

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

product suite and further ease an accountant's workload as they head into the 2019 tax year.

Feb. 11, 2020



Canopy, a cloud-based practice management platform for tax and accounting professionals, has released new updates that enhance the functionality of its product suite and further ease an accountant's workload as they head into the 2019 tax year.

"We know tax season is generally the busiest time of year for accounting professionals," shared Larry Furr, Chief Product Officer, Canopy. "We've been working hard developing key new features and functions to ensure this tax season is the most productive for our Canopy users and their clients."

New features and updates include:

Canopy Desktop Assistant "Scan To"

- Complementing the recently added print-to functionality, enabling users to print files directly to folders within Canopy, is the new "scan to" functionality in the same tool. Once the Desktop Assistant is downloaded, users can print or scan documents directly to Canopy.

Global Client Request Creation

- During the tax season, accountants are in touch with clients more than ever. With

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

directly in Canopy, saving time during tax season.

Mobile App Updates

- Canopy has added new capabilities to its Client Portal mobile app for clients of users to complete the e-signature process.
- iOS users can now scan documents directly to the client portal from their phones.
- Document scanning in the client portal app will be available to Android users later this tax season.

New Projects Dashboard

- With the new projects dashboard in Canopy's Practice Management software, Canopy users can track the time spent on specific services. Users can also create a new project, add assignees, designate services, and distribute budgeted project hours all from one place.
- The projects dashboard will be available this month.

Transcript Feature Enhancements

- Users can now save transcripts to contact files, and additional enhancements to the download and print options were also released.

Canopy provides a cloud-based practice management and tax resolution software to thousands of accounting professionals nationwide. The modern, easy-to-use software cuts out tax practice busywork, improves the client experience, and brings all the different tools a practitioner needs under one roof. Canopy is also known for its 2-minute IRS Transcripts Tool. Learn more at www.canopytax.com and @CanopyTax.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us