



Reimagine your firm's processes with Karbon's Template Library

karbonhq.com



Learning objectives

- ✓ How to navigate the library to find the most relevant templates quickly.
- ✓ How to add your templates to Karbon quickly (or open in a trial account if you're not already a customer).
- ✓ How to use the template in spreadsheet form if you'd prefer not to use in Karbon.
- ✓ How to understand the advanced elements of the template including automators, client tasks, job roles, and due dates.
- ✓ How to tailor each template quickly to suit your unique workflows.
- ✓ How to deploy and schedule client work from each template.



Meet your host



Ian Vacin

Karbon
Chief Customer Officer





Hundreds of free best practice accounting work templates

 karbonhq.com/templates

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*New templates
added weekly!*

Step-by-step work template design tutorial

How do I design my work templates for maximum efficiency?



Written by Evan Hall
Updated over a week ago

Learning Objectives:

After completing this course you should be able to _____

- design, build, and test a simple work template aligned to your operating preferences.
- configure client task messaging that effectively communicates your requirements to the client.
- setup an automator to eliminate a manual administrative step. Specifically, by recognizing when the owner, due date, or status of a piece of work will change during the normal course of performing the work.

Product Feature Keywords:

- [Client Tasks](#)
- [Global Automator](#)
- [Tasklist Automator](#)

WATCH

The way you divide tasks into sections directly affects the amount of automation and efficiency you achieve.



ACTIVITY

Organizing Template Sections

Step-by-step directions:

Further customize your work template by adding a default work type.

- Divide your list of tasks into sections. Start a new section anywhere the workflow requires a change in status, assignee, or due date.
- Add in client task sections anywhere you need to request documents or information from clients.



Wrap up

4 key Karbon work training videos

- **Work filters and saved dashboards (4 min):**
<https://karbonhq.wistia.com/medias/13dfsqxgo9>
- **Personalize a work template (6 min):**
<https://karbonhq.wistia.com/medias/sjzdxhhcsu>
- **Creating a work template from scratch (10min):**
<https://karbonhq.wistia.com/medias/h2w6jr1lrm>
- **Best Practices: Automation (9 min):**
<https://karbonhq.wistia.com/medias/m76gpl6w10>



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Advisory

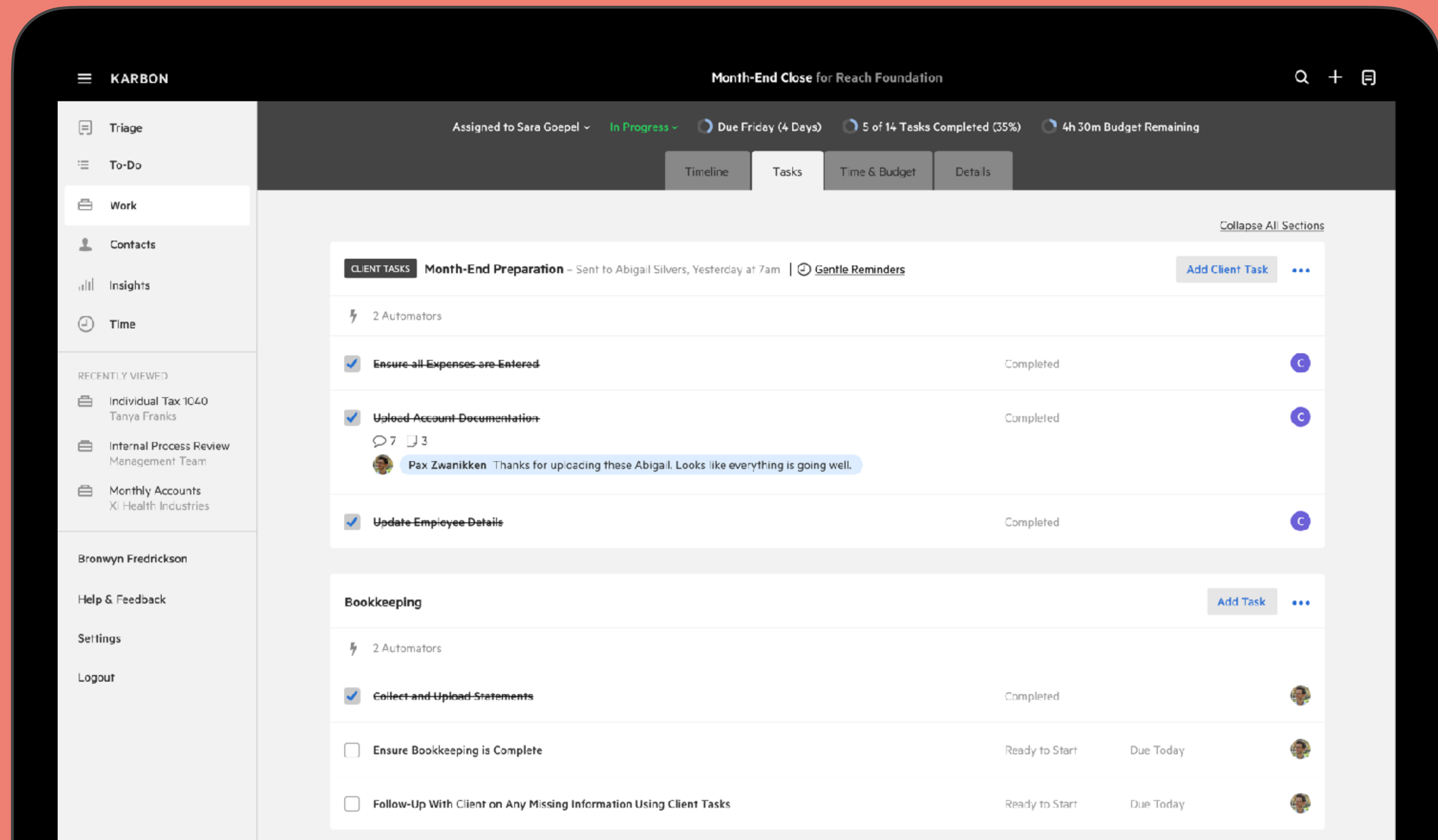
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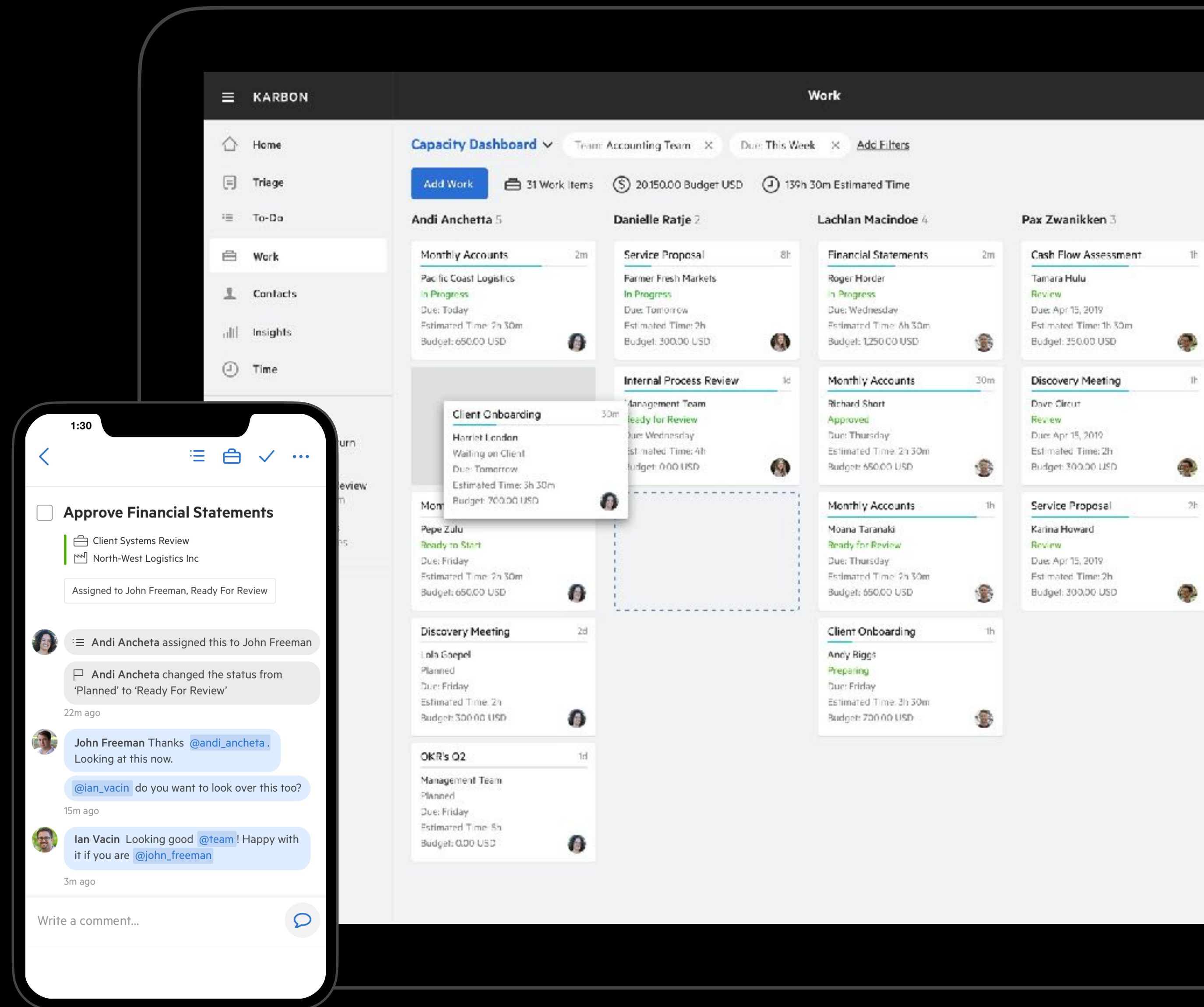
Questions?



Work Management Software *for* Accounting Firms

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GET STARTED



Thank you

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