



Managing your sensitive data in Karbon

Your hosts



Lachlan Macindoe
Head of Marketing



Sara Goepel
Head of Product

- 1. Permissions**
- 2. Email sharing**
- 3. Conversations**
- 4. Privacy**
- 5. Demonstration + questions**

User settings

- Avatar image
- Job Title, Job Roles, Teams, Email, Phone, Social profiles
- User permissions, email sharing preferences
- Email signature

Edit email signature

Lachlan Macindoe

Head of Marketing

[Karbon](#)

lachlan@karbonhq.com

This email has been composed using Karbon, which is made with love in Sausalito, California.

B

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A⁺

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🖼️

☐ Append signatures to replies as well as new emails from Karbon

Cancel

Save

Lachlan Macindoe (@lachlan_macindoe)



Job Title

Head of Marketing

Edit

Job Roles

Marketing


Teams


Management Team, Marketing Team, Marketing website

Email

lachlan@karbonhq.com

Social Profiles

 in/lachlan-macindoe-047b7a30

 karbonhq

User Permissions

Admin

Preferences

Auto share email from contacts ?

Email signature


☒

Edit

User Permissions

- **Admin:** Access to Settings & data exports
- **Standard:** No access to Settings or data exports
- **Restricted:** Very limited access

Ian Vacin (@ian_vacin)



Profile Edit

Add your job title & contact details.

Teams




Bookkeeping Team

Email

ian.vacin.ic@gmail.com

User Permissions

Admin

Colleagues				
Colleagues Teams Job Roles				
Invite colleague				
COLLEAGUE	ROLES	TEAMS	EMAIL SHARING	PERMISSIONS
 Anthony Exchange		Business advisory B		Restricted
 Chris Springsteen		Business advisory B, Tax		Admin
 Christian		Offshore		Standard

Triage 24

To-do

Work

Contacts

RECENTLY VIEWED

Monthly Accounting w/ C...
Wonka Industries

Monthly Accounting
Acme Corporation

Monthly Accounting
Freds Donuts

Drafts 0

Sent

Low Priority

Cleared

Insights

Settings

Frank Abernathy

Help & Feedback

Log Out

What can restricted users see and do?

- Their own To-do list
- Contacts they are on the client team for
- Work they are on the work team for
- Global search only shows their own emails, emails on timelines they have access to, and work and contacts they have access to
- No access to Settings or Insights
- Can only create work for clients they have access to
- Can create contacts (they are put on team and get access)

1. Permissions
2. Email sharing
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4. Privacy

User Permissions

☒ Admin

Preferences

☒ Auto share email from contacts ?

With 'Auto share' turned on, your email communication will be automatically placed on the timeline of any new contact added to Karbon. Sharing rules can be adjusted on individual contacts where sharing is not desired.

Frank Abernathy

Accountant, Bookkeeper, Client Manager, Operations Manager

Ian Vacin

Bookkeeper, Client Manager, Operations Manager

Lachlan Macindoe

Accountant, Bookkeeper, Client Manager, Operations Manager

Pax Zwanikken

INVITE PENDING

Tax

Richard Snell

INVITE PENDING

Accountant, Bookkeeper, Client Manager, Operations Manager

Sara Goepel

Partner

Accountant, Bookkeeper, Client Manager, Operations Manager

Scott Gerdzunas

Accountant, Bookkeeper, Client Manager, Operations Manager

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

Abigail Silvers (Adam & Smith Consulting & 1 more)

Timeline

Work

Details

Some of your email communication with Abigail Silvers is not currently shared on their timeline. [Change](#)

Post a note

Send an email

This week

[1 colleague sharing_email from Abigail Silvers](#)

Abigail Silvers → Andi Ancheta in Directorship

Wednesday, 9:56am

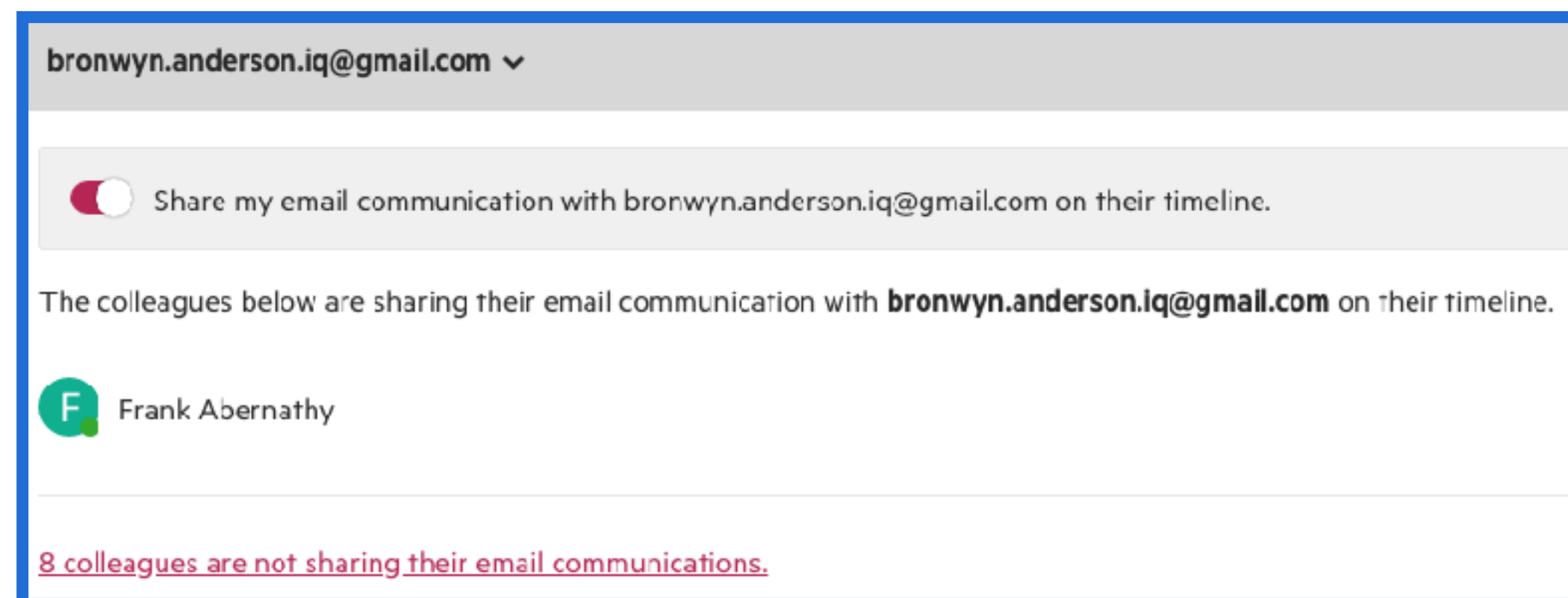
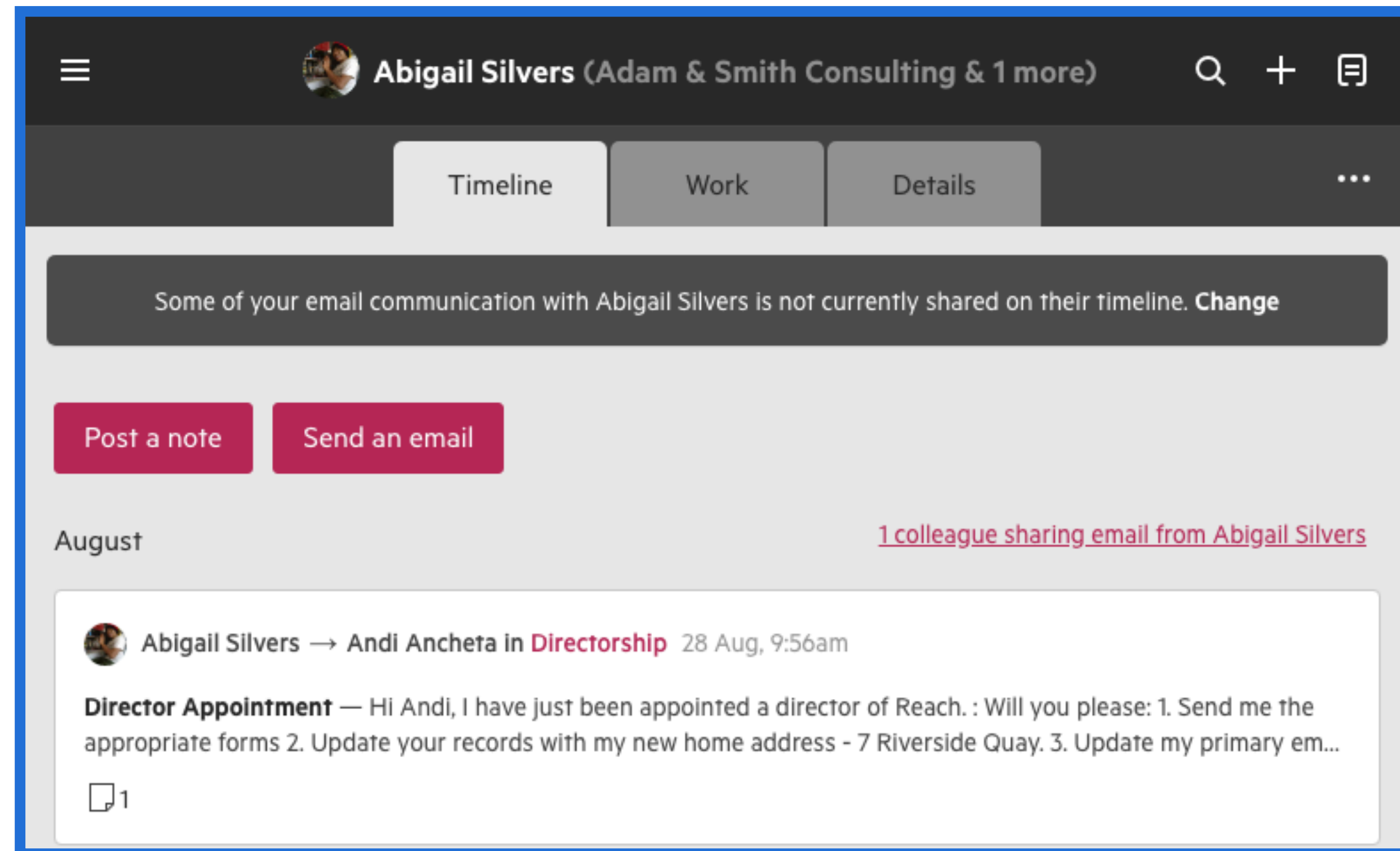
Director Appointment

Hi Andi, I have just been appointed a director of Reach. : Will you please: 1. Send me the appropriate forms 2. Update your records with my new home address - 7 Riverside Quay. 3. Update my primary email address to abigail@reachfoundation.com See attached and let me know if you have any questions or if you need any other information from me Thanks, Abigail.

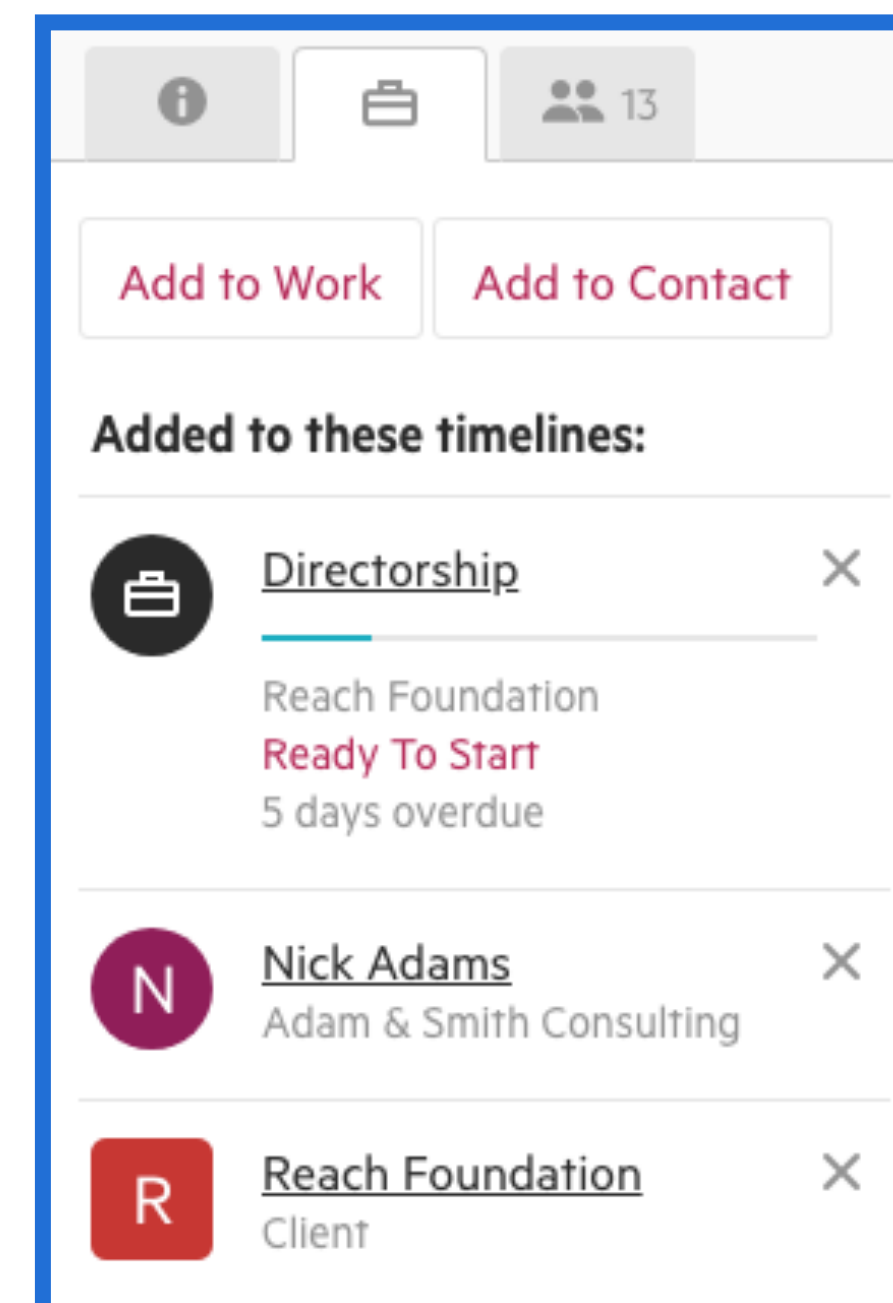
Sharing of emails

- **Sharing vs. Privacy:** Sharing is for comms; Privacy is for contacts & work.
- **Benefits:** Makes it easy for anyone to help a company contact
- **Restriction:** Can only be set by the user
- **Toggle:** Main Menu > Edit profile > Preferences
- **Auto-share:** Automatically adds emails to timelines when the contact has been added to Karbon.
- **Selectively share:** Specify per contact whether to share emails.
- **Add share:** Toggle on from the new client modal window.
- **Modify share:** If no auto-sharing, add sharing from client banners.

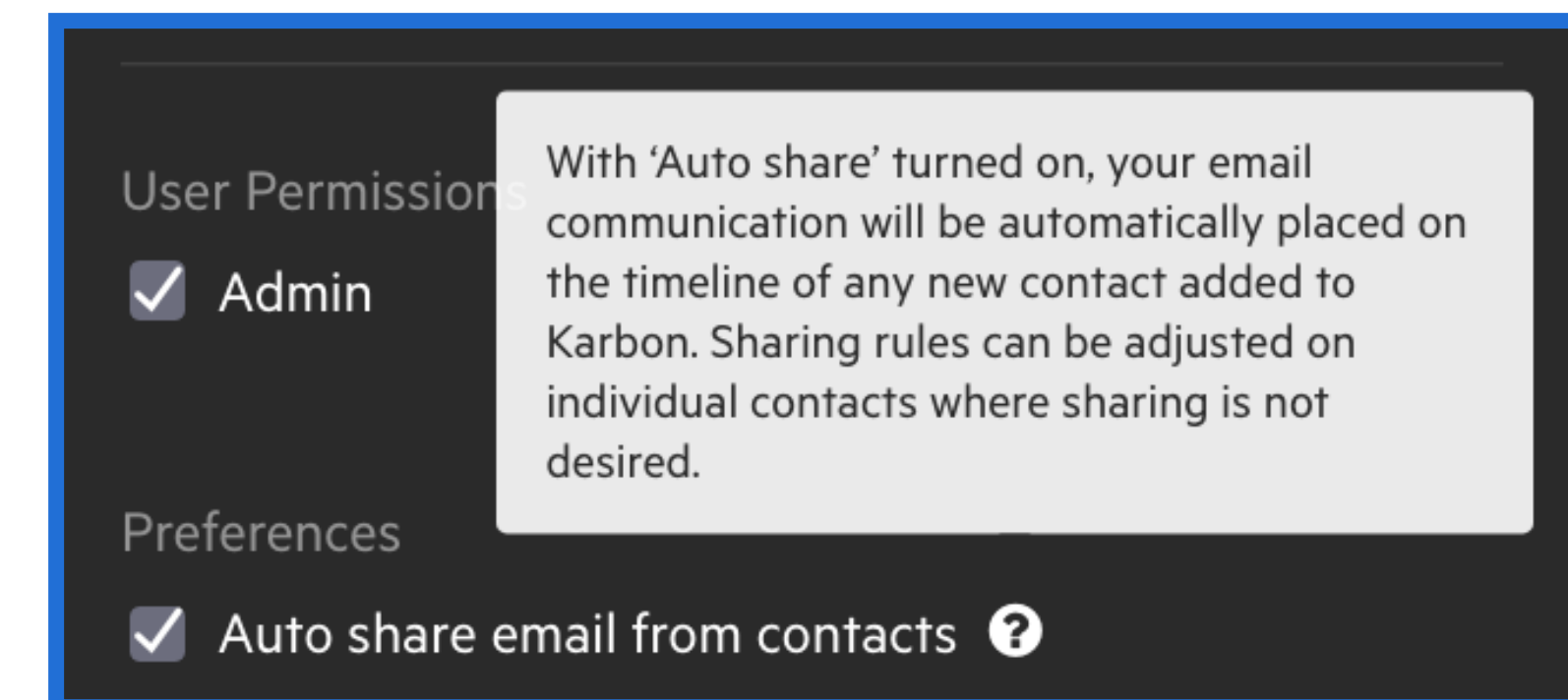
Add/ remove sharing



- **Contact:** Use grey bar to add for contact. Click link to toggle off/on/manage.
- **Email:** Use timeline tray to add/remove a single comm from related timelines.



- **Overall:** Set for all comms via User profile.



Frequently Asked Questions

- Can I remove a single message from a conversation on a timeline?
- Can I remove a colleague from an email conversation? How about an email?
- If I mention/assign a colleague on/an email, can they access the entire email?
- What happens if an email is on a private and a public contact/work timeline?
- Why can I see colleagues who have bcc:d in emails?
- What emails can I see in Global Search?
- Will a colleague see my private emails?
- How do I handle receiving private and public conversations from a contact?

This email has been added to private and public timelines. Remove this email from the public timelines if its content is sensitive.

1. Permissions
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Conversation splitting and access

- **Why:** Ensure privacy of comms
- **What happens when...**
 - Removing people from email
 - Forwarding
 - CC:
 - BCC:
 - Mention colleague
 - Other cases


Send as new email conversation

You have removed a colleague from your reply but they still have access to the conversation.


If you don't want the removed colleague to see your reply, send this email as the start of a new conversation.


[Cancel](#) [Send](#) [Send As New](#)



Exceeding Tax filing Deadline
[Add to work](#)


 Frederick Wallace · 9 Apr, 3:13pm · 1

Hi Erin, I have reconciled all my transactions in Xero and I think we are good to go on the tax

 Erin Jamison forwarded this email, so a [new conversation](#) was created. Just now

 [Reply To All](#)

 [Comment](#)

1. Permissions
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4. Privacy

Primer on Privacy

- **Privacy:** Starts at the contact
- **Levels of privacy**
 - Public: Available for all
 - Private: Visible, but locked
 - Hidden: Not visible/searchable
- **Differing teams**
 - Client team
 - Work team
- **Expansion of the client/work team:**
 - Comment via @ mention
 - Assign (work, note, email or task)
 - Place on client/work team

Privacy level for Abigail Silvers

This contact's details, work and communication are accessible to:

- ☒ **Public:** Everyone at 1 - CA Demo.
- ☐ **Private:** Just the client team. Colleagues without access can still see the contact and work names but not details or communication.
- ☐ **Hidden:** Just the client team. Colleagues without access will not know the contact or work exists in Karbon.

Client vs. work team

- **Compare:** Client team < work team.
- **Contractor:** Invite to work items only on Private clients.

Client team

Client Owner

Carla Caldwell

Client Manager

Erin Jamison

Other Colleagues

Any other colleagues that are regularly involved in dealing with the client and their work.

Andi Ancheta

Ian Vacin

Work team

Client Owner

Carla Caldwell

h

m

Est. Time

Client Manager

Erin Jamison

h

m

Est. Time

Assigned To

Andi Ancheta

h

m

Est. Time

[Change Assignee](#)

Work Team

Colleagues assigned tasks, emails or notes relating to this work are automatically added to the work team. You can also manually add colleagues to the work team.

Ian Vacin

h

m

Est. Time

[Remove](#)

[Add Colleagues/Teams](#)

Total Estimated Time

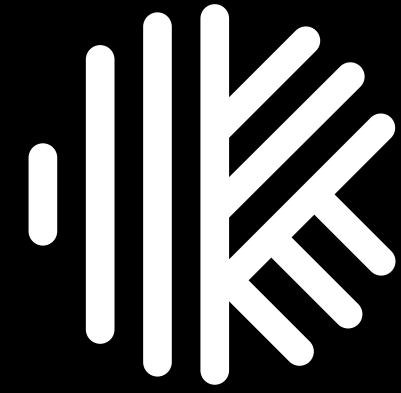
0h 0m

Cancel

Save

Demonstration

Questions?



Thank you

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