

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

powerful insights to develop deeper advisory relationships with their clients and simplify complex firm data in a few clicks.

Isaac M. O'Bannon • Aug. 01, 2023



Accounting practice management software maker [Canopy](#) is expanding the AI-driven capabilities of its software with the introduction of [Canopy Insights](#). This new feature of the Canopy platform will provide accounting professionals with powerful insights to develop deeper advisory relationships with their clients and simplify complex firm data in a few clicks.

Canopy Insights provides accounting firms with easily visualized and customizable reports to accelerate the decision making process and help fine-tune firm operations. Canopy can fast-track insights by keeping data and data analysis tools all within the

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

Canopy Insights provides users with:

- Canopy Insights allows users to directly type questions about individual reports and receive answers using artificial intelligence.
- New dashboards in the Clients, Tasks, and Time products designed to give all Canopy users a sample of the type of visuals and reports that can be created within the new Canopy Insights module.
- Users can get answers to firm-specific questions such as, "What were our most profitable service items?"
- The answers generated in Canopy Insights can be added to a Canopy "Live Board. The Canopy Live Board acts as a dashboard that is composed of all the questions and answers in a manageable and organized area for easy access to the key performance indicators of the firm and is populated with live data.
- Users can create individual reports or aggregate several into a report dashboard.
- Users can set alerts and schedule reports to be automatically delivered.

"Canopy Insights provides an intuitive visualization of completely customizable reports and insights to support accounting professionals in managing their practice at the highest levels of efficiency and productivity," said Shane Westra, Chief Product Officer at Canopy. "Ultimately, this will enable practitioners to identify trends more quickly and take action with the ability to drill down into areas of concern such as decreased productivity or revenue fluctuations."

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