

New Canopy Insights Advances Practice Management Analytics with AI-Driven Custom Query and Reporting Capabilities

Canopy is expanding the AI-driven capabilities of its software with the introduction of Canopy Insights.

DRAPER, UTAH, UNITED STATES, August 1, 2023 /EINPresswire.com/ -- Canopy, provider of industry-leading accounting practice management software, is expanding the [AI](#)-driven capabilities of its software with the introduction of [Canopy Insights](#). This new feature of the Canopy platform will provide accounting professionals with powerful insights to develop deeper advisory relationships with their clients and simplify complex firm data in a few clicks.

Canopy Insights provides accounting firms with easily visualized and customizable reports to accelerate the decision-making process and help fine-tune firm operations. Canopy can fast-track insights by keeping data and data analysis tools all within the Canopy platform, which provides firms with a real-time pulse on their firm's key performance indicators at any time.

"Insights is not just another reporting tool. We built it to give firms access to critical, real-time, actionable information that will help them better serve their clients and become more profitable," said Davis Bell, CEO of Canopy. "Because every firm is different, we didn't want to build another standardized reporting tool. Canopy Insights makes it easy to find and visualize the specific, individualized trends and information that are vital to each firm."

Canopy Insights provides users with:

Canopy Insights allows users to directly type questions about individual reports and receive answers using artificial intelligence.



Canopy Accounting Practice Management Software



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New dashboards in the Clients, Tasks, and Time products designed to give all Canopy users a sample of the type of visuals and reports that can be created within the new Canopy Insights module.

Users can get answers to firm-specific questions such as, “What were our most profitable service items?”

The answers generated in Canopy Insights can be added to a Canopy “Live Board. The Canopy Live Board acts as a

dashboard that is composed of all the questions and answers in a manageable and organized area for easy access to the key performance indicators of the firm and is populated with live data.

Users can create individual reports or aggregate several into a report dashboard.

Users can set alerts and schedule reports to be automatically delivered.

“Canopy Insights provides an intuitive visualization of completely customizable reports and insights to support accounting professionals in managing their practice at the highest levels of efficiency and productivity,” said Shane Westra, Chief Product Officer at Canopy. “Ultimately, this will enable practitioners to identify trends more quickly and take action with the ability to drill down into areas of concern such as decreased productivity or revenue fluctuations.”

To see Canopy Insights in action, watch this overview and this brief demo video.

About Canopy

Canopy is an award-winning, cloud-based practice management software suite designed to increase efficiency and boost revenue for accounting firms. It offers tools for client management, document management, workflow, and time & billing, as well as specialty compliance solutions that help accountants obtain IRS transcripts and resolve notices quickly. Canopy’s solutions are SOC2 certified and data encrypted to ensure personal information is secure. Learn more at <https://www.getcanopy.com/>.

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