



Transcripts & Notices

IRS Integration | Transcripts Monitoring | Reporting | Notice Templates | Engagement Letters

GET ALL OF THE DATA WITHOUT ANY OF THE HASSLE

Collecting data from the IRS can be time intensive and frustrating. Login. Search. Download each transcript one at a time. Open and view in a separate software. And, finally, execute on that information in a different software. With Canopy Transcripts & Notices, once you have a POA on file, you can download years of data in minutes, view them in an easy-to-read table, AND take care of work related to that information—all within Canopy.

“The highest feature Canopy offers is its robust IRS Resolution software - **it grabs data from transcripts and puts it in a very efficient, easy to digest format. I can't say enough!** Also, Canopy is always listening to practitioners needs/wishes and updating its features; and involving/collaborating with practitioners in the development update process. Awesome!”

JEREMY ANDRIAS, MASTER PLAN TAX SERVICES

STOP

- Logging into the IRS on a regular basis
- Requesting/pulling transcripts one at a time
- Reading transcript after transcript
- Finding out about a notice from a client
- Stressing about how to resolve a notice
- Writing an engagement letter manually

START

- + Getting access to the IRS with a secure, one-time login
- + Downloading upwards of 20 years of authorized data (POA required on file) in minutes
- + Viewing all years of authorized data in one easy-to-read table
- + Automating transcript pulls and get notified of any changes with version history
- + Utilizing pre-built templates and step by step guides to resolve a large number of notices
- + Populating engagement letters with client information and recommended language and formatting

Try it free: getcanopy.com/transcripts-notices

