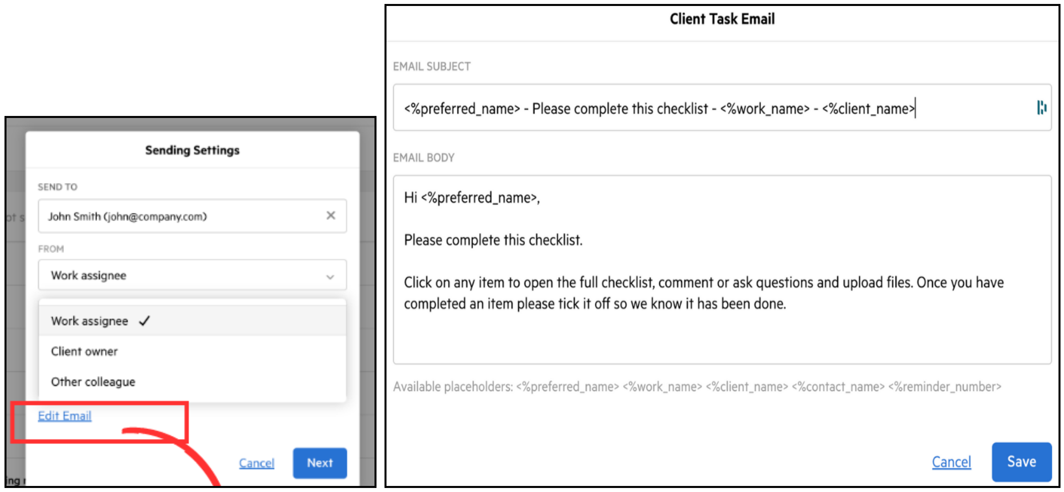


A pop-up will appear to ask you for details:



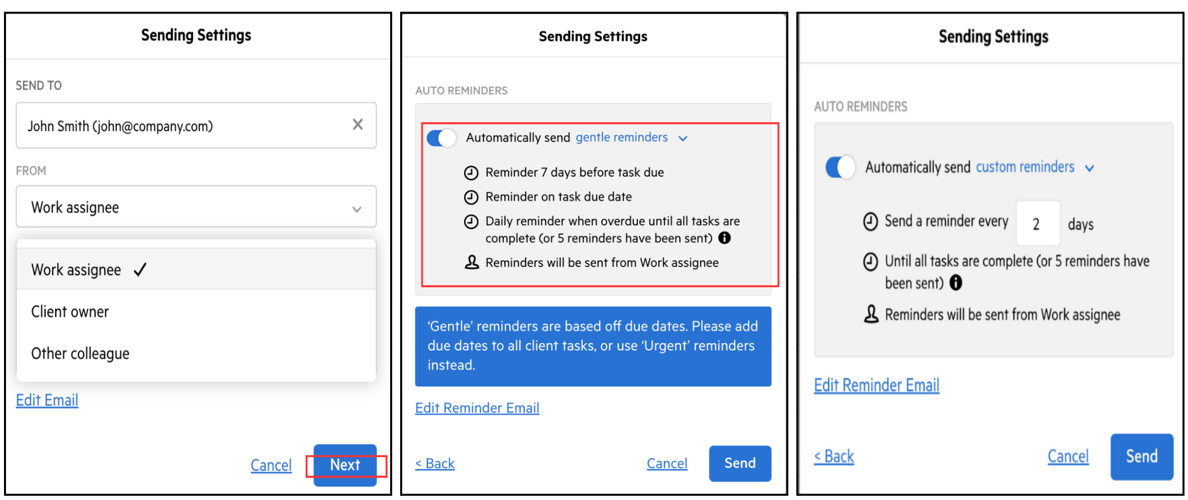
- **Send To:** This is where you will input the email address. It will provide you suggestions, but it is best to use the email address to a specific team member of the company.
- **Send Request:** This provides two options, sending the request now or auto-send at a later date.

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



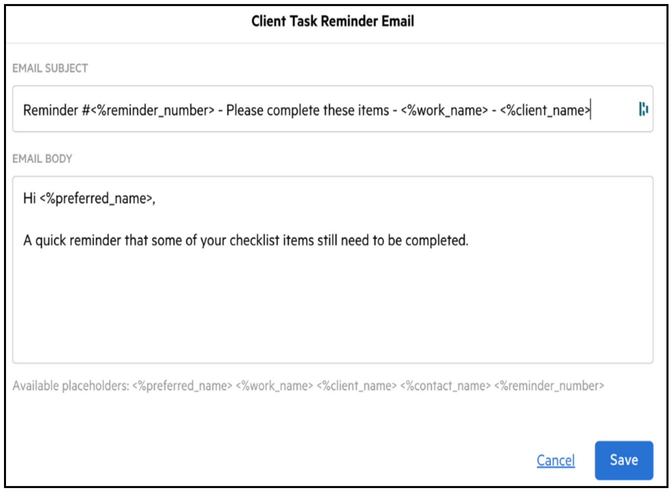
- Make sure the Email Subject provides enough information such as "Name of Member - Name of Task - Work Name - Client Name" so that if the client sees the subject name, similar to a Quick Summary of the Email Body.
- The Email Body should be formal, and it is best to address the client by their first 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.



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.

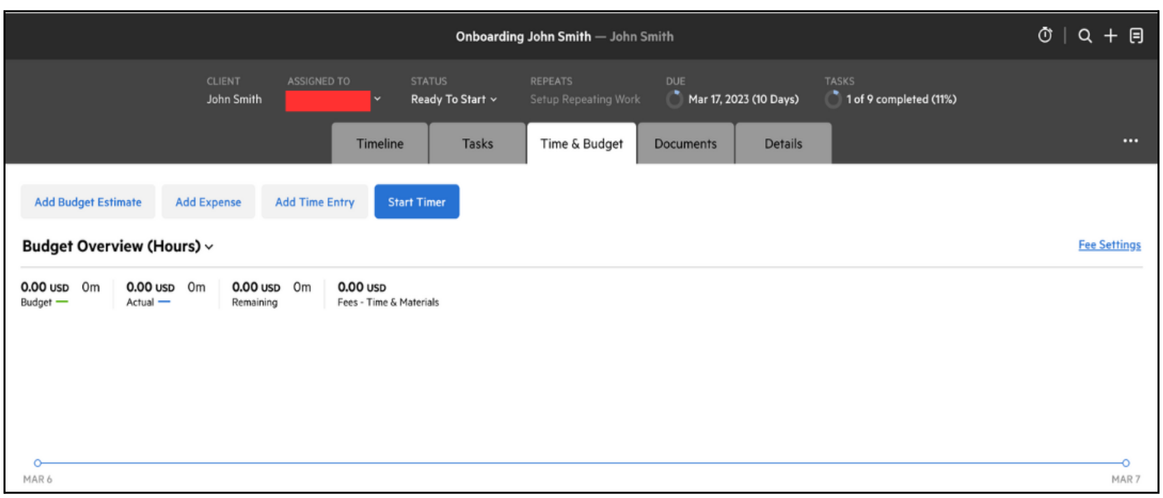
You can also add and edit the **Reminder Email** here. You can make it short but detailed, to make sure your client will get your thought upon reading the email.



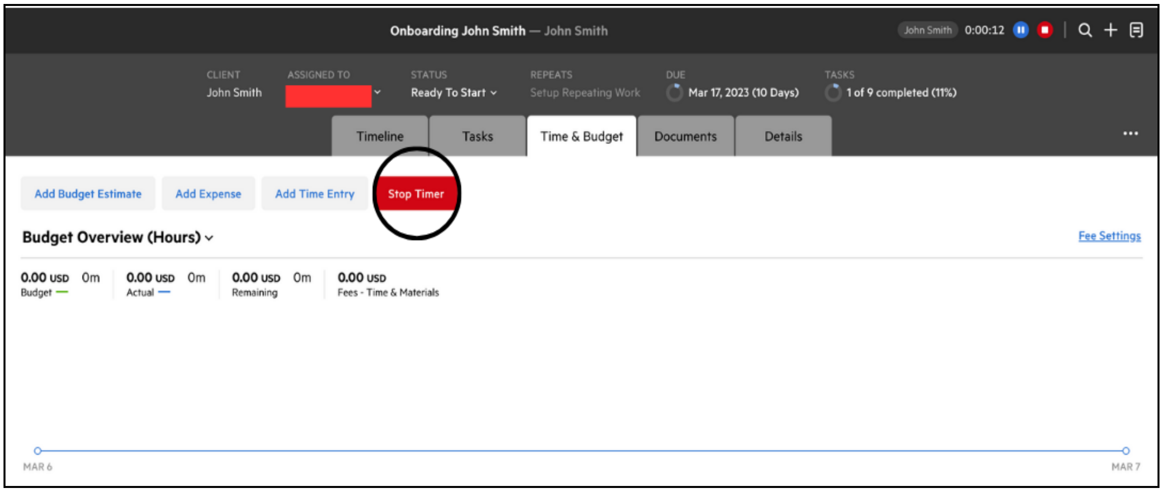
Other Tabs

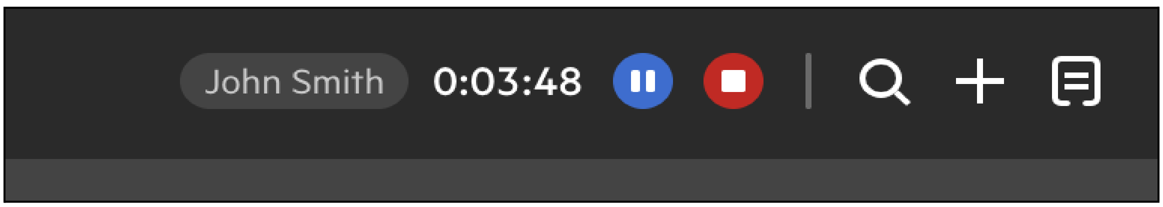
Time and Budget

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

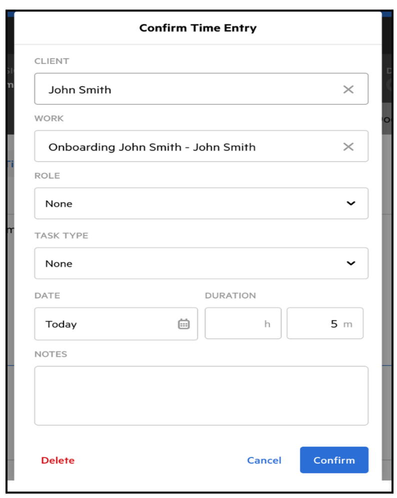


To start the recording of the time entry, click the **Start Time (blue button).** And once it's done, click the **Stop Time (red button)** or the **small stop button** at the upper right corner.



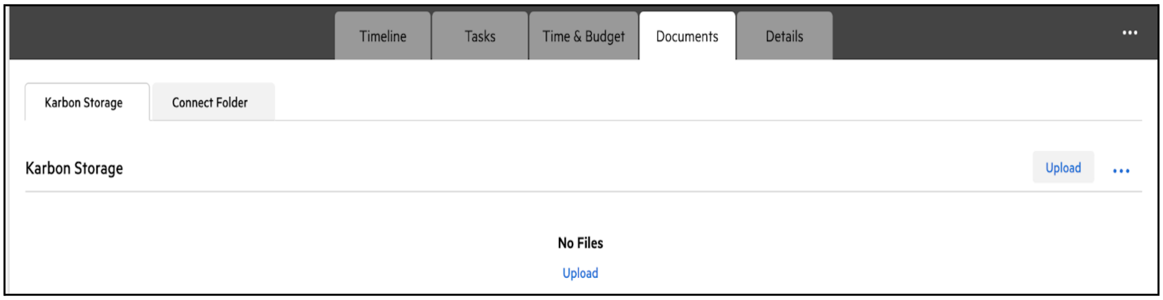


A form will pop up once the stop button has been clicked. Fill up the form and indicate the details needed for documentation and easy-search when filtered.



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.



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.