



# A-Z Introduction to SuiteFiles

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If you've ever found yourself drowning in emails, digging through endless folders for the right file, or chasing signatures like it's an Olympic sport—welcome to the club. Admin work has a sneaky way of taking over your day, leaving you with less time for the work that actually matters. But it doesn't have to be that way.

Enter SuiteFiles, your all-in-one document management and workflow solution that helps you work smarter, not harder. Whether you're an accountant, a consultant, or just someone who's tired of version chaos (seriously, how many "Final\_v4\_REALFINAL" docs can one person have?), this guide will take you through everything you need to know about SuiteFiles—from A to Z.

From Automation to Zero Admin, this is your quick, easy, and fun roadmap to working with fewer clicks, less hassle, and more efficiency. Ready to say goodbye to busywork and hello to a smoother workflow? Let's dive in.





## Automation

Admin tasks can eat up hours of your workweek, but SuiteFiles helps eliminate repetitive tasks through automation. From auto-filling document templates to organizing client folders instantly, SuiteFiles reduces the time spent on manual work so you can focus on what really matters. Automate email workflows, document approvals, and even client communications to keep everything moving seamlessly. Less admin, more efficiency—automation is the key to a smoother workflow.



## Backup & Security

Your business runs on data and keeping it safe is critical. SuiteFiles is a fully cloud-based system with automatic backups, secure access controls, and Microsoft 365 integration, ensuring your documents are protected from accidental loss, cyber threats, and hardware failures. With enterprise-grade security and version control, you never have to worry about losing an important file or unauthorized access. Sleep easy knowing your data is secure and always accessible when you need it.



## Cloud-Based

Say goodbye to clunky servers and scattered files—SuiteFiles is 100% cloud-based, giving you instant access to your documents from anywhere, at any time. Whether you're in the office, at home, or working remotely, your files are securely stored and easy to retrieve. With seamless integration into Microsoft 365 and Xero, SuiteFiles ensures that your workflow remains uninterrupted, no matter where you are. Work smarter, faster, and with greater flexibility in the cloud.



## Document Management

Managing documents shouldn't be a headache. SuiteFiles makes it easy to store, organize, and retrieve files with a powerful search function, metadata tagging, and structured folder management. Stop wasting time hunting for lost files—SuiteFiles ensures every document is exactly where it needs to be. Collaborate in real-time, control access permissions, and keep your document history intact with automatic versioning. When document management is seamless, productivity soars.



## Electronic Signatures

Chasing clients for signatures can slow down your workflow and delay important deals. With SuiteFiles' built-in electronic signature tool, you can send documents for signing in seconds—no printing, scanning, or mailing required. Signed documents are automatically stored in the correct client folder, keeping everything organized and secure. Best of all, Unlimited Signing means no hidden fees or extra costs, so you can sign as many documents as you need without restrictions.



## File Templates

Why start from scratch when you can use a template? SuiteFiles file templates allow you to create standardized documents that auto-fill with client data from Xero or other integrated platforms. Whether it's contracts, proposals, or engagement letters, templates save time, reduce errors, and keep documents consistent across your team. Pre-populated fields ensure accuracy, and with just a few clicks, you can have a fully prepared document ready to send.



## Group Permissions

Not all files should be accessible to everyone. With SuiteFiles' group permissions, you can control who can view, edit, or share specific documents and folders. Set up access levels by department, role, or project team, ensuring sensitive data remains protected while still allowing seamless collaboration. Need to update permissions? SuiteFiles makes it easy to adjust access settings in just a few clicks, keeping your data secure and your team organized.



## Help Centre

New to SuiteFiles or need a refresher on a feature? The SuiteFiles Help Centre is your go-to resource for step-by-step guides, troubleshooting tips, and best practices. Whether you're looking for quick answers or in-depth tutorials, the Help Centre is designed to make your experience smooth and hassle-free. Plus, if you ever need extra assistance, SuiteFiles' support team is ready to help you get the most out of your document management system.



## Integrations

Your work shouldn't be scattered across multiple apps. SuiteFiles integrates seamlessly with Xero, Microsoft 365, Karbon, QuickBooks Online, and other essential tools, bringing all your documents, emails, and client data into one streamlined system. No more switching between platforms or duplicating work—integrations allow you to pull in client details, auto-populate templates, and access everything you need from a single, centralized workspace. Work smarter, not harder, with tools that talk to each other.



## Just One Window

Too many open tabs? SuiteFiles helps reduce app-switching fatigue by keeping everything in one window. Instead of jumping between platforms, searching for emails, and hunting for files, you can manage client documents, send emails, track approvals, and organize workflows—all from within SuiteFiles. By consolidating your daily tasks into one intuitive workspace, SuiteFiles eliminates distractions and keeps your work flowing smoothly.



## Knowledge Sharing

Your business runs on knowledge, and the more accessible it is, the more efficient your team becomes. SuiteFiles makes knowledge-sharing effortless by ensuring all your important documents, templates, and client records are in one place. With full-text search, metadata tagging, and version control, employees can find what they need in seconds—no more emailing colleagues or digging through folders. Whether you're onboarding a new hire or collaborating on a project, SuiteFiles keeps company knowledge at your fingertips.



## Live Editing

Collaboration should be instant and seamless. SuiteFiles' integration with Microsoft 365 allows for real-time, live editing of Word, Excel, and PowerPoint documents. Multiple team members can work on the same file simultaneously, with changes saved automatically—no need for email attachments or duplicate versions. Whether you're co-authoring a report or reviewing a proposal with a client, live editing ensures everyone is on the same page—literally.



## Metadata

Finding documents shouldn't feel like searching for a needle in a haystack. With metadata tagging in SuiteFiles, you can categorize, filter, and retrieve files instantly. Instead of relying on complex folder structures, simply tag files with relevant keywords—client names, project types, or document status—and use SuiteFiles' powerful search function to pull up what you need in seconds. No more wasted time scrolling through endless folders!



## Notifications

Stay in the loop with real-time notifications that keep your workflow moving. Whether a document is signed, a file is updated, or a task is completed, SuiteFiles ensures you never miss an important action. Team collaboration becomes effortless when you're automatically alerted to approvals, changes, or pending tasks—so you can stay productive without constantly checking for updates.



## Onboarding

Switching to a new system can be daunting, but SuiteFiles makes onboarding seamless. With easy-to-follow setup guides, a dedicated Help Centre, and expert support, your team can get up and running quickly. Whether you're migrating from an outdated document system or setting up SuiteFiles for the first time, the transition is smooth, stress-free, and tailored to your business needs.





## Portals

Tired of back-and-forth emails with clients? SuiteFiles' secure client portals provide a centralized space for document sharing, approvals, and collaboration. Clients can easily upload, download, and sign files—without needing email attachments or third-party apps. With built-in security controls, portals ensure that sensitive client information stays protected while making communication faster and more efficient.



## Quick Access

When you need a document, you need it fast. SuiteFiles' Quick Access features ensure that your most-used files and folders are always at your fingertips. Pin important documents, save frequently accessed folders, and use instant search to find what you need in seconds. No more clicking through endless directories—SuiteFiles helps you work at lightning speed.



## Remote Work

Work isn't tied to an office anymore, and neither are your documents. SuiteFiles is fully cloud-based, giving you access to your files anytime, anywhere. Whether you're working from home, on the road, or across time zones, SuiteFiles keeps your team connected with real-time collaboration, secure file access, and seamless integrations with Microsoft 365. Remote work just got a whole lot easier.





## Single Source of Truth

Scattered files lead to version confusion, duplication, and errors. SuiteFiles acts as your single source of truth, ensuring that every document, email, and file is stored in one central, organized system. No more searching through emails or wondering if you're working on the latest version—everything is right where it should be, updated in real-time.



## Task Management

Keep your team on track with SuiteFiles' task management tools. Assign tasks, set due dates, and track progress—all within the same platform where you store your documents. Whether you're managing approvals, following up on client requests, or streamlining internal workflows, task management in SuiteFiles keeps things moving without cluttered inboxes or endless spreadsheets.



## Unlimited Signing

Why pay extra for document signing when you don't have to? SuiteFiles offers Unlimited Signing with no hidden fees, so you can send as many documents for e-signatures as you need. Whether it's contracts, engagement letters, or compliance forms, everything is securely signed, stored, and organized within SuiteFiles—no external signing tools required. It's fast, seamless, and completely built-in.



## Version Control

Never lose track of changes again. SuiteFiles' Version Control keeps a full history of every document edit, so you can easily restore previous versions when needed. Whether a file was accidentally overwritten or you need to review an earlier draft, version tracking ensures you always have access to the right information—no more duplicate files labeled “final\_final\_v3.”



## Workflow Efficiency

Admin tasks shouldn't slow you down. SuiteFiles automates and streamlines your daily workflows, from document approvals to client communications. With features like template automation, email integration, and task management, you can eliminate time-consuming manual work and focus on the tasks that drive business growth. Faster processes, fewer bottlenecks, and a more efficient team—it's a win-win.



## Xero Integration

For accounting firms and businesses that use Xero, SuiteFiles is the perfect match. With two-way integration between SuiteFiles and Xero Practice Manager, you can auto-populate documents, create structured client folders, and keep all your client data in sync. No more copying and pasting—SuiteFiles pulls everything directly from Xero, saving you time and reducing errors.



## Your Business, Your Way

SuiteFiles isn't just another document storage tool—it's a platform designed to fit the way your business works. Whether you're an accounting firm, a legal practice, or a consulting business, SuiteFiles adapts to your workflow with custom folder structures, permission settings, and automation tools. Work the way you want, without unnecessary complexity.



## Zero Admin, Zero Waste

Too much admin is draining your time, slowing down your workflow, and creating unnecessary friction. SuiteFiles helps businesses go paperless and reduce admin overload by digitizing and automating processes that used to require endless paperwork, manual filing, and redundant data entry. Less admin means more time for valuable work—and a more sustainable, efficient way to operate.





## SuiteFiles is the secret to supercharging your firm

Our powerful and intuitive document management system is the perfect solution for overcoming your business' biggest challenges thanks to our seamless document and email management, secure client portal, vast integrations, task management, digital signing, and so much more.

Book a demo to see how SuiteFiles can generate maximum end-to-end impact for your firm.

[Book a demo](#)

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