

SuiteFiles is the only **all-in-one document management platform** designed for small and mid-sized professional services firms.

We're on a mission to empower you to get the most out of your workday with a simple yet powerful platform to solve all your document and storage needs — one your colleagues and clients actually enjoy using.

With over 10,000 customers just like you (and a 99.6% renewal rate!) we make it our business to help you grow yours.



But we're not doing this all on our own — our integration partners bring your files and data into SuiteFiles so you can benefit from one source of truth.

Xero – XPM and WorkflowMax

Our integration with Xero helps you look after clients by filing their documents into an easily navigable folder structure, ensuring one source of truth for your client data. This includes auto populating templated documents and emails with their information to eliminate the risk of costly data-entry errors. Manage sensitive documents using SuiteFiles Connect client portal and don't worry about setting unique login credentials for clients, they can access Connect using their Xero details.



Luke at Flashpoint Accounting let us know what Xero and SuiteFiles have meant for his firm. *“Using a combination of Xero and SuiteFiles has made life much easier for our team. For instance, last year was a breeze – I think we finished with a couple weeks up our sleeve. We weren't twiddling our thumbs but not far off it.”*

Microsoft 365

SuiteFiles integrates deeply with Microsoft 365 giving you access to familiar favorites like Excel and Word but with a user-friendly interface to navigate through your files. You can access all of your documents directly from Outlook to save as attachments and create templates for any standard emails you're regularly sending out. Any incoming emails can be auto saved into client folders so that you're able to stay up to date with them without spending an afternoon in your inbox!



Karbon

Karbon is the collaborative practice management platform for accounting firms. Our integration brings your Karbon contact and organization data into SuiteFiles. From there, you can use your Karbon data in SuiteFiles' templates, client portal, document signing, and more. Simple dimple!





FuseWorks

FuseDocs integrates with SuiteFiles by automatically locating the files required for your document package then collating them into a fully formatted PDF, complete with branding and bookmarks. For clients, this means all their files are accessible from one source, with minimal user errors and consistent branding. Kate at Kendons Scott MacDonald's shares *"SuiteFiles' FuseDocs integration makes it easy to create document packs for our accounts and tax returns then file them away."*



AccountKit

AccountKit is a suite of tools designed to consolidate client information and automate day-to-day compliance and administration tasks. The SuiteFiles integration connects your client documents directly to AccountKit's tools so that you're able view, output, and link direct to source documents without leaving AccountKit.



GreatSoft

Between SuiteFiles and GreatSoft you can streamline your client and document management processes using file templates which pull data directly from your CRM.



Wolters Kluwer

CCH Business Fitness practice tools help accountants work smarter from the content suite to the workpapers. When you're using Wolters Kluwer's CCH Business Fitness, you can now attach documents directly from SuiteFiles!



APS Accountants' Workspace

APS Accountant's Workspace brings all of your applications, tools, and data together in one place integrating with Microsoft 365 and SuiteFiles to provide rich automation, email filing, and document management features.



Notud

Notud is professional cloud note-taking with handwriting and drawing on to your own custom templates to provide a flexible and efficient work day. Notud integrates directly with SuiteFiles so you can be handwriting notes on your iPad, tablet, or other device then, at the click of a button, save in SuiteFiles. With Notud, you're working smarter as notes are automatically filed to your clients, backed up, and encrypted.



CAS 360

Automate compliance tasks and streamline your document workflows by connecting CAS 360 and SuiteFiles! As files are created in CAS 360, they'll automatically save to your client folders in SuiteFiles. The result is one source of truth for client info, freeing up the time you'd spend sourcing and sharing documents between the two applications. Simone from SN Partners says, "Being able to work between SuiteFiles, CAS 360, and Xero has probably halved our workweek - it's just efficient software that makes your life easier."



ATO SmartDocs

Integrate ATO SmartDocs with SuiteFiles to automatically process and file any ATO document your practice receives. This starts with renaming documents according to your conventions and checking estimated amount against assessed. Once your docs are client-ready, you'll be able to stay compliant with our secure file sharing portal Connect.



ATOMate

ATOMate allows you to process and send out ATO documents collected by post or via tax agent portal. Connecting to SuiteFiles allows you to view, edit, share, or sign ATO documents while automatically filing them into your client folders along with relevant emails. With ATOMate and SuiteFiles, the team at Sinnotts went from having 400 letters from the ATO dumped on their desks every morning to having one spot in the cloud for everything (and spare space on their desks!)

