canopy

Canopy Chooses PrizmDoc Editor to Streamline Tax Resolutions in Its Accounting Software

In accounting, there are dozens of processes which require different tools to complete tasks. Whether it's handling tax resolution cases, billing, or collections, accounting firms need a technology solution that can provide efficient time savings through automation. Canopy offers a client and practice management software that allows accounting firms to streamline their workflow processes and aid in tax resolution cases.

Overview:

Accounting firms typically use 8-10 different tools to get their work done. Canopy's goal is to provide a solution that does it all. One of the most useful functions Canopy provides is tax resolution. When the IRS comes to a company notifying them that they paid too little, too much, or there's simply an error on their tax return, Canopy is able to help accounting firms streamline the resolution process.

Canopy wanted to create a way for accounting firms to recognize different IRS notices, assign each a number related to a template, and populate a resolution response in minutes. The response letter needed to be consistent and applicable to each specific notice and have fields for filling in the correct information for each client.

Challenges

As they created this tax resolution software, Canopy originally had an in-house document assembly and editing solution. They quickly discovered that the maintenance alone would require too many resources and development time was best spent elsewhere. That's when they decided to search for an integration that could help them get up-and-running quickly.

Canopy's senior product manager, Chandler Love, found Accusoft's PrizmDoc Editor via a Google search. After some research with his team, they realized that they were already using a PrizmDoc Cloud conversion API for another solution.

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>
> - Chandler Love,
> Senior Product Manager, Canopy

Challenges Continued

"We looked at a number of different companies who provided document editing," says Love. "We looked at open source and paid solutions all across the market, but we were really picky because we knew exactly what we were looking for. When I asked the team, one of our senior engineers mentioned that he knew Accusoft and we were already using one of the products."

The team at Canopy researched the tools their customers were using. That research helped lead to a final decision. Around 90% of Canopy's clients use a Microsoft Office (MSO) product, and they are familiar with the user interface and its functionality.

"We wanted something that mimicked the look and feel, but provided higher security for sensitive documents," reports Love. "We decided to use PrizmDoc Editor to autofill the client's information into the tax resolution letter and populate any other relevant case information."

Results

During the evaluation phase, before Canopy signed a contract, their engineers were given development licenses to test the product in their environment as a proof of concept. The team was impressed with the ease of integration.

"Accusoft developers were on the phone talking to Canopy developers, and that was a great resource to have. This communication and quick response times via email, cut down the development time drastically. It was one of the more smoother integrations that I've been involved with," states Love. "All in all, we were able to finish the integration, and now that we have the product live, we're tracking adoption."

Since implementing PrizmDoc Editor, Canopy has seen a massive improvement in the product's performance and acceptance in the market. **"The feedback from our customer base is really good. It was a homerun,"** affirms Love. "Adding PrizmDoc Editor to this product made our software more valuable."

The difference can be seen in the numbers. "We are seeing better NPS scores, and the product adoption metrics are going up," says Love. "We had a company wide webinar to demo the functionality and to show off other enhancements within Canopy. We received more traffic and attendees to this webinar than we've ever seen before."

"Any time we had a comment, question, or concern, it was addressed. We felt like we were being heard. Our developers also appreciate the documentation side of the house. It's straightforward and just makes sense," comments Love.

Canopy continues to grow its accounting software with new solutions that solve for a variety of accounting challenges. As they grow, they plan to partner with Accusoft in building more innovative, modern solutions.

About Canopy

Canopy provides cloud-based practice management and tax resolution software to thousands of accounting professionals nationwide. The modern, easy-to-use software cuts out accounting firm busywork, improves the client experience, and brings all the different tools a practitioner needs under one roof. Committed to data security, Canopy's solutions are SOC2 certified and data encrypted to ensure personal information is secure. Learn more.

About Accusoft

Founded in 1991, Accusoft is a software development company specializing in content processing, conversion, and automation solutions. From out-of-the-box and configurable applications to APIs built for developers, Accusoft software enables users to solve their most complex workflow challenges and gain insights from content in any format, on any device. Backed by 40 patents, the company's flagship products, including OnTask, PrizmDoc Viewer, and ImageGear, are designed to improve productivity, provide actionable data, and deliver results that matter. The Accusoft team is dedicated to continuous innovation through customer-centric product development, new version release, and a passion for understanding industry trends that drive consumer demand. Visit us at www.accusoft.com.