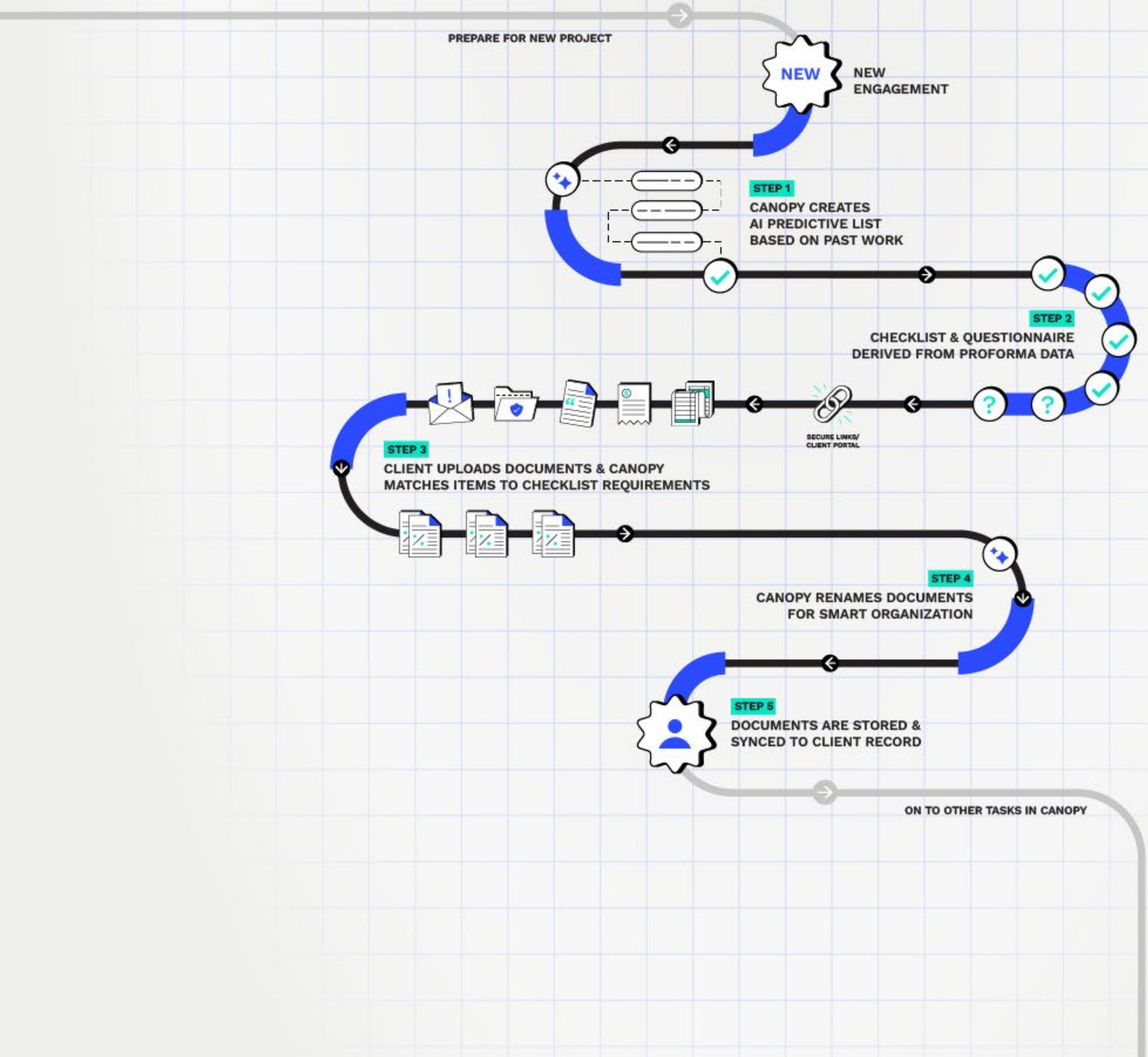
canopy

Smart Intake

PLAYBOOK



Canopy's new Smart Intake feature streamlines the onboarding and re-engagement process with AI-powered tools that automate document collection, pre-fill client data, and trigger internal workflows.

This rollout playbook equips admins and operations leaders to configure the system, train teams, and drive adoption across tax and bookkeeping services. The result is faster client readiness, reduced admin burden, and more consistent service delivery.

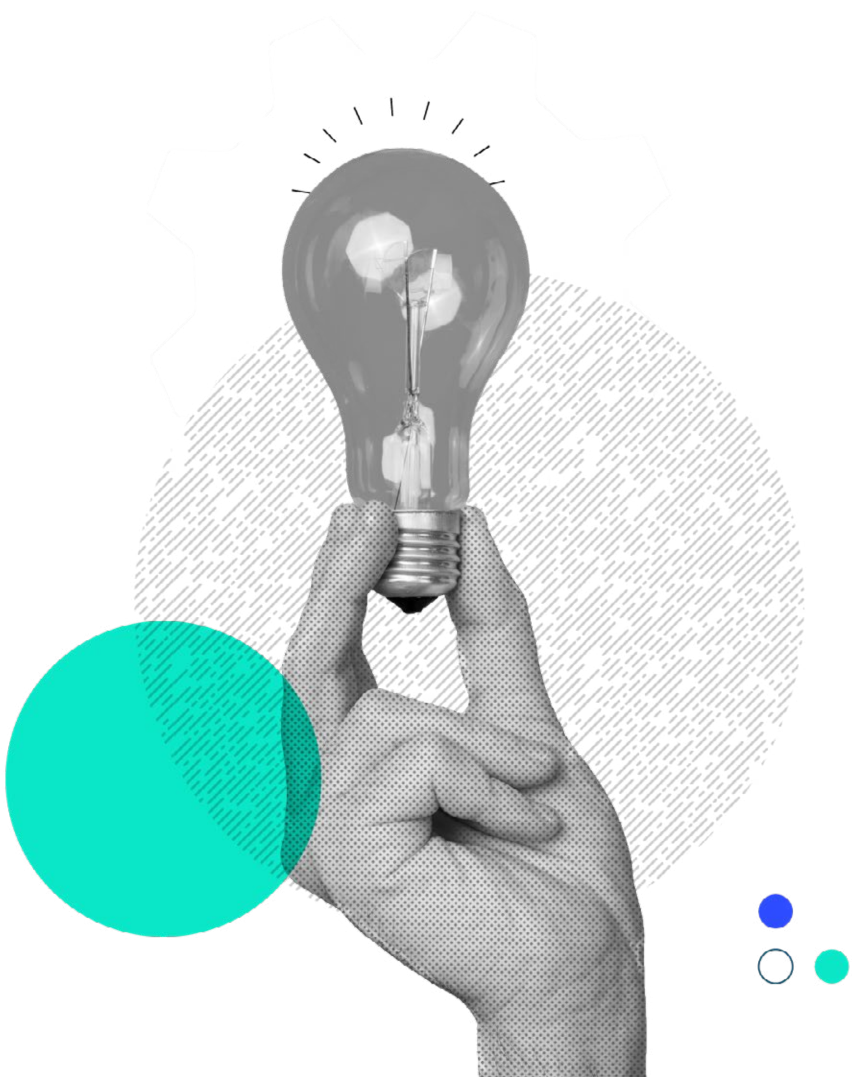
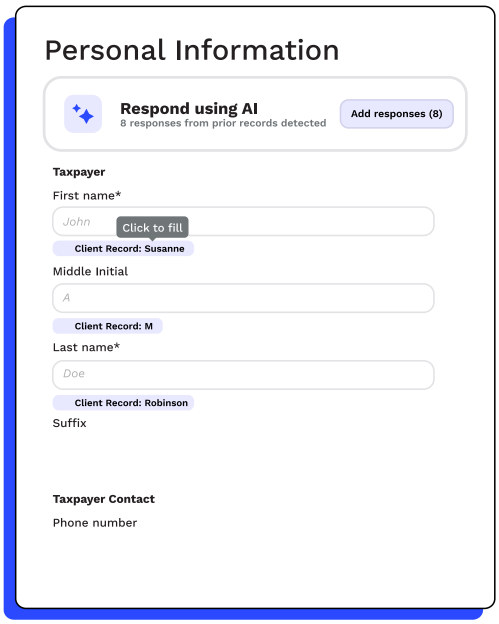


TABLE OF CONTENTS

01.
WELCOME



Hi there,
We built Canopy's new **Smart Intake** experience to help your firm convert leads into paying clients faster, cleaner, and with far less manual work.

This playbook gives you everything you need to:

- Train your internal team on the new smart intake features
- Customize intake flows for your firm's services (tax, bookkeeping, etc.)
- Roll out the features with minimal disruption
- Drive adoption with your staff and clients

Let's help your team collect everything you need from clients up front so you can start the work faster.

02.
WHAT'S NEW

FEATURE	DESCRIPTION	BENEFIT
AI Document Renaming & Classification	Automatically rename files using AI and enforce naming standards.	Consistent file naming with no manual effort.
AI Document Matching	Match uploaded docs to request list items (even bulk/nested).	Eliminate manual checklist matching.
AI Questionnaires & Checklists	Auto-generate forms and document request lists from prior data.	Reuse past data to get started faster.
AI Pre-Fill	Pre-populate answers in client questionnaires.	Reduce redundant data entry.
Manual Document Checklists	Create custom one-off checklists.	Flexibility for niche workflows.
Secure Links & Client Portal	Clients can submit data via secure links or the portal.	No login required for link-based workflows.
Engagements + Task Automation	Auto-generate tasks when engagements are accepted.	Set it and forget it—automated internal prep.
Payment Info & Recurrence	Collect/store payment data, run recurring payments.	Smooth billing operations.
Client Reminders & Auto Emails	Automate status updates and follow-ups.	Let Canopy handle the "nagging."

03.
ADMIN SETUP CHECKLIST

Before you train your team, use this checklist to get everything organized. Consider working with your stakeholder group to divide and complete tasks.

- Configure your settings, including:
  - Set permissions for team access
  - Customize secure link branding (if applicable)
  - Set up your Global File Naming Convention
- Configure standard engagement templates, including task automations.
- Build one or many intake questionnaires by service line (tax/bookkeeping/etc.)
- Test auto-reminder and email workflows
- Validate AI pre-fill performance with existing data
- Identify key services for first rollout (e.g., tax only)

04.

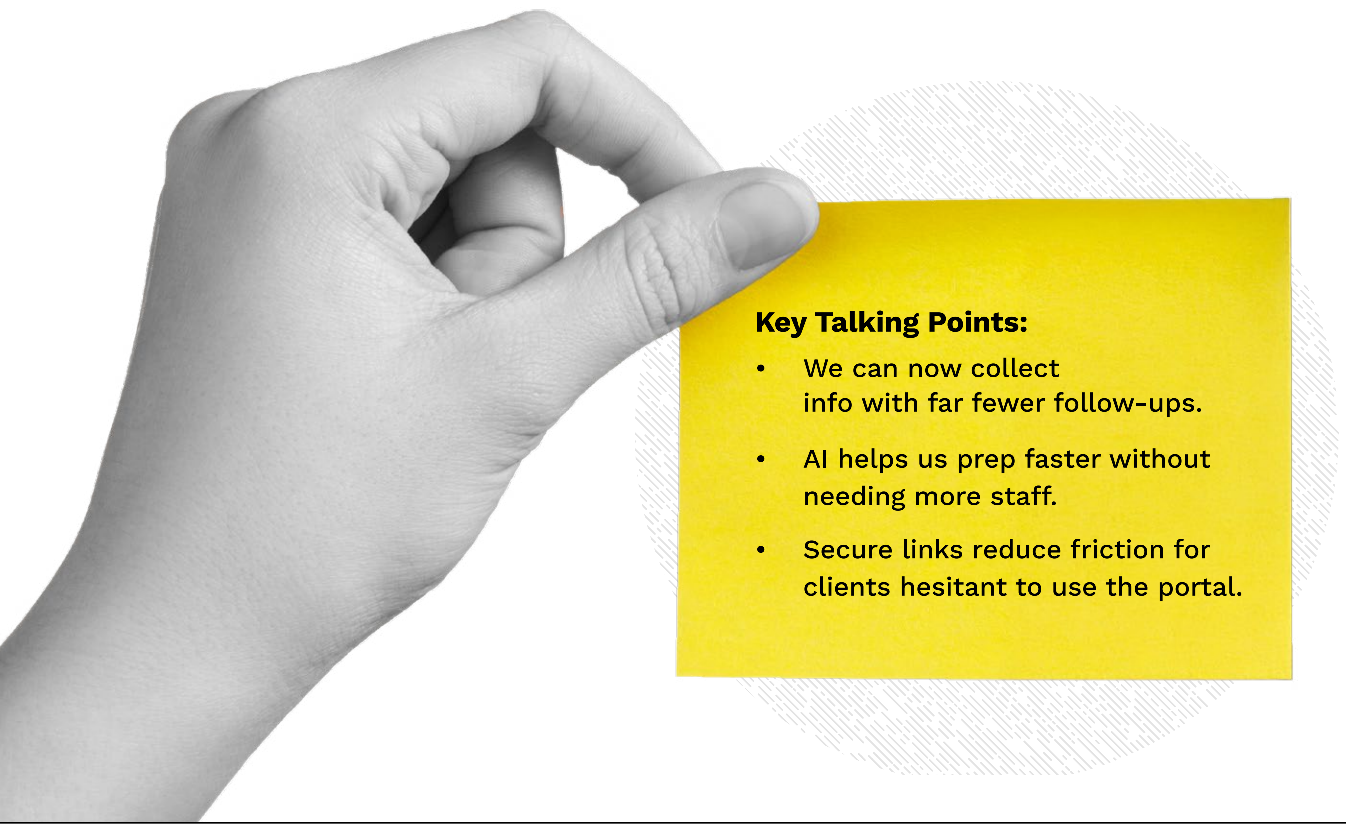
SAMPLE: INTERNAL TEAM TRAINING TEMPLATE

(30-Minute Session)

Objective:

Admins will introduce the new Smart Intake features and guide the team through common workflows.

TIME	TOPIC
0-5 min	Welcome + Goals of Intake Automation
5-10 min	What's New: Features Demo (via interactive demo pain point callouts)
10-20 min	Role-Based Workflow Walkthroughs (Tax, Bookkeeping)
20-25 min	Common Questions & Known Limitations
25-30 min	Live Q&A & Feedback Collection



05.
INTERNAL ANNOUNCEMENT TEMPLATE

Slack, Teams, or Email:

New Feature Alert: Smart Intake Automation is Live!

We've launched Canopy's new intake features, including AI Document Request Lists, questionnaires, and reminders. These tools will save hours of admin time and help us start work faster.

- Intake checklists by service
- Secure client submission links
- Auto-reminders and pre-filled data

Training is happening this [date/time].
Check the calendar invite!
[Demo here]
Questions? Ask [Admin Contact Name] or reply here.

SEND

06.
CLIENT COMMUNICATION TEMPLATES

Email – Notify Clients of New Process:

Cc Bcc

Subject: A Faster Way to Share Info With Us

Hi [Client First Name],
We've updated our intake process to make it faster and easier for you to share the info we need to get started.

☑ Fill out Questionnaires with AI
☑ Simple checklists for document uploads
☑ No portal login required – just click a secure link

You'll receive your intake packet soon—let us know if you have any questions!

Thanks,
[Your Firm Name]

SEND

07.
BEST PRACTICES BY USE CASE

TAX FIRMS

- Use AI to generate personalized checklists based on prior-year proforma data
- Leverage auto-reminders for document deadlines
- Send engagement, automate task creation, manage billing workflows

BOOKKEEPING

- Request receipts and transaction data early and often
- Configure recurring document requests monthly
- Use AI document renaming to organize uploaded receipts

ADVISORY / MISC.

- Customize questionnaires to reflect discovery or planning needs
- Automate follow-up tasks after intake packet is submitted

08.
CLICK-SAVING FEATURES

Top Time-Savers:

- **Auto-Match:** Upload a combined PDF → Canopy splits & matches to checklist
- **Pre-Fill:** Clients see 80% of their answers already completed
- **Engagement Acceptance** → Auto-create project tasks and reminders
- **Automated Reminders:** Schedule follow-ups for multiple clients at once

09.
ADOPTION & SUCCESS METRICS

METRIC	HOW TO MEASURE
****% of clients using intake forms**	Completed vs. sent forms
Time from form sent to work started	Intake sent to project management kickoff
Reduction in follow-ups	# of reminders sent pre/ post rollout
Internal admin time saved	Manual hours vs. AI-automated actions
Client satisfaction	NPS or short feedback post-intake acceptance

10.
RESOURCES

Interactive Demo: Click to Launch

Support Article Library: support.getcanopy.com

Need Help? Contact your Canopy CSM or Support Team