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You deal with files all day, every day, and because of that, your experience should be as seamless and hassle-free as possible. So, we've upgraded our document management to better fit your workflow needs. Here's what's new.

Centralized File Access

Canopy now includes global files and a global inbox, which means you'll have a centralized place for easy access to all of your files including personal, team, and client files—no matter where you are within the software. However, only team members with the necessary permissions will be able to view and modify client files.

Drag-and-Drop File Uploader

In addition to centralized file access, uploading files to Canopy has never been so simple. You can now drag and drop files from your computer and quickly save them to your inbox or another location.

Integrated Workflows

Lastly, say goodbye to siloed files. With our new document management experience, your files are integrated with other features within Canopy. For example, you can embed files in a particular step for a task.

Eventually there will be other integrations as well. Coming up next is file integrations with email.

“Document management is a common pain point experienced by tax professionals across accounting practices, regardless of size,” said Nate Barrett, VP of Product at Canopy. “With the addition of global files, a global inbox, and integrated workflow features to our Document Management solution, users can now manage and store all of their files in one place.”

With all of the changes being made to Canopy's document management experience,

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