Uploading a file to Canopy

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

Created by

Amanda Lynnes

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STEP 1

Click on Files

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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
	Ē	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).

	Files	ħ.
	Q. Search files	
	2023	• >
	Accounting - Client Uploads	• >
	Payroll - Archived	>
	Payroll - Client Uploads	• >
	U D WBs	• >
	Drag files here to add	
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	Tie name	
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	Add a file	



STEP 3

Find your file and rename

Make sure you label files correctly

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	□ □ W9s	•
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STEP 4

Click on Save

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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!***

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