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Canopy Configuration Tips

Overview

This document will provide tips and tricks that coincide with the Canopy resources that are available to you. This information is provided as a means to help you quickly and efficiently configure Canopy to use within your firm. It is based on what we learned implementing Canopy within Dillon Business Advisors.

Canopy resources

Access the Canopy Academy Training Resources:
https://getcanopyonboarding.zendesk.com/hc/en-us

Areas of use + tips/tricks

This section provides additional information regarding specific areas, please refer to the Canopy training for details on all areas.

Settings

Click your profile image and go to Settings.

Team Organization

Users

Add your team members – communicate to them that they'll receive an email invite but not to do anything in Canopy yet since you are just getting it set up.

Roles

Add your roles (ie. Client Service Manager, Controller, CFO) - these will be used to assign to Task templates and then defined at the client level for the specific team member.

Billing Settings

Service Items

Add your Engagements (from Practice CS) or Services (from Onvio). These will be used in time entry and for reporting purposes.

User Rates

If you have varied rates for team members, add them. You can give the team member a single rate or define a rate per service item.

Custom Fields

Add Client ID to both Individuals and Businesses.

Tags

Add tags for the various products that your firm sells so you can track which clients are utilizing which products. These can be added at any time.

Clients

Once your clients are added you'll need to clean up the clients.

- Follow the Canopy instructions to link records
- Add team members to clients in their appropriate roles

Folder Structure

Navigate to Templates > Folders and add a template for each folder like what you used in your prior system.

Examples:

- Accounting
    - 2023
    - 2024
    - 2025
- Payroll
    - 2023
    - 2024
    - 2025
- Tax
    - 2023

- 2024
- 2025

Task Templates

First, Canopy's terminology is slightly different than what you are use to.

- Tasks = Projects (due date)
- Subtasks = Tasks (workflow steps)

Before you configure your tasks, set up your automation emails.

- Go to Templates > Emails and create the email templates you'd like to send for automation purposes.

  Examples:

  - An email to let the client know their documents have been received by the firm
  - An email to let the client know their return is waiting to be reviewed
  - An email to let the client know their return has been filed with the taxing agencies

Then set your custom statuses. You must first add a task to a client to then add custom status options.

1. Go to Templates >Tasks
2. Click the icon to the far right on a Canopy Task, choose duplicate and click Copy
3. Go to Clients > Client List
4. Choose a client
5. Click on Tasks
6. Click Create task
7. Click Template
8. Choose Template and click Appy
9. Click Create and Manage
10. Click any status field and add the custom statuses

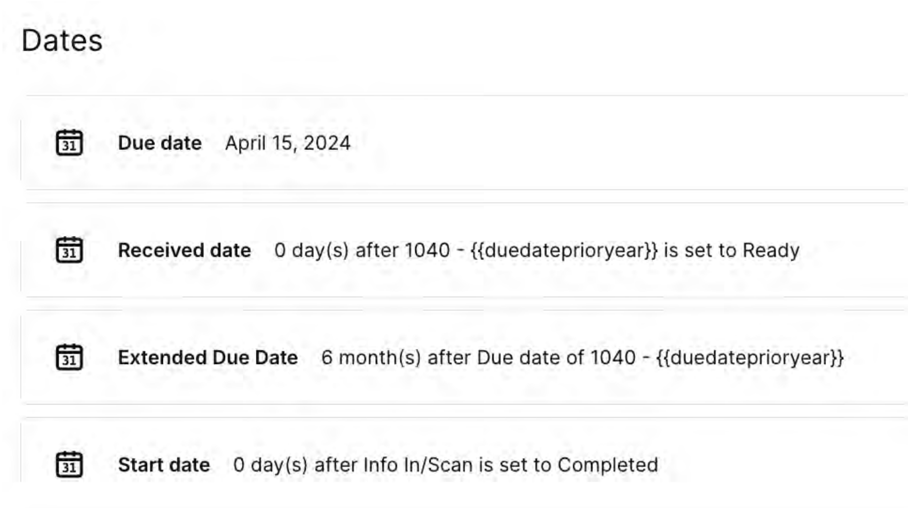
Now you are ready to create your firm's task templates.

Task Name

Utilize the dynamic placeholders in the Task name field – this will be super important for time entry selection.

Dates

Create the following date options:

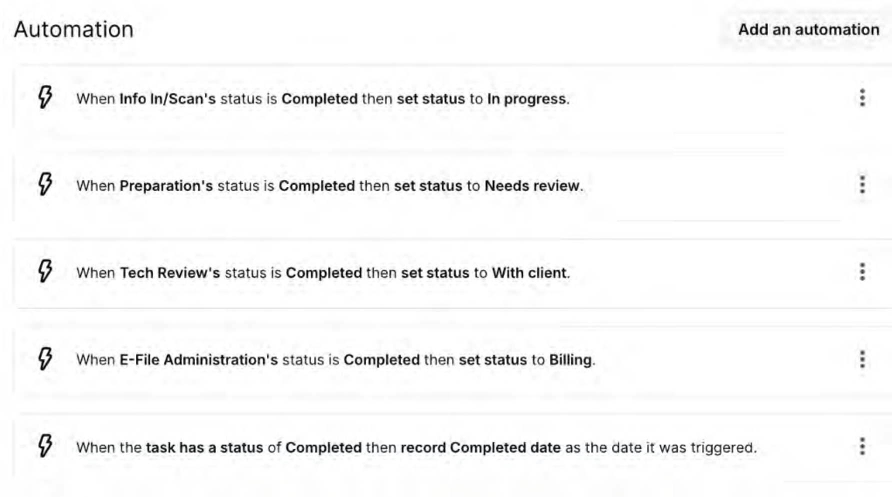


- Due date – hard code for due date of project
- Received date – this will the day it came in and got logged into the system
- Extended due date – set to # of months after due date
- Start date – this will be the day it was started – meaning docs were saved/uploaded to appropriate internal location

Automation

These will allow you to change status and send emails to clients.

This screenshot displays that as each subtask is completed the main task status will update for quick viewing. The completed date will also be logged when the task is completed which will be helpful with reporting.



Subtasks

Create each subtask. It is recommended to delete all of the pre-defined subtasks, create your first one, and then duplicate for each additional subtask inside that task. Use the following screenshots for assistance.

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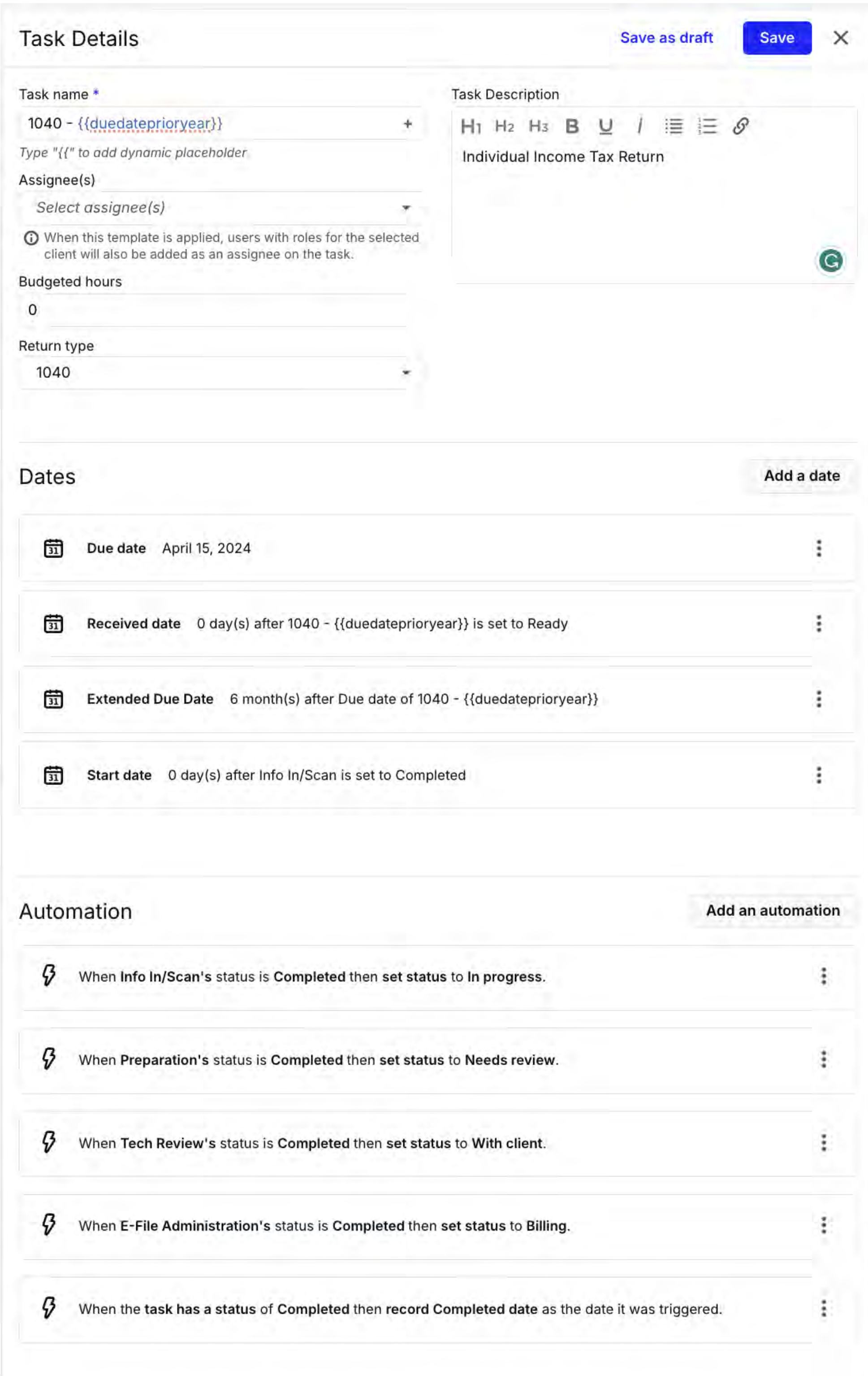
Tax Task with Subtasks Example



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Recurring

Recreate on

Due date schedule

Yearly every 1 year(s)

Create task(s) 4 month(s) before their due date

Subtask Details

Subtask name *

Info In/Scan

Assignee(s)

Select assignee(s)

When this template is applied, users with roles for the selected client will also be added as an assignee on the subtask.

Budgeted hours

0

Subtask Description

Info In/Scan

Dates

Add a date

Due date 0 day(s) after Due date of 1040 - {{duedatprioryear}}

Extended Due Date 6 month(s) after Due date of 1040 - {{duedateprioryear}}

Start date 0 day(s) after 1040 - {{duedateprioryear}} is set to Ready

Received date 0 day(s) after 1040 - {{duedateprioryear}} is set to Ready

Completed date 0 day(s) after Info In/Scan is set to Completed

Automation

Add an automation

When the **subtask has a status** of **Completed** then send email to client with **Received Documents** template.

When the **task has a status** of **Ready** then **set status** to **Ready**.

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Subtask Details

Subtask name *

Preparation

Assignee(s)

Controller

When this template is applied, users with roles for the selected client will also be added as an assignee on the subtask.

Budgeted hours

0

Subtask Description

H1 H2 H3 B U I

Preparation

Dates

Add a date

Due date 0 day(s) after Due date of 1040 - {{duedatprioryear}}

Extended Due Date 6 month(s) after Due date of 1040 - {{duedatprioryear}}

Start date 0 day(s) after Info In/Scan is set to Completed

Received date 0 day(s) after 1040 - {{duedatprioryear}} is set to Ready

Completed date 0 day(s) after Preparation is set to Completed

Automation

Add an automation

When **the previous subtask or client request has a status** of **Completed** then **set status** to **Ready**.

When the **subtask has a status** of **Completed** then send email to client with **Tax Return Review** template.

Subtask Details

Subtask name *

Review

Assignee(s)

Controller

When this template is applied, users with roles for the selected client will also be added as an assignee on the subtask.

Budgeted hours

0

Subtask Description

Review

Dates

Add a date

- **Start date** 0 day(s) after Preparation is set to Completed
- **Received date** 0 day(s) after 1040 - {{duedatprioryear}} is set to Ready
- **Completed date** 0 day(s) after Review is set to Completed
- **Due date** 0 day(s) after Due date of 1040 - {{duedatprioryear}}
- **Extended Due Date** 6 month(s) after Due date of 1040 - {{duedatprioryear}}

Automation

Add an automation

When **the previous subtask or client request has a status** of **Completed** then **set status** to **Ready**.

Subtask Details

Subtask name *

Tech Review

Assignee(s)

CFO

When this template is applied, users with roles for the selected client will also be added as an assignee on the subtask.

Budgeted hours

0

Subtask Description

H1 H2 H3 B U I

Tech Review

Dates

Add a date

Start date 0 day(s) after Review is set to Completed

Received date 0 day(s) after 1040 - {{duedatprioryear}} is set to Ready

Completed date 0 day(s) after Tech Review is set to Completed

Extended Due Date 6 month(s) after Due date of 1040 - {{duedatprioryear}}

Due date 0 day(s) after Due date of 1040 - {{duedatprioryear}}

Automation

Add an automation

When **the previous subtask or client request has a status** of **Completed** then **set status** to **Ready**.

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Subtask Details

Subtask name *

E-File Administration

Assignee(s)

Select assignee(s)

When this template is applied, users with roles for the selected client will also be added as an assignee on the subtask.

Budgeted hours

0

Subtask Description

E-File Administration

Dates

Add a date

Received date 0 day(s) after 1040 - {{duedatprioryear}} is set to Ready

Completed date 0 day(s) after E-File Administration is set to Completed

Start date 0 day(s) after Tech Review is set to Completed

Due date 0 day(s) after Due date of 1040 - {{duedatprioryear}}

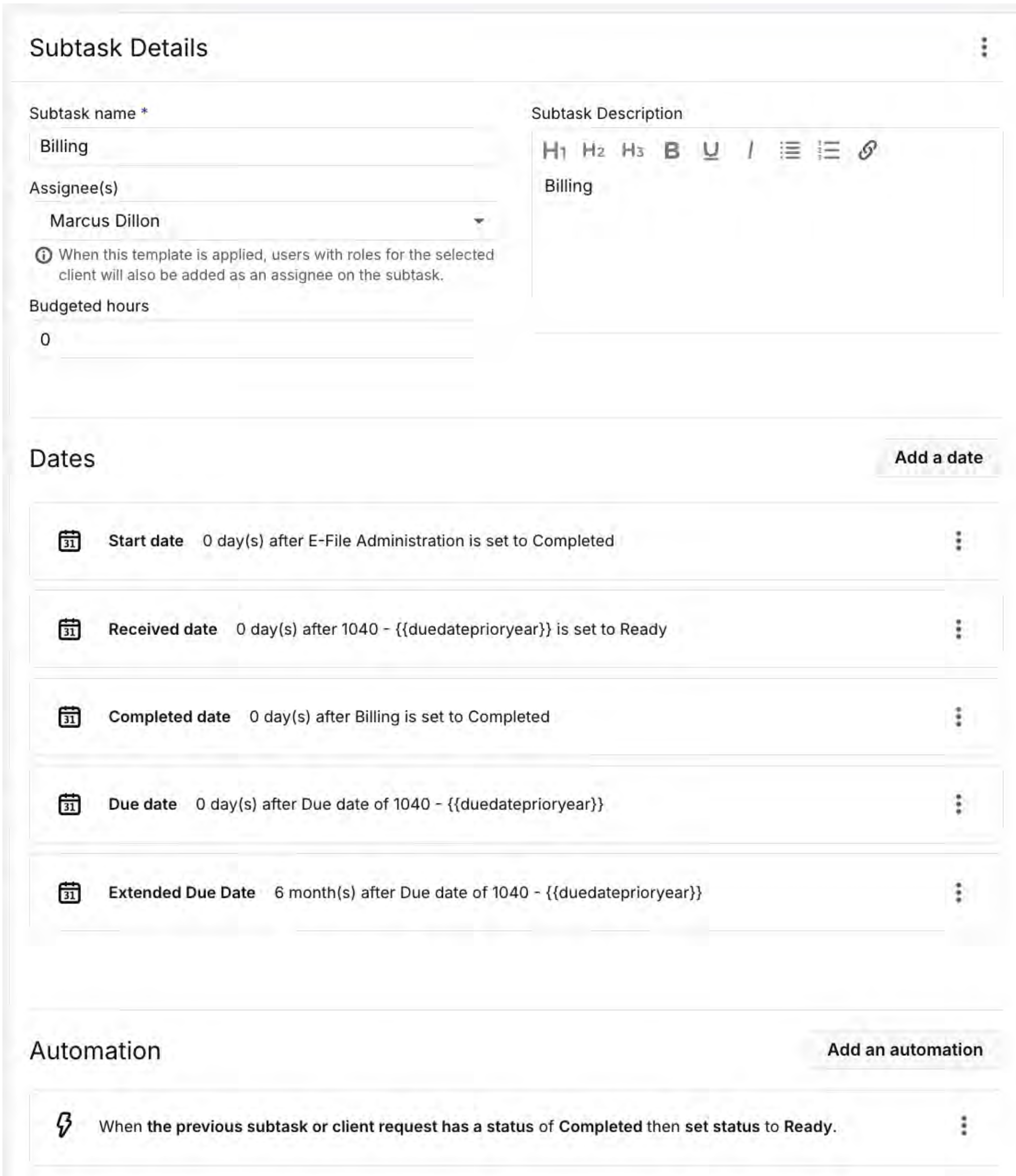
Extended Due Date 6 month(s) after Due date of 1040 - {{duedatprioryear}}

Automation

Add an automation

When **the previous subtask or client request has a status** of **Completed** then **set status** to **Ready**.

When the **subtask has a status** of **Completed** then send email to client with **Tax Return E-filed** template.



Subtask Details

Subtask name *

Billing

Assignee(s)

Marcus Dillon

When this template is applied, users with roles for the selected client will also be added as an assignee on the subtask.

Budgeted hours

0

Subtask Description

Billing

Dates

Add a date

Start date 0 day(s) after E-File Administration is set to Completed

Received date 0 day(s) after 1040 - {{duedatprioryear}} is set to Ready

Completed date 0 day(s) after Billing is set to Completed

Due date 0 day(s) after Due date of 1040 - {{duedatprioryear}}

Extended Due Date 6 month(s) after Due date of 1040 - {{duedatprioryear}}

Automation

Add an automation

When **the previous subtask or client request has a status** of **Completed** then **set status** to **Ready**.

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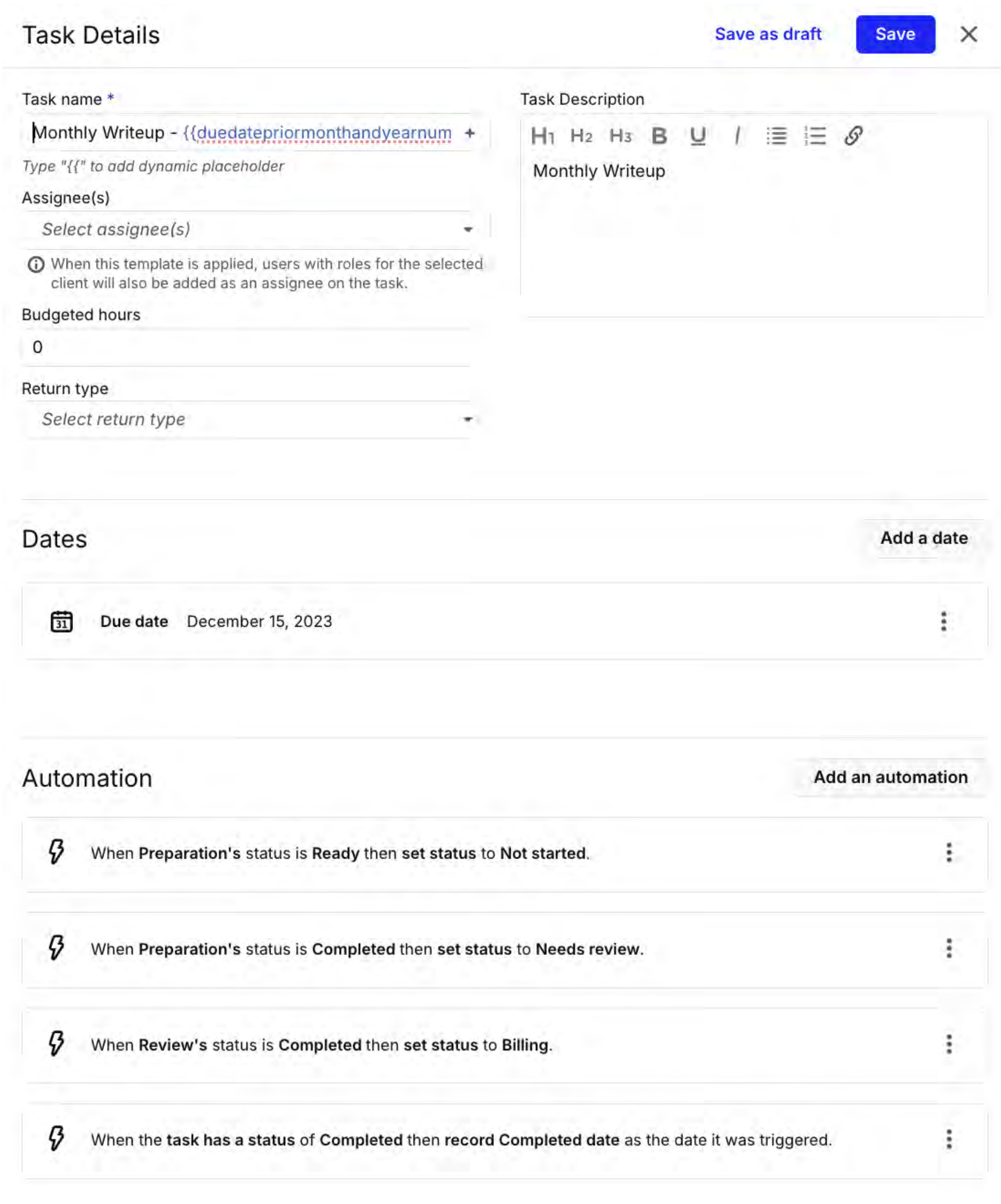
Example of Monthly Task


Task Details

Save as draft | Save

Task name *

Monthly Writeup - {{duedatepriormonthandyearnum

Type "{{" to add dynamic placeholder

Assignee(s)

Select assignee(s)

When this template is applied, users with roles for the selected client will also be added as an assignee on the task.

Budgeted hours

0

Return type

Select return type

Task Description

Monthly Writeup

Dates

Add a date

Due date December 15, 2023

Automation

Add an automation

When **Preparation's** status is **Ready** then **set status** to **Not started**.

When **Preparation's** status is **Completed** then **set status** to **Needs review**.

When **Review's** status is **Completed** then **set status** to **Billing**.

When the **task has a status** of **Completed** then **record Completed date** as the date it was triggered.

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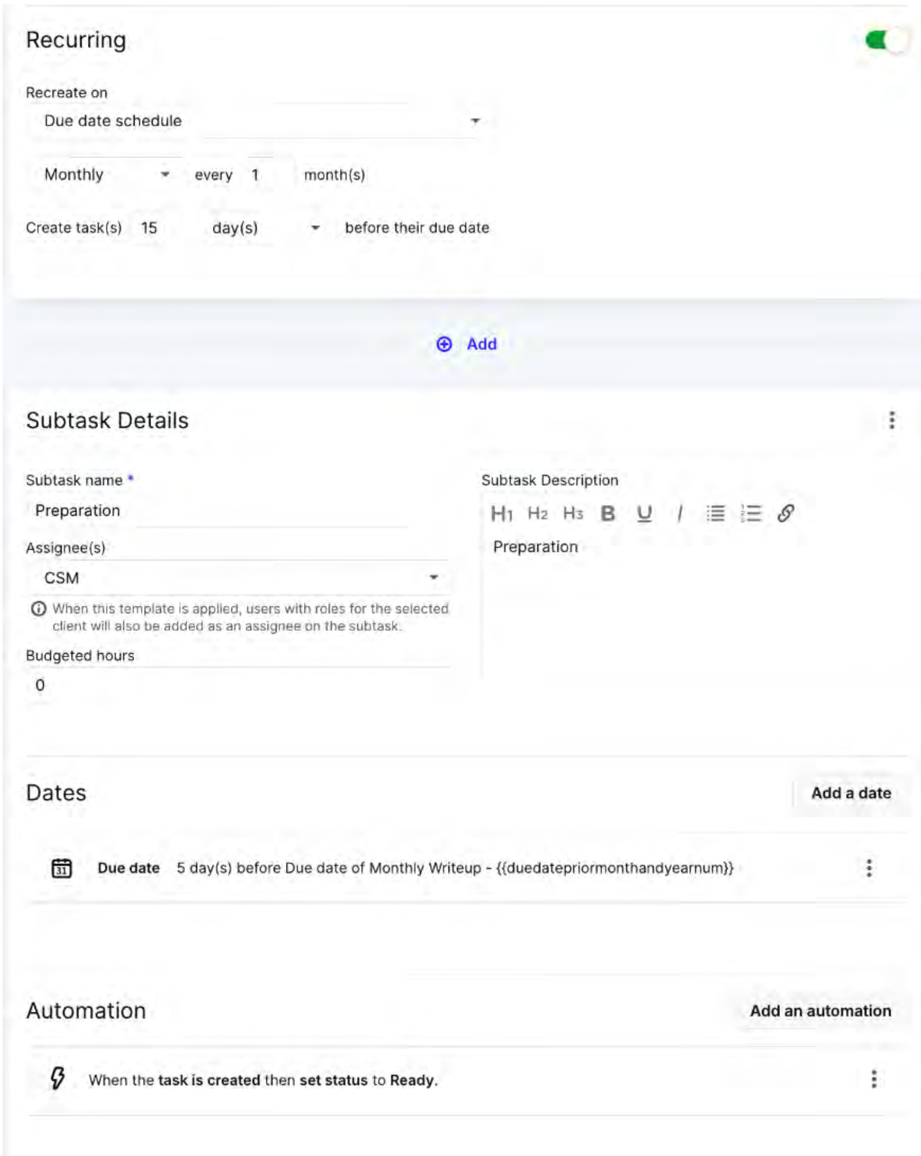

Recurring
Recreate on
Due date schedule
Monthly
every
1
month(s)
Create task(s)
15
day(s)
before their due date
Add
Subtask Details
Subtask name *
Preparation
Assignee(s)
CSM
When this template is applied, users with roles for the selected client will also be added as an assignee on the subtask.
Budgeted hours
0
Subtask Description
Preparation
Dates
Add a date
Due date
5 day(s) before Due date of Monthly Writeup - {{duedatepriormonthandyearnum}}
Automation
Add an automation
When the task is created then set status to Ready.

Subtask Details

Subtask name *

Review

Assignee(s)

Controller

When this template is applied, users with roles for the selected client will also be added as an assignee on the subtask.

Budgeted hours

0

Subtask Description

H1 H2 H3 B U I

Review

Dates

Add a date

Due date 0 day(s) after Due date of Monthly Writeup - {{duedatepriormonthandyearnum}}

Automation

Add an automation

When **the previous subtask or client request has a status** of **Completed** then **set status** to **Ready**.

Subtask Details

Subtask name *

Billing

Assignee(s)

CFO

When this template is applied, users with roles for the selected client will also be added as an assignee on the subtask.

Budgeted hours

0

Subtask Description

H1 H2 H3 B U I

Billing

Dates

Add a date

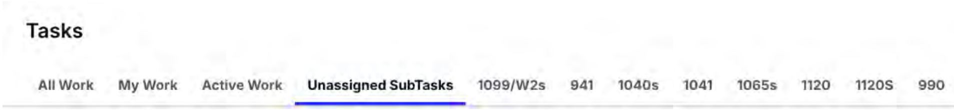
Due date 0 day(s) after Due date of Monthly Writeup - {{duedatepriormonthandyearnum}}

Automation

Add an automation

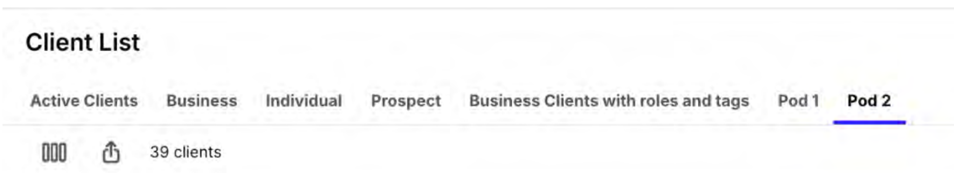
Task List

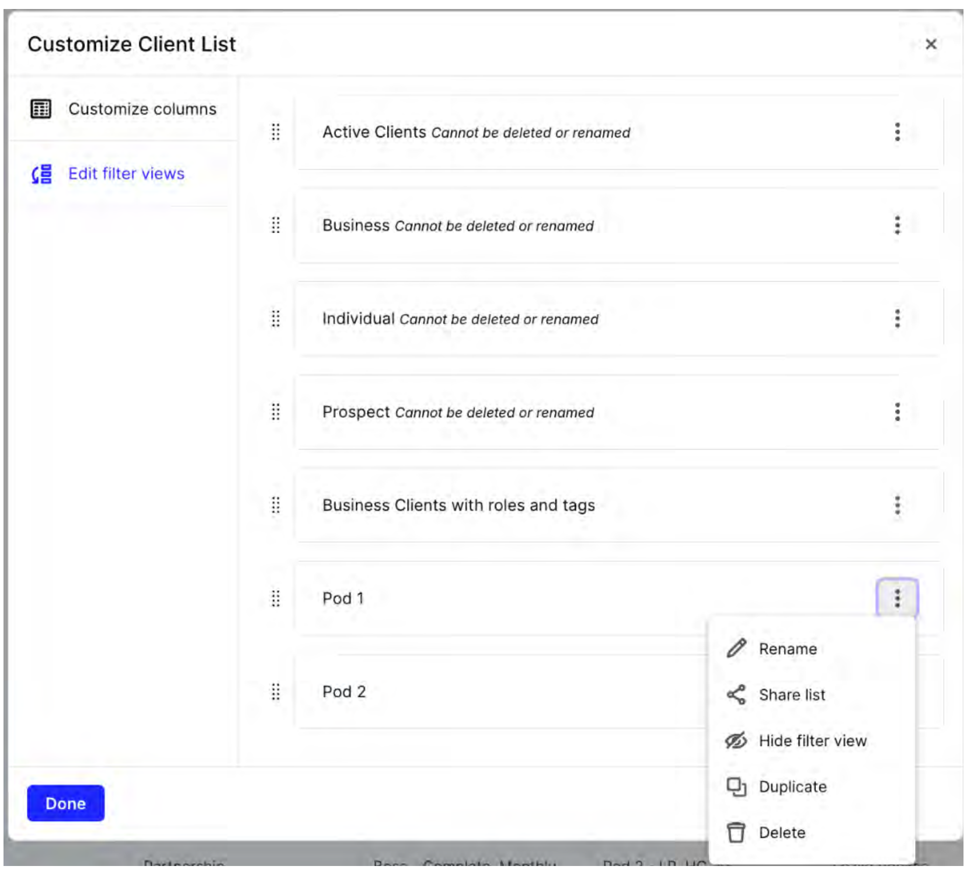
You have the ability to customize tabs within the Tasks list to manage all work. These customized tabs are unique to you. Start filtering and then save your filter.



Client List

You can filter your client list to create various tabs for easy viewing. These customized filters can be shared with others in your firm. While on the filtered tab click the 3 vertical bars then the 3 dots to share the list.





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