



# SuiteFiles

## Top folder structures

This guide highlights the most popular folder structures amongst accounting practices as well as changes our customers have made to meet their unique requirements. We hope these examples will spark some inspiration and help you determine the ideal folder structure for your practice.

# Welcome

Deciding on a method of document management is no easy task.

If you can't efficiently navigate a sea of files, you risk getting lost amongst them and maybe even a verbal confrontation with your computer. To help you confidently navigate your files, we suggest organizing them using a robust folder structure. Throughout this guide, we'll look at the benefits of folder structures, compare alternatives such as metadata and look at some examples of folder structures in practice.



## What's document management?

Chances are, you already have some form of document management – even if you're not calling it that!

Document management is using software to **organise**, manage and track your accounting practice's files. Folder structures act as the **organise** function of document management, using folders and subfolders to keep client files both tidy and secure.

## Folder structure matters

In addition to day-to-day needs to access and update files, you'll likely need to save and be able to quickly retrieve client files. For example, to comply with an audit. A solid folder structure allows you to do this efficiently by providing a roadmap to any file you need access to.

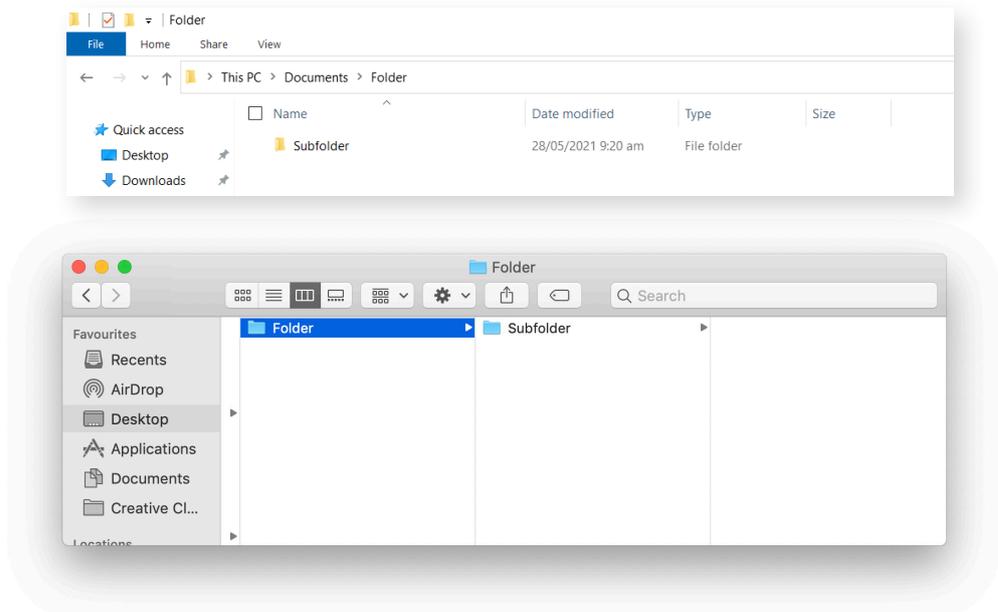
## Folder structure vs. metadata

Depending on your current document management software, you might already be using folder structures or you might be using metadata.

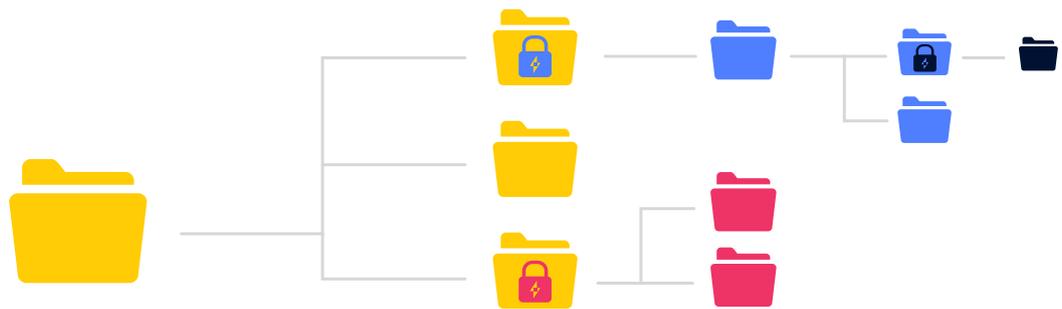
Metadata is descriptive information you link to a file. For example, title, date, client name and keywords. Metadata relies on you and your colleagues entering full information and using agreed on conventions consistently. With that, you have searchable files. Without that, you can lose visibility of what files exist. An advantage of metadata is that it allows for the same file to be categorised under multiple tags whereas folder structure requires you to file under X or Y folder. Although folder structures demand clear cut choices, its easy to create a logical folder structure which will guide you to make those decisions.

Folder structures are visual, typically intuitive and allow you to explore for yourself when you don't know exactly what you're looking for. Say you want to know what files are available for a certain client. Follow the folder structure and you'll have the information you're looking for in a matter of seconds. But what if you know what file you're looking for, just not where it is? Folder structures often make use of search functionality which means you can search for files without having to know the folder they're in. Of course, accessing files is only one piece of the puzzle. Ensuring staff can confidently use folder structures is a different concern. Fortunately, anyone who's used a computer to open documents has used folder and file and will be familiar with the logic behind folder structures.



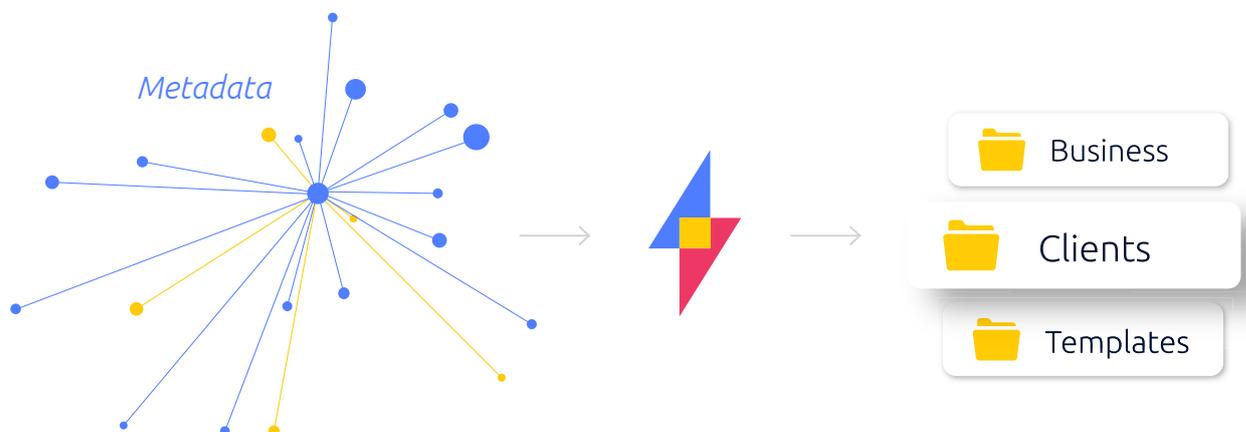


If you're worried about staff making too many folders or accessing sensitive information, you can use permissions to customise their access or lock certain folders to decide who should be able to access them.



## Folder Structure

SuiteFiles, and most accounting practices, use folder structures to group files together in a logical hierarchy.



## Metadata migration

If you're currently using metadata and want to switch to folder structures, it's not a problem. At the migration stage, SuiteFiles can convert from metadata to folder and file, leaving out any historic metadata that hasn't been used.

## Folder structures

In this section, we'll take a look at some folder structure templates based off the most popular folder structures we've found. We encourage you to have a think about how these models could apply to your practice and the ways we can help customise them to your specific needs.



Regardless of how you choose to structure your folders we advise you to:

### 1. Store your clients' folders in the SuiteFiles 'Clients' folder.

Following this formula allows you to capitalise on SuiteFiles' integrations like Xero Practice Manager (XPM) by easily switching between the two applications.

### 2. Think about having financial year folders directly under the client folder.

Placing financial years under the client unlocks SuiteFiles' advanced search settings which provide you with an extensive list of filters to refine your search.

### 3. Organise your business function folders (e.g. tax, financial planning) under the financial year folder.

This way you can search by all financial planning folders and, once again, make the most of SuiteFiles' advanced search settings.

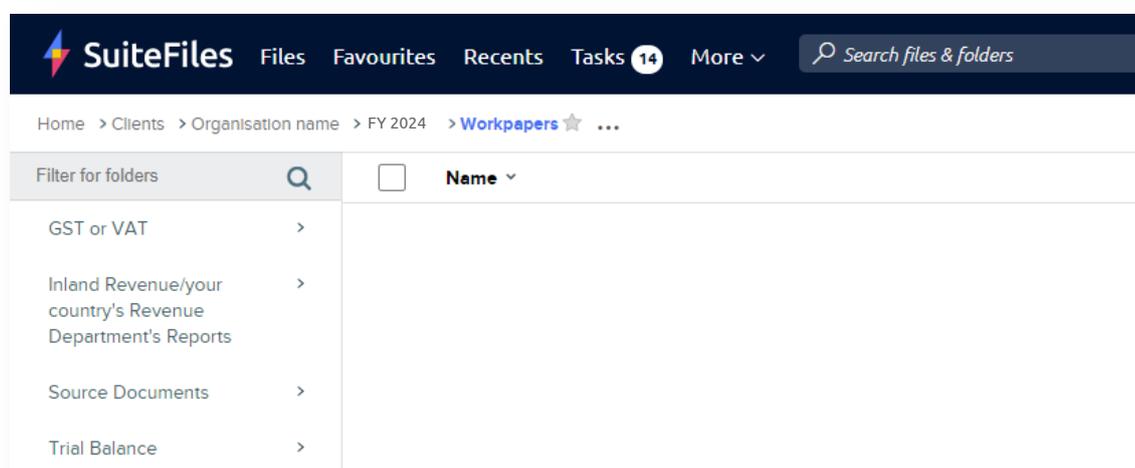
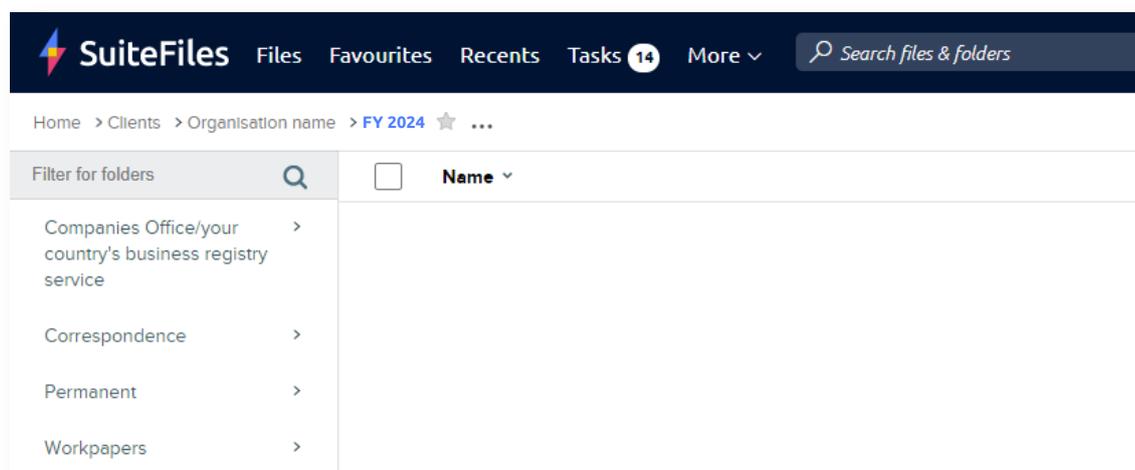
## Company/Partnership

As the title suggests, this template is widely applicable and can be used as a solid foundation when setting up your own folder structure.

Begin with the Organisation Name > Financial Year.

Add Companies Office/your country's business registry service, Correspondence, Permanent and Workpapers.

Under Workpapers, we suggest adding GST or VAT, Inland Revenue/your country's Revenue Department's Reports, Source Documents and Trial Balance.



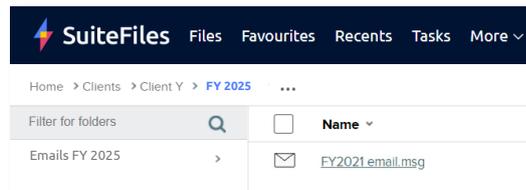
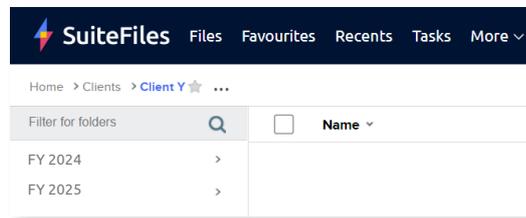
Wondering what your practice's folder structure might look like under SuiteFiles?

Feel free to [book a demo](#) with us.

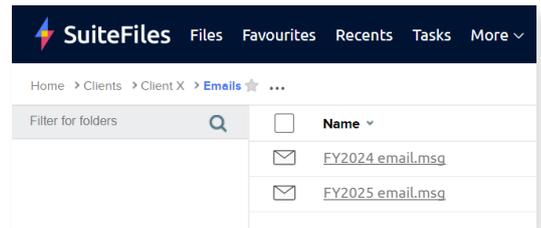
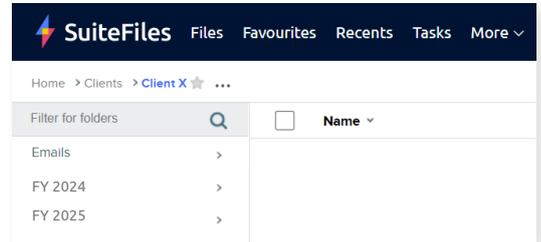
As we mentioned before, they're your documents, so the way you manage them is totally up to you. For example, you might decide that an Audit folder would be handy so you have all the necessary files at the ready in one folder should you need them.

*Top Tip – Some practices prefer to keep their correspondence/email folder directly underneath the company, so all emails are in one place, not sorted by year.*

## Email subfolders for each financial year



## One multiyear email folder example



We asked our SuiteFiles Community if they have one multiyear email folder or email subfolders for each financial year. We found that the majority use email subfolders for each financial year.

Email subfolders for each financial year

One multiyear email folder

*Top Tip – Similarly to email, some practices prefer to keep their permanent folder for files that won't be edited further directly underneath the organisation/company instead of under a financial year.*

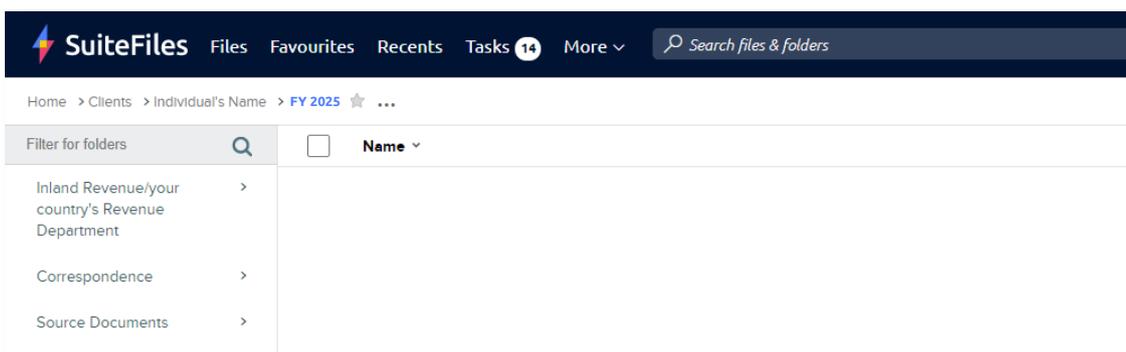
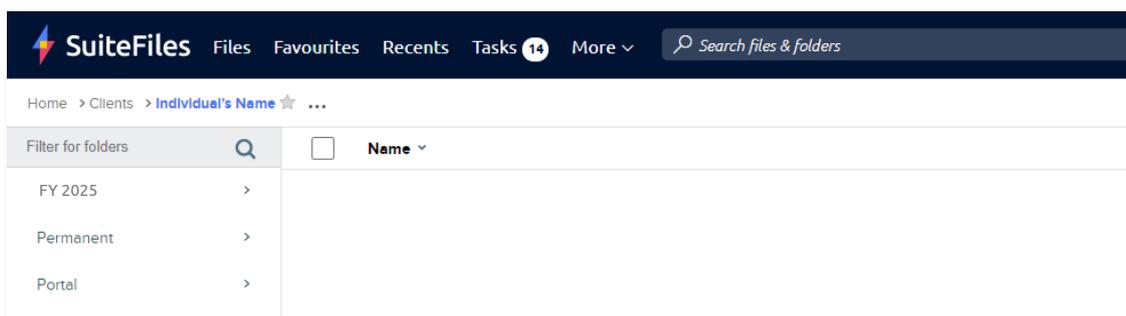
## Individual

While individual accounts may not require the same complexity as a company or partnership, they prioritise being able to easily track interactions with clients using Permanent and Portal folders.

Begin with the Individual's Name

Under that, add Financial Year, Permanent and Portal.

Under the financial year, add correspondence, Source Documents, and we suggest adding Inland Revenue/your country's Revenue Department



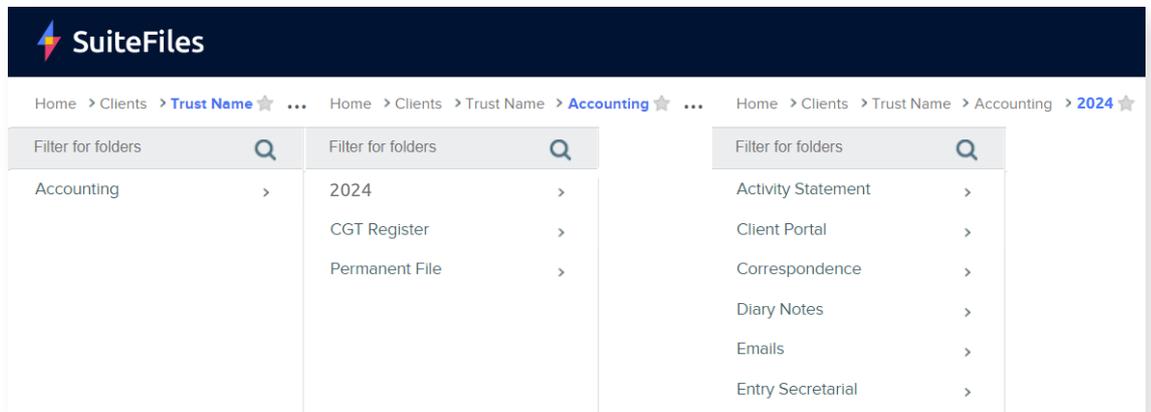
We recommend practices think about how they work and then have their email folder structure support their way of working. For example, some practices are jobs-centric so they save relevant emails to jobs mirroring your integrated software.

*Top Tip – If you're using Xero Practice Manager (XPM), our integration will automatically create a 'jobs' folder, as well as folders for each individual job, which you can also create templates for.*

*Top Tip – Using portals is the most secure way to exchange important information with clients. As part of our Super Suite bundle, we offer a client portal that works to streamline communications with clients. Whether you want to request a document or set a task to be completed, you can do so all from the same platform.*

## Trust

Begin with Trust Name > Accounting and under that CGT Register if applicable, Permanent File and Financial Year. Under Financial Year, have subfolders for Activity Statement, Client Portal, Correspondence, Diary Notes, Emails, and Entry Secretarial.



These are just the most commonly seen structures, feel free to adjust and update to really make them your own.

*Top Tip – to keep your main folders current, you may want to create an archive or historical folder.*

# Examples from our customers

Let's move on from principles to practice!

## Australian customer example

Here's how an Australian SuiteFiles customer chose to structure their files with us. While what they've done generally follows the principles, they've got some unique folders such as Non-trading Entity and Final and Self-managed Super Fund (SMSF). As well as unique subfolders Business Activity Statement (BAS) and Instalment Activity Statement (IAS) to fit the Australian accounting environment.

The screenshot shows the SuiteFiles interface for a Business customer. The breadcrumb trail is: Home > Clients > Business > Permanent Portal Year (2024). The folder structure is as follows:

- Permanent Portal Year (2024) >
  - Bookkeeping >
  - Correspondence >
  - Source Documents >
  - Tax >

When 'Bookkeeping' is selected, a sub-menu appears with the following folders:

- Filter for folders
- BAS >
- IAS Payroll >
- Miscellaneous >

When 'Tax' is selected, a sub-menu appears with the following folders:

- Filter for folders
- Final >
- Workpapers >

The screenshot shows the SuiteFiles interface for an Individual customer. The breadcrumb trail is: Home > Clients > Individual > Permanent Portal Year (2024). The folder structure is as follows:

- Permanent Portal Year (2024) >
  - Correspondence >
  - Final >
  - Source Documents >
  - Workpapers >

The screenshot shows the SuiteFiles interface for an SMSF customer. The breadcrumb trail is: Home > Clients > SMSF > Permanent Portal Year (2024). The folder structure is as follows:

- Permanent Portal Year (2024) >
  - Auditor Pack >
  - Correspondence >
  - Final >
  - Source Documents >
  - Workpapers >

**SuiteFiles**

Home > Clients > SMSF Audit > Permanent Portal Year (2024)

Filter for folders	Filter for folders	Filter for folders
Permanent Portal Year (2024)	Audit Report Pack	Final
	Correspondence	
	Workpapers	

**SuiteFiles**

Home > Clients > Non Trading Entity > Permanent Portal Year (2024)

Filter for folders	Filter for folders
Permanent Portal Year (2024)	Correspondence
	Final
	Source Documents
	Workpapers

**SuiteFiles**

Home > Clients > Trustee Company > Permanent Portal Year (2024)

Filter for folders	Filter for folders
Permanent Portal Year (2024)	Correspondence
	Final
	Source Documents
	Workpapers

## My Accountant QLD

My Accountant QLD offers a good example of how to structure your folders within SuiteFiles. By following the client and financial year folder template, My Accountant are able to get the most out of SuiteFiles' advanced search settings.

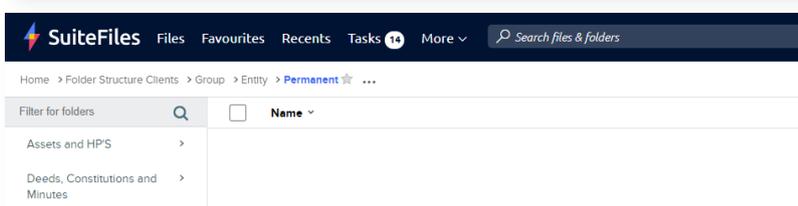
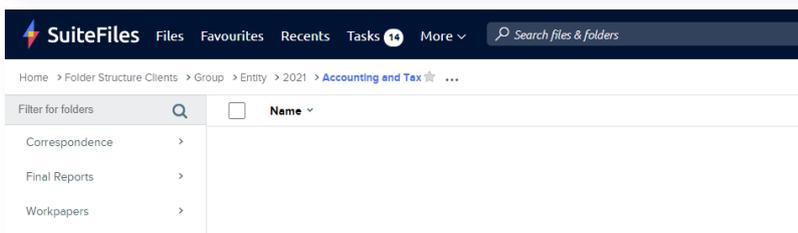
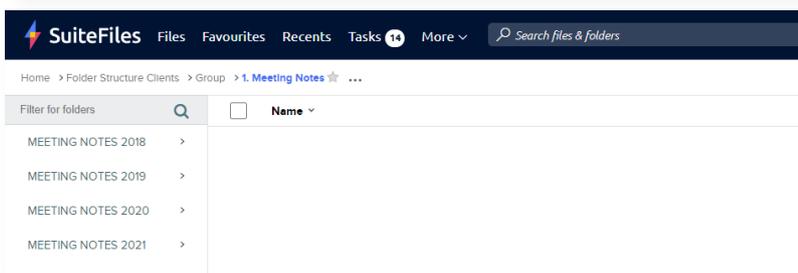
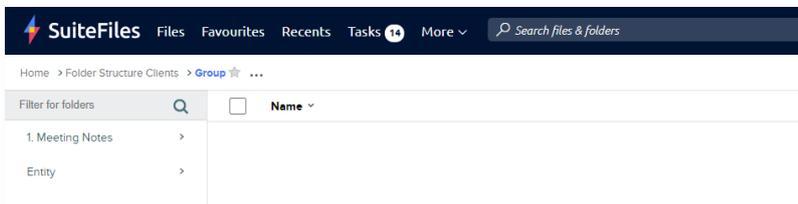
**SuiteFiles**

Home > Clients > Client - My Accountant QLD > 2024

Filter for folders	Filter for folders
2020	ASIC
2021	BAS
2022	Correspondence
2023	Other
2024	Tax
2025	Tax Planning
Invoices	Tax Workpapers
Newsletters	
Permanent	
Tax Workpapers	Engagement Docs
	Register

## Accounting customer example

This company used a familiar structure but introduced meeting notes and entity folders early on to refine their search for client files. From this point, their structure largely follows the templates we've seen – including organizing emails under financial year. When we caught up with them, they explained that organizing emails under financial year saved them time rummaging through client folders which span several years.



Get in touch to discuss how you'd like to organize your folders.

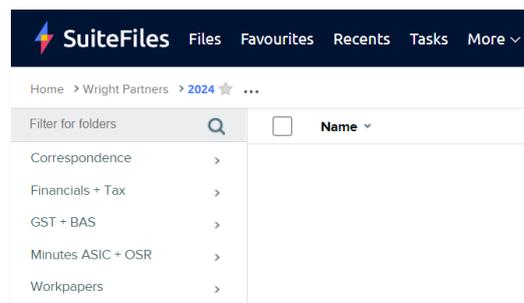
[Book a demo](#)

## Client folder generation

Folder structures save you considerable time but can require a level of maintenance. If you're hesitant about the manual process of adding new client folders, we've got you covered. Our Semi-Suite customers can pay for bulk folder generations while our Super Suite customers have access to an automated tool for simple bulk folder generations. Below we have some examples of customers who've taken advantage of bulk folder generations.

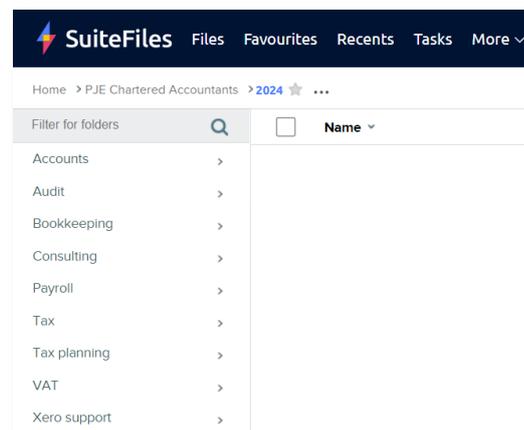
### Wright Partners

Wright Partners developed a tight folder structure with minimal subfolders. Being selective with subfolders is a good way of establishing a logical hierarchy which eases the process of navigating through your folder structure.



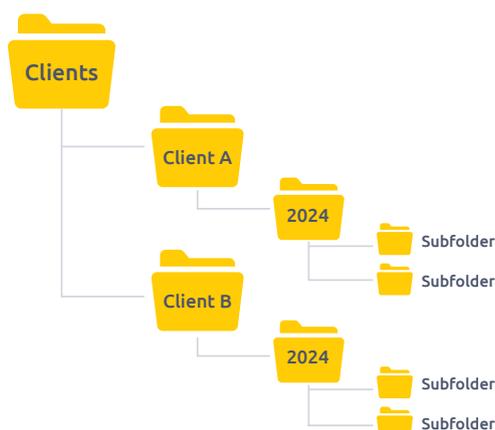
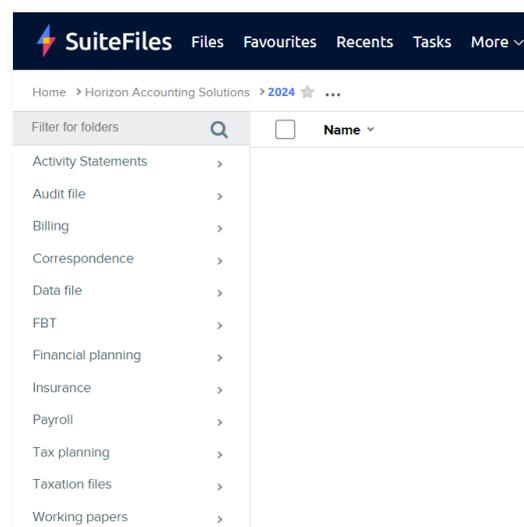
### An accounting firm

Turning to a U.K. client, we can identify region specific subfolders such as VAT (value added tax) but also unique folders such as Xero support. Throughout the folder generation process we will consider your practice's requirements and create a folder structure which complements the way you work.



### Horizon Accounting Solutions

Horizon Accounting Solutions opted for a longer list of subfolders to ensure there were clear cut choices as to where files are stored. While a lengthy list of subfolders may normally get you into trouble, Horizon's are sorted by client and financial year which make them easily accessible in the SuiteFiles app.



*Top Tip – Customers on our Super Suite plan have access to our automated tool to DIY simple bulk folder generations.*

# About us

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 Xero, Karbon, Microsoft 365, and more.

We're on a mission to give firms of all sizes enterprise-grade solutions and service that meets them where they are in their growth trajectory. The result? A simple, scalable, intuitive platform that your team and clients will actually enjoy using. Our product development and customer support teams are responsive – meaning you have people invested in you getting the most out of SuiteFiles. With SuiteFiles, your document management needs are taken care of and your IT burden is lifted allowing you to increase billable hours and strengthen relationships with your clients.



**When we first built SuiteFiles we debated at length whether to use folders or metadata but the answer was simple once we started talking to customers – folders! Everyone knows and understands folders so why make life harder when changing to SuiteFiles, keep folders and you don't have to learn how metadata works.** 

**SUITEFILES CO-FOUNDER AND CEO ANDREW SIMS**





## SuiteFiles is the secret to supercharging your accounting firm

Our powerful and intuitive digital 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](#)