CoralTree

basil

PRACTICE MANAGEMENT

USER'S MANUAL

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Basil Simple User's Manual

1. Basil all-in-one Practice Management software

Basil is a cloud-based all-in-one practice management software for accounting companies, developed by CoralTree, Inc., San Jose, CA. CoralTree is also the maker of Qbox, used by accountants and bookkeepers to share Intuit QuickBooks™ Desktop company files.

Basil has several features typically used by accounting companies to manage their operations efficiently. These include Client Portal with white label and branding, document sharing, electronic Signatures, Tasks, and more. Accounting firms can choose the features they need to provide a consistent and reliable software environment for their employees and clients.

This user's manual describes each feature and its use in an integrated all-in-one software environment. Basil features have been influenced by considerable input from accounting firms on usability and ease of use. Please also refer to the Basil Help Guides for additional information related to setting up and customizing Basil features to maximize operational efficiency.

2. Client Portal

2.1. Clients

Clients are entities to whom the accounting company provides services like bookkeeping, payroll, or tax preparation services.

Each Client can optionally have one 'Primary' Client User.

Clients can be deactivated and reactivated by the Account Owner and Team Members, removing them from the Clients list in the People tab. This will also prevent the Client's Primary User from being able to sign into Basil until the Client is reactivated.

Each Client has a folder to store documents, accessible to the Account Owner, Team Members, and only the Client User who has been invited.

2.2. Document upload and download

Documents can be uploaded to any Client folders in one of many ways:

- Team Member or Client User can sign into their Basil account, navigate to the target folder, and use the 'Upload Folder(s) / File(s)' link to upload documents or folders containing documents.
- The user can simply drag and drop a file or folder directly into the target folder.
- A Client User can simply be sent a link to upload documents. They will be sent a verification code for validation.

Documents can be downloaded from any Client folder in one of many ways:

- Users can select a 'Download File' link for a document or bulk select documents and download
- A Client User can simply be sent a link to download documents. They will be sent a verification code for validation.

2.3. Viewing and editing documents

Office documents like Documents, Spreadsheets, and Presentations can be edited online in Basil. When the file is opened, the user is prompted to lock the file so another user cannot simultaneously edit the document. When the first user is done with the edits and closes the file, a new version of the file is created and the lock is released so another user can work on the document. A history of versions and details of who modified the file and the date modified are available for review. Basil retains 20 versions of a file which can be restored to any of the previous versions. Deleted files are retained in Basil for a period of 30 days from the date of deletion, and can be restored when needed by clicking the 'Deleted Items' link within the folder where the file originally was stored.

3. My Firm

3.1. My Firm Folders

Basil provides folders for the accounting firm's own use as well, under the My Firm tab. The Account Owner has default access to all the folders under My Firm. Staff members of the accounting firm can be given access to one or more folders as needed. Typically, the accounting firm can use the My Firm area to create folders for their own HR, Legal, Sales, Marketing, and other such departments.

3.2. Team Members, Roles, and Permissions

The Account Owner can add staff members providing services to their clients, as 'Team Members'. They will have access to all Clients and have the same permissions for most of the functions across Basil. Team Members are billable users and will be added to the Account Owner's bill.

4. Electronic Signatures

4.1. Basil Electronic Signatures

Basil has an electronic Signature feature that accounting companies can use to get engagement letters, tax forms, legal agreements, and other such documents signed electronically. This avoids the trouble of using 3rd party software for Signatures. Signed documents remain within their Basil accounts and can be accessed readily when needed.

4.2. Document preparation

PDF documents can be prepared for electronic Signature by populating several different components like Signatures, dates, text, and assigning them to the people who will be signing the document. Once the document is prepared for Signature, it can be sent to the users, who can sign the document even if they do not have a Basil account.

A Signature 'order' can be enforced if the users need to sign the document in a particular order.

4.3. Audit Trail

Basil maintains an audit trail for documents that are prepared and signed electronically. The audit trail contains information such as name, email address, IP address, and time of Signature for every user signing the document. The audit trail in PDF format can be used as proof of Signatures when needed.

5. Tasks

5.1. Basil Tasks

Basil Tasks can be created and assigned to the Account Owner and Team Members. Tasks help streamline accounting services, helping everyone plan their work and provide a consistent service to their clients.

Basil Tasks are created for a Client or My Firm. Tasks can be assigned to Client Users and Team Members or left 'Unassigned' so any Team Member can pick up the task. Tasks can also be assigned to multiple team members who need to work on the same task.

5.2. Task status, Kanban Task board

Basil Tasks assigned to Team Members and Client Users can be tracked on the Kanban Task board by selecting the Placard view. Kanban provides an elegant, pictorial representation of the Task status, with a tile representing each Task. Task details are available on the Task tile. Kanban Task status is represented in columns, with the Tasks not started on the left and completed on the right columns. The 'In Progress' Status is provided, making the Kanban 3 Status board. The Kanban Task board and colors motivate the Task owners to complete their Tasks on time, by advancing them from left to right until completion.

5.3. Task List View

This view for Tasks can be used to view a larger number of Tasks in a tabular format. Filters can be used to select a specific Team Member, client, or Task Status.

6. Forms

6.1. Basil forms and templates

Basil Forms is a great tool available to the Account Owners who routinely collect details from their clients, like data required for processing their tax returns or bank loan applications. A form template can be created for each requirement and sent to one or more clients who can fill in the details and submit them. Form templates can be created using several elements like single line and multi-line texts, names, EIN and SS numbers, drop-down lists, check boxes, radio buttons, questionnaires, currency, Signature, etc. Submitted forms can be resent and resubmitted if there are errors. Cora assistant can be enabled for forms, which will send email reminders until the form is completed.

6.2. Form responses

When recipients have completed their forms, the responses will be viewable in the Forms tab for the Basil user from the web interface or by downloading to PDF. If there were files attached to the form responses, those files will be stored in hidden folders. The Basil user can view the attached files in the 'Open folder containing files' link at the bottom of the form response when viewing from the Forms tab. From there, the user can move those files to other folders.

7. Search

Basil has powerful search features to search for items locally and globally. Local search is used to search for items within the context of the displayed items. Global search is used to search for any item across the account. These search features help users find items they are looking for just with a few keystrokes.

8. White Label
Account owners can enable the white label feature under settings. They can upload their company logo in the prescribed format so their clients will see their company logo instead of the logo of Basil. When white label is enabled, account owners can use the code provided to create a direct link on their websites for their clients to access their Basil accounts.

9. Basil AI Copilots - Empowering Account Owners, Team Members, and Clients with AI Assistance
9.1. What Are AI Copilots?
Basil AI Copilots enable users—including Account Owners, Team Members, and Clients—to streamline their work using Basil's built-in ChatGPT integration. These intelligent tools help users complete tasks faster and more efficiently, directly within the Basil platform.

9.2. Current AI Copilot Capabilities?
As of now, Basil AI Copilots support the following key workflows:

- Document Summarization

Quickly generate concise summaries of PDF documents to understand their content at a glance.

- Smart Signature Placement

Automatically identify and insert e-signature fields at appropriate locations in documents.
Additional AI Copilots are under development and will be included in future releases.

9.3. How AI Usage is Tracked
AI Copilot operations consume AI Credits, which are required for each AI-powered task. The number of AI credits used is displayed at the end of every operation and automatically deducted from the user's available balance.

- AI Credit Allocation

Basil provides AI credits at no extra charge to paying customers, based on the following monthly entitlements:

Trigger	Monthly AI Credits Granted
Each billable user (Owner/Member)	100,000 AI credits
Every 25 GB of additional storage purchased	100,000 AI credits

- Important Notes
- AI credits reset monthly — Unused credits expire at the end of each monthly billing cycle.
- New credits are added on the first day of every monthly billing cycle.
- Non-transferable — AI credits cannot be transferred, resold, or converted into cash.

- AI credits are only usable for Copilot features within Basil.

10. Paying for Basil

    Basil is billed for the Account Owner and their Team Members on a monthly or yearly cycle. Two months' discount is provided when paying yearly. Basil provides 25 GB of storage free for every billable Team Member, and additional storage can be purchased when needed. Clients, Electronic Signatures, Tasks, and other features are not billed and can be enabled or disabled as needed. Please refer to Basil pricing for more details.

    Basil offers the most cost-effective solution in the industry, priced for use by large and small accounting firms. Basil is designed to provide an elegant, easy-to-use, consistent, and scalable environment for all accounting companies and client users.

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