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use cases including client and teammate collaboration, task management,
document scanning ...

Apr. 11, 2019

The Canopy logo is displayed in a large, white, lowercase sans-serif font. The letters are bold and evenly spaced. The logo is centered horizontally and vertically within a solid green rectangular background that fills the lower half of the page.

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iteration of our mobile app and look forward to continuing to simplify the day-to-day experience for accounting and tax professionals.”

Canopy designed the new app to enhance and complement the work accountants perform at their desks with the long-term vision of covering important accounting use cases including client and teammate collaboration, task management, document scanning, dashboards and more.

Whether at the desk or on the go, accountants can access personal, team and client files directly from their device, including contact information, client records and tax documents. Accountants can also view, share files, capture key details, add new contacts and modify records on the go. Leveraging built-in file sharing functions, sharing files is simple and practitioners can communicate over native phone, messenger and email.

Designed to keep important data safe, Canopy's mobile app offers powerful security that doesn't sacrifice convenience. Security features include:

- Two-factor authentication: Validate the initial login over email and enjoy persistent sessions.
- Passcode, Touch ID, or Face ID: After the initial two-factor authentication, sessions will persist without inconvenient logouts, all while being protected with easy passcode, Touch or Face ID authentication.
- Device management: Track all connected mobile devices, revoke access and conduct data purges if a device is lost or stolen.
- Data encryption: All data is encrypted at rest and in transit.

“With the new mobile app, Canopy’s customers can now access important

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attorney to launch Canopy from his basement in 2014.

Firm Management

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