



Managing your clients and contacts in Karbon

Your hosts



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Karbon
VP Education



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Karbon
VP Success

Before we get started, *some housekeeping*...

zoom

- 1. Close any open apps**
- 2. Ask and we'll answer**
- 3. Have fun!**

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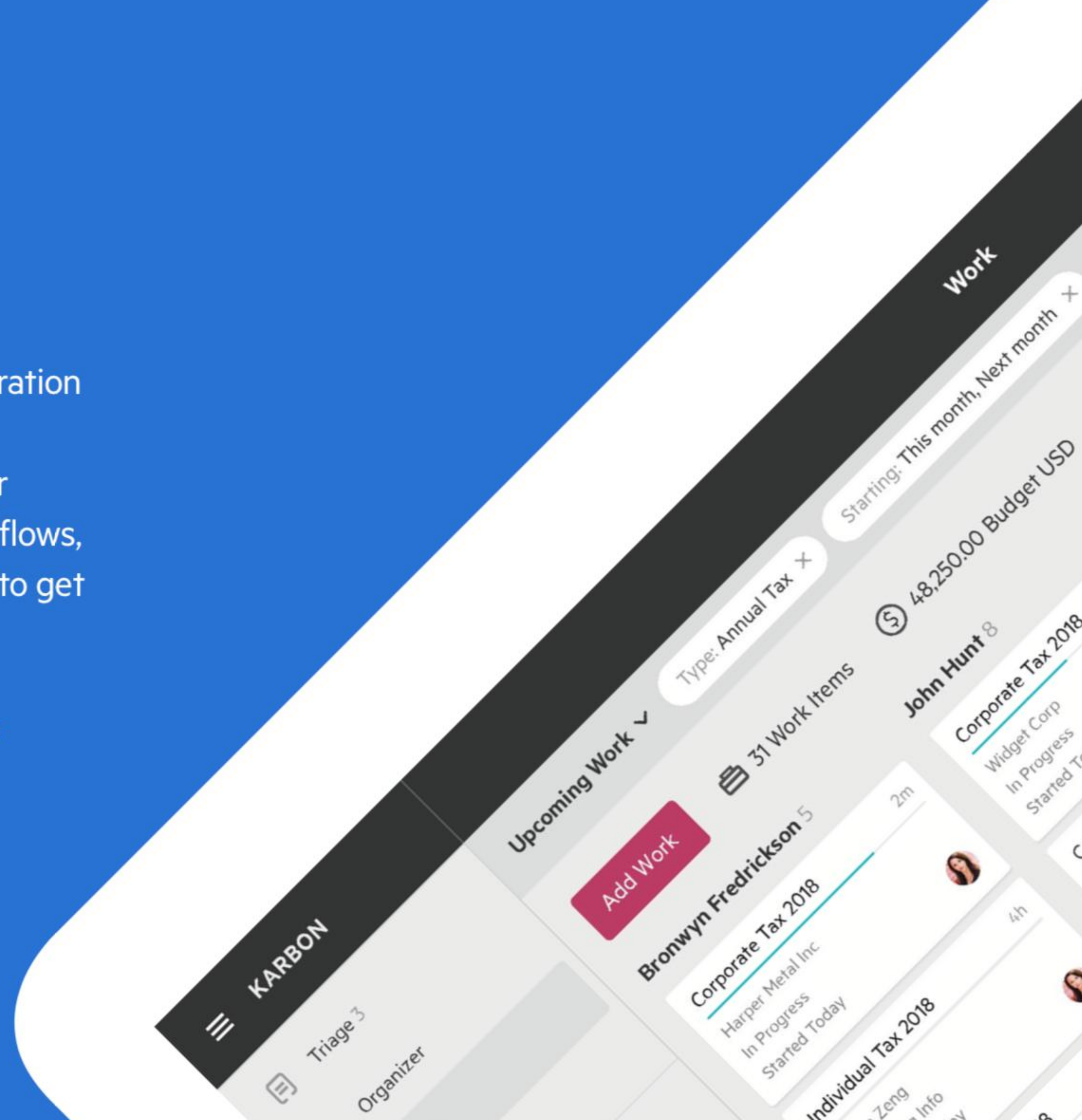
1. **Close any open apps**
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How work gets done.

Karbon is an advanced workstream collaboration platform, ensuring visibility across teams, departments and locations. Combining your email, discussions, tasks and powerful workflows, Karbon keeps everything your team needs to get work done in one place and in context.

Learn how you can maximize your team's output with Karbon.

Visit karbonhq.com




1. **Primer on contacts**
2. **Overview of contact settings**
3. **Managing and filtering work**
4. **Demo**

Primer on Karbon contacts

The ins and outs of contacts

- **Three types:** People, organizations, and client groups.
- **People:** Individuals you work with (have an email).
- **Organizations:** Businesses you work with (don't have an email).
- **Client groups:** Can be any number of people and organizations.
- **Contact cards:** People can be individuals & associated to orgs.
- **Contact types:** Categorize contacts into groups.
- **Contact details:** Track basic, details/cards & accounting details (use the Details tab).

How to add contacts

 Jamie Engelhardt
jamie@theprofitablefirm.com

Description

Outsourced marketing exclusively for accountants, accountancy firms, and bookkeepers in the UK, USA, and all throughout the world.


Role


The Profitable Firm


Location

Blackfriars St, Salford M3 5BQ, UK

Social Profiles

 company/the-profitable-firm

 theprofitablefirm

 ProfitableFirm

Add Contact

- **Global add:** Press “+” button in upper right.
- **From Triage:** Click name & “Add contact”.
- **From email:** Import from Contacts.
- **Bulk upload:** Request via Help & Feedback.

Add people, organization, and groups

Add Person
Individuals and Sole Traders

Add Organisation
Companies, Family Trusts, Nonprofits

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

CANCEL

New Person

Full Name

Add Preferred Name

First


Middle

Last

Email Address

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

Phone Number

 ▼

 +1 000 000 0000 [Work](#) ▼

Contact Type

None ▼

Organisation

Organisation Name

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

[Cancel](#) Create

New Organisation

Organisation Name

Website

Contact Type

None ▼

Primary Contact Person

First Name

Last Name

Email Address

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

[Cancel](#) Create

New Client Group

Client Group Name

Contact Type

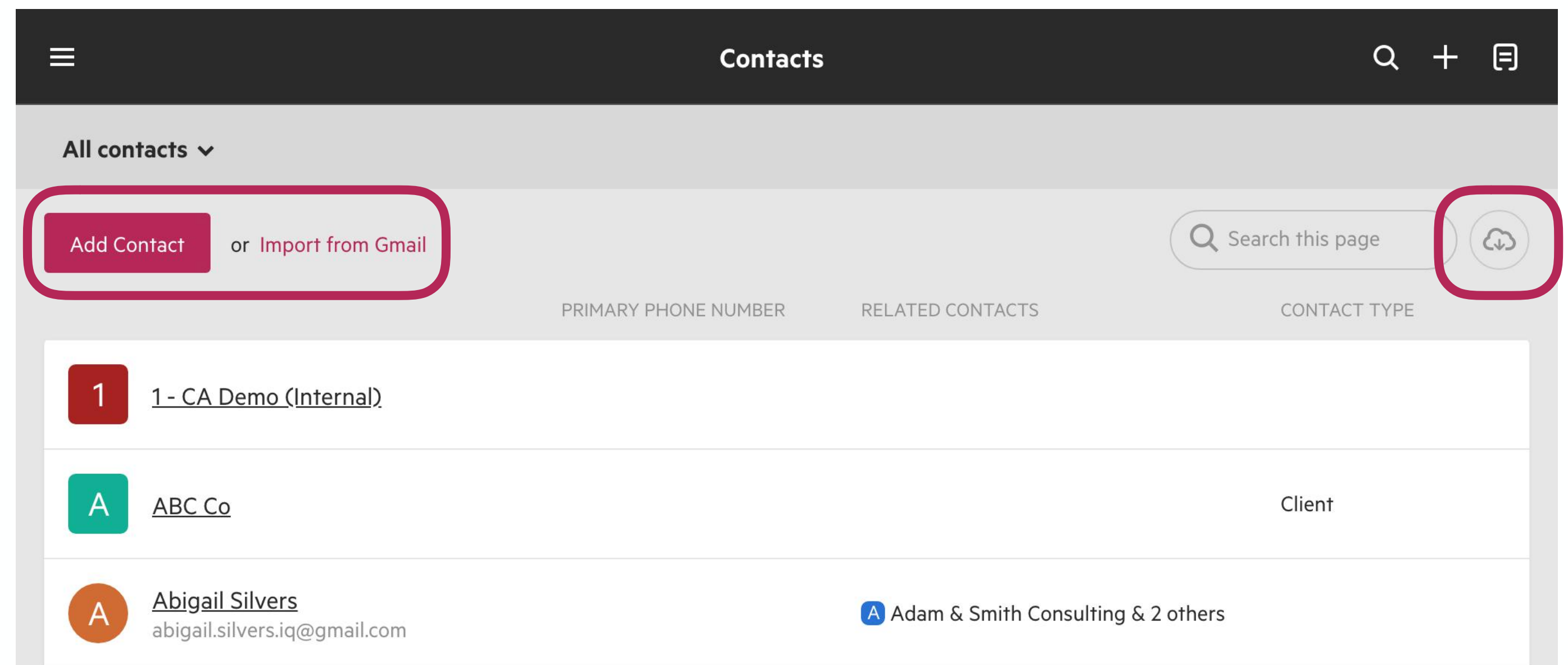
None ▼

[Cancel](#) Create

	A	B	C	D
1	Examples of Relational Data in Karbon's Import File Spreadsheet			
2				
3	Client Group	Organization	People	Email address
4	ABC Group	Acme Corporation	John Smith	john@acme.com
5	ABC Group	Business Sense	John Smith	john@bizsense.com
6	ABC Group	Can Do Ltd	John Smith	john@cando.com
7	Smith Family	John & Joanna Smith	John Smith	john@gmail.com
8	Smith Family	John & Joanna Smith	Joanna Smith	joanna@gmail.com
9	Smith Family		Justin Smith	justin@gmail.com
10			Jane Doe	jane@janedoe.com
11	ABC Group		Joanna Smith	joanna@gmail.com
12	ABC Group	Acme Corporation	Accounts - Acme	accounts@acme.com
13				
14	Important Use Case Explanations (of the import data table above)			
15	<ol style="list-style-type: none"> 1. Karbon will import from the top down and from left to right. 2. We'll import the Client Group "ABC Group" once using cell A2. 3. With the various organizations and people listed in Columns B (B2 - B4) and C (C2 - C4 & C9 - C10), we'll associate them to the Client Group "ABC Group" 4. We'll import John Smith once using cell C2 but then create contact cards using the various emails listed in Column D (D2 - D5) 5. We'll import John & Joanna Smith using B5 to represent the marriage of John Smith (C2) and Joanna Smith (C6) and list them under the Client Group "Smith Family" (A5) 6. Justin Smith is John & Joanna's son and will be listed as a member of the Client Group "Smith Family" (A5) 7. Jane Doe (C8) is an individual Client and is not associated to an Organization or a Client Group 8. The email address "accounts@acme.com" (D10) is not associated to a person but an email address used for the Organization "Acme Group". A name or a generic name has be entered into cell C10 or Karbon will use the email address as the name. 			

How to download contacts

- Export to Excel from the Contacts area
- Requires Admin access





Overview of contact settings

Set your Contact Settings...

Settings

+

Settings

Client Tasks

Colleagues 11

INVITE

Company Details

Connected Apps 2

Contact Settings 14

Subscription

Workflow

Work Templates 18

←

Contact Settings

+

People Contacts Name Order

First Middle Last (e.g. John Fredrick Smith) [Edit](#)

Contact Types

Add Contact Type

	CONTACTS USING TYPE	
Client	14	...
Client - QB	0	
Client - QBO	0	
Client - Xero	0	
Clients - Churches	0	

... to power your Contacts

KARBON

1

1 - CA Demo

Triage 14

To-do

Work

Contacts

RECENTLY VIEWED

Business tax return (T2)
Acme Corporation

Client onboarding
Acme Corporation

Website Redesign
1 - CA Demo (Internal)

Drafts 0

Sent

Low Priority

Contacts

All contacts

Add Contact

or Import from Gmail

Search this page

PRIMARY PHONE NUMBER

RELATED CONTACTS

CONTACT TYPE

1

1 - CA Demo (Internal)

A

ABC Co

Client

A

Abigail Silvers
abigail.silvers.iq@gmail.com

A

Adam & Smith Consulting & 2 others

A

Accounts - Bower Group
accounts@bowergroup.com

B

Bower Consulting & 3 others

A

Acme Corporation
www.acmecorporation.com

+1 123-456-7890

Ian Vacin & 1 other

A

Adam & Smith Consulting

+1 478 896 3138

A

Abigail Silvers & 2 others

Client

https://app.karbonhq.com/lt4dYjQgW5F#/contacts/m5ZPSgY2YMG

All contacts

My contacts

People

Organizations

Client Groups

Client

Client GP

Tips & tricks of contact management

- **Preferred names:** Add to power the personalization of client tasks
- **Client IDs:** Use client IDs to power Karbon search to find exactly what you want.
- **Quick add:** Add a person by clicking their name within Triage.
- **Quick review:** Hover of a person's name in Triage to see their background details.
- **Bulk review & update:** Request your complete export via Help & Feedback (requires Admin and Karbon Champion approval).
- **Keep in sync:** Use integrations to keep contacts in sync with other software.

Connect Karbon to anything with Zapier

When a new contact
is added to Karbon...



Mark Tourell
mark@tourell.com

Add Contact



...add them to a
MailChimp Newsletter

Hi Mark,
Welcome aboard

We're thrilled to have
Tourell logistics work with
us. in the next day or so,
our onboarding liason

Learn how: www.karbonhq.com/zapier

Managing and filtering work

Managing work with contact settings

Assignee

Client Owner

Client Manager

Client

Client Group

Client - Contact Type

Client - Fiscal Year End

Status

Work Type

Start Date

Due Date

Completed Date

- **Assignee:** Colleague who owns the work item.
- **Client Owner:** Colleague who owns the client.
- **Client Manager:** Secondary owner of the client.
- **Client:** Choose client(s) to view work by.
- **Client Group:** Choose group or groups to filter by.
- **Client - Contact type:** Narrow dataset by contact type.
- **Client - Fiscal Year End:** Specify fiscal year end for each client and then filter by given month.

Demonstration in Karbon

Wrap up

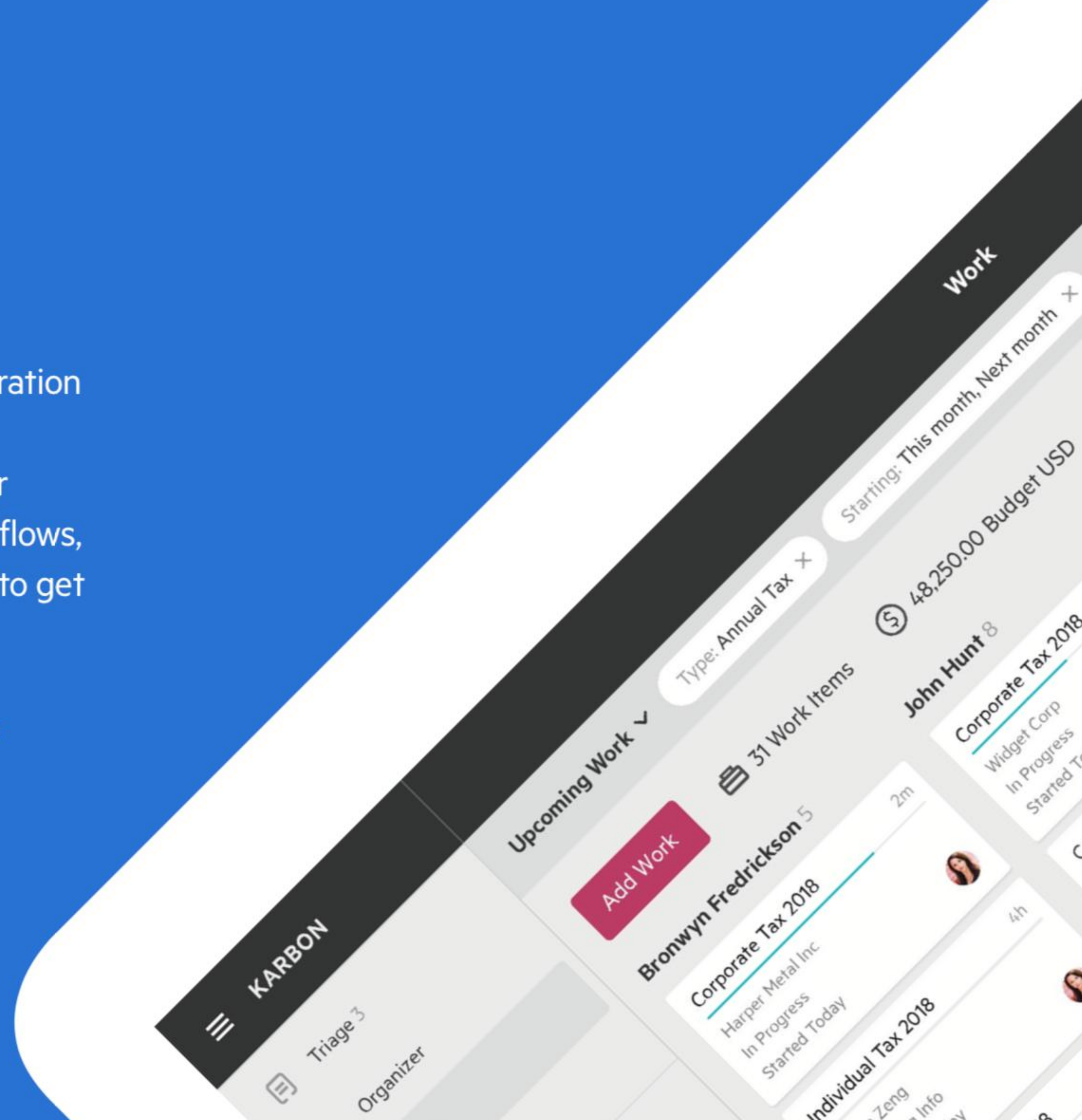
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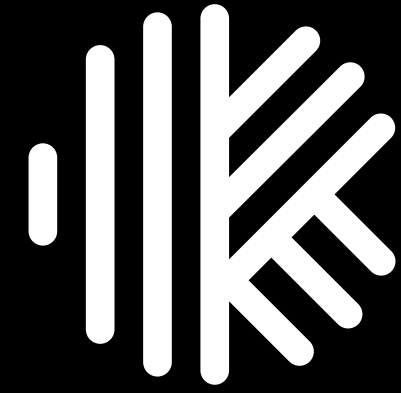
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Questions?



Thank you

Get Karbon — karbonhq.com

@KarbonHQ

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