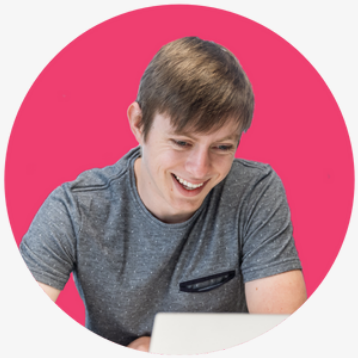
SuiteFiles

Multiple XPM Accounts



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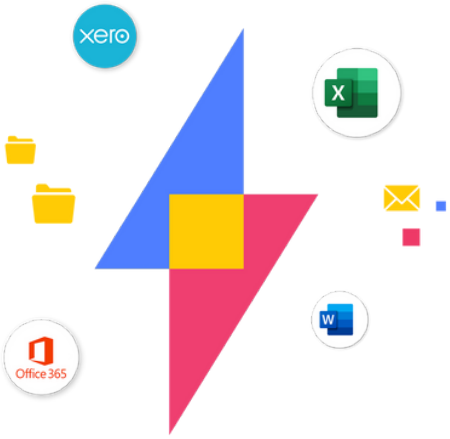
Introduction

Introduction

Want to use multiple Xero Practice Manager (XPM) accounts with SuiteFiles? No problem!

Whether you have multiple branches that all share one XPM account or you have separate XPM accounts, SuiteFiles can connect to all in a way that complements how you manage your clients.

Xero is no longer allowing businesses to create multiple new XPM accounts. If you already have multiple XPM accounts, there's no issues using them with SuiteFiles.



SuiteFiles and XPM

SuiteFiles and XPM

Before we get into the details of connecting multiple XPM accounts, let's start with why you would want to integrate SuiteFiles and XPM.

SuiteFiles builds on XPM by providing you with a cloud-based document management system tailored to the needs of medium sized businesses.

If you're already using XPM, adding SuiteFiles is easy. SuiteFiles' two-way integration with XPM allows you to work seamlessly between the two applications all while providing one source of truth for your client data. Here's what that means for you.

Joint client creation

Whenever you create a client in XPM, you'll be able to auto-create a corresponding folder in SuiteFiles along with a sub-folder structure. From there, you can browse your files by either client or group & use our built-in filter to easily locate relevant information.

Template population

Any templated documents or emails you set in SuiteFiles can be auto populated using client data from XPM. This ensures that your client data is consistent and easily traceable.

SuiteFiles' two-way integration with XPM allows you to work seamlessly between the two applications all while providing one source of truth for your client data.

A single client view

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

These are just some of the ways SuiteFiles can enhance your use of XPM. We also offer our own additional features to help you service clients. For example, if you need to exchange sensitive documents securely, SuiteFiles' client portal has you covered. We've also got document and email management, task management, digital signing and PDF tools!

Multiple XPM accounts

Multiple XPM accounts

Back to connecting multiple XPM accounts, the main consideration is how your business handles your clients.

Clients shared across branches

Maybe you have different offices or divisions that all share the same clients. This would mean that you work in one SuiteFiles account and multiple XPM accounts. SuiteFiles can connect to all of your Xero clients and contacts across multiple XPM accounts and bring them into one source of truth.

Clients separate across branches

Or maybe the offices or divisions of your business all work independently from each other with separate clients. In that case, SuiteFiles can help by providing multiple client data storage areas (i.e. SuiteFiles accounts) and allow you to connect XPM accounts to each.

This diagram shows the flexibility that SuiteFiles offers and how we can set up your business. On the left is how we set up businesses where clients are shared across all branches. Whereas on the right is how we set up businesses where the clients are branch specific.

Book a demo

Book a free one-to-one demo to talk about what would work best for your business.

Microsoft/Office 365

Microsoft/Office 365

You might have spotted the 365 logo in the diagram.

SuiteFiles integrates deeply with 365, allowing you to use staples like Excel and Word while automatically saving your files into the cloud with complete version histories. Between SuiteFiles and Outlook, you've got full control of your email management.

Your SuiteFiles account(s) will come under your 365 account.

If you need multiple 365 accounts, we can accommodate that as well. We can set up one or more SuiteFiles accounts within each 365 account so that each branch within your business has their own document management system, their own client list and their own XPM account(s) linked to it.

Next steps

What's next?

1.

Book a free one-to-one demo with one of our team to work out, based on how your business works with clients, what the best solution for you would be.

2.

Whether you're best to set up one SuiteFiles account and have multiple XPM accounts attached to it or have multiple SuiteFiles accounts paired with multiple XPM accounts, we're happy to walk you through it and give you a demonstration of SuiteFiles that is personalised to your needs and the requirements of your business.

3.

If you like what you see in the demo, we'll get you started in a free trial and we'll assist you in connecting your accounts for your testing purposes.

SuiteFiles

Book a demo

suitefiles.com