New Canopy Engagements Enables Accounting Professionals to Automate and Customize Engagement Letters and Proposals

Canopy, an industry-leading accounting practice management software now includes Canopy Engagements, a seamless solution to automate client experiences.

Canopy Accounting Practice Management Software

DRAPER, UTAH, UNITED STATES, November 16, 2023 /EINPresswire.com/ -- Canopy, provider of industry-leading accounting practice management software announced today the launch of 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 allows firms to create 5-star client experiences with a secure web and mobile app," said Westra. "It professionalizes and streamlines sending engagements and collecting payment."
>
> *Shane Westra, Chief Product Officer*

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.

Canopy Engagements provides a seamless, automated solution that allows engagement data to flow directly into Canopy without having to rely on integrations to push client or prospect details

into practice management software. Once the proposal is accepted, all of the tasks associated with it will be automatically created within Canopy which eliminates hours of manual labor in creating the projects and tasks and automatically assigning them.

Canopy Enables Engagement Management Tracking Every Step of the Way
Canopy Engagements provides a clear and accurate view of engagements and 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:

Davis Bell, CEO, Canopy

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.

About Canopy
Canopy is an award-winning, cloud-based practice management software suite designed to increase efficiency and boost revenue for accounting firms. It offers tools for client management, document management, workflow, and time & billing, as well as specialty compliance solutions that help accountants obtain IRS transcripts and resolve notices quickly. Canopy's solutions are SOC2 certified and data encrypted to ensure personal information is secure. Learn more at https://www.getcanopy.com/.

Chad Saley
Canopy
+1 517-918-9353
email us here
Visit us on social media:
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