

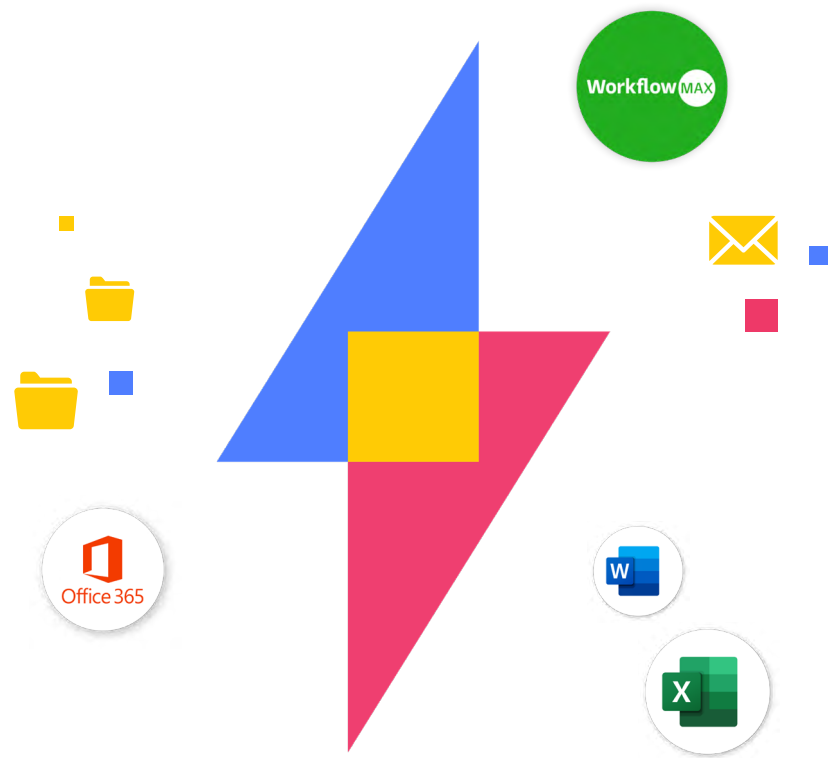
**Workflow** **MAX**  
*a xero product*

X

 **SuiteFiles**

Everything you need  
**in one place.**





## Simple document management and so much more.

Document creation, collaboration, and signing all in one spot. SuiteFiles is simple – yet powerful – document management software for accounting and professional services firms. Our workflows are exactly what small to mid-sized firms need to grow along with their clients. We back your daily activities, integrating with WorkflowMax, Microsoft 365, and more.

For more information check out [suitefiles.com](https://suitefiles.com)

# Welcome

## Here's some of the suite ways we can enhance your business:

### **Improve your efficiency**

SuiteFiles removes steps from time consuming processes which chip away at the limited hours you have in a day. If you have a vexing task that's impacting your productivity, it's likely we've found a way to automate it.

### **Enjoy the perks of being cloud based**

Access all of your files with just an internet connection, no matter where you are. No need to hold onto folders worth of paper and risk misplacing something, any elusive file you may have is a search away from being found.

### **Collaborate more effectively**

We make easy collaboration and secure sharing within your team and with clients possible. Always work with the most up-to-date document and keep track of how it's progressing.

### **Store your files securely**

Manage all your permissions to grant access to, and delete folders and files. SuiteFiles documents are kept safe in your own Microsoft environment, secure, and recoverable within Microsoft's leading-edge retention framework.



For years, we've helped businesses hop off aging servers, save costs on continued IT support and free up more time to look after their clients.

# SuiteFiles is packed with features to help you cut down on your downtime.



## Document & Email Management

While file management can get complicated, we strive to keep it as simple as possible. This begins with the ability to store and edit all of your documents, emails and tasks in one place. We've also got you covered with document and email templates which you can auto-fill with client data using our WorkflowMax integration. As you navigate through files, you'll be able to use our intuitive folder system and advanced search settings to quickly locate whatever you're after.



## Task Management

Send tasks to colleagues for an easy follow up process, request changes to a document, an upload, or a task, then instant message within SuiteFiles. Have your colleagues click complete when done!



## Digital Signing

Digital signing makes being a paper-free business just a little bit easier. Use our digital signing tool to set documents up for signing, send them direct to signatories, and be notified when they're complete.



## PDF Tools

Review and customise PDFs in SuiteFiles without juggling several applications. Make annotations whenever you need to mark areas of interest or jot something down, and merge PDF files to save time compiling your PDFs.



## Client Portal

Request signatures, files and feedback from clients all through SuiteFiles Connect. Don't worry about making clients create unique sign-in credentials, they'll be able to transfer their login details from existing Xero or Google accounts.



## Integrations

Use all the tools you love, with SuiteFiles. Our integrations make processes even simpler by linking everything back to your document management system. We integrate with WorkflowMax, Microsoft 365 and more.

## Integrations

### WorkflowMax x SuiteFiles

Spend less time managing projects and more time progressing them with WorkflowMax and SuiteFiles.

#### Completely Cloud Based

A single ledger, all of your client data, every document, every email, all online, accessible from anywhere.

#### Improve your workflows

Automatically create client folders, create auto-population workflows, automate job management and more.

#### Automate repetitive processes

Connect directly to the Xero suite including WorkflowMax to save reports, use client-data and more.

#### Simple client and job management

WorkflowMax and SuiteFiles combine to make managing your clients and jobs simple – easily source data and track jobs.

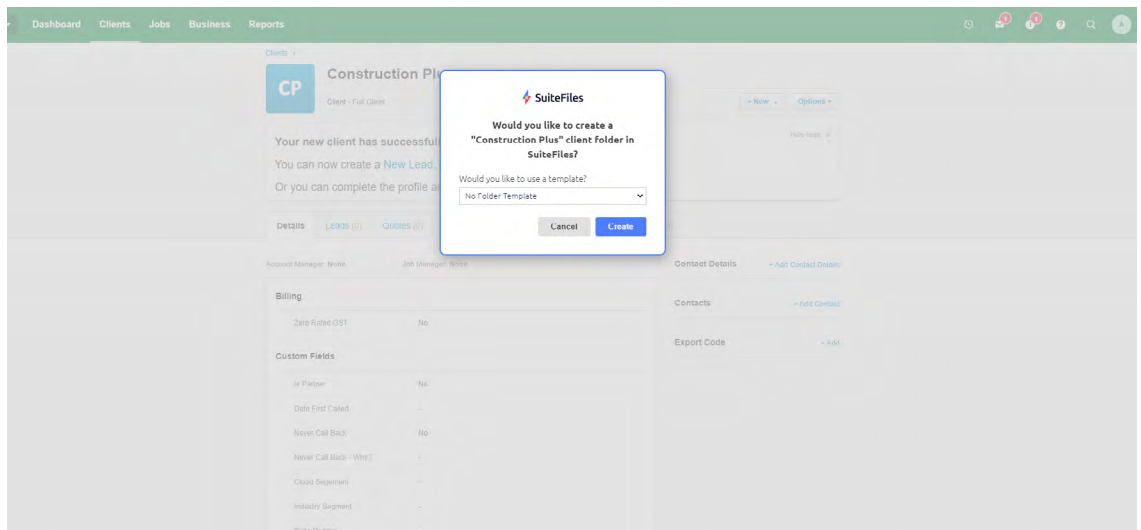
#### Work with Microsoft documents

SuiteFiles allows Xero to link to Microsoft 365, powering efficiencies in your business.

#### One source of truth

Xero creates the basis for a fully integrated app system, no data inconsistencies and fully traceable information.





## WorkflowMax x SuiteFiles in practice

SuiteFiles' two-way integration with WorkflowMax makes organising your clients effortless.

### Joint client creation

Whenever you create a client in WorkflowMax, you can auto-create a folder for that client in SuiteFiles, as well as a subfolder structure.

### Document generation

Use your WorkflowMax client data like names and addresses to auto-populate any templated document you have in SuiteFiles. For example, a document you're going to send to a client to sign via SuiteFiles.

### Consistent client information

See all of your client information, emails and SuiteFiles documents in a single place using the WorkflowMax documents tab.

Uploading documents against an existing client folder in either WorkflowMax or SuiteFiles will automatically sync across both.



## Microsoft 365

Microsoft 365 lays the foundations for SuiteFiles to take businesses to the cloud.

### File types you're used to

Open files to the desktop and still have them auto-file back into the cloud. Edit and manage your files from anywhere.

### The best Microsoft 365 features

Keep ownership of your data and enjoy Microsoft staples like Microsoft documents and complete version histories.

### A powerful Outlook

Make Outlook even better with automated email management and full visibility of your documents, all within the Outlook App.

# Simple pricing - no matter your needs

Semi-Suite	Best value for small to medium Super Suite	Super Suite For Enterprise
<p><b>\$25</b> Per Month Per User <i>Minimum of \$250 or 10 users</i></p>	<p><b>\$45</b> Per Month Per User <i>Minimum of \$225 or 5 users</i></p>	<p><b>Price on Application</b> <i>For 100+ users</i></p>
<p>Web access, file explorer, and offline access</p>	<p>Web access, file explorer, and offline access</p>	<p>Web access, file explorer, and offline access</p>
<p>Automated functionality with integration partners such as Xero and Karbon</p>	<p>Automated functionality with integration partners such as Xero and Karbon</p>	<p>Automated functionality with integration partners such as Xero and Karbon</p>
<p>Secure storage</p>	<p>Secure storage</p>	<p>Secure storage</p>
<p>On-demand training</p>	<p>On-demand training</p>	<p>On-demand training</p>
<p>View and annotate PDFs</p>	<p>View, annotate, merge, reorder, rotate, add and delete pages in PDFs</p>	<p>View, annotate, merge, reorder, rotate, add and delete pages in PDFs</p>
<p>Email management and Outlook integration</p>	<p>Email management and Outlook integration</p>	<p>Email management and Outlook integration</p>
<p>Paid bulk folder generations</p>	<p>Automated tool for simple bulk folder generations</p>	<p>Automated tool for simple bulk folder generations</p>
	<p>Unlimited digital signing – secure, no SuiteFiles log in for your clients, your branding, automatic filing</p>	<p>Unlimited digital signing – secure, no SuiteFiles log in for your clients, your branding, automatic filing</p>
	<p>SuiteFiles Connect – client portals for collaboration</p>	<p>SuiteFiles Connect – client portals for collaboration</p>
	<p>Annual Customer Success check in to get the most out of SuiteFiles</p>	<p>Annual Customer Success check in to get the most out of SuiteFiles</p>

Try for free

Pricing current as of June 2023

## Any questions?

Adding new tech to a business can be a big process. If you've got any questions at all, send us a message [here](#) – we're happy to help!

We offer onboarding, training, help centre resources and ongoing support.

**Contact us**

Join us for a  
free demo **here**

