CPA
Practice Advisor

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Resolution Software

Users can now set time budgets on tasks and subtasks to track how teams use their time. As a result, managers have better insight into specific projects as well as a holistic view of productivity across projects.

Sep. 24, 2020

Canopy has released new features and updates across its software suite to equip industry professionals with the tools they need to best organize their firm and efficiently utilize their time. The company is the maker of cloud-based practice management platform for accounting professionals.

"On the heels of a very busy season for tax professionals, we have made enhancements to our Practice Management and Tax Resolution offerings to continue providing our users with leading edge software. By streamlining the day-to-day activities of industry professionals, our goal is to make sure our customers can provide the best possible service to their clients," said Larry Furr, Chief Product Officer, Canopy.

New features and updates include:

Practice Management

Canopy is further streamlining firm activities through feature updates to the Canopy

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client requests, directly from the Canopy Mobile app.

"Canopy will continue to update its time and billing functionality including improved reporting, enabling firms to more easily track projects in addition to adding more powerful insights to how the practice is performing overall. These updates are increasingly important as virtual work becomes a necessity," continued Furr.

Tax Resolution

- **Notices eSign:** Accountants and their clients can now eSign an editable document within Canopy's Notices tool, resulting in saved time and streamlined notice resolution for the client.

In the coming weeks, Canopy will also be introducing annotations for better document management. PDF annotations can be applied and managed within Canopy to support team collaboration, particularly for teams working remotely. Staying updated and comparing notes on documents, has never been easier.

Firm Management

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