



SuiteFiles

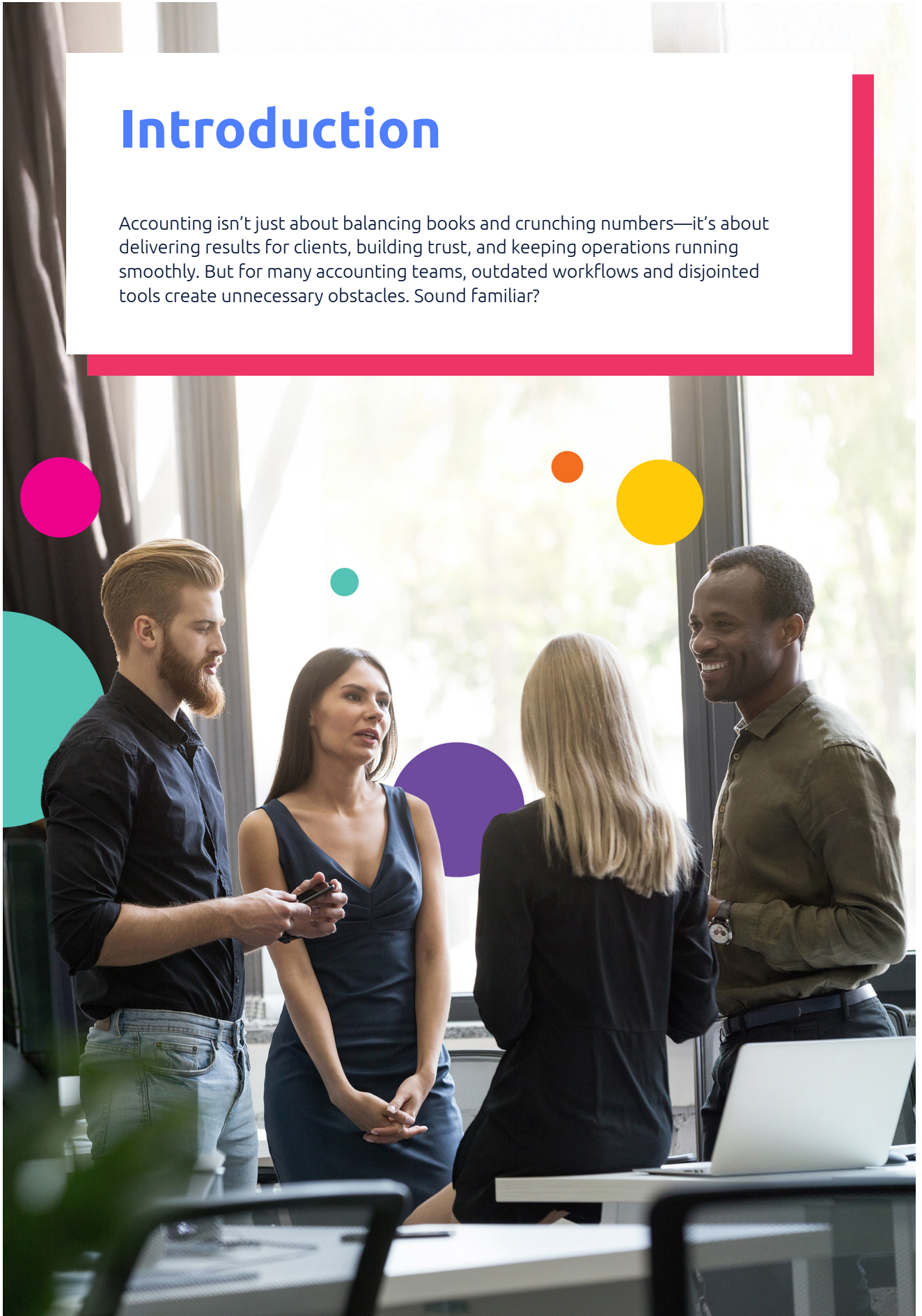


KARBON

Transforming the Way Accounting Teams Work

Introduction

Accounting isn't just about balancing books and crunching numbers—it's about delivering results for clients, building trust, and keeping operations running smoothly. But for many accounting teams, outdated workflows and disjointed tools create unnecessary obstacles. Sound familiar?



The problem: Scattered Tools, Fragmented Workflows

Imagine this: You're deep into a project, only to realize the file you need is saved in one app, while the client updates are buried in another. You lose precious minutes (or hours) toggling between tools, hunting down information, and trying to ensure everyone on your team is working off the same page.

Unfortunately, this is the norm for many firms. Studies show that employees waste an average of 25% of their workweek toggling between apps—time that could be spent on high-value tasks. For accountants managing tight deadlines and precise deliverables, inefficiencies like these are more than just frustrating—they're costly.

The Impact: Wasted Time, Missed Opportunities

Scattered workflows don't just slow your team down—they lead to errors, duplicated effort, and missed deadlines. Disorganized systems make collaboration harder, and clients can sense when things aren't running smoothly. For growing firms, these challenges only multiply as teams expand and workloads increase.

The Solution: SuiteFiles x Karbon Integration

What if there was a way to eliminate these inefficiencies and bring your tools together in one seamless workspace? That's where the SuiteFiles Karbon integration comes in. By addressing the common pain points faced by accounting teams, this integration is designed to:

- Save time by streamlining workflows.
- Improve collaboration across teams.
- Reduce errors with automated syncing.
- Scale easily to meet the demands of growing firms.

With everything you need in one window, the SuiteFiles Karbon integration empowers accounting teams to focus on what really matters: delivering exceptional service to their clients.

In this eBook, we'll explore how the SuiteFiles Karbon integration solves the everyday challenges of accounting teams, delivers real value through tangible benefits, and helps firms of all sizes work smarter, not harder. Let's dive in.

CHAPTER 1

The Everyday Challenges of Accounting Teams

Let's face it: accounting teams are the glue that holds businesses together. From crunching numbers to keeping clients happy, there's a lot on your plate. But while you're busy managing deadlines and deciphering spreadsheets, there's one thing constantly slowing you down—your tools.

The Multi-Platform Problem

You know the drill. A client sends an email with updated documents, which you download, rename, and save to your cloud storage. Then you hop over to your project management tool to update the task, open a spreadsheet to check some data, and send a follow-up message... all before realizing the original file wasn't the latest version.

Sound familiar? You're not alone. Studies show that employees waste an average of **25% of their workweek toggling between apps**. That's 10 hours lost every week, just jumping between tools. For accounting teams, where precision and deadlines are critical, this inefficiency is more than a minor annoyance—it's a major obstacle.

Disorganized Files, Disrupted Workflows

When your files are scattered across multiple platforms, staying organized becomes a constant battle. Misplaced or outdated documents aren't just frustrating—they're risky. One wrong file could mean incorrect reports, unhappy clients, or worse, compliance issues.

And let's not forget the time wasted searching for what you need. According to McKinsey, employees spend 1.8 hours every day—nearly 20% of their time—just looking for information. For accounting teams, that's time better spent on billable work or building client relationships.

Collaboration Confusion

Collaboration is at the heart of every accounting team, but keeping everyone aligned is easier said than done. Whether it's double-checking numbers or working on client deliverables, real-time collaboration is often hampered by tools that don't play well together.

Picture this: Your team is reviewing a financial report, but half the comments are in an email thread, and the other half are in your project management tool. Meanwhile, the file itself is saved in three different places. Not only does this disrupt your workflow, but it also increases the chances of errors and missed updates. And in an industry where accuracy is everything, "close enough" doesn't cut it.

Scaling Challenges for Larger Teams

As accounting firms grow, so do their challenges. Larger teams mean more moving parts, more data to manage, and more potential for things to fall through the cracks. When workflows aren't streamlined, scaling becomes a logistical nightmare, with inefficiencies compounding as teams expand.

For firms with 15+ seats, the cracks in a disjointed workflow can quickly become chasms. Communication breaks down, deadlines slip, and client satisfaction takes a hit. In today's competitive market, that's a risk no firm can afford.

The Bottom Line

Disorganized tools, inefficient workflows, and collaboration roadblocks don't just cost you time—they cost you trust. Whether it's with clients, your team, or your own peace of mind, the price of inefficiency is too high. But here's the good news: it doesn't have to be this way.



CHAPTER 2

Introducing SuiteFiles' Karbon Integration

A Seamless Workflow Revolution

Say goodbye to scattered tools and hello to a new way of working. The SuiteFiles Karbon integration is here to transform your workflows, bringing everything you need into one window and making your processes smarter and more intuitive than ever before.

What Makes It Different?

With the SuiteFiles Karbon integration, you can:

- **Create, upload, and organize files directly within Karbon:** No more toggling between systems. Manage all your files and documents effortlessly while linking work items to SuiteFiles folders.
- **Collaborate live in real-time:** Work on files with your team in SuiteFiles, Karbon, or Microsoft apps while keeping everyone updated and aligned.
- **Sync folders automatically between SuiteFiles and Karbon WorkStream:** Create a new client folder in SuiteFiles, and it syncs instantly with Karbon—and vice versa. No manual updates, no duplication.

Why It Matters

Before this update, managing files and workflows often felt like solving a puzzle with missing pieces. The SuiteFiles Karbon integration changes the game by:

Eliminating inefficiencies: Reduce time lost switching between platforms and tools. Everything is where you need it.

Reducing errors: Automated syncing ensures files are always up-to-date, so you never work off the wrong version.

Improving collaboration: Live, real-time updates mean everyone's on the same page, whether they're in SuiteFiles or Karbon.

Designed for Growing Teams

For larger firms with 15+ seats, scaling your operations has never been easier. By streamlining document management, the SuiteFiles Karbon integration gives teams the tools they need to work smarter, faster, and more effectively—without the usual growing pains.



CHAPTER 3

The Tangible Benefits of the Integration

Why This Integration Changes Everything

The SuiteFiles Karbon integration isn't just a tool—it's a game-changer for accounting teams. Here's how it delivers real value to your business:

1. Save Time by Streamlining Workflows

Switching between platforms? That's a thing of the past. By managing your files directly from Karbon, you eliminate app toggling and cut down on wasted time. Need to update a file or check a work item? It's all in one place, saving your team hours every week.

2. Improve Collaboration Across Teams

Real-time collaboration is no longer a dream. Whether your team is editing a shared document or reviewing client files, this integration ensures everyone stays aligned. No duplicate versions, no missed updates—just seamless teamwork.

3. Reduce Errors with Automated Syncing

Manual updates leave room for mistakes. Our Karbon integration keeps your files synced automatically, so you're always working with the latest version. This means fewer errors, more accurate reports, and happier clients.

4. Scale Without the Stress

As your firm grows, so does the complexity of your workflows. Our integration is designed to handle the demands of larger teams, making it easier to scale without compromising efficiency or quality.

5. Enhance Client Experiences

When your workflows are smooth, your clients notice. Faster turnaround times, more accurate deliverables, and better communication all add up to a superior client experience. And happy clients mean repeat business and glowing referrals.

CHAPTER 4

Real-Life Success Stories with the Integration

Proof in Practice

Seeing is believing, and nothing illustrates the value of the SuiteFiles + Karbon integration better than the real-world success stories from accounting teams just like yours. These firms have embraced the integration to streamline workflows, improve accuracy, and create a better experience for their clients.

Copper Ledger: Creating a Seamless Client Experience

The Problem: Copper Ledger, a firm that relies heavily on Karbon as the backbone of their practice, faced challenges managing client documents. Clients were frustrated by being sent to multiple platforms to retrieve information, and legacy tax returns lacked an accessible archive. This caused confusion, repetitive requests, and a subpar client experience.

How SuiteFiles Solved It:

- Seamless integration with Karbon enabled Copper Ledger to sync client folders automatically, eliminating the need for manual duplication.
- Connected folders gave clients a single, secure access point for all archived documents, removing confusion and frustration.
- SuiteFiles' encrypted email capabilities saved the firm \$50/month by replacing costly third-party tools.

The Result: Copper Ledger improved their client experience, reduced costs, and created peace of mind for their team. With SuiteFiles integrated into Karbon, clients now have easy access to everything they need, while the firm works more efficiently.



Amplify 11: Saving Time and Boosting Efficiency

The Problem: Amplify 11 founder knew they wanted a completely cloud-based, paperless workflow, but struggled to find a document management system with a user-friendly interface. While tools like OneDrive provided basic functionality, it left room for disorganization and manual errors.

How SuiteFiles Solved It:

- SuiteFiles provided a better, more intuitive interface built on Microsoft's familiar ecosystem.
- Integration with Karbon ensured that folder templates and client files were always up-to-date and consistent.
- Automated folder creation using Xero Tax templates saved significant time, eliminating manual folder setup.
- SuiteFiles' built-in digital signing capabilities saved Amplify 11 up to \$100/month on additional subscriptions.

The Result: Amplify 11 achieved 100% time savings in document management tasks, ensuring nothing fell through the cracks. With everything organized in SuiteFiles and synced seamlessly to Karbon, they now work faster, smarter, and without unnecessary stress.



CHAPTER 5

Getting Started with the SuiteFiles x Karbon Integration

Your Path to Seamless Workflows

Ready to transform how your team works? Implementing the integration is simpler than you might think. Here's how to get started and maximize the value of this powerful tool.

Step 1: Activate the Integration

To use the Karbon integration, you'll need the latest "Karbon" version of the SuiteFiles Chrome extension. Even if the integration is already enabled, you'll still need to install the latest version of the Chrome extension. You can get it by visiting the Google Chrome Web Store and downloading the SuiteFiles extension.

Once you've got the extension installed, activating the integration is straightforward. Visit your SuiteFiles settings, enable the Karbon integration, and follow the prompts to connect the two platforms. For new users, onboarding support is available to ensure a smooth setup.

Step 2: Train Your Team

To get the most out of the SuiteFiles Karbon integration, make sure your team knows how to use it effectively. Schedule a team training session to explore key features like:

- Managing files directly from Karbon.
- Automatic syncing between platforms.
- Real-time collaboration workflows.

Our help centre and support team are always available to help answer questions or provide additional resources. Check out this article to get started.



Step 3: Customize for Your Workflow

Every firm operates differently, and the SuiteFiles Karbon integration is designed to adapt to your unique needs. Take time to customize settings, templates, and workflows to align with your team's processes. Whether it's setting up shared folders or defining work item links, a little customization goes a long way.

Step 4: Monitor and Optimize

Once the integration is live, regularly review its impact on your workflows. Use team feedback and performance metrics to identify what's working well and where improvements can be made. Continuous optimization ensures you're getting the maximum benefit.

Tips for Long-Term Success

- **Encourage Adoption:** Make the integration the default workflow for your team to build consistency.
- **Stay Updated:** Watch for new updates and features from SuiteFiles to keep improving your processes.
- **Leverage Support:** Use SuiteFiles' support resources and community to stay ahead of the curve





SuiteFiles is the secret to supercharging your firm

Our powerful and intelligent workspace 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](#)