



**The Karbon work  
dashboards that provide  
visibility, clarity, & control**

[karbonhq.com](https://karbonhq.com)





# Learning objectives

- ✓ Understand the role Karbon dashboards play in workflow management.
- ✓ Explore the most common dashboards and how to improve them.
- ✓ Implement advanced dashboarding methods to supercharge your workflow.



*“The key with a good work view is that it should solve a specific problem. Don’t try and do too much.*

*You’re using a brush and palette to paint a picture, not a roller to paint a wall.”*

— Evan Hall, Head of Education and Academy, Karbon

# Meet your hosts



**Kylene O'Connor Carse**

BWCO CPAs  
Partner



**Ian Vacin**

Karbon  
Chief Customer Officer





# Kylene Carse, CPA



**COMPANY:** BWCO CPAs

**ROLES:** Partner – President - Innovator

**FIRM FACTS:**

- Founded in 2002
- Women Owned

## **2020 BIGGEST ACCOMPLISHMENT:**

We successfully transitioned our office to a completely virtual firm two days prior to our shutdown in San Antonio, and have stayed virtual the remainder of the year, while using our physical office as a document drop off station/scan concierge service. And we also successfully migrated to a new (Karbon) cloud service to make us even more efficient and streamlined with our services and client offerings.

[www.neighborhoodcpa.com](http://www.neighborhoodcpa.com)

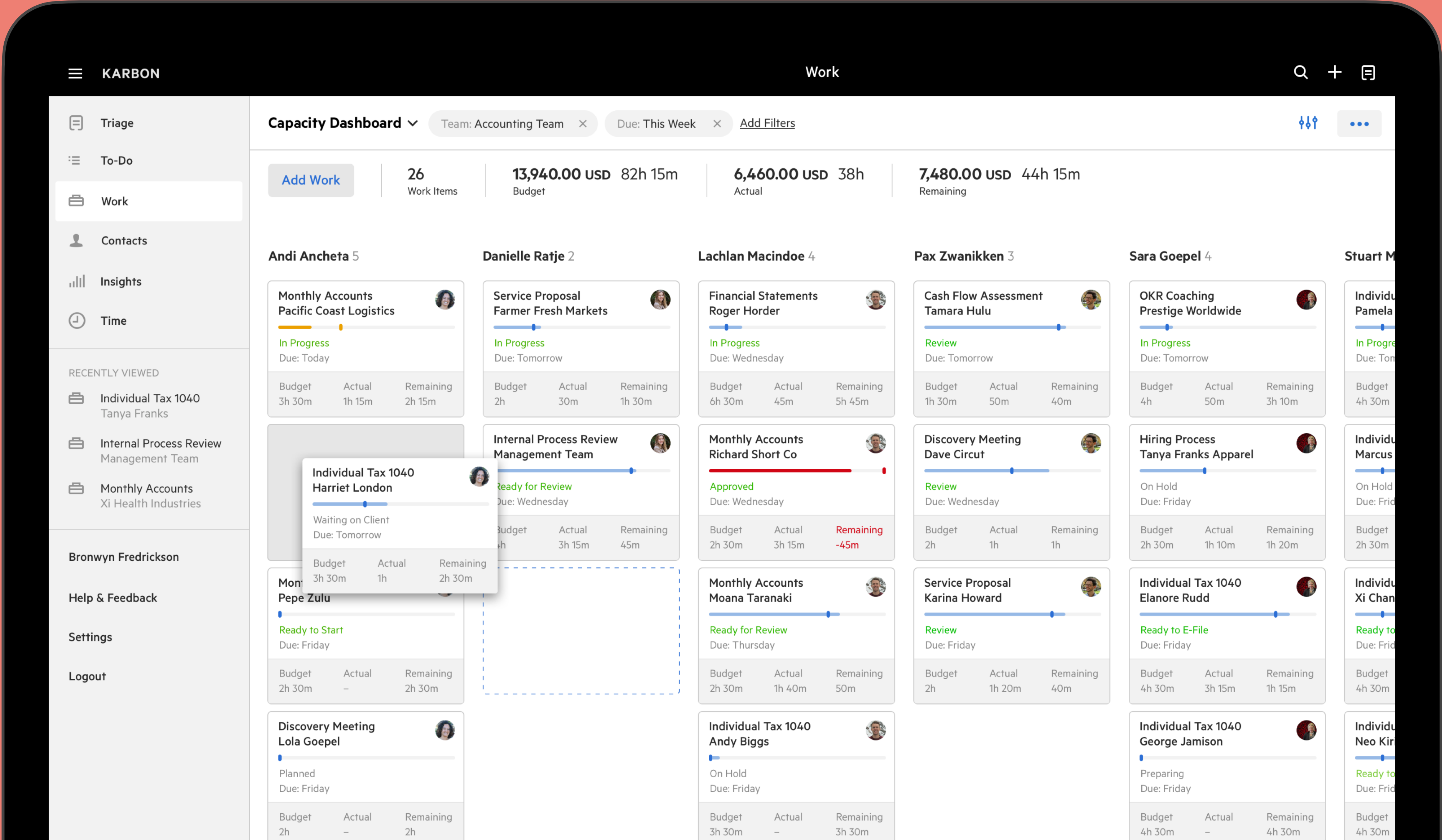
[karbonhq.com/customer-stories/bwco](https://karbonhq.com/customer-stories/bwco)



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



Gain unparalleled visibility over your team's work and progress.

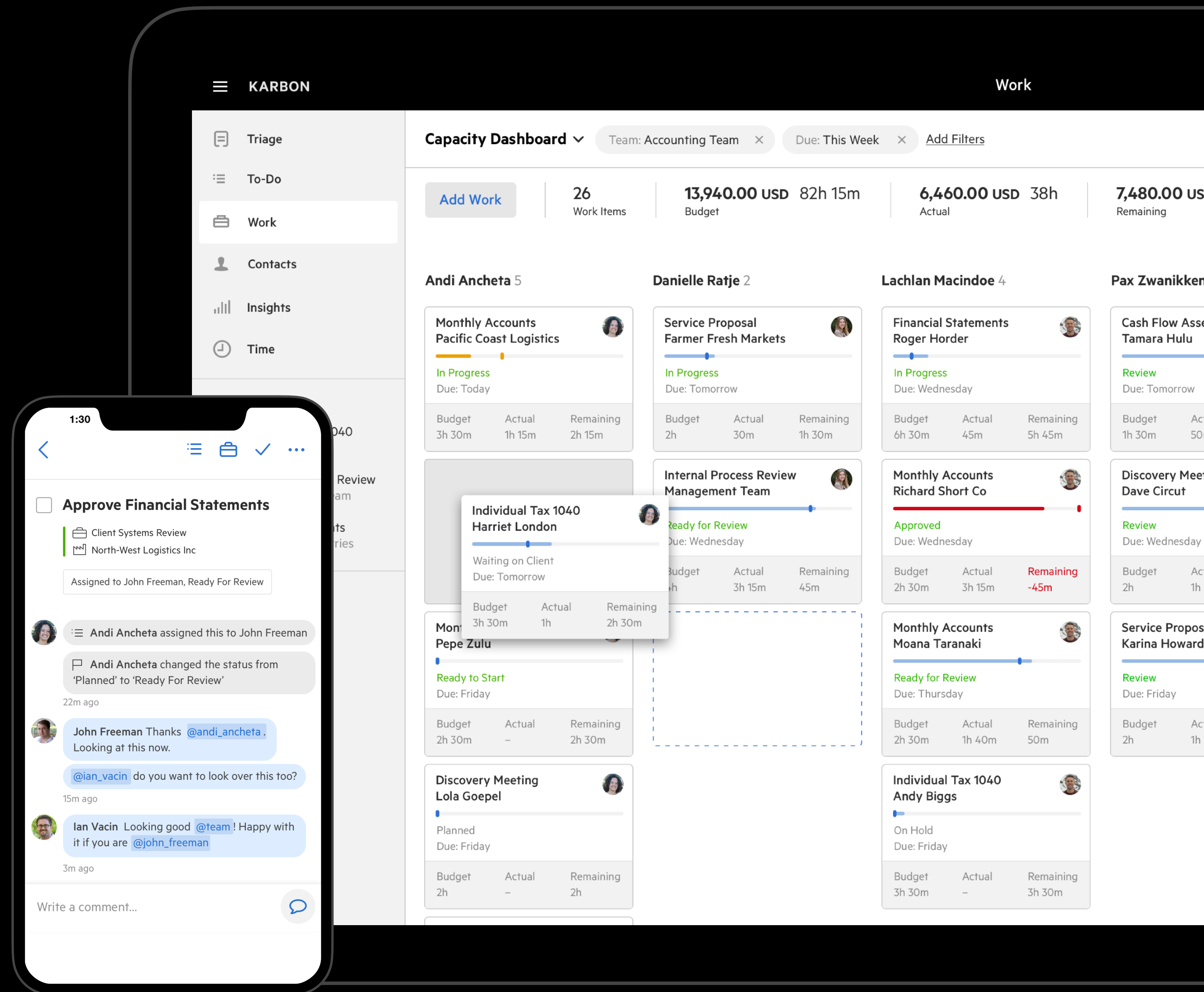




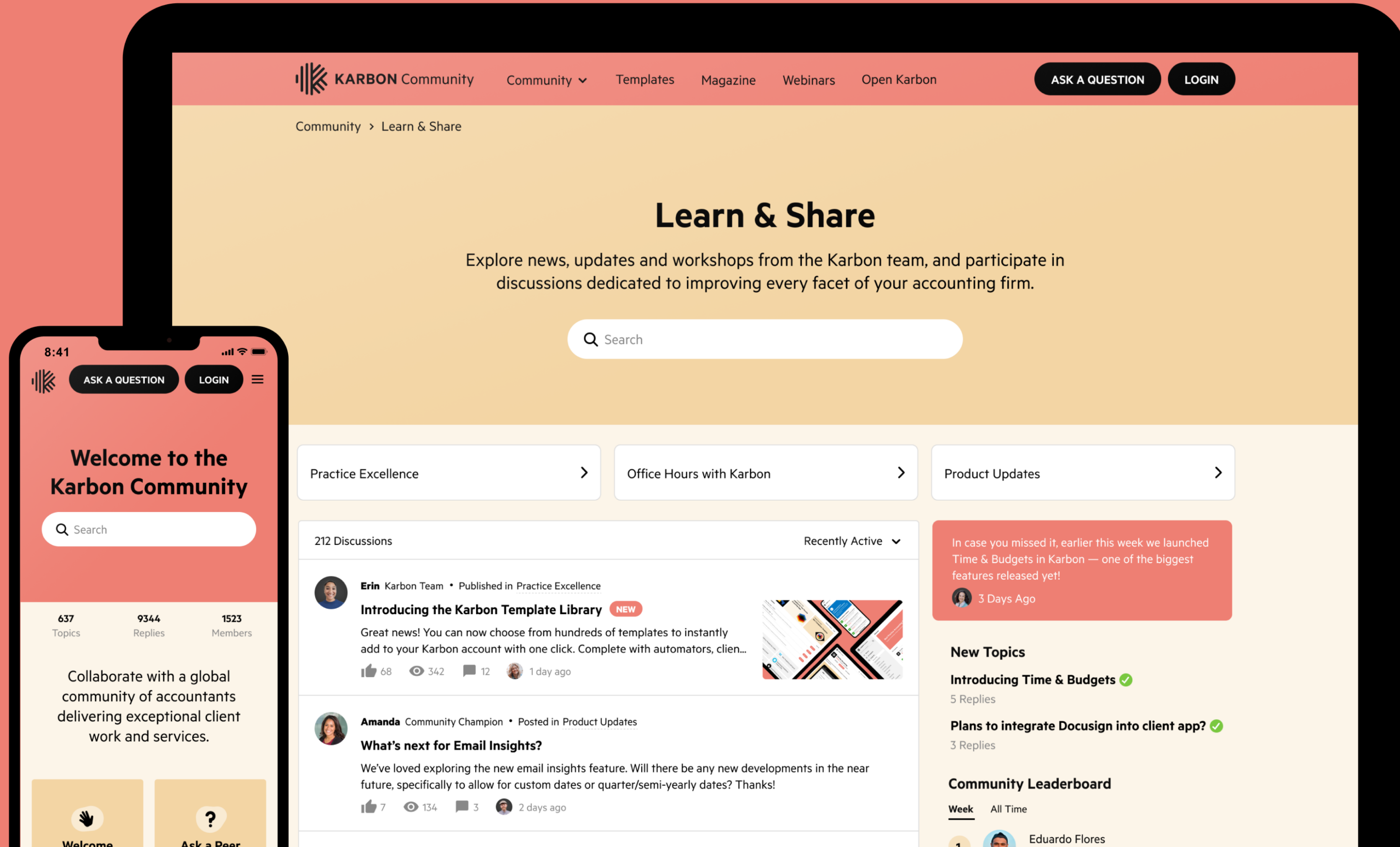
# Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED



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- 1. Recipe to success**
- 2. Top saved views**
- 3. Kylene's examples**
- 4. Dashboards to consider**
- 5. Why to share a saved view**

# The steps to getting the visibility you want

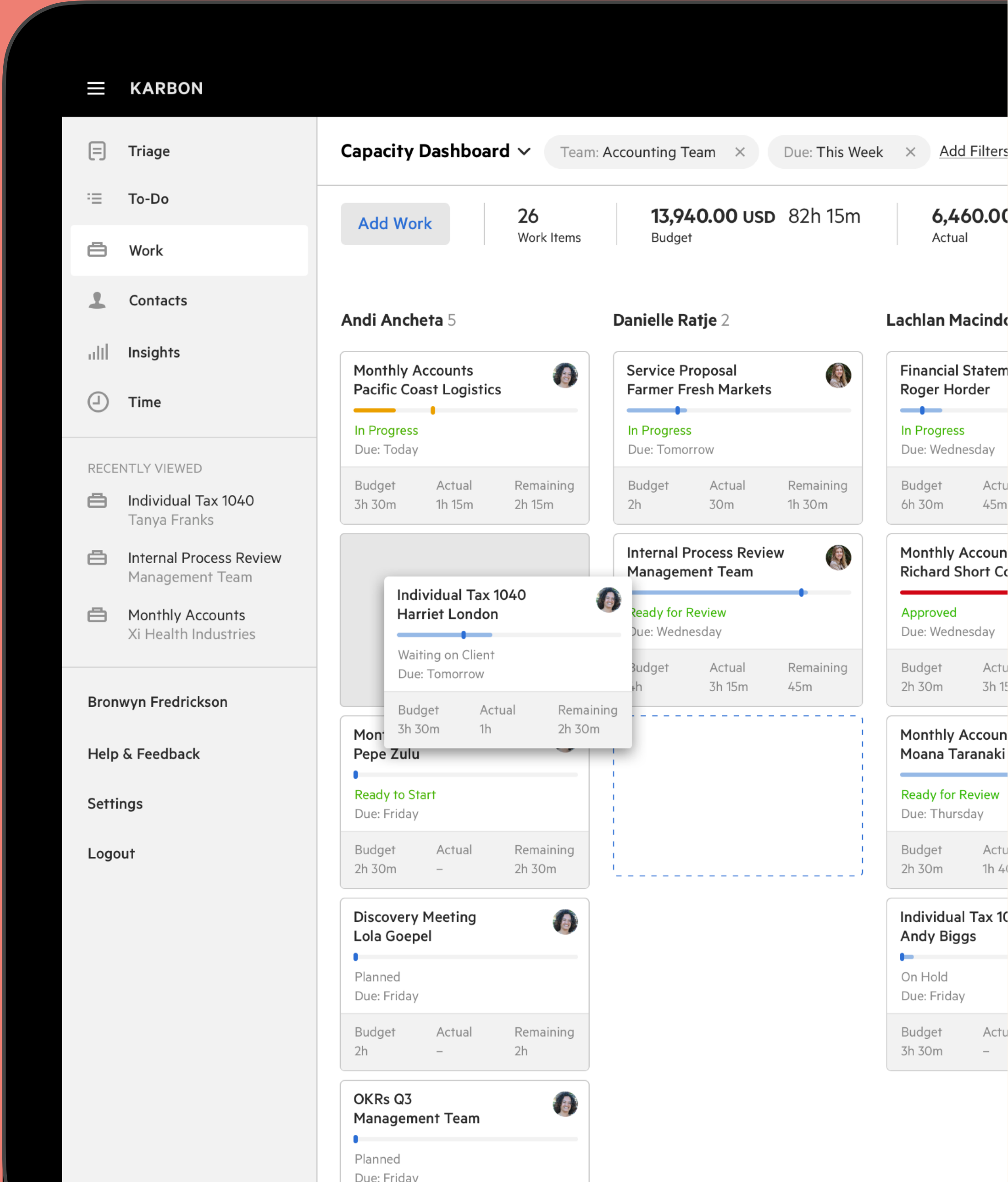
1. **Ask:** Ask yourself the business question you want to have answered.
2. **Filter:** Use the filters to narrow down your data to see to what matters.
3. **View:** Use the View By to organize the display to what's meaningful.
4. **Save:** If what you want, Save as a new view. If not, refactor what you see.
5. **Explore:** Review the data to determine if it is what you expect.
6. **Share:** Collaborate with colleagues knowing you're looking at the same data.
7. **Recall:** Use the drop-down menu to select and view when needed.

**Pro-Tip:** Use a placeholder filter to allow for easy toggling between different views as needed (e.g. “Assignee” to review each colleague)

# Ask: Example questions to ask yourself

1. Is work on track to complete on time and within budget?
2. What status is work in? Has anything stalled? Progressing per usual?
3. What is on each employee's plate?
4. Who is overwhelmed and who can I re-balance work between?
5. What is the “big picture” of ongoing work for specific client(s)?
6. What is remaining this week for my team? What can't be finished?
7. What is the value of my book of business? What work needs attention?

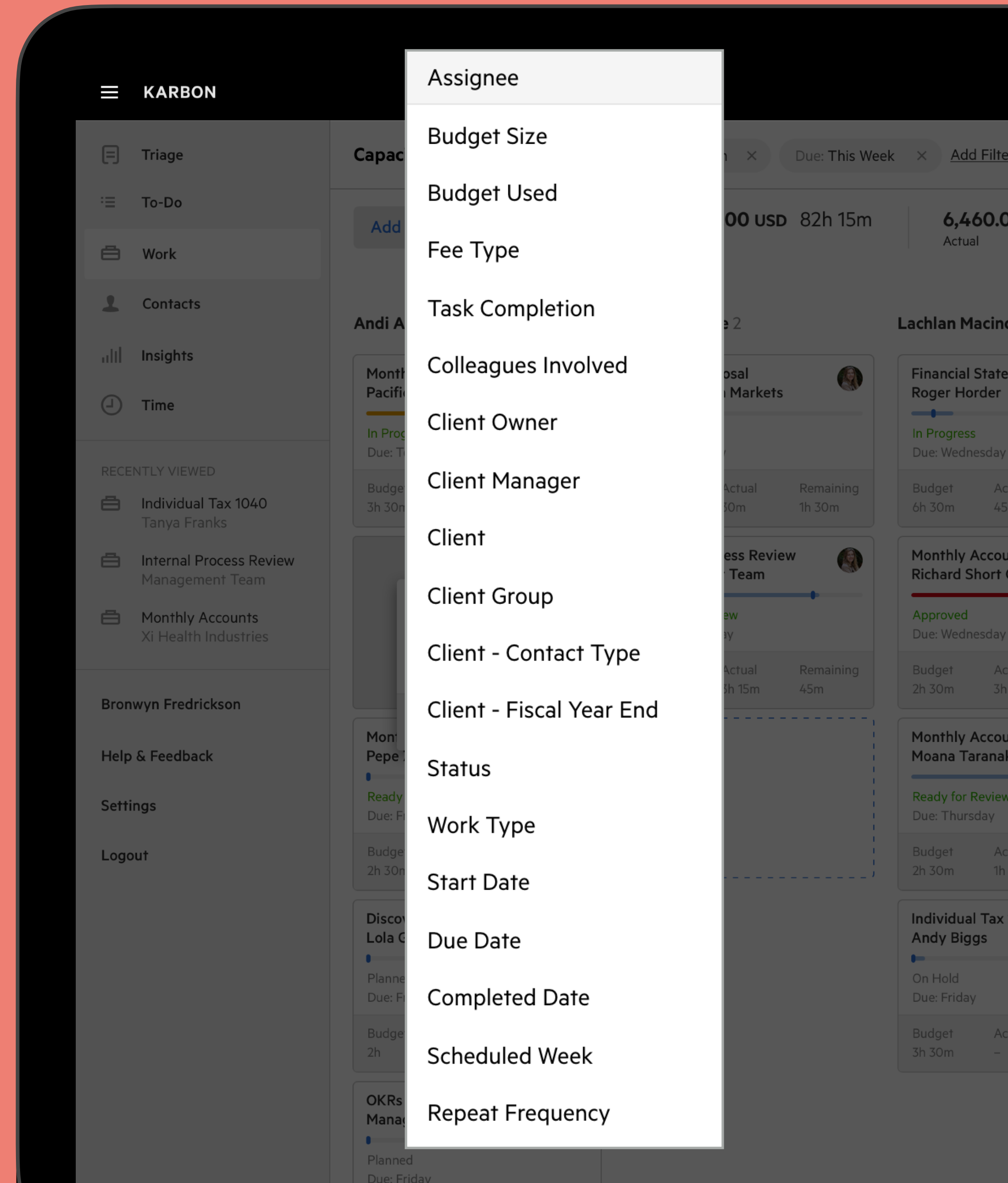




# Filters

## Purpose:

Narrow down your data to see what matters.



# Filters

## Purpose:

Narrow down your data to see what matters.

## Top used (in order):

- Status
- Assignee
- Work Type
- Due Date
- Start Date
- Client Owner
- Client Manager
- Colleagues Involved

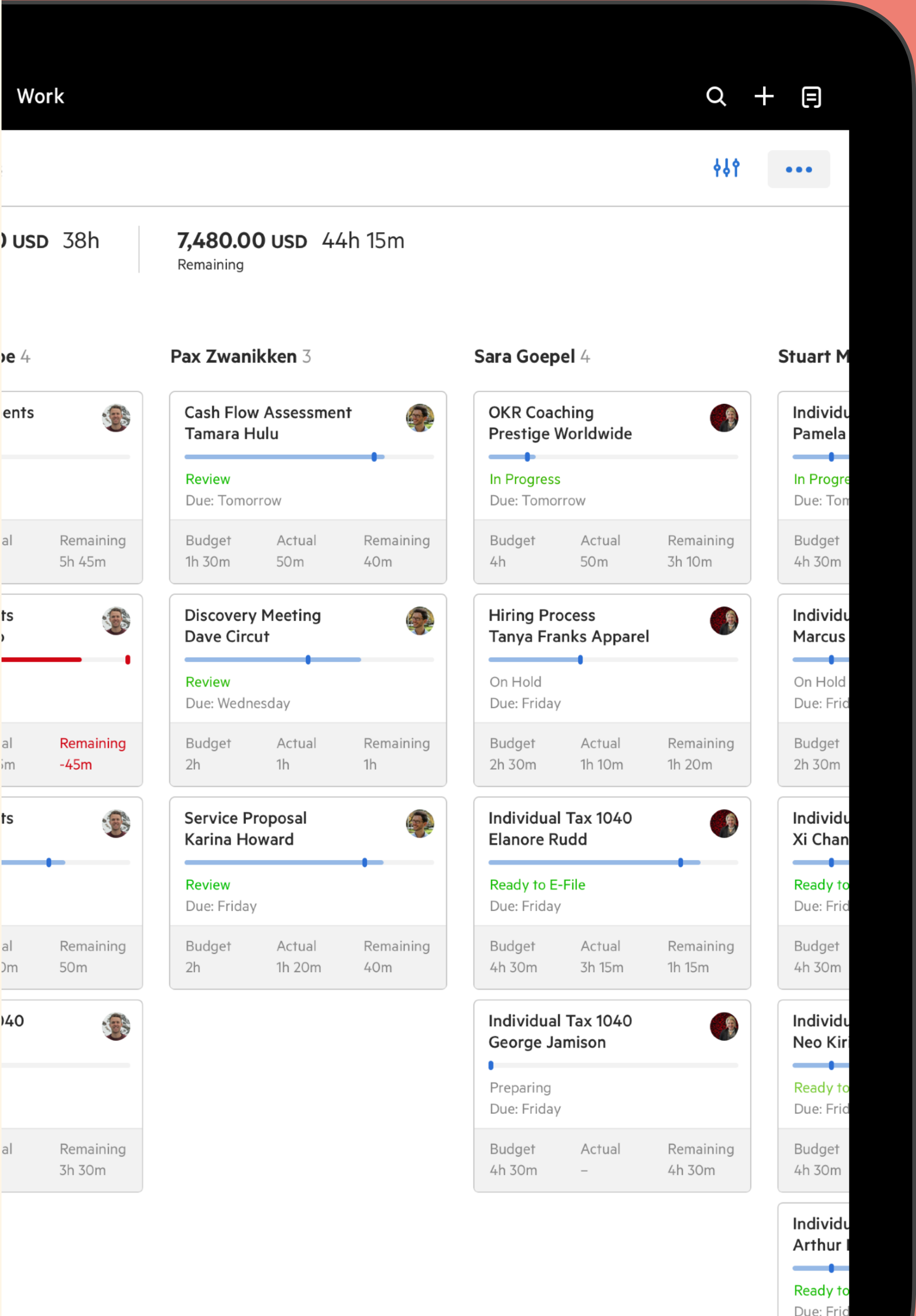
## Stats:

- 1 filter: 79%
- 2 filters: 11%
- 3 filters: 7%
- 4 filters: 2%

# Sort by

## Purpose:

To organize and display the data in a way that’s meaningful to you.





# Sort by

## Purpose:

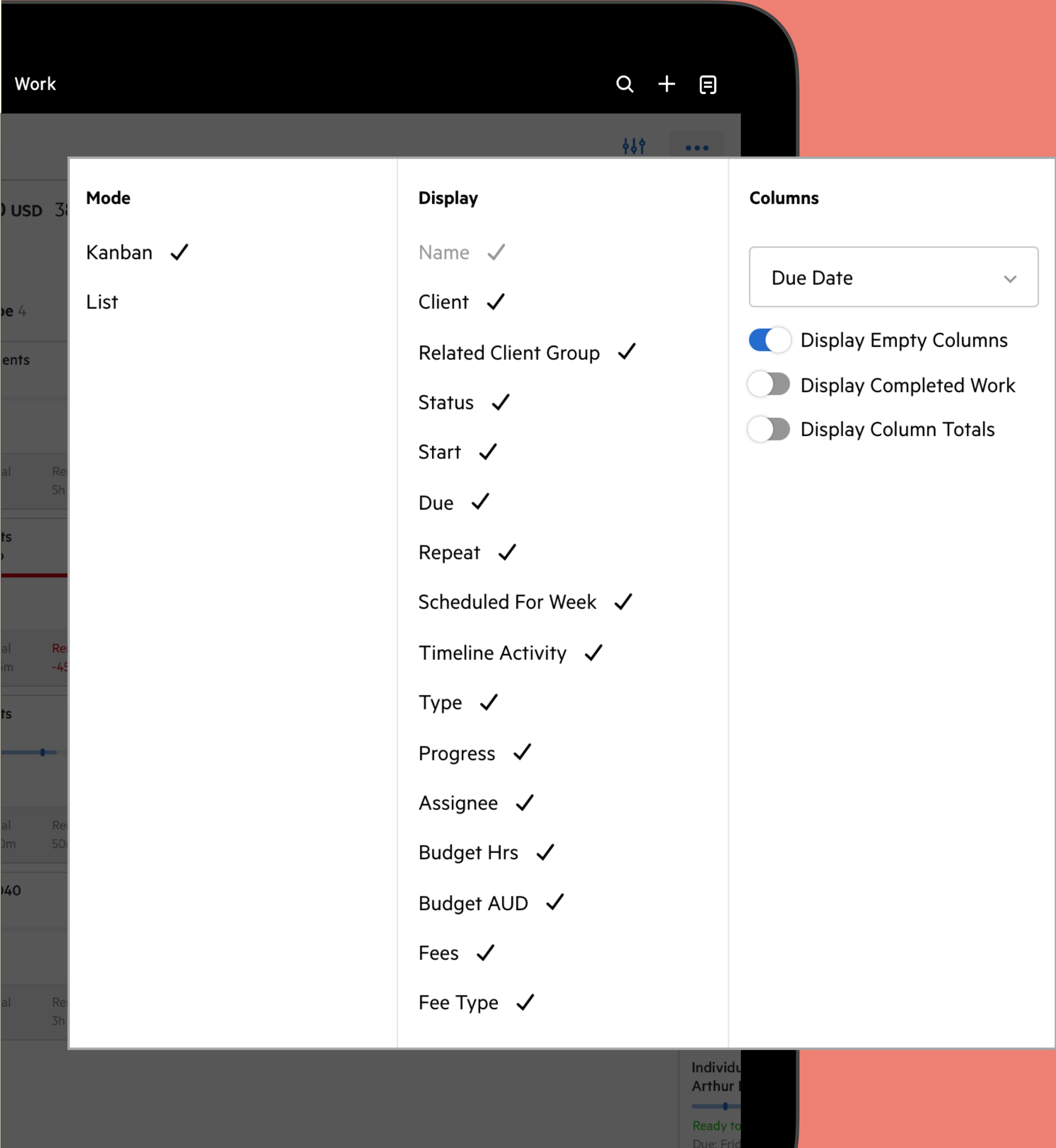
To organize and display the data in a way that’s meaningful to you.

## Top “Sort By” options:

- Due Date
- Status
- Start Date
- Assigned
- Client Group

## Stats:

- Kanban (73%; majority as single filter)
- List (27%; typically for two filters)
- Display empty columns: 13%
- Display completed work: 22%
- Display column totals: 18%



**Is Karbon setup to capture this data?**

**Work status**

**Work type**

**Contact type**

**Budgets**

**Client owner / manager**

# Kanban or List View?

Graphical (77%) vs. spreadsheet (23%)

**How many filters?**

**As many as needed to answer the question.**



help.karbonhq.com/en/articles/5570159-building-custom-work-views-to-save-and-share



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## Building custom work views to save and share

Whether in Kanban or List mode, work view dashboards help you quickly check in on the information you need.



Written by Evan Hall  
Updated yesterday

Work views in Karbon should answer specific questions and solve specific problems. Don't feel like you need one view that solves for everything all at once. Build focused views and save them for [quick one-click reference](#) later.

How to start:

1. Ask: Ask yourself the business question you want to have answered.
2. Filter: Use the [filters](#) to narrow down your data to see to what matters.
3. View: Use the View By to [organize](#) the display to what's meaningful.
4. Explore: Review the data to determine if it is what you expect.
5. Share: [Send the view](#) to colleagues to answer questions and illustrate your point.



1. Recipe to success
2. **Top saved views**
3. Kyleene's examples
4. Dashboards to consider
5. Why to share a saved view

# Work in progress

**All Work** ▾ Status: 11 Statuses ✕ [Add Filter](#)

[Add Work](#) 96 Work Items 40,273.83 CAD Budget 335h 50m 1,121.67 CAD Actual 7h 34m 39,1 Rem

**Admin Placeholder** 3 **Andi Ancheta** 10 **Carla Ca**

TEST Month-end close copy  
Test P Zimmermanp A

Prep

Started Aug 1

26 days overdue

Timeline Activity: 6w

Type: Month-end close

Repeat: Every Month

Fees: 500.00

Fee Type: Fixed Fee

Budget	Actual	Remaining
3h 45m	-	3h 45m
512.50	-	512.50

TEST Month-end close copy  
Test P Zimmermanp A

Prep

Started Sep 1

Due Monday

Timeline Activity: 6w


Type: Month-end close

Repeat: Every Month

Fees: 500.00

Fee Type: Fixed Fee

Budget	Actual	Remaining
3h 45m	-	3h 45m
512.50	-	512.50

Month-end close Jul 2021  
EH Brewing 

Prep

Started Jul 30

33 days overdue

Timeline Activity: 19w

Type: Month-end close

Repeat: Every Month

Fees: 500.00

Fee Type: Fixed Fee

Budget	Actual	Remaining
3h 45m	-	3h 45m
512.50	-	512.50

Month-end close Jul 2021  
Edmond Industries ...

Prep

Started Jul 30

33 days overdue

Timeline Activity: 19w

Type: Month-end close

Repeat: Every Month

Fees: 500.00

Fee Type: Fixed Fee

Budget	Actual	Remaining
-	-	-
-	-	-

Tax: Bu  
Reliable

Follow-  
Started

15 days

Timelin

Type: T

Repeat:

Fees: N

Fee Typ

Budget
7h 0m
550.00

Account  
for Aug  
AAA A

Prep

Started

Due tod

Timelin

Type: M

Repeat:

Fees: 50

Fee Typ

Budget
3h 45m

## Purpose:

Identify potential bottlenecks in high volume steps.

## Recipe:

### Filters:

- Filter #1: Status

### View by:

- Mode: Kanban
- Columns: Sort by Assignee

## Pro-Tip / Notes:

- Further filter by due date for urgency.



# My work

## Purpose:

Review work assigned to me or my team.

## Recipe:

### Filters:

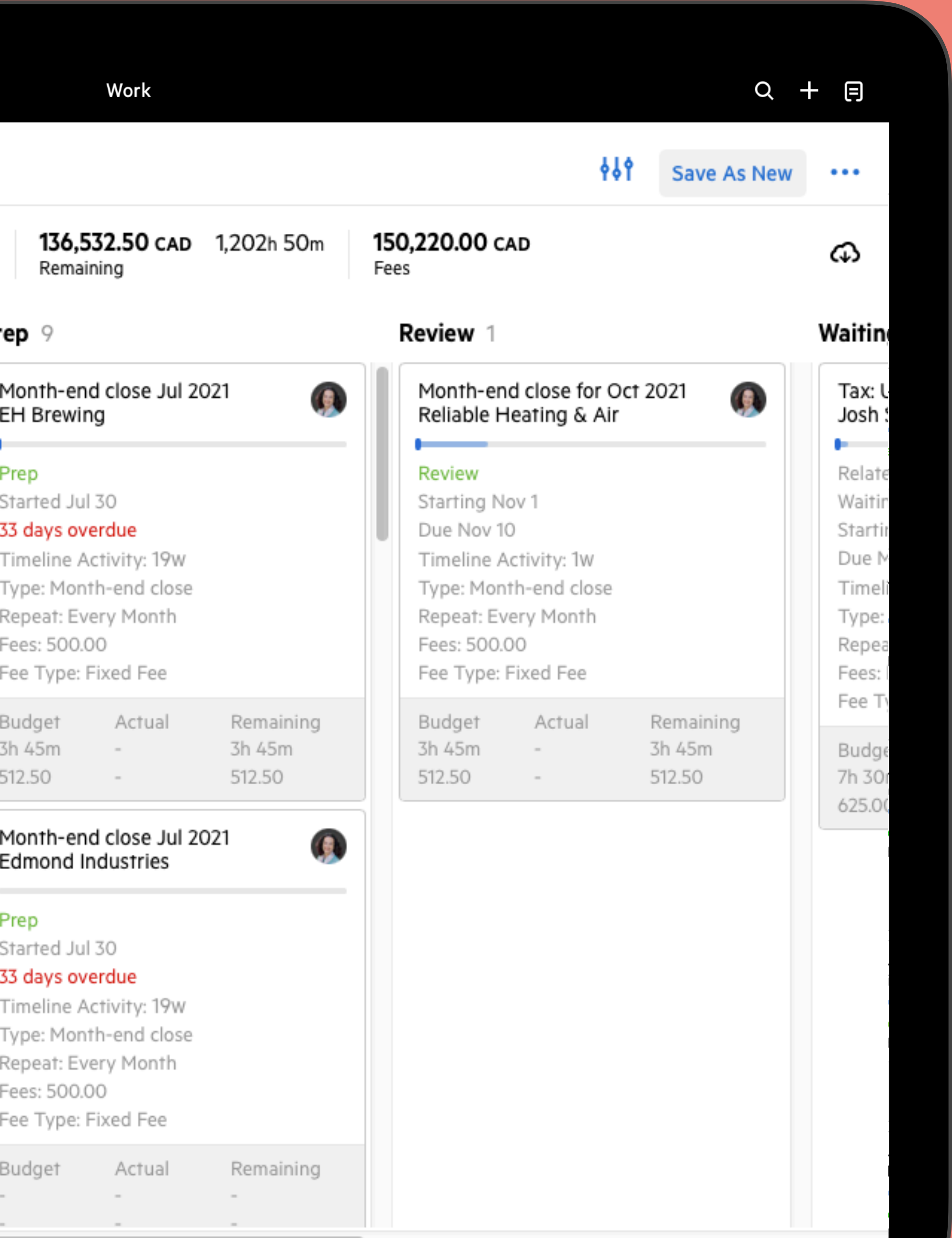
- Filter #1: Assignee (colleague or team)

### View by:

- Mode: Kanban
- Columns: Sort by Status

## Pro-Tip / Notes:

- Filter by client group to focus on key accounts.



# Slippage audit

## Purpose:

Prevent items falling through the cracks.

## Recipe:

### **Filters:**


- Filter #1: Work Type
- Filter #2: Status


### **View by:**


- Mode: Kanban
- Columns: Sort By Status or Due Date

## Pro-Tip / Notes:

- Especially helpful to watch items waiting on client.

All Work 

Work Type: Month-end close 

Status: 10 Statuses 

Add Filter

Add Work

1  
Work Item

512.50 CAD  
Budget

3h 45m


0.00 CAD  
Actual

0m

512.50 CAD  
Remaining

3h

Waiting for client 1

Month-end close Aug 2021  
CV Heating & Air

Waiting for client  
Started Sep 1  
**Due today**  
Timeline Activity: 1w  
Type: Month-end close  
Repeat: Every Month  
Fees: 500.00  
Fee Type: Fixed Fee

Budget	Actual	Remaining
3h 45m	-	3h 45m
512.50	-	512.50

# Prioritization

## Purpose:

For high volume work, identify clients with more urgency.

## Recipe:

### Filters:

- Filter #1: Status
- Filter #2: Assignee

### View by:

- Mode: List
- Columns: Sort By Due Date

## Pro-Tip / Notes:

- Try filtering by due date this week and sorting by budget remaining to catch items with hidden drags on time.

Work

1 Filter

Save As Ne

m	2,680.00 CAD Remaining	32h 55m	1,250.00 CAD Fees
RELATED CLIENT GROUP	STATUS	START	DUE ▼
-	Prep	Aug 12	Sep 30
-	Review	Sep 1	Monday
-	Prep	Sep 1	2d overdue
-	Prep	Aug 23	12d overdue
-	Prep	Aug 4	40d overdue
-	Process	Jul 28	47d overdue
-	In Progress	Apr 19	99+d overdue



# My bookkeeping

## Purpose:

Focused view on my work on specific types of work.

## Recipe:

### Filters:

- Filter #1: Work type
- Filter #2: Assignee

### View by:

- Mode: List
- Columns: Sort By Due Date or Status

## Pro-Tip / Notes:

- Filter for status: remember that List view includes completed work by default.

All Work ▾		Status: 29 Statuses ✕	Assignee: J Joe Carufe ✕	Work Type: Bookkeeping	
<a href="#">Add Work</a>		4 Work Items	400.00 CAD Budget	4h 0m Actual	0.00 CAD Remaining
NAME	CLIENT	STATUS			
Weekly Bookkeeping due 16 Jul, 2021	EH Brewing	Ready To Start			
Weekly Bookkeeping due 9 Jul, 2021	Edmond Industries	Ready To Start			
Weekly Bookkeeping due 9 Jul, 2021	Eastlake Golf Resort	Ready To Start			
Weekly Bookkeeping due 9 Jul, 2021	EH Brewing	Ready To Start			

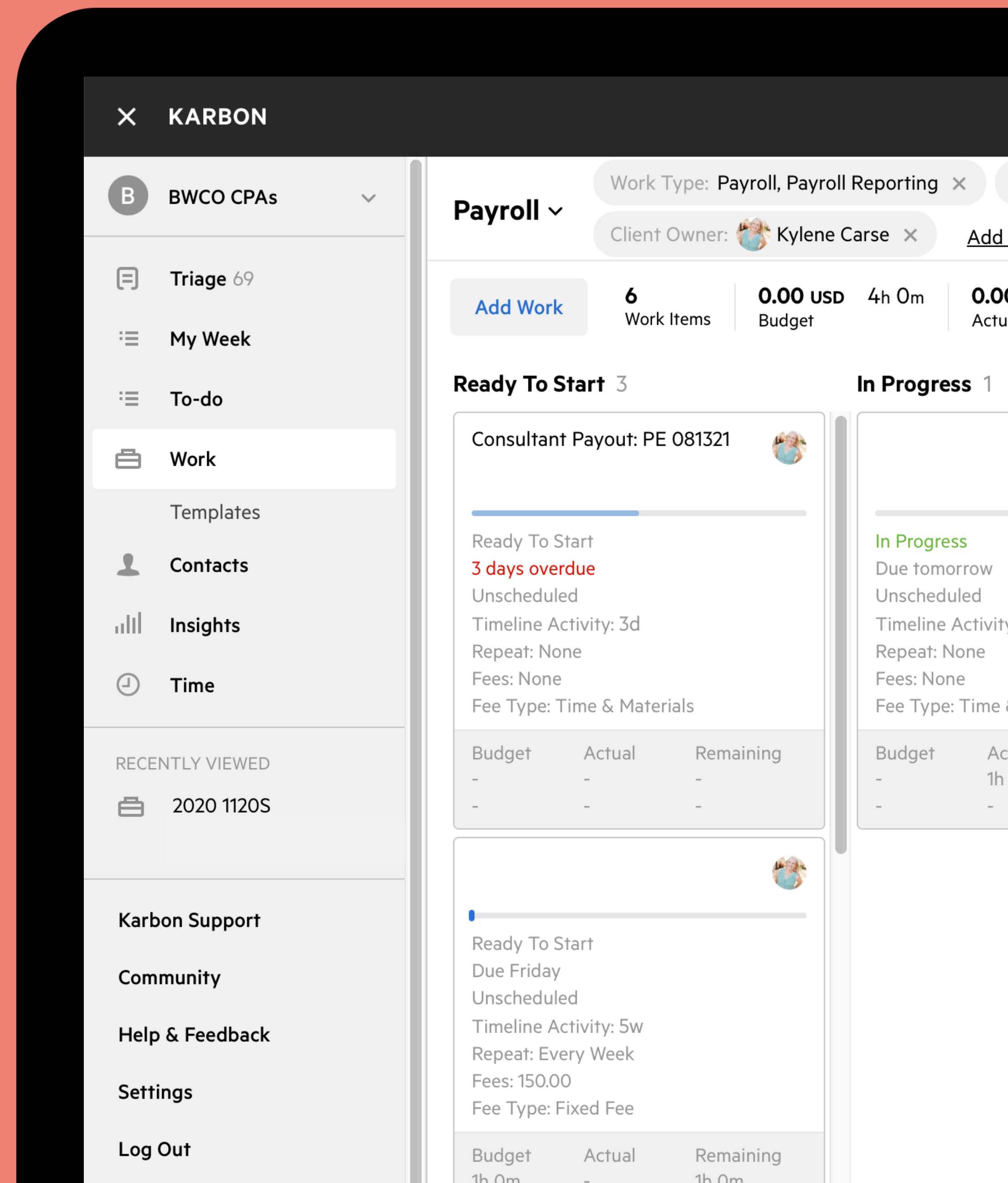
1. Recipe to success
2. Top saved views
3. **Kylene's examples**
4. Dashboards to consider
5. Why to share a saved view

*“When building views, I really try to focus on what is my purpose for this - what information am I trying to see and what is the most important factor - is it capacity by team member, is it work to be done by a due date, is it a specific type of work, etc...? Once I know this, then I modify the actual view to give me what I need, and remove information that isn't important for this view.*

*I have both lists and Kanban views - for me it just really depends on what is most important to see and then how efficiently I can see it. Also, I will often modify view as I learn new things about Karbon!”*

— Kylene O'Connor Carse, Partner, BWCO CPAs





# Payroll

## Purpose:

Quickly review the state of the work to ensure things don't fall through the cracks.

## Recipe:

### **Filters:**

- Filter #1: Work Type (processing & quarterly reports)
- Filter #2: Due Date (this week & overdue)
- Filter #3 (optional): Status
- Filter #4 (optional): Client Owner

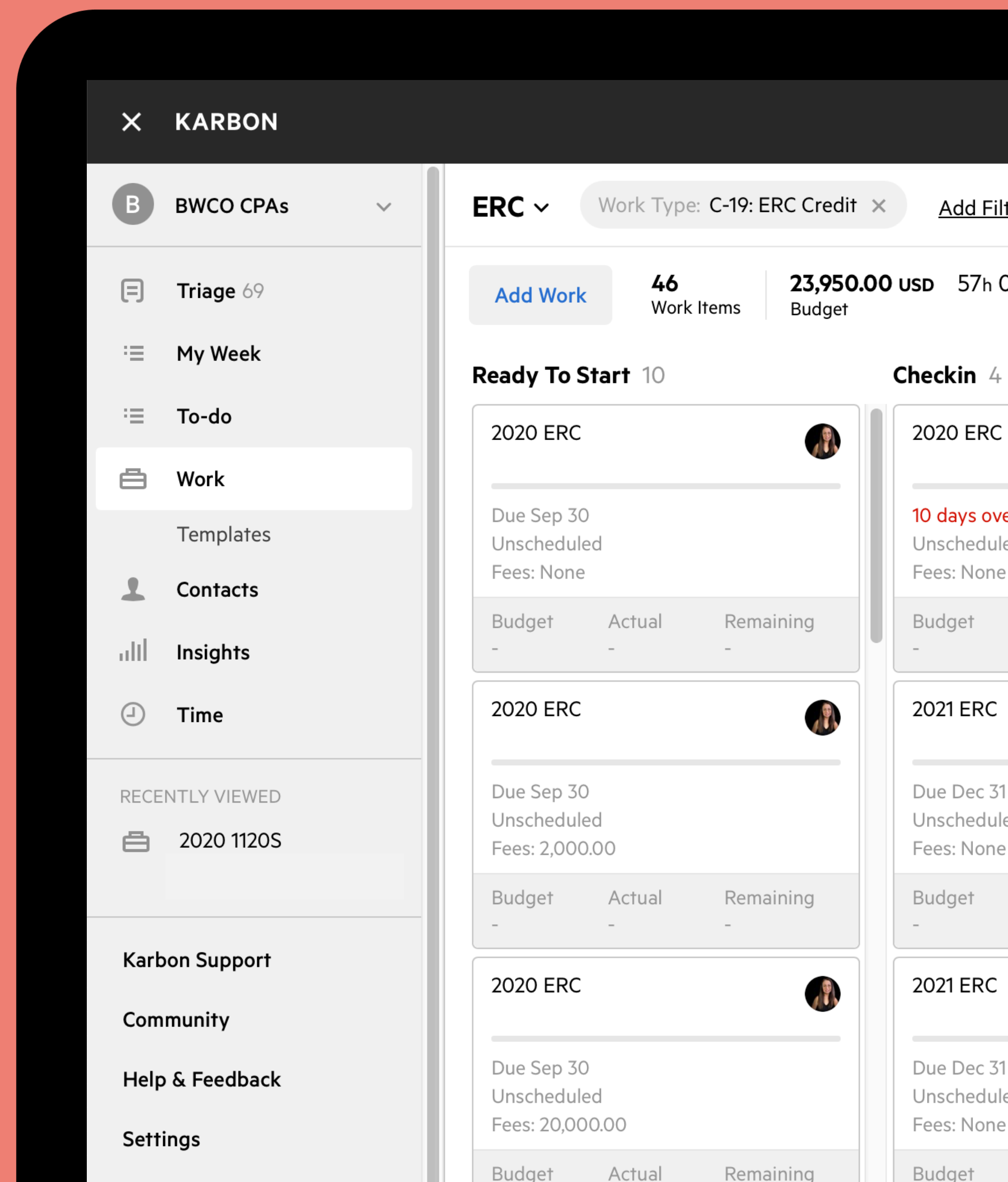
### **View by:**

- Sort: Status  
(incl. Ready to Start, Prep, Process, Review, Waiting to Confirm, Follow-up)

## Pro-Tip:

- Number of status based on number of people involved.





# Employee Retention Credit

## Purpose:

Obtain visibility across a very complex workflow that takes months to complete.

## Recipe:

### **Filters:**

- Filter #1: Work Type

### **View by:**

- Sort: Status

## Note:

- View started just for tracking initial outreach but the utility grew as work and time progressed.





1. Recipe to success
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# Trending over budget

## Purpose:

Identify and address problems before work progresses too far.

## Recipe:

### Filters:

- Filter #1: Tasks < 25% completion
- Filter #2: Budget used > 50%
- Filter #3: Optional: work type

### View by:

- Mode: Kanban
- Columns: Sort By Assignee

## Pro-Tip / Notes:

- 25% task completion is approximate, consider structure of your templates.

The screenshot shows a project management interface with the following elements:

- Filters:** All Work, Task Completion: Under 25%, Budget Used: Over 50%, Assignee: [blank]
- Summary:** 2 Work Items, 1,000.00 CAD Budget, 7h 0m, 0.00 CAD Actual, 9h 0m, 1,000.00 CAD Remaining
- Task 1 (Joe Carufe):** test, Sara and Joe Aberett, Ready To Start, Started Jul 9, 50 days overdue, Timeline Activity: 10w, Type: None, Repeat: None, Fees: None, Fee Type: Time & Materials. Budget: 6h 0m, Actual: 8h 0m, Remaining: -2h 0m. 900.00, -, 900.00.
- Task 2 (Suzanne Puckett):** Bookkeeping: Weekly reconciliation due 9 Jul, 2021, Reach Foundation, Ready To Start, Started Jul 5, 68 days overdue, Timeline Activity: 14w, Type: Bookkeeping, Repeat: Every Week, Fees: 150.00, Fee Type: Fixed Fee. Budget: 1h 0m, Actual: 1h 0m, Remaining: -. 100.00, -, 100.00.

# To be billed

## Purpose:

For work completed this month, what time & materials work has yet to be billed?

(allow for marking payment has been requested)

## Recipe:

### Filters:

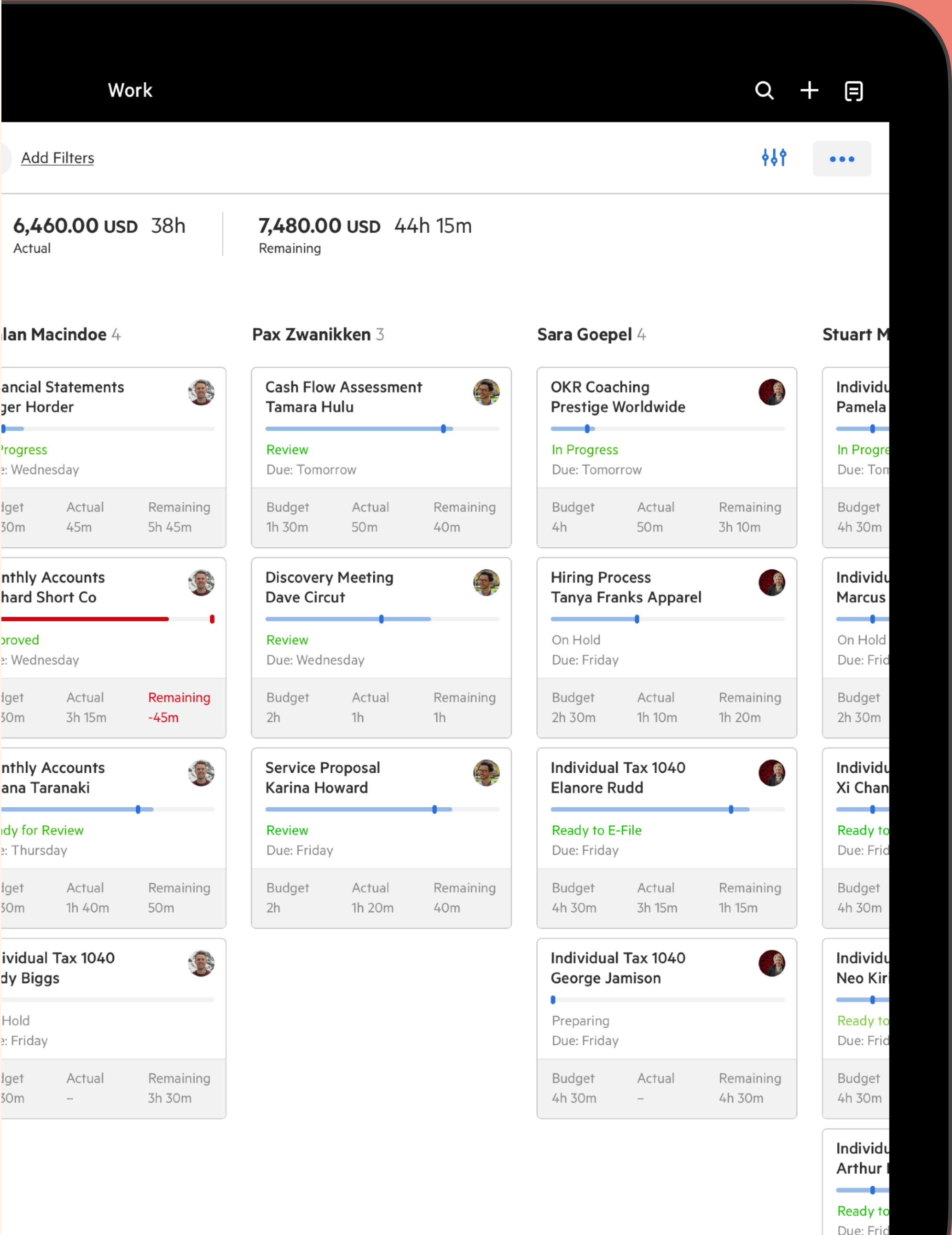
- Filter #1: Completed date
- Filter #2: Fee type = time & materials
- Filter #3: Status = not billed

### View by:

- Mode: List
- Columns: Sort by Contact

## Pro-Tip / Notes:

- Alternate version: Kanban view sorted by assignee.



# Scope creep

## Purpose:

Limit scope creep by monitoring what projects your team is working on.

## Recipe:

### Filters:

- Filter #1: Work type = Ad hoc
- Filter #2: Work completed = Last week

### View by:

- Mode: Kanban (include column header summaries)
- Columns: Sort By Assignee

## Pro-Tip / Notes:

- Require all non-standard work to be captured in a work item of the “Ad hoc”.

All Work ▾

Work Type: Ad hoc ×

Add Filter

Add Work

1 Work Item

0.00 CAD Budget

0m

50.00 CAD Actual

30m

-50.00 CAD Remaining

-30m

Carla Caldwell 1

Capacity per week: Not Set

Fees: 50.00

Budget	Actual	Remaining
-	30m	-30m
-	50.00	-50.00

Allocated to Carla Caldwell:

Budget	Actual	Remaining
-	-	-
-	-	-

Directorship Reach Foundation

Completed Jul 16

Timeline Activity: 8w

Type: Ad hoc

Repeat: None

Fees: 50.00

Fee Type: Time & Materials

Budget	Actual	Remaining
-	30m	-30m
-	50.00	-50.00

Suzanne Puckett 0

Capacity per week: Not Set

Fees: None

Budget	Actual	Remaining
-	-	-
-	-	-

Allocated to Suzanne Puckett:

Budget	Actual	Remaining
-	-	-
-	-	-

No work for assignee.

Also working on 1

Directorship Reach Foundation

1 item assigned

# Key account new work

## Purpose:

What key work is coming up for my highest value clients?

## Recipe:

### Filters:

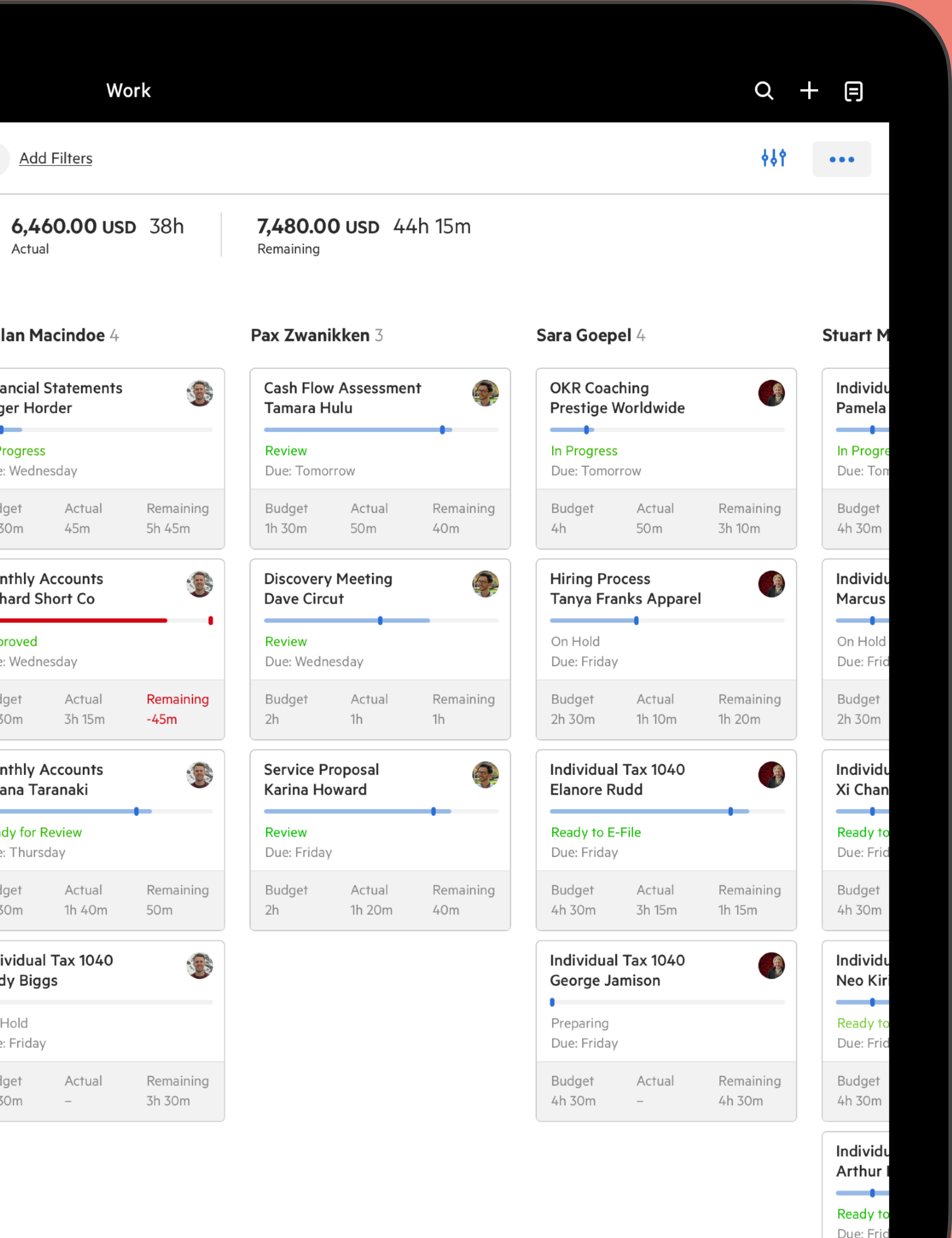
- Filter #1: Client owner = You
- Filter #2: Fiscal year end = Next month
- Filter #3: Budget size amount > \$xx
- Filter #4: Status = Planned

### View by:

- Mode: List
- Columns: Sort By work Start Date

## Pro-Tip / Notes:

- Add work type filter if necessary.





All Work

Client Owner: Andi Ancheta

Budget: 500-999,999,999 CAD

Status: Planned, Pre-sale

Add Filter



Save As New



Add Work

71  
Work Items

55,312.50 CAD  
Budget 455h 45m

0.00 CAD  
Actual 0m

55,312.50 CAD  
Remaining 455h 45m

57,000.00 CAD  
Fees



NAME	CLIENT	STATUS	START	DUE	TYPE	FEES (CAD)
Accounting: Month-end close due 25 Oct, 2021	Adam & Smith Consulting	Planned	Oct 1	Oct 25	Month-end close	500.00
Accounting: Monthly accounting	Allo Limited	Planned	Oct 1	Oct 2	Accounting	1,000.00
Accounting: Monthly accounting!!!!!! Oct 2021	ABC Co.	Planned	Oct 1	Oct 30	Accounting	1,000.00
Month-end close Sep 2021	EH Brewing	Planned	Oct 1	Oct 15	Month-end close	500.00
Month-end close Sep 2021	CV Heating & Air	Planned	Oct 1	Oct 15	Month-end close	500.00
Month-end close Sep 2021	Digitalis Corp.	Planned	Oct 1	Oct 15	Month-end close	500.00
Month-end close Sep 2021	Eastlake Golf Resort	Planned	Oct 1	Oct 15	Month-end close	500.00
Month-end close Sep 2021	DRM	Planned	Oct 1	Oct 15	Month-end close	500.00
Monthly Accounting Sep 2021	Conway Industries	Planned	Oct 1	Oct 25	Accounting	1,000.00
Monthly Accounting Sep 2021	Country Day Flowers	Planned	Oct 1	Oct 25	Accounting	1,000.00
Monthly Accounting Sep 2021	Cheetos Place	Planned	Oct 1	Oct 25	Accounting	1,000.00
Monthly Accounting Sep 2021	Bower Environmental Inc.	Planned	Oct 1	Oct 25	Accounting	1,000.00
Monthly Accounting Sep 2021	Chem Industries	Planned	Oct 1	Oct 25	Accounting	1,000.00

# Capacity planning

All Work ▾

Due Date: This Week, Overdue ✕

[Add Filter](#)

[Add Work](#)

**364**  
Work Items

**132,238.67** CAD  
Budget

1,068h 5m

**1,346.67** CAD  
Actual

19h 5m

**Admin Placeholder** 53

Capacity per week: Not Set

Fees: 48,300.00

Budget	Actual	Remaining
185h 45m	-	185h 45m
27,847.50	-	27,847.50

Allocated to Admin Placeholder:

Budget	Actual	Remaining
49h 30m	-	49h 30m
5,535.00	-	5,535.00

Monthly Accounting Jun 2021  
Conway Industries

A

Ready To Start

Started Jul 1

54 days overdue

Timeline Activity: 24w

Type: Accounting

Repeat: Every Month

Fees: 1,000.00

Fee Type: Fixed Fee

Budget	Actual	Remaining
8h 0m	-	8h 0m
950.00	-	950.00

Monthly Accounting Jun 2021  
CMD Inc.

A

**Amelia Freeman** 4

Capacity per week: 20h 0m

Fees: 3,150.00

Budget	Actual	Remaining
25h 0m	-	25h 0m
2,950.00	-	2,950.00

Allocated to Amelia Freeman:

Budget	Actual	Remaining
8h 0m	-	8h 0m
1,400.00	-	1,400.00

Weekly Bookkeeping due 16 Jul,  
2021  
Eastlake Golf Resort

A

Ready To Start

Started Jul 12

61 days overdue

Timeline Activity: 22w

Type: Bookkeeping

Repeat: Every Week

Fees: 150.00

Fee Type: Fixed Fee

Budget	Actual	Remaining
1h 0m	-	1h 0m
100.00	-	100.00

Monthly Accounting Jun 2021  
Country Day School

A

**Andi**

Capacity

Fees: 2

Budget	Actual	Remaining
153h 30m	-	153h 30m
17,822.50	-	17,822.50

Allocat

Budget	Actual	Remaining
120h 9m	-	120h 9m
13,035.50	-	13,035.50

Bi-W  
Gem

Reac

Start

54 d

Time

Type

Repe

Fees

Fee

Budget	Actual	Remaining
1h 0m	-	1h 0m
80.00	-	80.00

Mon  
Bully

## Purpose:

Identify bottlenecks and over utilized team members.

## Recipe:

### Filters:


- Filter #1: Due date = This week + Overdue

### View by:

- Mode: Kanban
- Columns: Sort By Assignee

## Pro-Tip / Notes:

- Great for reviewing new items under queue user accounts.

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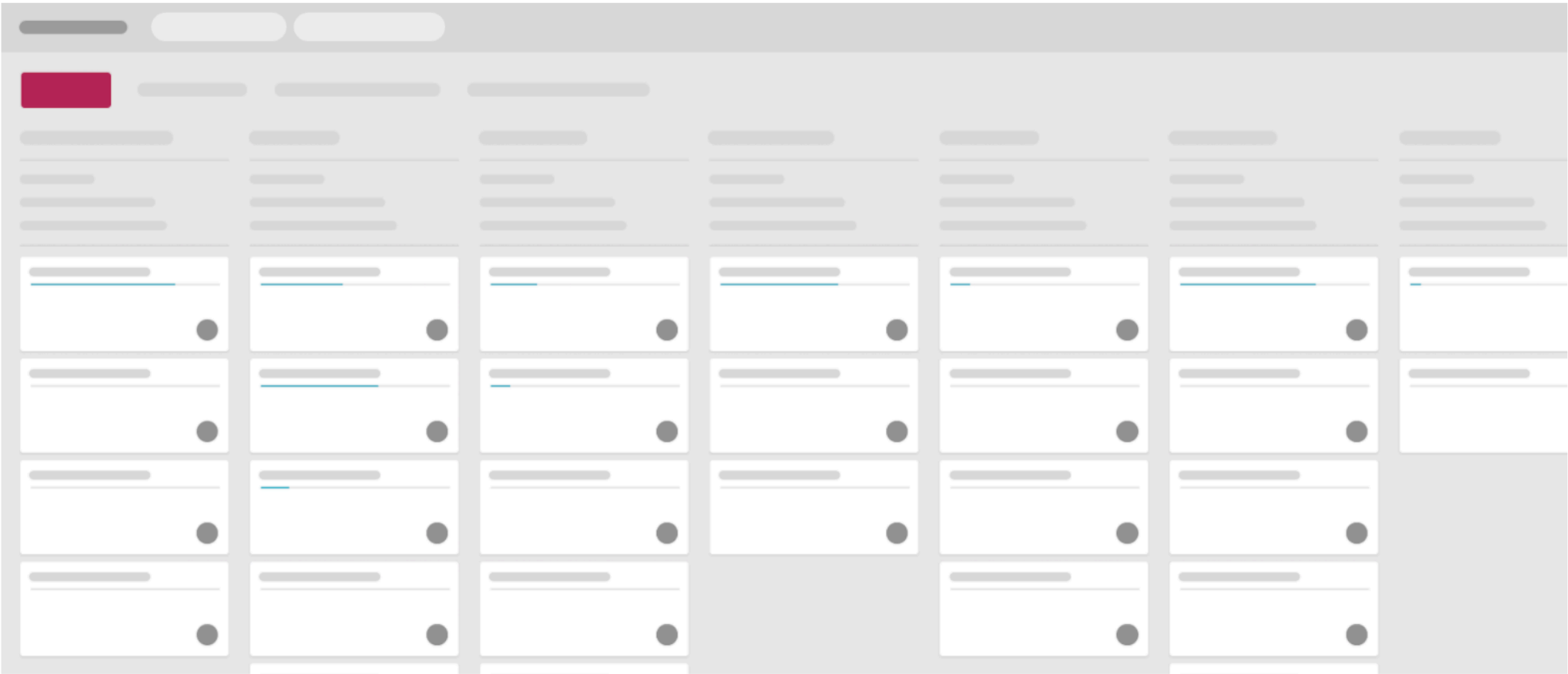
DISCOVER KARBON

LOGIN

TECHNOLOGYLEADERSHIPWORK LIFE  
GROWTHINDUSTRYKARBON

12 Karbon work dashboards that will give you complete clarity

KARBONTIPS & TRICKS



With so much happening across your business at any given time, your Kanban board helps you to visualize what's important, understand priorities and keep everyone on the same page.

The visibility you achieve in Karbon is great for avoiding blind spots, but it does mean you can be looking at hundreds, if not thousands, of work items across your firm.

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1. **Recipe to success**
2. **Top saved views**
3. **Kylene's examples**
4. **Dashboards to consider**
5. **Why to share a saved view**



# Why to share a saved view

- **Alignment:** Spend a moment to determine the key dashboards for the firm (or team) and easily pass along for everyone to add to their views.
- **Discussion:** Have a 1:1? Pass along the same view so each person can come prepared after reviewing the same data.
- **Onboarding:** Help a new colleague get up and running quickly by sharing your saved views so they can quickly update to reflect their world.



help.karbonhq.com/en/articles/5541970-sharing-a-saved-view-in-karbon

Work

Accounting Work (this month) ▾

Assignee: 4 colleagues ✕

Work Type: Bookkeeping, Accounting ✕

Due Date: This Month, Overdue ✕

Add Filter

Add Work

71  
Work Items

29,750.00 CAD  
Budget

257h 0m

225.00 CAD  
Actual

1h 30m

29,525.00 CAD  
Remaining

255h 30m

33,375.00 CAD  
Fees

Planned 6

Ready To Start 65

Weekly Bookkeeping due 17 Sep, 2021  
Edmond Industries

Planned

Starting Sep 13

Due Friday

Timeline Activity: 13w

Type: Bookkeeping

Repeat: Every Week

Fees: 150.00

Fee Type: Fixed Fee

Budget	Actual	Remaining
1h 0m	-	1h 0m
100.00	-	100.00

Weekly Bookkeeping due 17 Sep, 2021  
Eastlake Golf Resort

Planned

Starting Sep 13

Due Friday

Timeline Activity: 13w

Type: Bookkeeping

Repeat: Every Week

Fees: 150.00

Fee Type: Fixed Fee

Budget	Actual	Remaining
1h 0m	-	1h 0m
100.00	-	100.00

Weekly Bookkeeping due 9 Jul, 2021  
Edmond Industries

J

Ready To Start

Started Jul 5

65 days overdue

Timeline Activity: 23w

Type: Bookkeeping

Repeat: Every Week

Fees: 150.00

Fee Type: Fixed Fee

Budget	Actual	Remaining
1h 0m	-	1h 0m
100.00	-	100.00

Weekly Bookkeeping due 9 Jul, 2021  
Eastlake Golf Resort

J

Ready To Start

Started Jul 5

65 days overdue

Timeline Activity: 23w

Type: Bookkeeping

Repeat: Every Week

Fees: 150.00

Fee Type: Fixed Fee

Budget	Actual	Remaining
1h 0m	-	1h 0m
100.00	-	100.00

Save

Save as New

Rename

Revert

Delete

Share



help.karbonhq.com/en/articles/5541970-sharing-a-saved-view-in-karbon

Work

Accounting Work (this month) ▾

Assignee: 4 colleagues ✕

Work Type: Bookkeeping, Accounting ✕

Due Date: This Month, Overdue ✕

Add Filter

Add Work

71  
Work Items

29,750.00 CAD  
Budget

257h 0m

225.00 CAD  
Actual

1h 30m

29,525.00 CAD  
Remaining

255h 30m

33,375.00 CAD  
Fees

Planned 6

Ready To Start 65

Weekly Bookkeeping due 17 Sep, 2021  
Edmond Industries

Planned

Starting Sep 13

Due Friday

Timeline Activity: 13w

Type: Bookkeeping

Repeat: Every Week

Fees: 150.00

Fee Type: Fixed Fee

Budget	Actual	Remaining
1h 0m	-	1h 0m
100.00	-	100.00

Weekly Bookkeeping due 9 Jul, 2021  
Edmond Industries

Ready To Start

Started Jul 5

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Budget	Actual	Remaining
1h 0m	-	1h 0m
100.00	-	100.00

Weekly Bookkeeping due 17 Sep, 2021  
Eastlake Golf Resort

Planned

Starting Sep 13

Due Friday

Timeline Activity: 13w

Type: Bookkeeping

Repeat: Every Week

Fees: 150.00

Fee Type: Fixed Fee

Budget	Actual	Remaining
1h 0m	-	1h 0m
100.00	-	100.00

Weekly Bookkeeping due 9 Jul, 2021  
Eastlake Golf Resort

Ready To Start

Started Jul 5

65 days overdue

Timeline Activity: 23w

Type: Bookkeeping

Repeat: Every Week

Fees: 150.00

Fee Type: Fixed Fee

Budget	Actual	Remaining
1h 0m	-	1h 0m
100.00	-	100.00

Share View

Share this link with your colleagues so they can see this view

https://app.karbonhq.com/4BCW7n871kQ2#/wor

Copy



**Wrap up**

- 1. Recipe to success**
- 2. Top saved views**
- 3. Kylene's examples**
- 4. Dashboards to consider**
- 5. Why to share a saved view**

**Questions?**



# Kylene Carse, CPA



**COMPANY:** BWCO CPAs

**ROLES:** Partner – President - Innovator

**FIRM FACTS:**

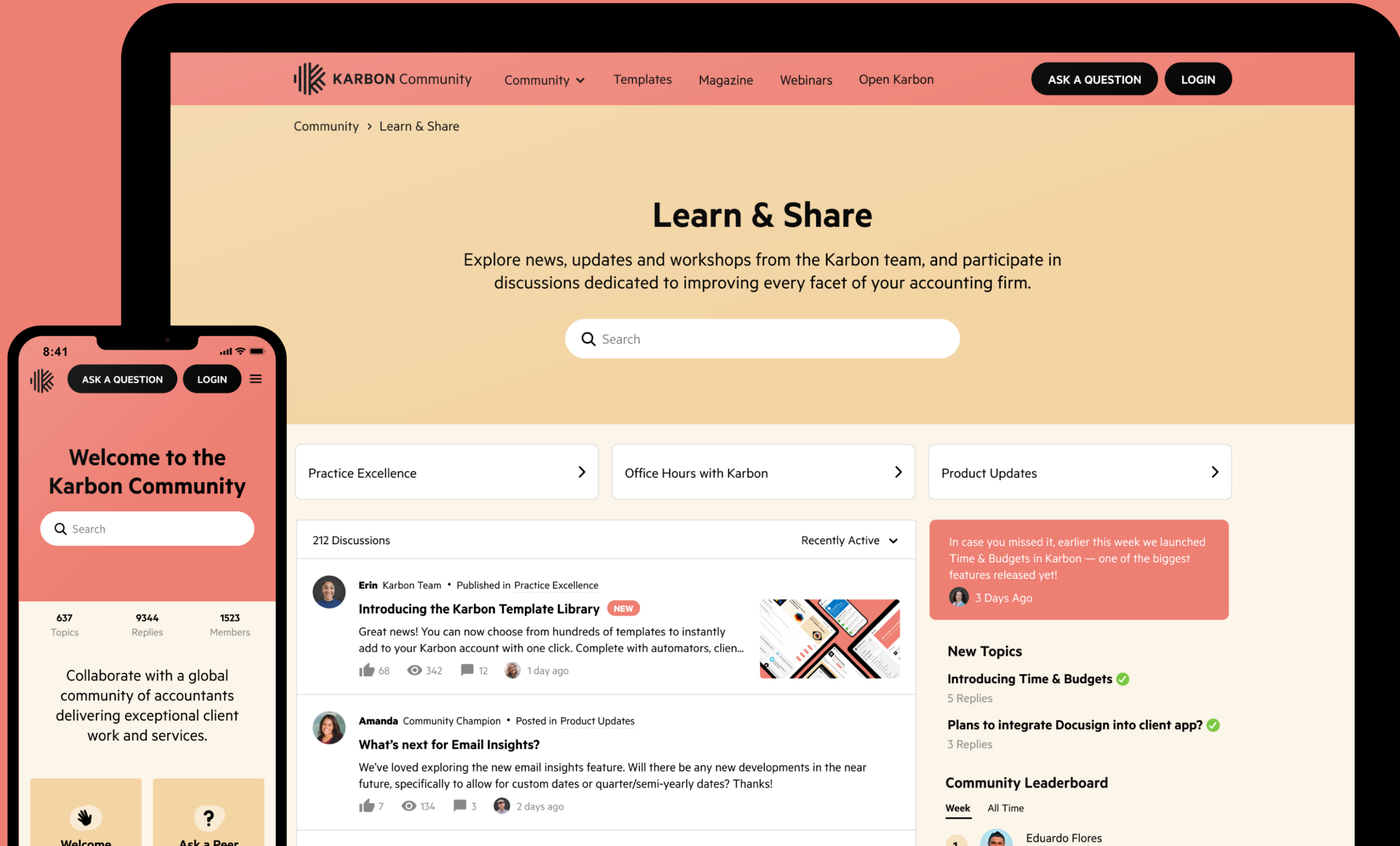
- Founded in 2002
- Women Owned

## **2020 BIGGEST ACCOMPLISHMENT:**

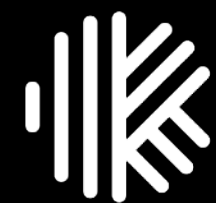
We successfully transitioned our office to a completely virtual firm two days prior to our shutdown in San Antonio, and have stayed virtual the remainder of the year, while using our physical office as a document drop off station/scan concierge service. And we also successfully migrated to a new (Karbon) cloud service to make us even more efficient and streamlined with our services and client offerings.

[www.neighborhoodcpa.com](http://www.neighborhoodcpa.com)

Join the discussion: <https://bit.ly/399vYUC>



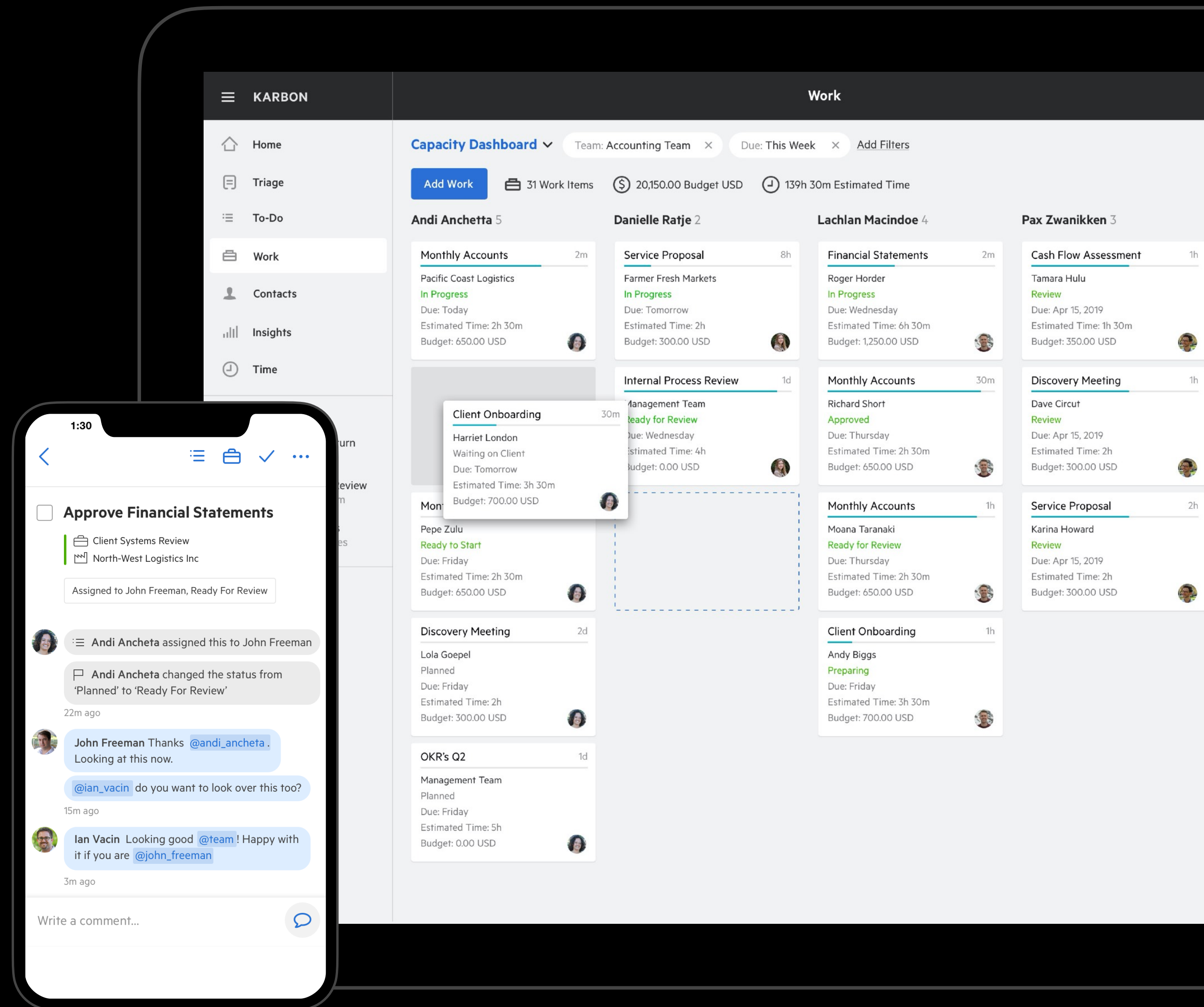




# Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED



# Thank you

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

Follow us on twitter [@KarbonHQ](https://twitter.com/KarbonHQ)

