8 WEEKS OF Implementation

Standard

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.

Customizing Workflow

Review workflows that you created and receive feedback from your Implementation Specialist. 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.

Success Call

Meet your support system after Implementation. We're here to support you and your journey throughout Canopy!

Add-On Features

Insights Overview: Familiarize yourself with Insights and data reporting.
Tax Resolution: Watch a recording on pulling Transcripts, creating Resolution Cases, and tracking Notices.

**Additions Included

*Client Import Assistance
*One pre-recorded Team Training pre-Success Call (1:1 Tailored Team Training can be purchased)

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