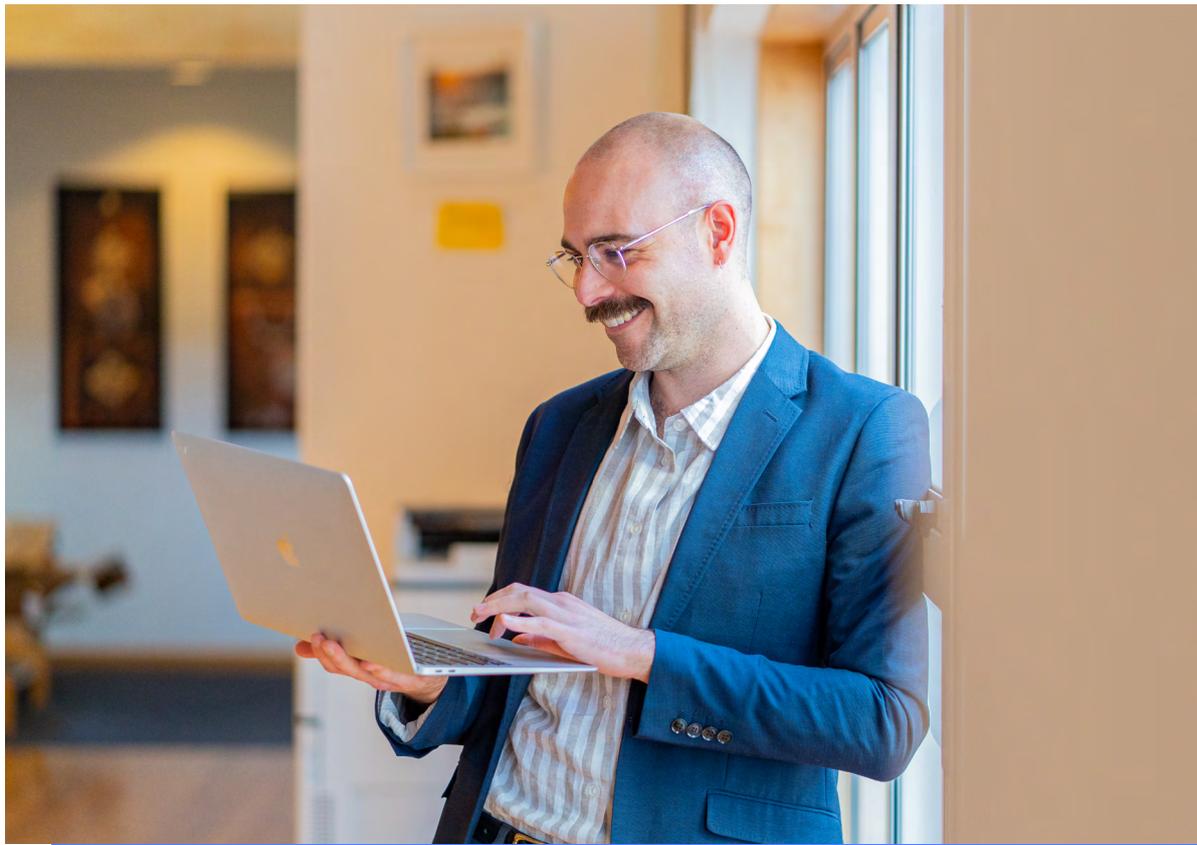




SuiteFiles



Everything you need
in one place.

SuiteFiles and Xero



SuiteFiles builds on Xero by providing professionals with a cloud-based document management system tailored to the needs of small to medium accounting practices.

If you're already stuck into apps like Xero Practice Manager (XPM), picking up SuiteFiles will be 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 are some of the ways we're able to do this:

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 and 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.

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 Xero products like XPM. However, we also offer our own additional features to help you service clients. Need to exchange sensitive documents securely? SuiteFiles' client portal has you covered.

If you're interested in hearing more about SuiteFiles features, press on below.



Welcome

Win back hours in your work week



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. 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.

Case studies



Creating our annual work papers and having them file directly into client folders has saved us time and ensured one source of truth for all of our client information and documents. Between the template features and its strong integration with XPM, SuiteFiles saves us an average of 5hrs per staff member, per week.

Craig Bruce
SMSF Advisor and Accountant
Resource Accounting QLD

Adding new clients into XPM and seeing them upload to SuiteFiles with their own folder, files and templates has allowed us to spend less time jumping between software and double-handling client documents.

Alison Hogg
Senior Consultant
The Outsider Chartered Accountant



SuiteFiles caters to the needs of accountants, so we quickly got a return on investment. The smooth integration with Xero Practice Manager alone makes SuiteFiles stand out from other document management solutions.

Brad Golchin
Founder and Managing Director
Wise Advice

[Book in a demo here](#)

Integrations



Microsoft 365

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

File types you're used to

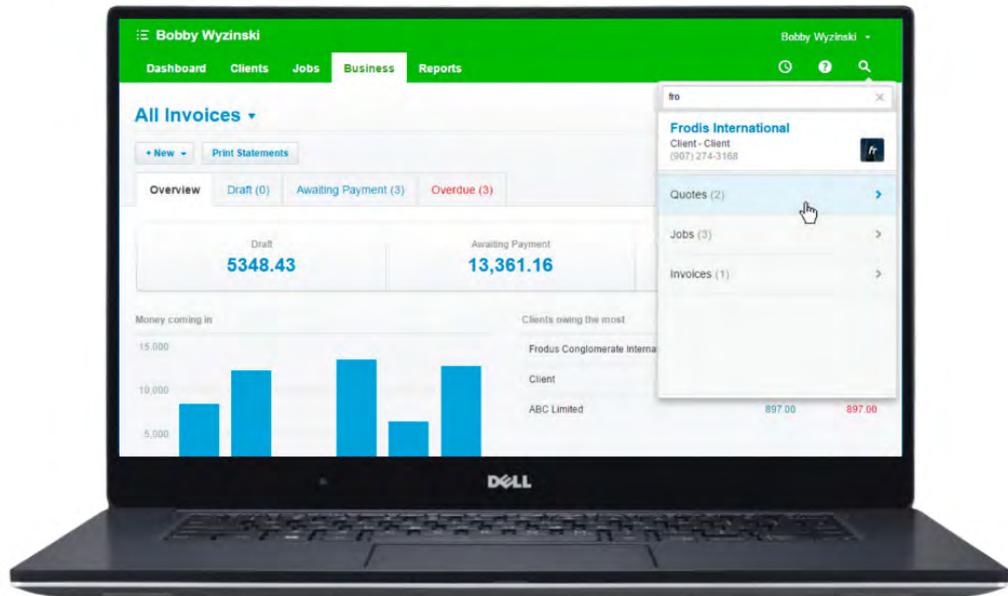
Open files to the desktop and still have them auto-file back into the cloud. Edit and manage your files from anywhere.

A powerful Outlook

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

The best Microsoft 365 features

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



WorkflowMax

Streamline your job management with SuiteFiles' WorkflowMax integration.

Job Management

Assign jobs, track timelines & be notified when projects are running late.

Lead Manager (CRM)

Track your leads, customer data, pipeline and proposals in a single place.

Actionable Reporting

Figure out profit margins for jobs, staff hours and so much more.



+ many more!



Simple pricing

- no matter your needs

Semi-Suite	Best value for small to medium Super Suite	Super Suite For Enterprise
<p>\$25 Per Month Per User <i>Minimum of \$250 or 10 users</i></p>	<p>\$45 Per Month Per User <i>Minimum of \$225 or 5 users</i></p>	<p>Price on Application <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></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></p>	<p>SuiteFiles Connect – client portals for collaboration</p>	<p>SuiteFiles Connect – client portals for collaboration</p>
<p></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

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