Thanks for joining the webinar! Below, you'll find answers to your Canopy-specific product questions from the session.

What do you recommend doing first when implementing Canopy?

- Assess your processes. No tool is the same as another. Whenever purchasing software, especially something as crucial as practice management, it's a great time to evaluate when you want to start, stop, or keep about your current processes. And are any of your processes the way they are because of your tools? Can your processes be made better? Think automations, templates, filters, etc.

What do accounting firms not think about doing in Canopy that is important and/or impressive to clients?

- Honestly, every firm using Canopy should figure out how to use the Client Portal to its fullest extent. Users love the portal and the mobile app! And that reflects well on the firm. If you haven't gone through the steps you ask a client to go through, do it! Canopy's client portal is robust and user-friendly. Clients can upload documents, scan documents, sign documents or engagements, save payment details, fulfill client requests, comment on client requests, complete questionnaires, view invoices, and access documents.

When will we be able to customize the Tax Organizer?

- You can use Questionnaires to build a custom Tax Organizer. Soon (within a month), we'll have an open beta for AI Questionnaires and Document Checklists that will be created using previous years' data.

How can we use Canopy to organize our office workflow to know every day who we are working with and follow up? And how to delegate the office to have different departments run different tasks to allow the tax preparers to focus on tax work.

- You can use roles to help designate who works on what accounting task. Let's say you have a client engaged in all offered services with the firm. You can set up roles at the global level and then assign individuals to those roles at the client level. Then, you can use roles in the assignee field when building task templates– that way you stick to a single SOP for every service or workflow. It also makes it so you don't have to manually assign colleagues. When you create a task from a template for a client, the template will read who is assigned as the Tax Preparer or Bookkeeper designated on the client record and assign those individuals to those tasks or subtasks. You can then filter your task list by status, due date, or customized relative dates (start date, review initiated, etc.) to help you view, aggregately, what is being worked on or what is with a client.

Are there plans to integrate more tightly with tax software (i.e., UltraTax)?

- We are building the ability to upload tax documentation and use AI to create custom questionnaires/DRLs. Today, you can easily save files from UltraTax and other tax prep software to Canopy—no extra steps, just smooth, organized sharing that keeps everything in one place—using the Canopy Desktop Assistant. We are currently building a more robust API, so more advanced integrations will be possible.

How does a small firm get started with Canopy when starting from scratch?

- Canopy has great onboarding resources to help you get familiar with the software, import your client list, and build out a workflow.

What are one or two of the highest leverage automation or AI opportunities that exist within Canopy today that Canopy users could implement?

- Anything automation requires a mindset of slow down to speed up. Our automations are robust, but require thinking through what you're doing. For example, you can set up automations to send client reminder emails. You can use AI to help you write those emails. Automations can also be used to change a status or notify a colleague or owner of a task or client. Do it once and do it well– create a template with embedded templates for client portal invitations, client requests, and emails.

Will there finally be updates as far as creating an Engagement tab in a client profile?

- Expect big news from Engagements at the beginning of Q4. It's a big project and priority.

I am researching CRMs, and I feel like my accounting firm CRM should have 5 requirements. Does Canopy have these 5?

1. **Maintain a complete client list with all the basic client info**

2. **Projects and the accountant in charge**
3. **Fees and revenue tracking by client/type**
4. **Portal for clients**
5. **Mass email communication**

- Yes! These are some of our most loved features!

How best do we utilize Canopy for capacity determination? Budgeted hours by project? # of hours and/or clients assigned to each preparer? Amount of revenue per preparer?

- You can set budgeted time at the task and subtask. You can also track quantity of tasks per preparer and associate revenue with each preparer/employee. We have pre-built reports within our insights tool and you can also create custom reports. OR work with one of our professional services experts to build something custom.

How to utilize Canopy for client communications, especially communicating status updates during tax season. How to automate outreach for: project checkpoints, missing info, payment instructions, etc.

- You can weave email templates throughout workflows and use automations to send them to provide status updates to your clients. You can also include client requests in your workflows and then have follow-up subtasks with attached files or instructions on how to handle missing information. Canopy also takes care of the nagging with automated client reminders to complete a task– request, eSign, or payment. When it comes to payments, we make it as easy as possible. Clients can save payment methods to their portal. You can collect deposits/retainers. And you can set up recurring payments.