



Designing a fully integrated tech stack

karbonhq.com



Meet your hosts



Stuart McLeod

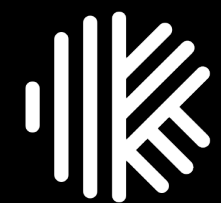
Karbon
CEO



Ian Vacin

Karbon
Chief Customer Officer

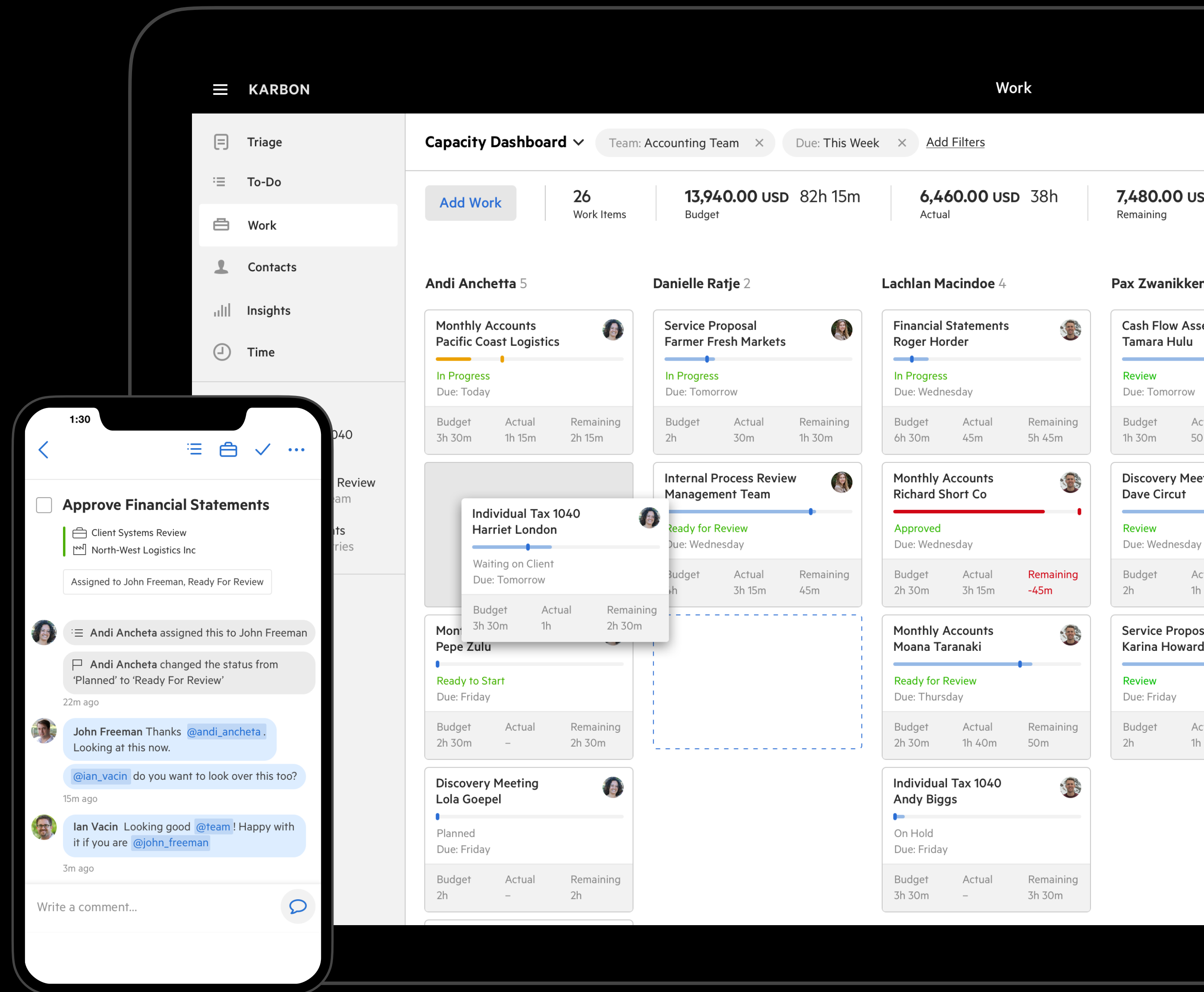




Work Management Software for Accounting Firms

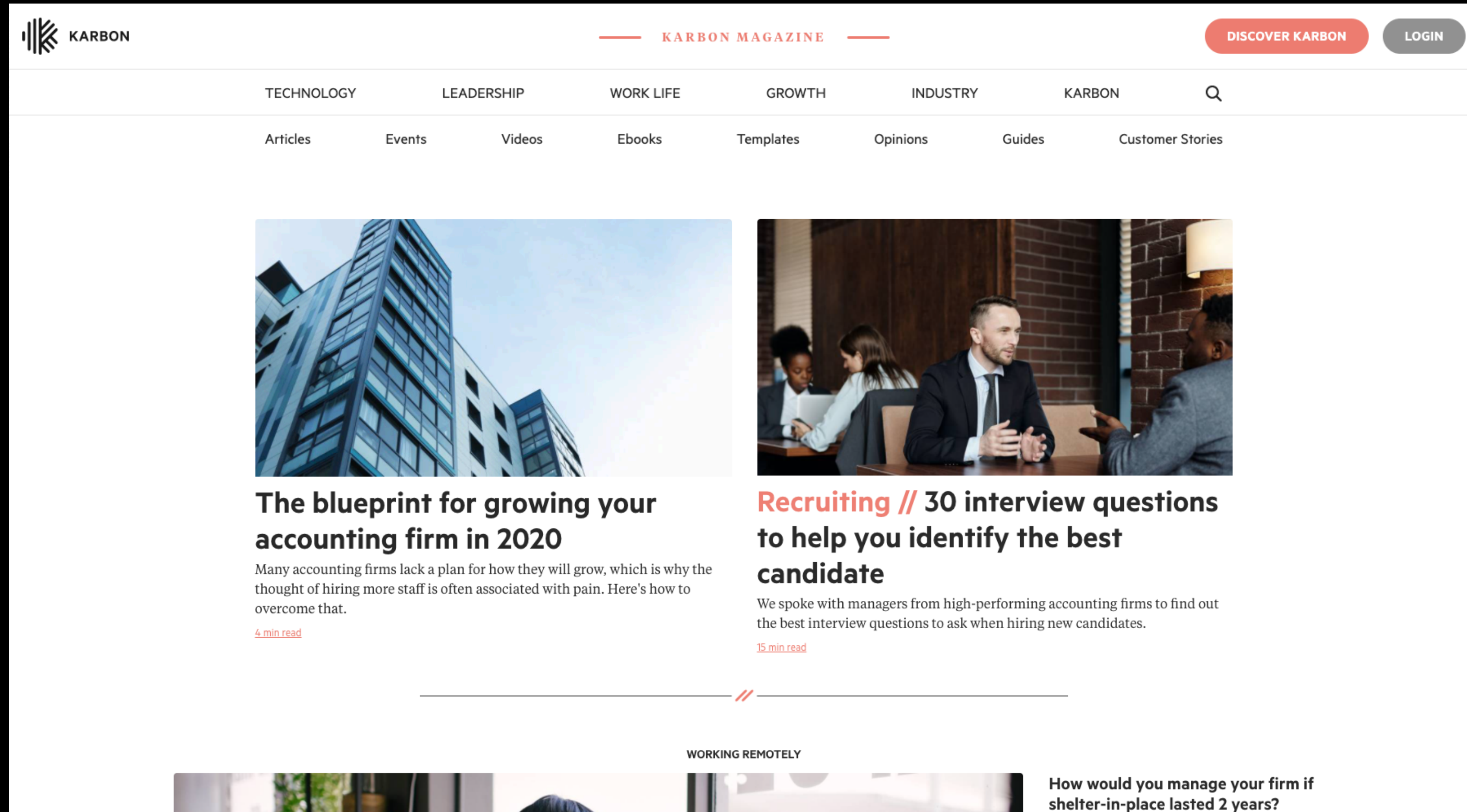
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- 1. Close any open apps**
- 2. Ask and we'll answer**

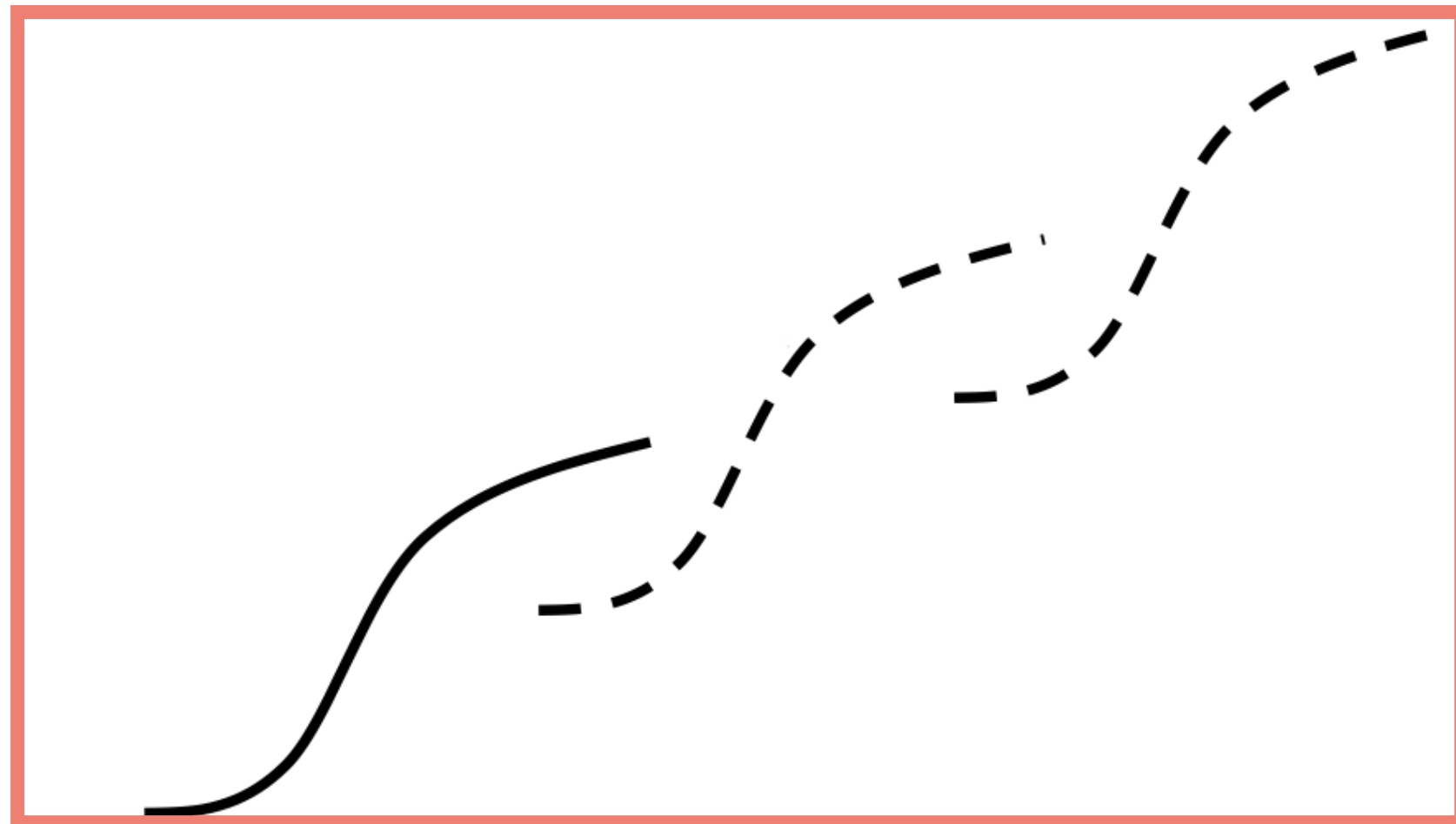


- 1. Overview**
2. Our stack
3. How to pick technology
4. Your stack
5. What's coming





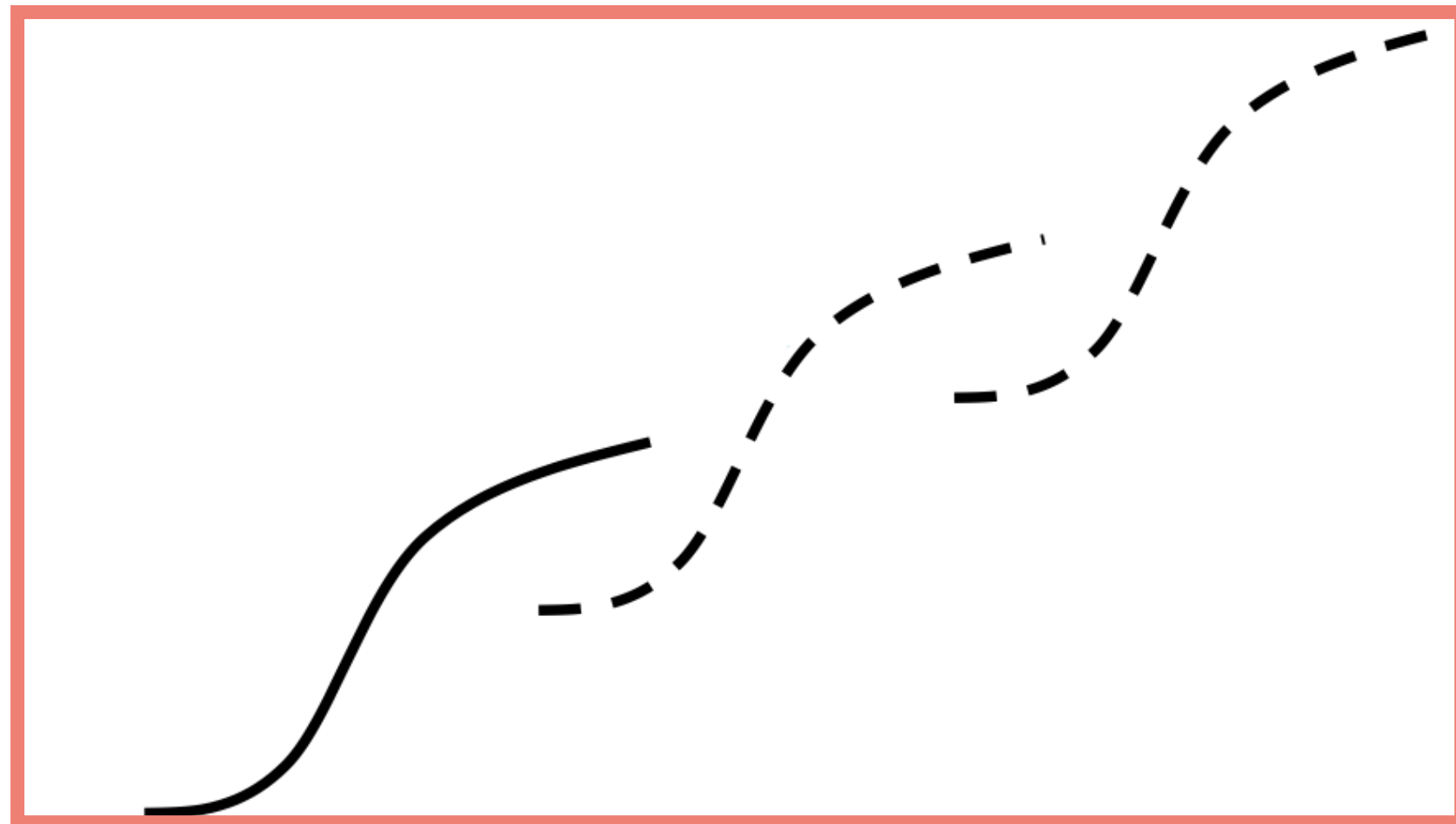
Typical path to modernize



Phases:

- Technology
- Learning
- Talent management
- Process improvement
- Client optimization
- Marketing redefinition

Typical path to modernize



**First, optimize your process.
Then, amplify with technology.**

Phases:

- Technology
- Learning
- Talent management
- Process improvement
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Three keys to profitability

Job completion metrics, workflow and training.





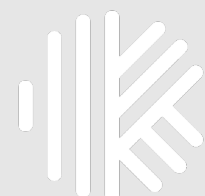
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Take the assessment:

karbonhq.com/get-scorecard

Download the report:

karbonhq.com/practice-excellence



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The Karbon Technology Stack

Infrastructure	Go-to-Market	Work & Productivity	Financial & HRMS
Authentication Security Development tools Data transport Reporting & analytics	CRM Sales automation Marketing automation Content publishing Customer Success	Communications Collaboration Document management Resource scheduling Work management	General ledger Billing AP / AR acceleration Payroll & HR management Budgeting & planning
Data	Relationships	Work	Financials



The Karbon Technology Stack

Infrastructure	Sales, Mktg, Success	Work & Productivity	Financial & HRMS
1Password	Chorus	Calendly	Expensify
AWS	Clearbit	DocuSign	General Ledger
Google Big Query	Contentful	Dropbox	Guideline
JAMF	Intercom	Gmail	Gusto
Microsoft Azure	Karbon	Google Apps	Jirav
Mode Analytics	Oktopost	Karbon	Lattice
Okta	Outreach	Quip	Receipt Bank
Segment	Pardot	Slack	Zuora
	Salesforce	Zoom	
	Vitally		
	Wistia		



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9 steps to picking & choosing technology

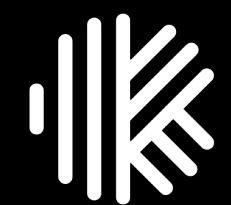
- 1 Identify your biggest opportunities
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- 9 Choose & use your winner

Read: Selecting the right technology for the modern accounting practice

<https://bit.ly/3iRRsbq>



Client services	Client management	Communication	Practice management
Audit	Client dashboard	Client communication	CRM
Advisory			Billing
Tax	Client collaboration	Practice communication	Projects & tasks
Accounting			Timeline & history
Bookkeeping			Staff & time
Payroll	Small business intelligence		Documents
IT consulting			Workflow
			Practice intelligence



Categories defining PM:

- Customer Relationship Management
- Billing & engagement management
- Staff & time
- Workflow & processes
- Project & task management
- Timeline & history
- Document management
- Practice Intelligence

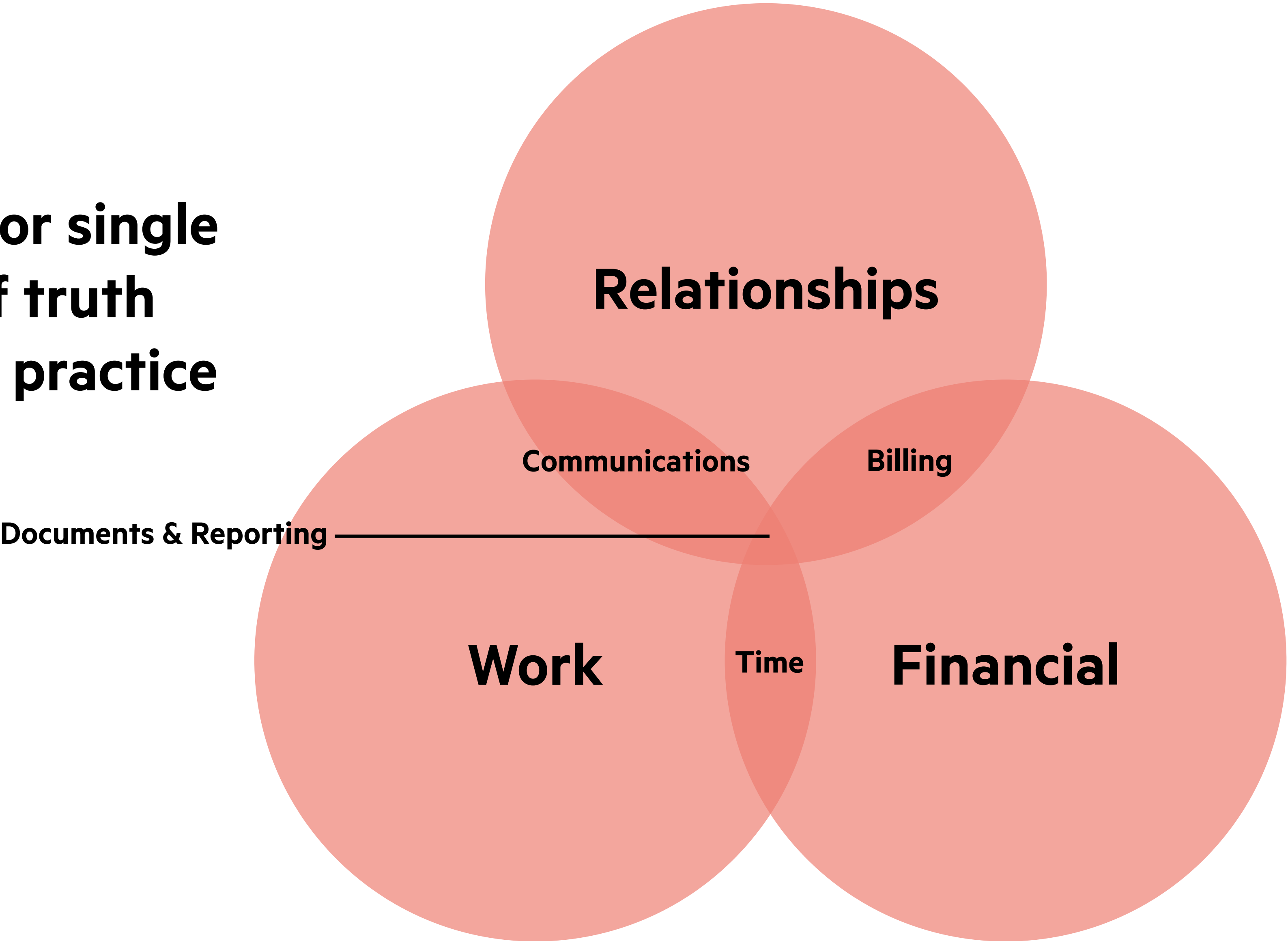


ACCOUNTING ECOSYSTEM TECHNOLOGY <small>ACCOUNTXUSA.COM</small> 2017													
Version 3.1 Updated 8/28/17													
ACCOUNTING SOFTWARE		BUSINESS INTELLIGENCE		CRM		PAYROLL							
HR		HOSTING		ERP		WORKFLOW		BILL PAY					
PRACTICE MANAGEMENT		FUNDING		INVENTORY MGMT		TAX PREP SOFTWARE		FIELD SERVICE MGMT					
MERCHANT SERVICES/ E-COMMERCE		POS		EDI		SALES TAX		DATA INTEGRATORS					
RECURRING/SUBSCRIPTION MANAGEMENT		AUDIT/RISK SUPPORT		OCR/DATA ENTRY									
Should your company be included? www.accountxusa.com/ecosystem													

Cut down the list of apps
Look to your core software provider



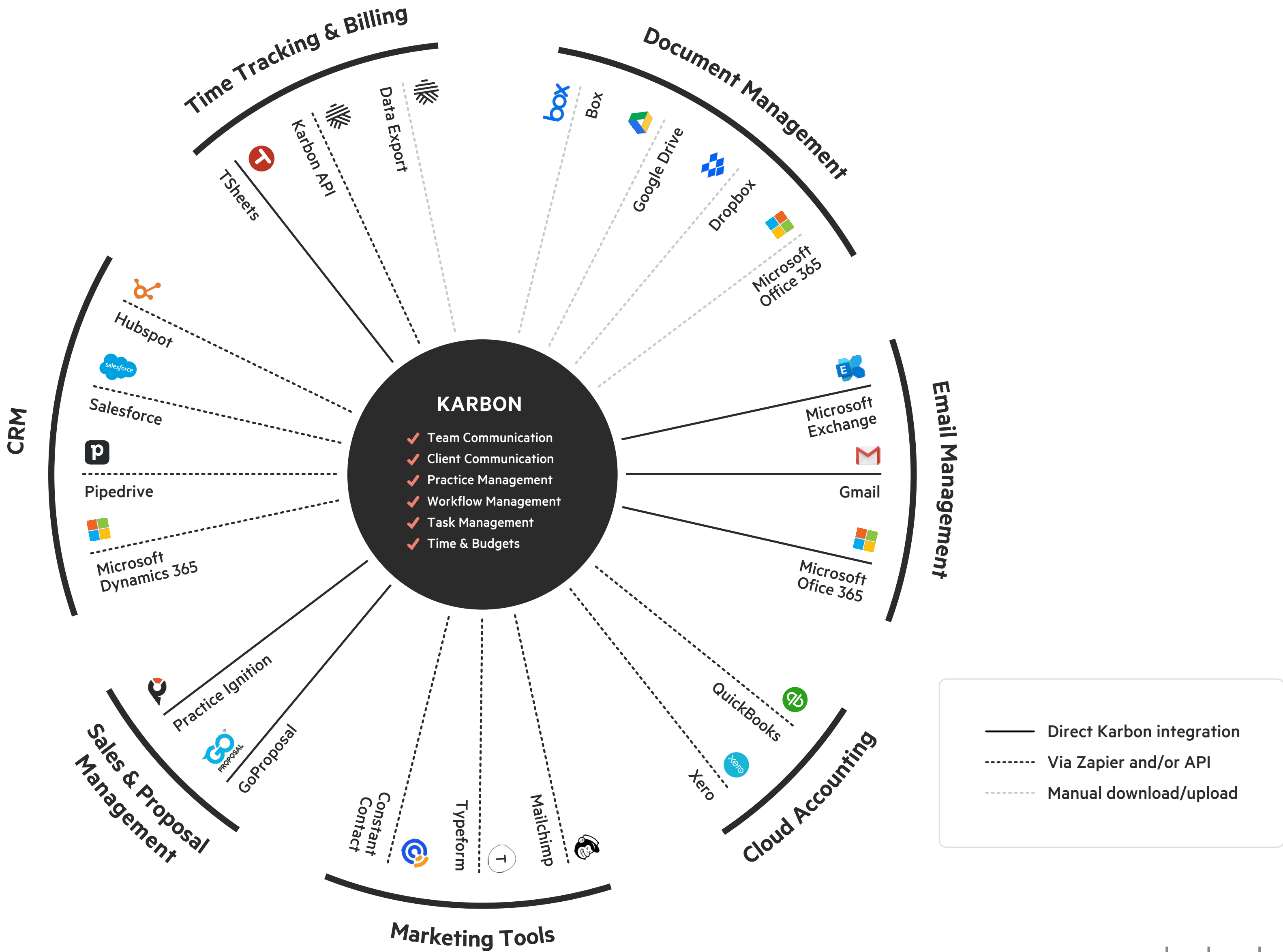
**Designing for single
source(s) of truth
within your practice**



On an island?
Good for vacation. Bad for data.



How to build your tech stack around Karbon



What are the ways to connect?

Direct integration	Zapier integration	Karbon API
<p>IN APP</p> <p>Karbon integrates directly with an ever-increasing suite of apps.</p> <p>↓</p> <p>LEARN MORE</p> <p>karbonhq.com/integrated-ecosystem</p>	<p>WEBINAR</p> <p>10 essential Zapier automations to build in your accounting firm.</p> <p>↓</p> <p>REGISTER</p> <p>karbonhq.com/resources/events</p>	<p>DEVELOPER CENTER</p> <p>Register for an account, explore the developer docs and get support.</p> <p>↓</p> <p>LEARN MORE</p> <p>developers.karbonhq.com</p>



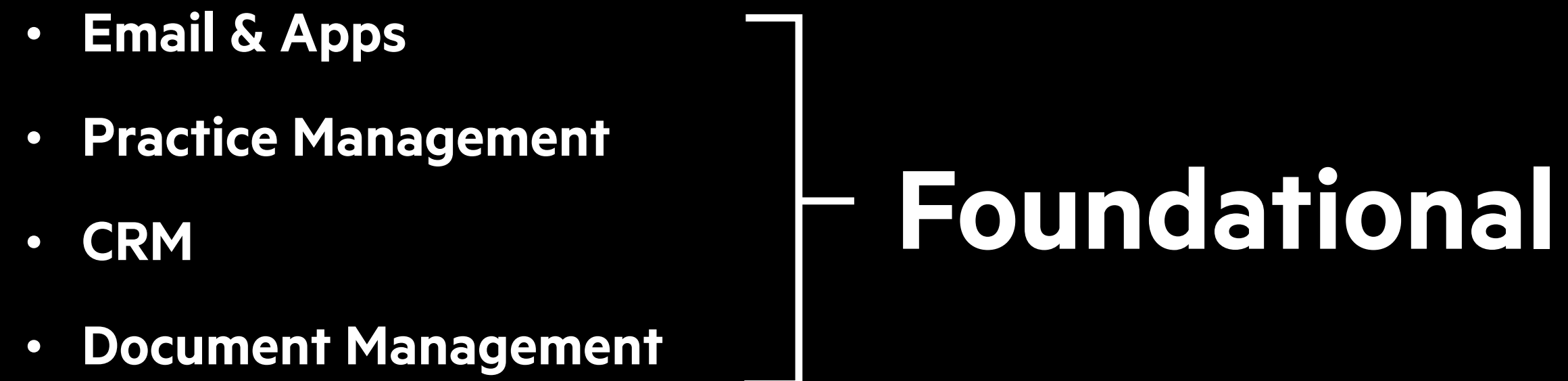
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Technology stack defined: Envolta example



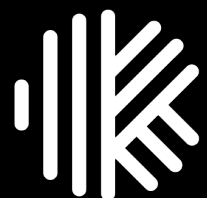
Technology stack defined: Envolta example



Technology stack defined: Envolta example

- Email & Apps
- Practice Management
- CRM
- Document Management
- Accounting
- Payroll
- Tax
- Advisory

} **Service delivery**

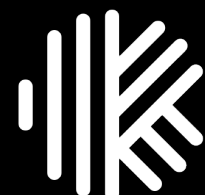


Technology stack defined: Envolta example

- Email & Apps
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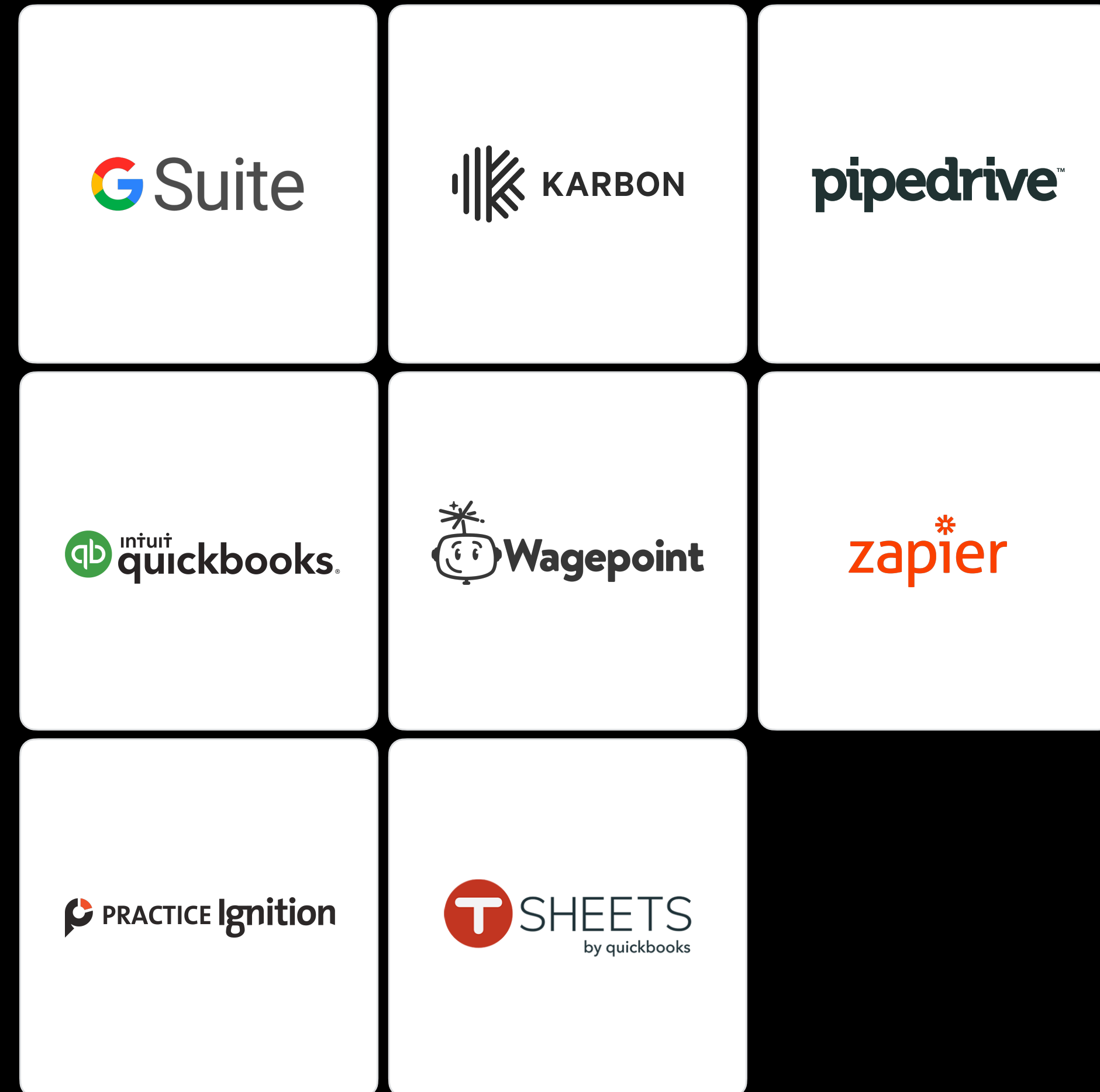
- Pricing & Proposal
- Time tracking
- Integration
- Other

Practice enablement



Technology stack defined: Envolta example

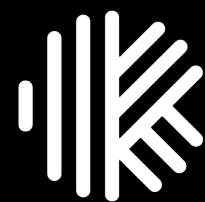
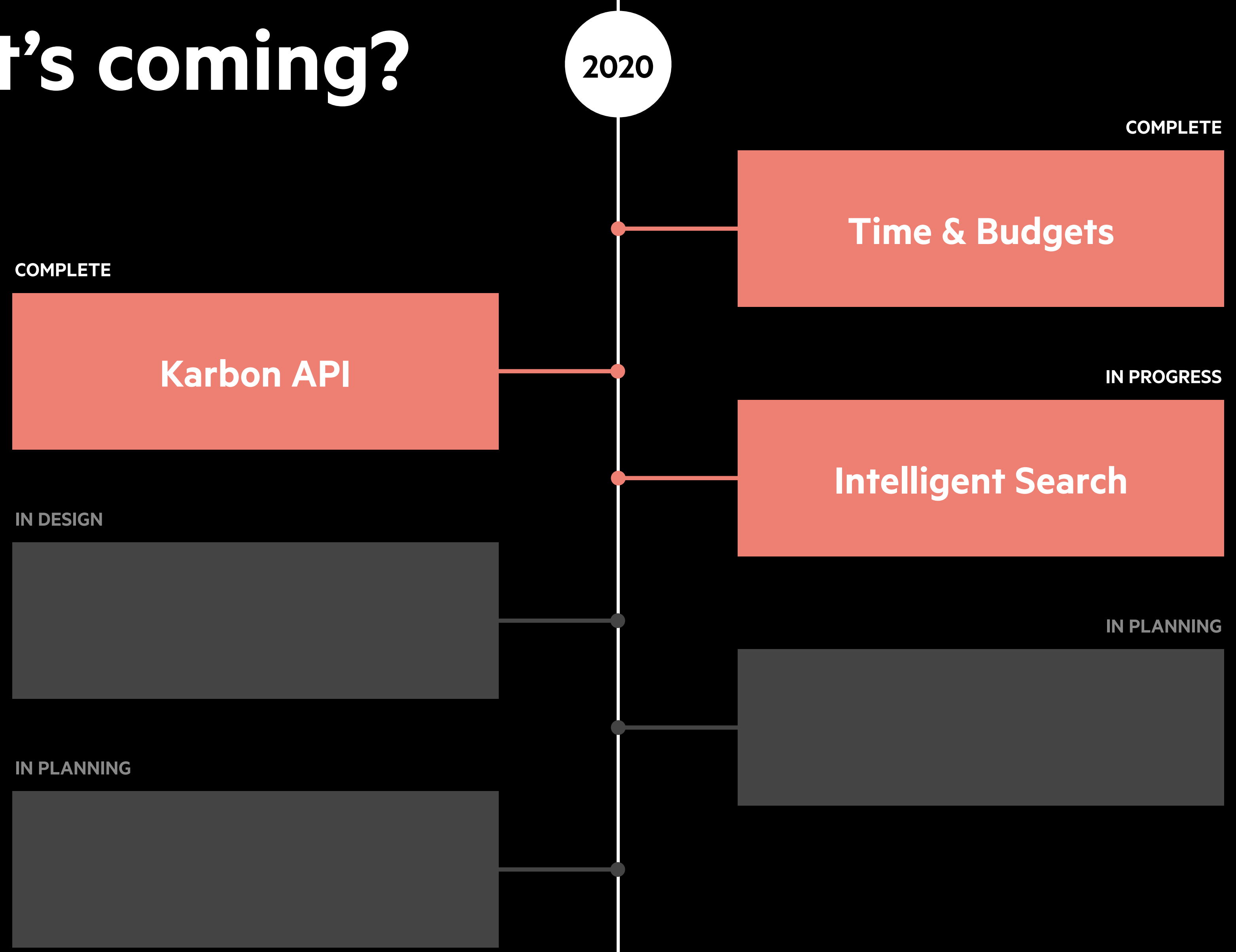
- **Email & Apps:** Gmail
- **Practice Management:** Karbon
- **CRM:** Pipedrive
- **Document Management:** Hubdoc
- **Accounting:** Intuit QuickBooks Online
- **Payroll:** WagePoint
- **Tax:** Intuit ProFile / ProTax
- **Advisory:** Fathom & Spotlight
- **Pricing & Proposal:** Practice Ignition
- **Time tracking:** Intuit TSheets
- **Integration:** Zapier
- **Other:** Slack, Zoom, Calendly, Plooto

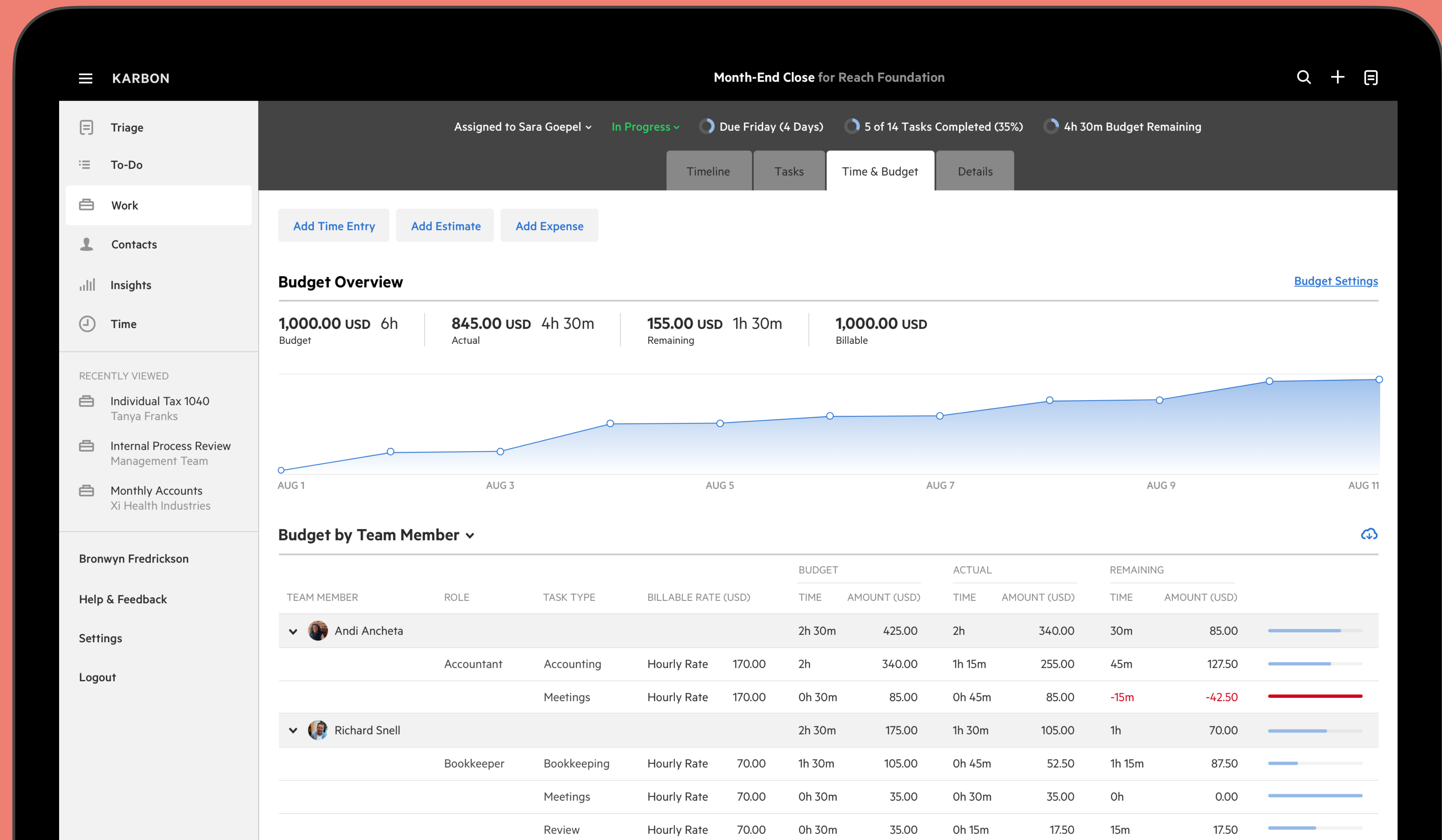


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What's coming?





Integrate quickly and painlessly using the Karbon API and documentation.



KARBON Developer Center

[API Docs](#)

[Issues](#)

[LOGIN](#)

Connect your app with the API.

Leverage the Karbon API to integrate your apps with Karbon, build custom solutions, optimize workflows and power your business.

[REGISTER →](#)



Get started

Connect with the Karbon API and start building.

[Get started →](#)



Explore the docs

Connect with the Karbon API and start building.

[Explore the docs →](#)




Get support

Get fast support and log issues to help improve the API.

[Get support →](#)



Integrate quickly and painlessly using the Karbon API and documentation.

 **KARBON** Developer Center

ClientGroups

GET

Get and/or Filter a Paged List of Client Groups

POST

Create a Client Group

GET

Gets a single Client Group by supplied Key

PUT

Perform a full update of a Client Group

PATCH

Perform a Partial update of a Client Group

GET

Get a Client Group from the supplied User Defined Identifier

Contacts

Files

Notes

Organizations

Users

Create a Client Group

REQUEST BODY SCHEMA: application/json

The new Client Group to Create

FullName

ClientOwner

ClientManager

ContactType

UserDefinedIdentifier

string

string

string

string

string

Responses

> 201 Client Group successfully created

— 400 Incoming Model is invalid

— 500 Error processing Request

POST /v3/ClientGroups

Request samples

Payload

Content type

application/json

Copy Expand all Collapse all

{
 "FullName": "abc123",
 "ClientOwner": "abc123",
 "ClientManager": "abc123",
 "ContactType": "abc123",
 "UserDefinedIdentifier": "abc1
}

Response samples


201

Content type

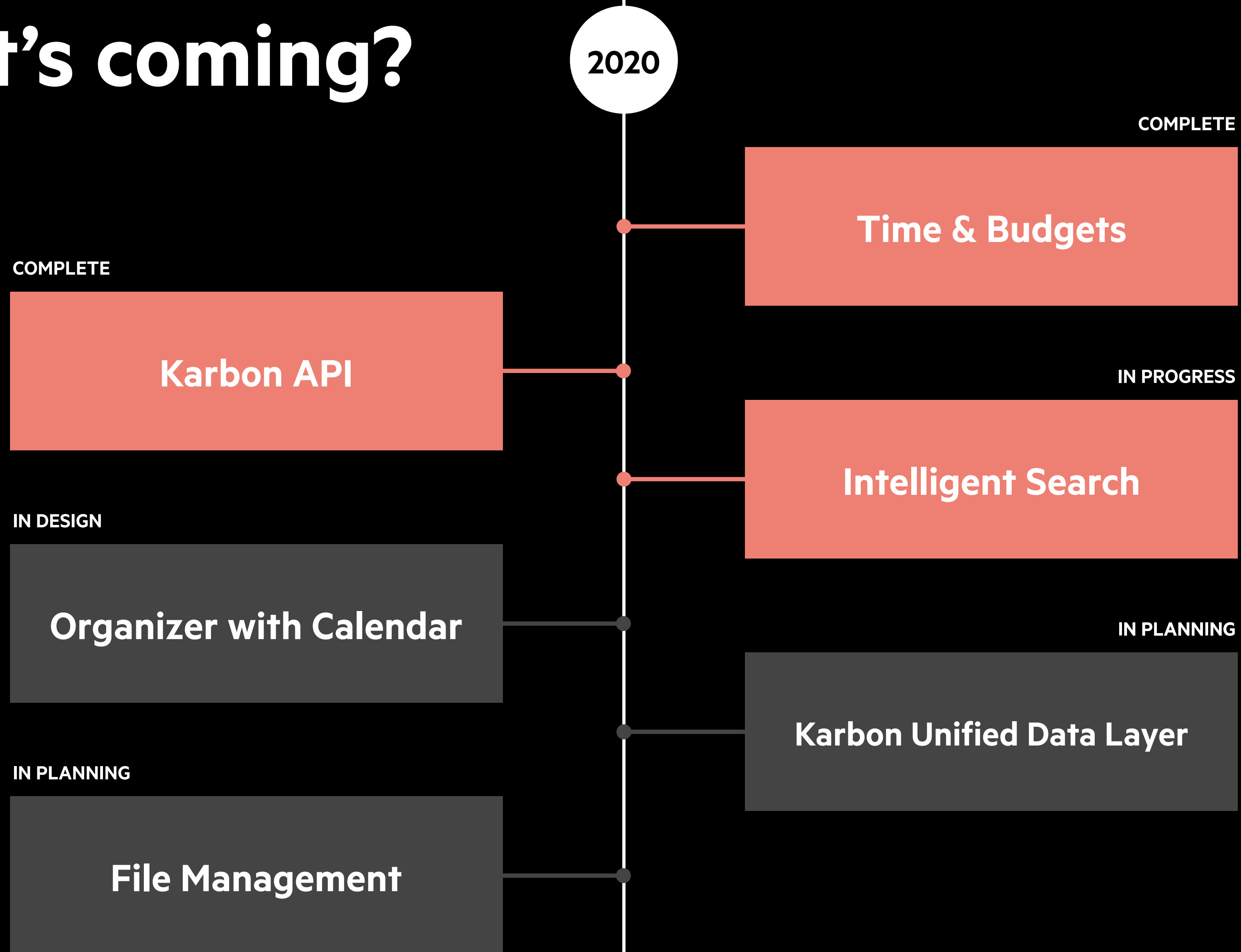
application/json

Copy Expand all Collapse all

{
 "FullName": "Karbon Sales Team



What's coming?



1. Overview
2. Recipe for change
3. How to pick technology
- 4. Wrap up**



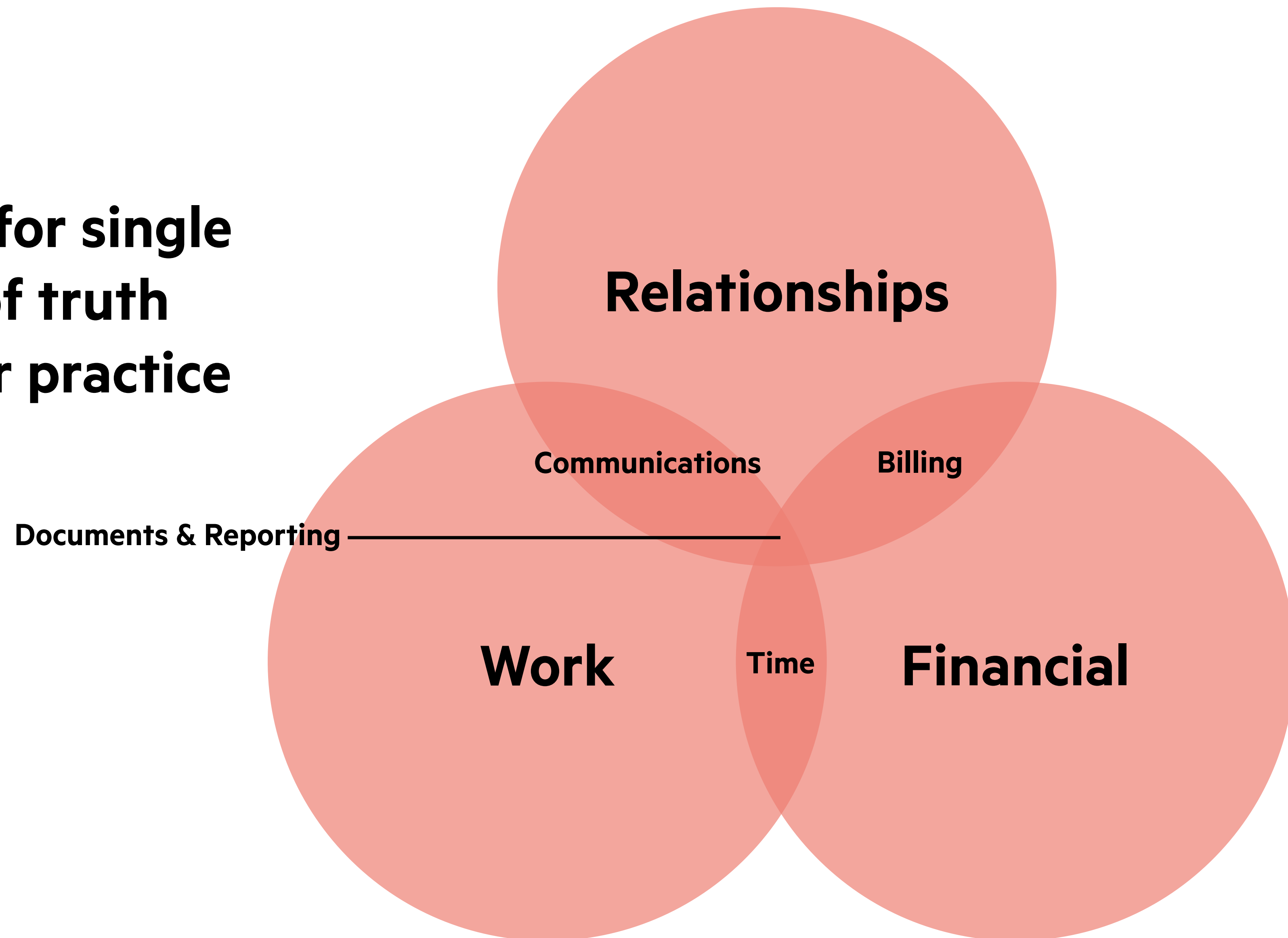
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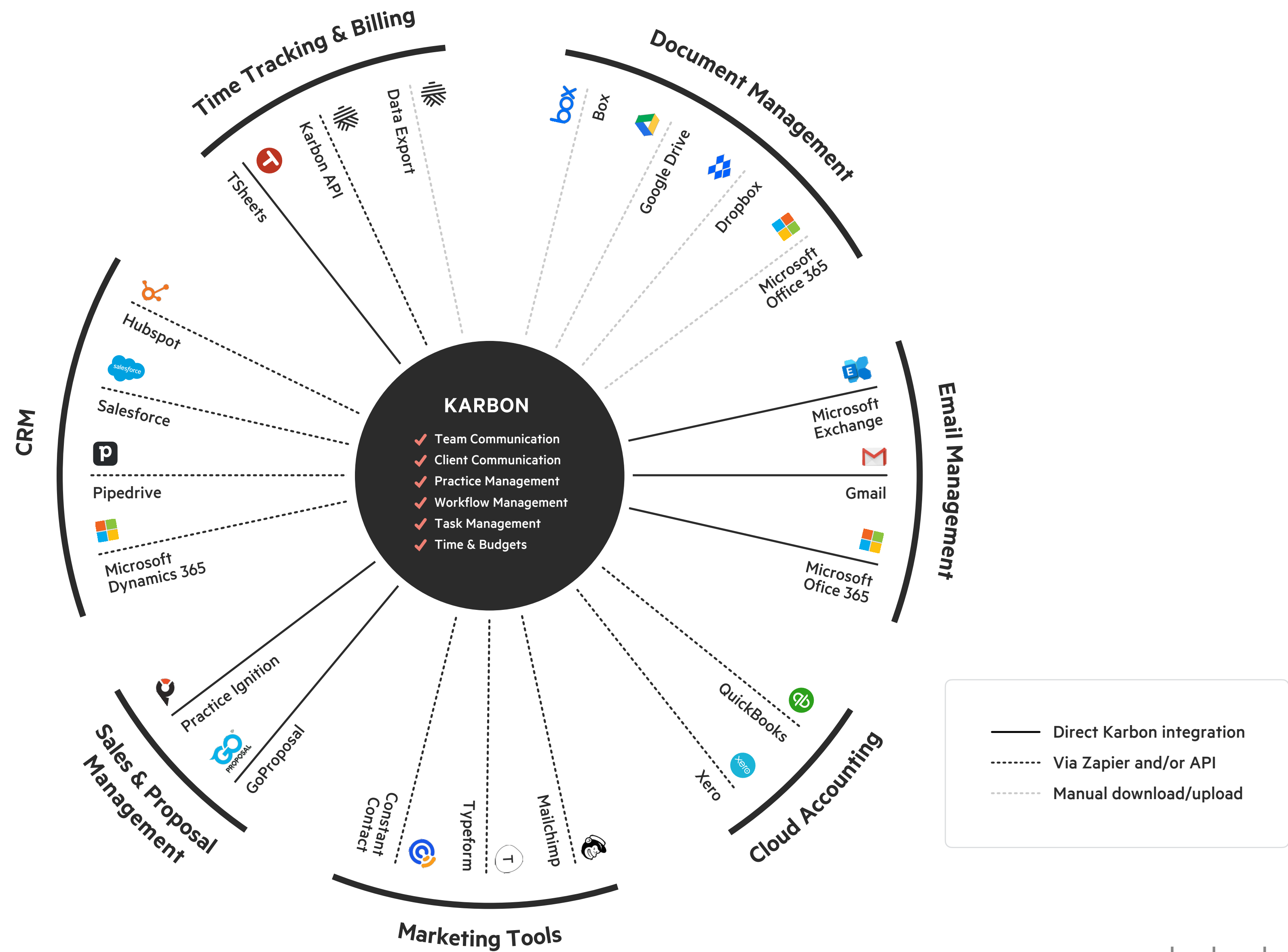
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<https://bit.ly/3iRRsbq>

**Designing for single
source(s) of truth
within your practice**



How to build your tech stack around Karbon





10 essential Zapier automations to build in your accounting firm

OCT 29 8:00AM, GMT+11

Register: karbonhq.com/resources/events

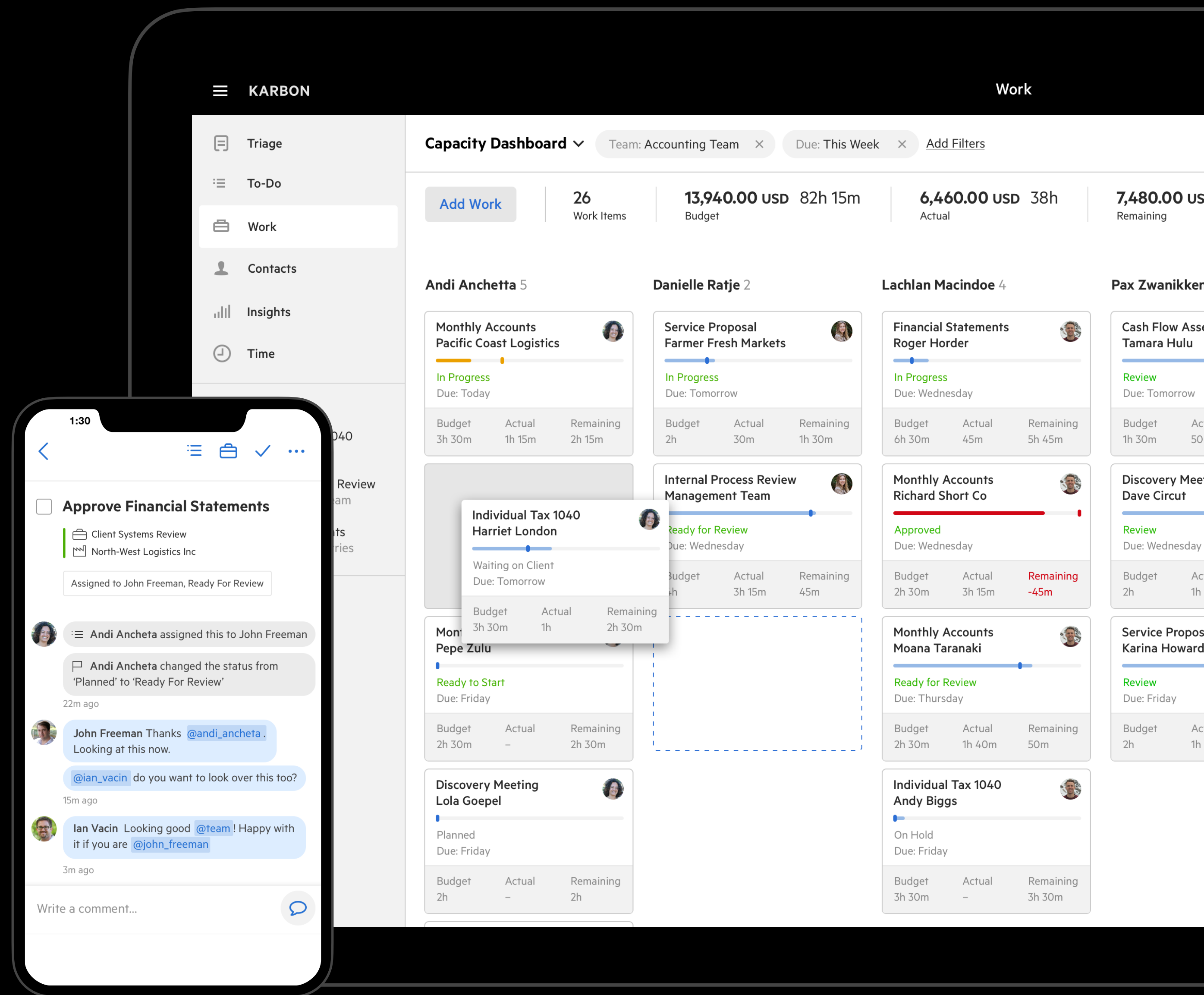




Work Management Software for Accounting Firms

karbonhq.com

GET STARTED



Questions?



Thank you

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