

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

with the ability to templatize each item a firm offers.

Isaac M. O'Bannon • Nov. 16, 2023



Canopy, the maker of accounting practice management software, has launched Canopy Engagements, a customizable and seamless solution that enables accountants to elevate and automate their client experiences with professional engagement letters and proposals right from within the Canopy suite.

Canopy Engagements Makes Engagement Letters and Proposals Effortless

Canopy Engagements incorporates a form-like process, built to capture every detail with the ability to templatize each item a firm offers. The associated product/service name, description, service item, rate, rate type, and billing frequency can all be defined with an unlimited number that can be added to every engagement. Capture payment information upfront and bill however you best see fit. And, of course, feel free to edit the engagement when responding to client feedback.

“Canopy Engagements provides Canopy users with a best-in-class proposal solution that allows them to automate project management at the moment of acceptance, eliminating much of the administrative burden pertaining to onboarding new clients,” said Shane Westra, Chief Product Officer at Canopy.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

proposals across the firm. See what engagements are partially accepted and who still needs to sign. Dial in on the progress of an engagement by seeing how many associated tasks are completed.

The new engagement module is designed to help make universal project status insights a reality providing accountants with capabilities including:

- Viewing proposals by accepted date.
- The ability to see progress on tasks associated with each engagement. The tasks can also be filtered by the assignee.
- The ability to create engagement item templates, both general and specific to each service item, customized to their firm and then individualized for each prospect or client.
- Client access to the engagement through a secure link, guiding them through a wizard that outlines the services, terms, and acceptance requirements (signature and payment). For their record, they can then download the accepted proposal.
- Decrease scope creep, delayed payments, and write ups/downs by outlining rates, payment terms, service items, and delivery dates.

“Canopy Engagements empowers firms to create five-star client experiences with a secure, branded, highly rated web and mobile app,” said Westra. “It both professionalizes and streamlines the process of sending engagements and collecting payment, and more.”

Canopy Engagements is included standard with Canopy's base product, Client Engagement. This includes the engagement builder, the client acceptance experience, eSignatures, engagement management, and CRM.

Read more about [Canopy Engagements](#) or [watch a brief demo video](#).

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us