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management, time and billing, document management, and client management capability. Canopy is completely cloud-based, so users can access the application from anywhere at any time.

Mary Girsch-Bock • May. 19, 2020



Canopy Practice Manager

www.getcanopy.com

From the **2020 reviews of practice management systems.**

Designed for accounting firms of any size, Canopy offers complete project management, time and billing, document management, and client management capability. Canopy is completely cloud-based, so users can access the application from anywhere at any time.

Canopy currently offers two plans, with a third plan due to be released sometime in the summer of 2020, and all plans include an unlimited number of users. Canopy also includes tax and portal mobile apps for both iOS and Android devices.

New features in Canopy for 2020 include a Deposits Dashboard, which provides a real-time view to all bank account balances and current cash flow. Also new is the option for clients to pay invoices in the client portal, storing payment information that can be used for future invoices. Users can also save and preview any email attachment and save tax forms directly to a client file for easy future access.

Adding a new contact in Canopy is easy, with users able to create contact

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edited, and users are able to view all billed and unbilled time from the Time Entries dashboard. Managers can view and edit time for all staff members from the dashboard as well, and any time entry can be added to any invoice for billing.

The screenshot shows the Canopy client portal interface for a user named Bryson Kennedy. The interface is divided into several sections:

- Client portal:** Includes contact information (Mobile: (602) 774-1356, Work: Bryson.kennedy123@gmail.com), About, Spouse, Dependents (Amelia Kennedy), Important contacts (Veronica Palmer), Linked contacts, and Tags.
- Active engagements:** A section with a '+ Create an engagement' button.
- Recently added files:** A list of files including 'California form 3520-BE Form', 'CA_565.pdf', 'Federal eFile.pdf', and 'State Paper File.pdf'.
- Active tasks:** A table with columns for Status, Task name, and Date. It lists tasks like 'Send K-1s', 'Meet with Bryson', '2019 return', and 'Collect McClintock...'.
- Recently updated notes:** A section with a '+ Add a note' button, containing notes about Bryson's availability and Taylor's note.

The interface also features a sidebar with navigation icons for Home, Communication, Notes, Files, Tasks, Engagements, Notices, Organizers, Transcripts, and Billing. The top navigation bar includes tabs for Home, Communication, Notes, Files, Tasks, Engagements, Notices, Organizers, Transcripts, and Billing.

Canopy includes excellent invoicing options, with users able to bill using time entries, as well as any customizable or add-on services. To make it easier to bill for add-on service, users can add service items to the application. Users can create both standard and recurring invoices in the application, while also setting up recurring payments on authorized payment dates from clients in Canopy. The billing dashboard provides users with a summary of all invoices due, a list of recurring invoices, as well as both current and past due invoices, while the billing dashboard

provides users with a list of all invoices, along with the client name, invoice date,

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Canopy currently has a Tax Prep module that is in beta release and includes a tax organizer, along with e-filing capability for both federal and state forms, and eSign capability for Form 8879, with Canopy users able to track all e-filed forms.

Those interested in workflow solutions will appreciate Canopy's ability to track progress on a task or project, as well as the ability to create custom task templates for easy task setup. Users can also sync calendars in the application if desired.

Canopy offers a variety of time and billing reports including an Aged Receivables Summary, Revenue by Team Member, Revenue by Contact, Hours Tracked by Service, and Hours Tracked by Team Members. All reports can be exported to a CSV file for customization if desired.

Canopy includes a variety of support options, including a searchable knowledgebase with getting started guides available. The support library offers access to numerous support articles, and a community forum is available as well. Chat-based, email and telephone support are included.

The application includes integration with Zapier, making it easy to connect with more than 2,000 apps, including Salesforce, QuickBooks Online, FreshBooks, Xero, Slack, and Microsoft Office applications such as Excel and Word.

Canopy currently offers two plans, Basic and Standard, with a Pro plan in the works. Pricing is based on the number of contacts: the Basic plan is \$894 per year for 200 contacts; the Standard plan is \$1,073 for the same number of contacts. Both plans include an unlimited number of users, the client portal, mobile app, document management, and invoicing, although time tracking or project management capability is only offered in the Standard plan.

2020 Rating – 4.5 Stars

Strengths:

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