ENGAGEMENT LETTERS CONNECTED TO THE CLIENT RECORD

From the engagement letter to obligations, budgets and invoices

Build the engagement letter in Word from client data, the fee budget, applicable rates and the allocation of obligations between the firm and the client.

The engagement letter is not an isolated document. It uses the firm's existing reference data and becomes the starting point for operational and financial monitoring of the engagement.

- Professional-body or internal templates, fully editable in Word.
- Configurable client attributes that can be reused in generated documents.
- Fee budgets, deposits, rates, obligations and deadlines linked to the client record.

Word	500 to 600 fields	12 months	1 folder
SOFTWARE EXPERTISE	REAL-WORLD USE	MANAGED RECORDS	ECOSYSTEM

Editable document

Generated templates and letters remain editable and can be saved in Word.

Reusable data

The characteristics are also used for lists, exports, targeted letters and e-mails.

Operational chain

The engagement letter can drive automated invoicing and obligation tracking.

A complete management cycle

From data entry to management insight

1. **Word template** Define the rules and permissions.
2. **Client data** Collect reliable data.
3. **Fees** Review before approval.
4. **Obligations** Deliver without duplicate data entry.
5. **Track** Measure and improve.

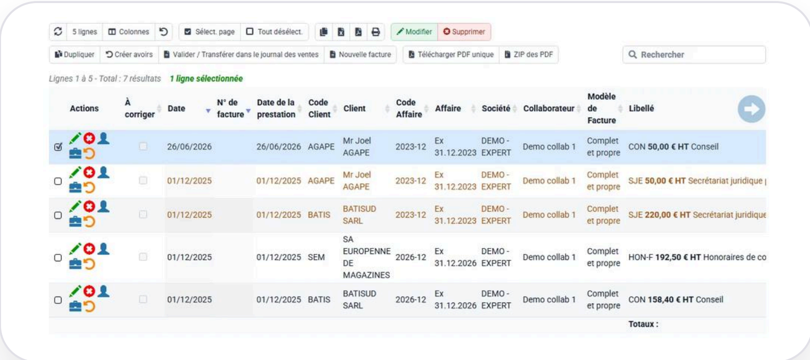
WHAT THIS SOLUTION COVERS

- Word templates, client variables, characteristics and signatories.
- Fee budgets, deposits, rates, quantities and deadlines.
- Annex “who does what”, obligations, reminders, JeSignExpert signature and conservation.

MODELS AND CLIENT DATA

Build an engagement letter that reflects the client record and the firm’s working practices.

Generate the document from the Deadlines and Events menu. Tempolia combines an editable template with the selected fields from the client record.



Reference Word templates

Tempolia can use an internal template or one based on professional guidance. The document remains editable in Word.

Import and reuse of data

Client attributes, contacts, addresses and settings populate the letter without duplicate entry.

Customisable attributes

The client record can contain as many attributes as the firm needs.

Model governance

Templates are centralised to prevent obsolete versions. Every change can be approved before release.

Contact details and signatories

Title, manager, contact details, references and legal information can be injected into the document.

Traceability

The generated letter can be filed in the client record and linked to follow-up events.

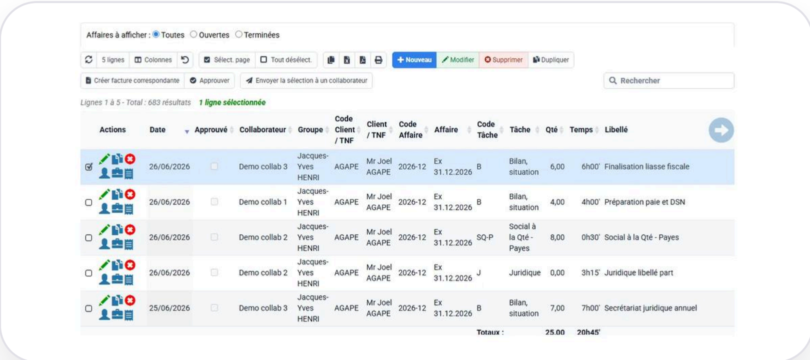
- Generation starts from professional-body templates or the firm's own templates; individual letters remain editable and can be saved in Word.
- Data can be imported from Excel and reused as selection criteria for exports, generated documents, letters and emails.
- The client record can include any required attributes: turnover, headcount, tax regime, activity, organisation, software and engagement-specific data.
- Template governance defines mandatory variables, approvers, authorised versions and retention rules.

The engagement letter becomes a structured output rather than a manual copy-and-paste exercise.

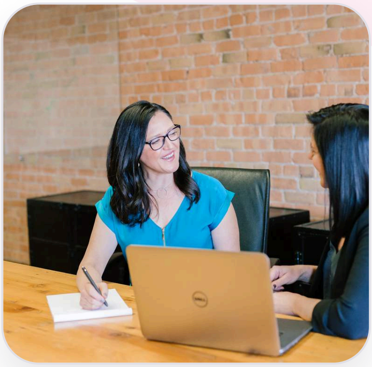
FEES AND INVOICING

Link financial commitments to budgets and actual work.

The letter can include fees planned for the financial year, hourly rates and quantity-based rates. These data then feed invoicing and engagement management.



Actions	Date	Approuvé	Collaborateur	Groupe	Code Client / TNF	Client / TNF	Code Affaire	Affaire	Code Tâche	Tâche	Qté	Temps	Libellé
	26/06/2026		Demo collab 3	Jacques-Yves HENRI	AGAPE	Mr Joel AGAPE	2026-12	Ex 31.12.2026	B	Bilan, situation	6,00	6h00'	Finalisation liasse fiscale
	26/06/2026		Demo collab 1	Jacques-Yves HENRI	AGAPE	Mr Joel AGAPE	2026-12	Ex 31.12.2026	B	Bilan, situation	4,00	4h00'	Préparation paie et DSN
	26/06/2026		Demo collab 2	Jacques-Yves HENRI	AGAPE	Mr Joel AGAPE	2026-12	Ex 31.12.2026	SQ-P	Social à la Qté - Payes	8,00	0h30'	Social à la Qté - Payes
	26/06/2026		Demo collab 2	Jacques-Yves HENRI	AGAPE	Mr Joel AGAPE	2026-12	Ex 31.12.2026	J	Juridique	0,00	3h15'	Juridique libellé part
	25/06/2026		Demo collab 3	Jacques-Yves HENRI	AGAPE	Mr Joel AGAPE	2026-12	Ex 31.12.2026	B	Bilan, situation	7,00	7h00'	Secrétariat juridique annuel
									Totaux :		25.00	20h45'	



Deposit invoicing

Invoices can be prepared automatically from planned periodic budgets.

Fee budget

Expected fees are listed by period, showing net, VAT and gross amounts.

Standard and specific rates

Applicable rates are configured in the invoicing settings.

Invoicing actual work

Invoicing can also include time spent, quantities delivered and expenses.

Accounting exports and direct debits

Accounting entries can be exported to the accounting system and bank payment files generated.

Payment conditions

Payment terms and due dates remain consistent with the client record.

- Planned fees are entered in each engagement budget, with deposits, hourly rates, quantity-based rates and a rolling twelve-month view.
- Invoicing actual work brings together available time, quantities and expenses, with control reports before the invoice draft is prepared.
- Rates can be standard, engagement-specific or tailored to a client; automation allows renewal and collective or individualized increases.
- The invoices issued can feed accounting entries, client accounts, sales and automatic bank debits.

Financial commitments in the engagement letter remain linked to the budget and invoicing cycle.

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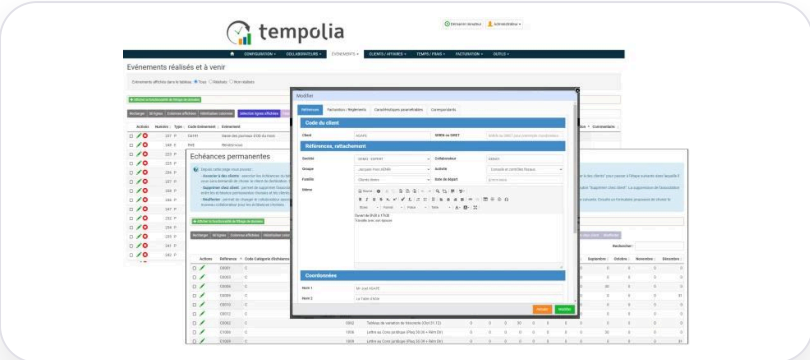
OBLIGATIONS AND IMPLEMENTATION

Turn the responsibility appendix into a practical tracking process.

The letter can include a schedule showing each obligation, deadline, recurrence and responsible party: firm or client.



Appendix: who does what

The division of obligations clearly specifies the responsibilities of the firm and the client.

Reminders and completion

Events have reminder and completion dates.

Obligation library

Standard obligations are available and can be tailored to each client record.

Checklists

Outstanding obligations can be tracked and followed up.

Duplication and deployment

A model can be duplicated from one client to another and then adjusted.

JeSignExpert electronic signature

The letter can be sent for electronic signature through JeSignExpert, then stored in the client record with its appendices.

- The “who does what” appendix specifies monthly, quarterly and annual obligations, deadlines and whether the firm or client is responsible.
- Staff have reminders and checklists; an obligation can be completed during time entry, connecting tracking with work delivery.
- Tempolia includes 500 to 600 tax, payroll and accounting obligations, plus preconfigured profiles that can be duplicated.
- The workflow can integrate JeSignExpert electronic signature, document filing, access permissions, version history, invoicing, direct debits and accounting exports.

NEXT STEP

Request a demo

JeSignExpert electronic signature extends the workflow naturally: generate, sign, file and track.

www.tempolia.com/contact/ **01 43 79 25 18**