# Uploading a file to Canopy

5 Steps <u>View most recent version</u>

Created by

Amanda Lynnes

Creation Date September 1, 2023 Last Updated September 1, 2023

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#### STEP 1

### **Click on Files**

Primz	То-	do
Home To-do	/	All of your tasks have been completed
Files	Rec	ent Files
l Billing	E	91.23 New Hire Documents.docx Sep 1, 2023
Schedule an appointment	Ē	8.31.23 New Hire Paperwork.docx Sep 1, 2023
	l	Joe B W4 2023.pdf Aug 31, 2023
	E	New W4 2023.pdf

#### STEP 2

## Click on "Add File" at the bottom of the screen

NOTE: In Canopy, you will not upload files to a specific folder. The uploads go to a pending folder. Once Canopy notifies Prime Numbers of the upload, we will review and sort to appropriate folder(s).

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New
New



STEP 3

## Find your file and rename

\*\*\*Make sure you label files correctly\*\*\*

	Payroll - Client Uploads	•
	□ <b>□</b> W9s	•
	Drag files here to add	
Name	Uploads ×	
• A 10	newly uploaded file has the option to be renamed or deleted for only minutes. Please review your files carefully.	
New file	name	
9.1.23	New Hire Docs .docx	
Save	Cancel	

#### STEP 4

## **Click on Save**

	Drag files here to add		
Name Uploads		×	
<ul> <li>A newly uploaded file has 10 minutes. Please review</li> </ul>	as the option to be renamed or deleted for o ew your files carefully.	nly	
New file name 9.1.23 New Hire Docs		.docx	
Save Cancel			



STEP 5

IMPORTANT: Please note that the document can only be edited or removed within 10 minutes of uploading. \*\*\*Make sure you label files correctly!\*\*\*

<ul> <li>Search files</li> <li>2023</li> <li>Accounting - Client Uploads</li> <li>Payroll - Archived</li> <li>Payroll - Client Uploads</li> <li>Payroll - Client Uploads</li> <li>W9s</li> <li>Time remaining to edit/delete your upload</li> <li>91.23 New Hire Docs.docx Added Sep 1, 2023 by Amanda Lynnes</li> <li>Drag files here to add</li> </ul>	Files	Į≞.	
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