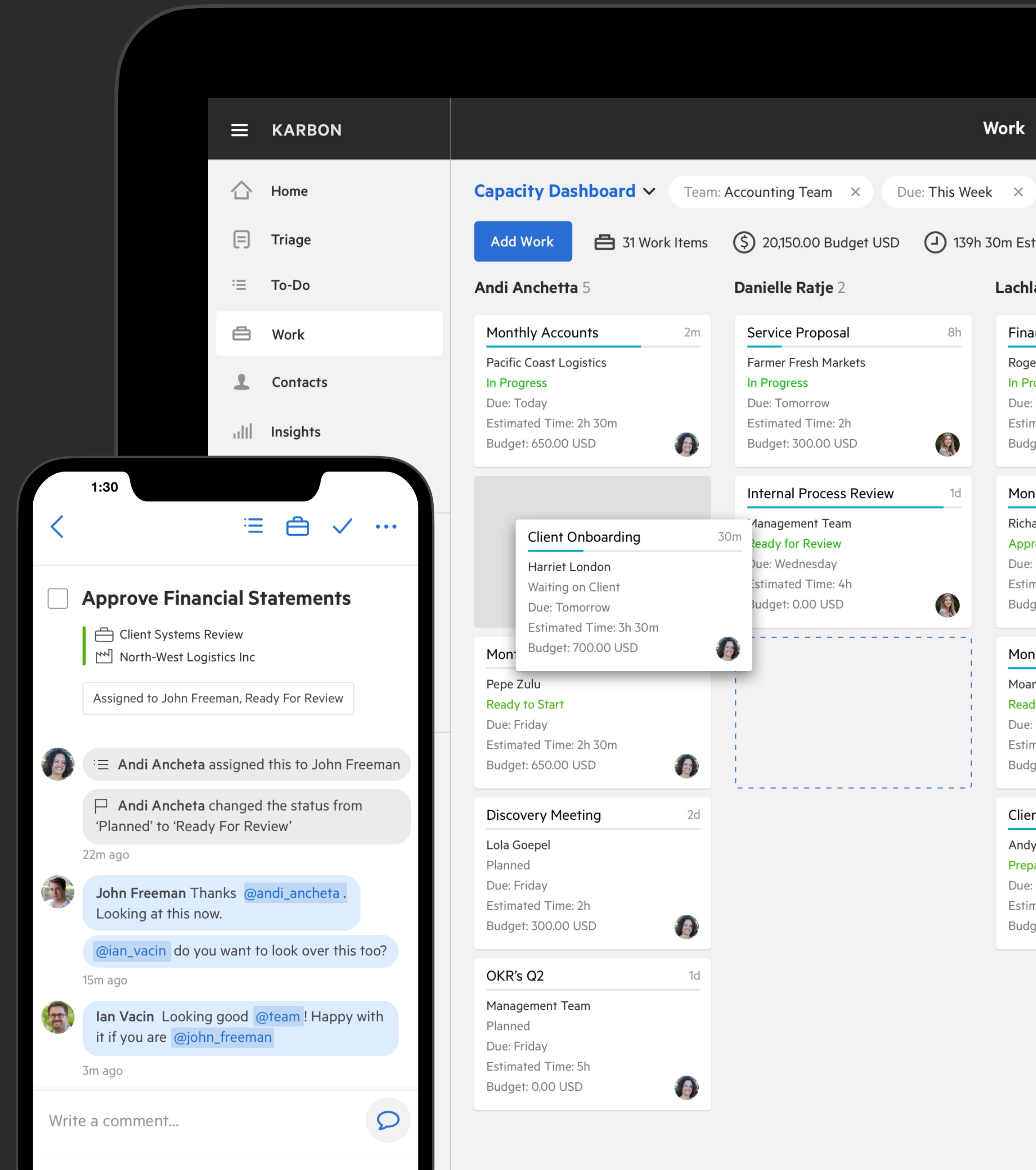




# Automating your workflow in Karbon

karbonhq.com



# Meet your hosts

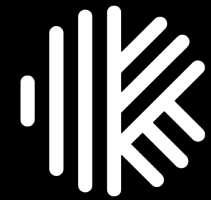


**Jake Lyman**  
Karbon Advisor



- 1. Close any open apps**
- 2. Ask and we'll answer**

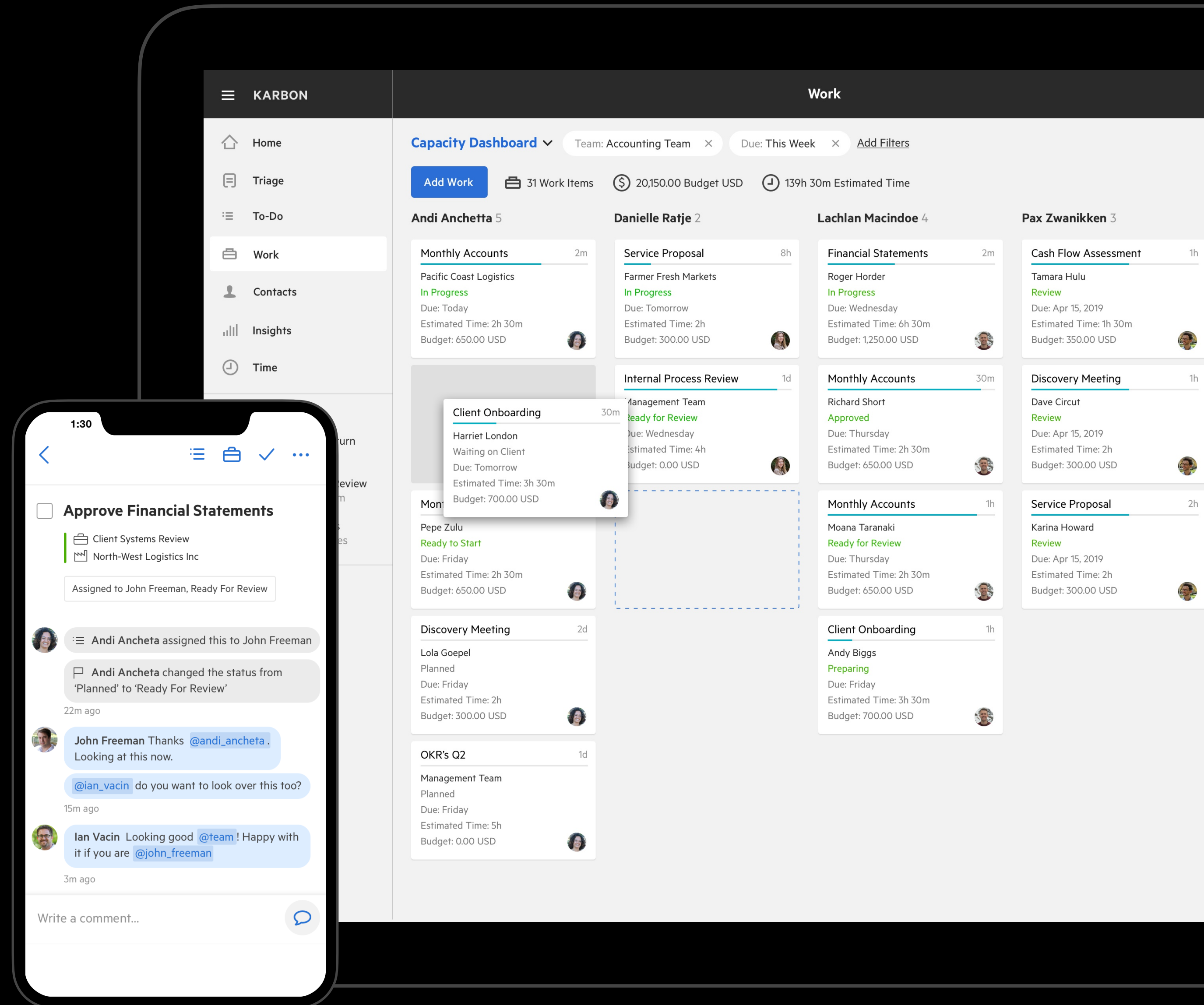




# Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED



# Poll



# Why automate your workflow?

- Be more efficient with tasks that add less value
- Improve reporting and accuracy of data to improve critical decision-making
- Ensure your team knows what to work on and when



# Automating workflow in Karbon

- Standardize your processes with **templates**
- Bring clients into your workflow using **Client Tasks**
- Use **auto-reminders** to handle the client chase
- Create **automators** to trigger updates
- Schedule **recurring work** creation for your clients
- Create **customized dashboards** to get a bird's-eye view of workflows



# Demo



# Questions



# Thank you

Get started at [karbonhq.com](https://karbonhq.com)

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