



## KARBON FOR CLIENTS SUPPORT GUIDE

### COLLABORATION

**Karbon for Clients** is a secure and user-friendly portal designed to simplify communication with your accountant. It helps you easily share documents, respond to requests, and approve important items—all in one place.

- One consolidated place to see all outstanding requests, submit documents to us and communicate together.
- Improved response times.
- Reminders for our clients who need a little more support.
- Centralized communications with your entire service team.
- A convenient mobile app to stay connected on the go, available on both **iOS** & **Android**.

### WHAT IS KARBON FOR CLIENTS (K4C)?

Your Karbon Client Portal will provide you with a personal checklist that will be visible to both you and your accountant. You will have a list of tasks or requests or even receive documentation pertaining to you or your company. Once a task is completed, please mark the item as complete to instantly notify us.

If you need any additional assistance with technical questions or you run into any issues, please contact [\*\*support@karbonhq.com\*\*](mailto:support@karbonhq.com).

### SETTING UP KARBON FOR CLIENTS (K4C) FOR THE FIRST TIME

You can choose to access “K4C” via the website or via the Karbon for Clients App. For instructions on the App, scroll down further. To access the website, click on this link below after you’ve read through the instructions.

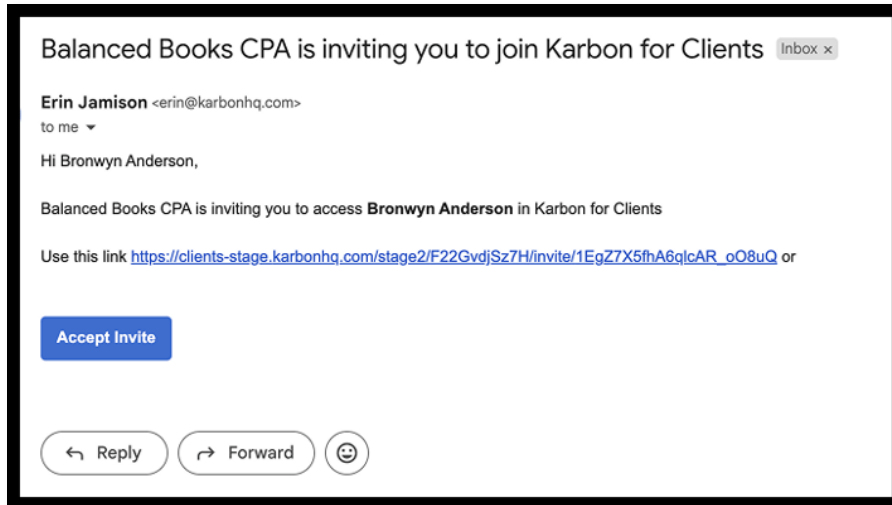
[\*\*https://clients.karbonhq.com/intu2/4HQFm9JZdhvD/login\*\*](https://clients.karbonhq.com/intu2/4HQFm9JZdhvD/login)

#### 1. Download the Karbon for Clients App

- iOS: Open the App Store on your iPhone or iPad and search for "Karbon for Clients". Tap Get to download and install.
- Android: Open the Google Play Store on your Android device and search for "Karbon for Clients". Tap Install to download and install.

#### 2. Accept the Invite:

When we send the invite, you will receive an email. Click the link or button in the email to accept our invite.

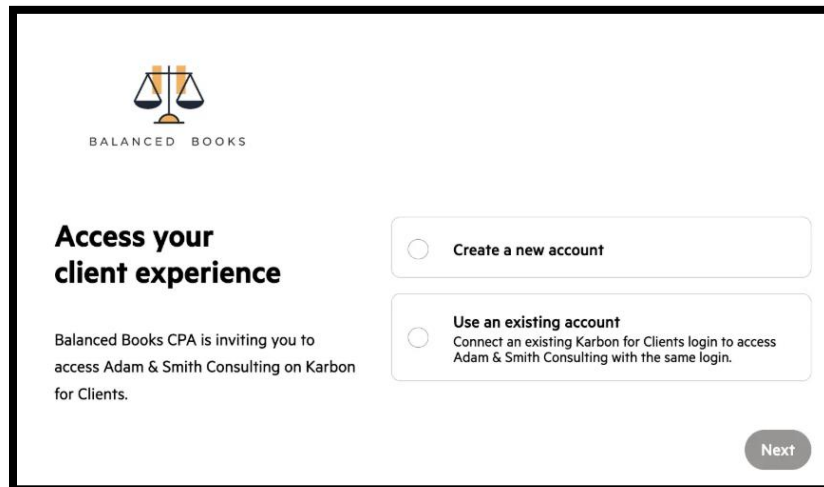


### 3. Create a New Account:

You will be prompted to create a new account. Important Clarification:

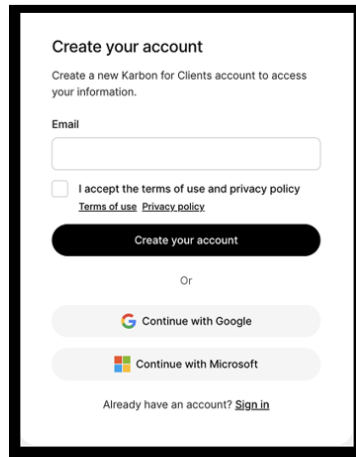
- Select "Create a New Account" if this is your first time setting up a Karbon for Clients Portal account, *even if you previously used an older version of the Karbon client portal in the past.*
- Select "Use an existing account" *only if you have previously set up and logged into a Karbon for Clients Portal account.* This option is for reconnecting an existing account, not for migrating from an older portal version.

Select "Create a new account" to begin the setup process.



#### 4. Sign In with Your Email:

Sign in using your email address. You will have the option to choose your email provider or manually enter your email address and login credentials.



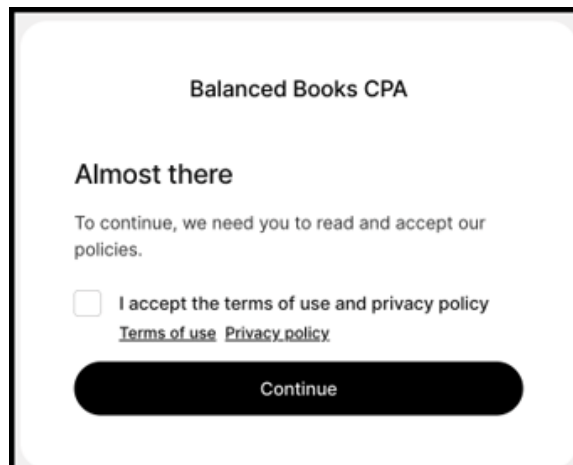
The screenshot shows a 'Create your account' form. At the top, it says 'Create your account' and 'Create a new Karbon for Clients account to access your information.' Below this is an 'Email' input field. Underneath the input field is a checkbox labeled 'I accept the terms of use and privacy policy' with links for 'Terms of use' and 'Privacy policy'. A black button labeled 'Create your account' is positioned below the checkbox. Below the button is the word 'Or'. There are two social login buttons: 'Continue with Google' and 'Continue with Microsoft'. At the bottom, it says 'Already have an account? [Sign in](#)'.

#### 5. REVIEW AND AGREE TO THE POLICIES:

Before proceeding, please review and agree to the following policies:

**Privacy Policy** - Karbon's privacy policy explains what personal data they collect from users of their services (website, apps, platform), how they use it, and what rights users have regarding their data (access, correction, deletion, etc.). It also covers data transfers, cookies, and how users can control their information.

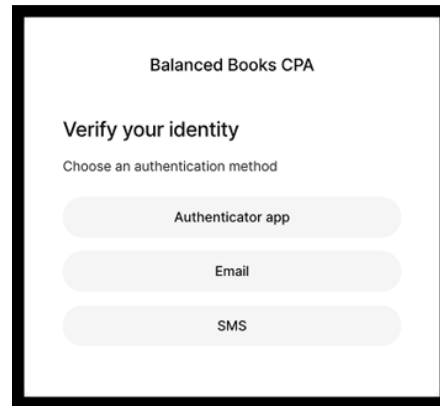
**Terms of Use** - Karbon's terms of use outline the rules and regulations for using their services. It covers user responsibilities, intellectual property rights, payment terms, dispute resolution (including arbitration), and limitations of liability.



The screenshot shows a screen titled 'Balanced Books CPA'. Below the title is the heading 'Almost there'. The text reads 'To continue, we need you to read and accept our policies.' Below this is a checkbox labeled 'I accept the terms of use and privacy policy' with links for 'Terms of use' and 'Privacy policy'. A black button labeled 'Continue' is positioned below the checkbox.

## 6. SET UP MULTI-FACTOR AUTHENTICATION (MFA):

For added security, you will need to set up Multi-Factor Authentication (MFA). This process requires verifying your identity using something you know (your password) and something you have (such as a code sent to your phone, email, or generated by an authentication app).



## ADDING ALL YOUR ENTITIES

Once you have created your Karbon for Clients account, you will need to accept an invite for every business or individual that is engaged for a service.

For example, if you are having a tax return done for your business in addition to your personal tax return, you will need to accept the invite for both your business and yourself.

Fortunately, this process only takes a few seconds each time. Just click on each link we email to you to accept the invite.

**Access Now**

**Why access the client portal?**

- **Stay informed:** Track the progress of your projects in real-time
- **Securely share documents:** Upload, review, and approve files with ease
- **Access anytime, anywhere:** Available 24/7 via browser or mobile app
- **Reduce back-and-forth:** Simple requests and automatic updates reduce the need for emails and calls

**Need help?**

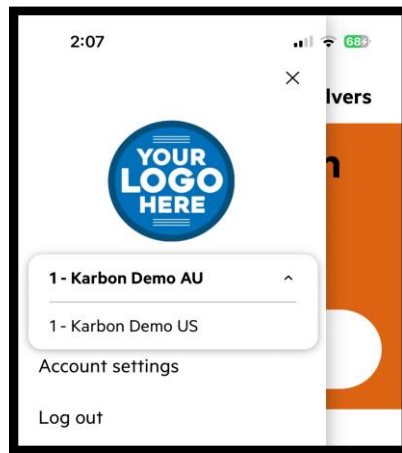
Visit the Karbon for Clients [Help Center](#) for tips on getting started and troubleshooting, or reply to this email with your questions.

## USING THE APP

### Logging In

- **Open the App:** Tap the Karbon for Clients app icon on your device.
- **Enter Your Credentials:** Use the same email address and password you use for the Karbon for Clients web portal.
- Tap "Log In".
- **Access Your Portal:** You are now logged in and can access the mobile app's features.

For users connected to multiple client accounts, a **client switcher** is available in the top right corner. Tap the current client name to open a list and select a different client portal.



## MOBILE APP FEATURES AND NAVIGATION

The Karbon for Clients mobile app offers all the same major functionalities as the web application, optimized for your mobile device. The primary navigation is located at the bottom of the screen for easy access to key areas:

**Home:** Provides an overview of recent activity and important updates from your accounting firm.

**Tasks:** Displays your assigned tasks and client requests. Tap a task to view details, add comments, and mark it as complete.

**Signatures:** Shows documents awaiting your signature. Tap a document to review and apply your signature.

**Documents:** Allows you to view documents shared with you and upload new ones.

Account-level options and settings can be found in the hamburger menu (usually located in the top left corner).

For users connected to multiple client accounts, a client switcher is available in the top right corner. Tap the current client name to open a list and select a different client portal.

## MANAGING TASKS

1. Navigate to the Tasks section.
2. Tap a task to view its details and add comments.
3. Mark a task as complete by tapping the checkbox next to it.
4. To upload documents to a task, open the task and look for an Upload or Add Document button. You can choose files from your device, take a new photo, or select from your photo gallery.

## SIGNING DOCUMENTS

1. Go to the Signatures section.
2. Tap the document you need to sign and review it carefully.
3. Tap the designated signature field and follow the prompts to draw, type, or upload your signature.
4. Tap Submit, Sign, or Complete to finalize.

## UPLOADING AND VIEWING DOCUMENTS

1. Navigate to the Documents section or open a specific task.
2. Tap Upload or Add Document.
3. Choose to upload a file, take a photo, or select from your gallery. Follow the on-screen instructions.
4. To view a document, tap its name in the Documents section or within a task.

## CLIENT SWITCHING

1. Locate the client switcher in the top right corner (if applicable).
2. Tap the current client name.
3. Select the desired client portal from the list. The app will update to show the information for the selected client.

## TROUBLESHOOTING

- **Login Issues:** Double-check your email and password and ensure you have a stable internet connection. Contact your accounting firm if you cannot log in.
- **Missing Tasks or Documents:** Verify you are in the correct client portal if you have multiple accounts. If the issue persists, contact your accounting firm.
- **Document Upload Problems:** Ensure the file type and size are supported and check your internet connection.
- **Signature Issues:** Make sure you are tapping within the designated signature field.