10-12 WEEKS OF Implementation

Premium

Kickoff Call

Introductions between you and your Implementation Specialist. We'll get on the same page, set deadlines, and discuss expectations.

Client Management

Focus on and learn the fundamentals. From the Client List to the Client Record, Templates and more, we'll show you how to start using the software.

Workflow Basics

A first glance into Tasks and how to start creating them. Learn how to enable your team with the different tools Workflow provides.

Workflow Review

Spend time reviewing workflows that have been created by our Professional Services team. Get ahead of the game.

Time Tracking

How to start and manage timers. We'll focus on getting your settings in order and enable you to start tracking billable and non-billable time.

Billing & Payments

Learn how to gather and track your revenue. Whether you're creating invoices, engagements, or payments, you'll feel confident enough to get started.

Document Management

Understand how to organize documents and share files with your team or your clients. Regardless of whether you're sending an e-Signature or receiving a file, we've got your back.

Team Training

Put what you've learned into practice. We'll walk your team through key features that were discussed throughout implementation to help them hit the ground running.

Success Plan

Meet your support system after implementation and set a cadence on when and how to connect. We're here to support you and your journey throughout Canopy!

**Additions Included

*Client Import Assistance
*Up to three Workflow Templates created (i.e. 1040, Bookkeeping, and Custom)
*One 45 min Insights Configuration or Consultation and one report creation
*_Note_: Team Training is typically one hour - More sessions can be purchased

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