

What are Client Tasks?

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Introduction to Client Tasks

Monthly accounting - July 2022

REQUESTED BY
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Provide the following details for this past month's financial statements

| | | |
|--------------------------|--|------------|
| <input type="checkbox"/> | Upload your month-end bank and credit card statements Go to your online banking site and download a statement to your computer. You can safely share your statement by attaching it to this task. | Due Friday |
| <input type="checkbox"/> | Upload your month-end bank and credit card statements Go to your online banking site and download a statement to your computer. You can safely share your statement by attaching it to this task. | Due Friday |
| <input type="checkbox"/> | Ensure all receipts and invoices are uploaded to the system Check that all receipts and invoices are uploaded to the accounting system. | Due Friday |
| <input type="checkbox"/> | Ensure your bank accounts are active and up-to-date in the accounting system Check that all prior payments are recorded in the accounting system. Update any bank accounts that are due or schedule as appropriate, if using a... | Due Friday |

4 Tasks Remaining to Complete

Powered by Karbon

Common Questions about Karbon's Client Tasks

Why have I got a link to these tasks?

You have received a link to these tasks because the person who sent them to you uses Karbon to manage jobs in their company and they have some tasks they would like you complete.

What is Karbon?

Karbon is used by organizations and teams to manage their jobs, email, and collaborate with their clients. [You can learn more here](#)

Why do I have to create a PIN?

You're asked to create a PIN to ensure no one else can access your client tasks. Creating this PIN will ensure only yourself and the person who sent these to you will have access to these tasks and related information.

Do I have to enter my PIN each time?

If you choose to remember your PIN on this device, then you won't be required to enter it each time. However, you will need to enter it the first time you access any of your tasks on a second device.

For example, if you first open the link on your mobile phone and create a PIN, and then later click on the link from your desktop, you would be asked for the PIN again.

What if I forget my PIN?

If you forget your PIN, simply click on the "Forgot PIN" link at the bottom of the page. This will send you an email where you can reset your PIN.

Do I need a separate PIN each time my accountant sends me new tasks?

No, you can use the same PIN for each new piece of work.

How do I complete these tasks?

When you have completed the tasks simply tick the box and it will be marked as completed. Before doing this, you can attach any files you'd like to send through this task.
