

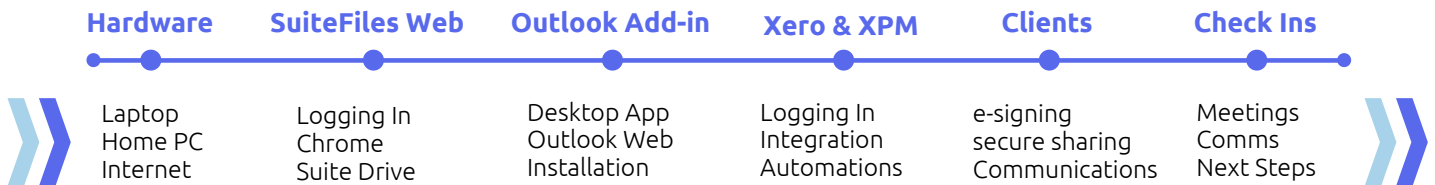
SUITEFILES AT HOME

One of the biggest benefits of SuiteFiles is the ability to access your information and work from anywhere. But as we prepare to have more of the workforce than ever before working remotely, we wanted to share some pointers for setting SuiteFiles up to work from home, even if you're not on your normal computer.



Using SuiteFiles at Home:

Because SuiteFiles is cloud-based technology, you should already be able to access it from absolutely anywhere that you have a working internet connection, but to make the process even smoother, here are 6 steps to quickly check through.



HARDWARE

- If staff are using their laptop, then it should basically be good to go
- If working from their home PC, they'll need to install some extras in the next steps
- Make sure everyone has access to internet from home, arrange temporary dongles/connections if not

SUITEFILES WEB

- Make sure staff have their SuiteFiles URL and can login with their Office365 credentials
- If on a different PC, ensure the Chrome extension is installed
- Install SuiteFiles Drive if required

OUTLOOK ADD-IN

- If your team are using the Outlook desktop app, make sure they have SuiteFiles Add-in installed
- If people are using a different PC, they may want to use Outlook web
- If using Outlook web, contact our team (support@suitefiles.com) and we'll sort it for you.











CLIENTS

- Advise clients you're working remotely
- Move in person meetings to phone calls where possible
- Set up clients to be able to e-sign using SuiteFiles
- Use SuiteFiles Connect to share documents where needed.

CHECK INS

- Set up check ins with your team
- Make sure all communications with clients are visible (save your emails)
- Make sure everyone can contact each other easily (consider Slack, Zoom etc)
- If you're using a lot of cloud-based technology, make sure these systems are all linked to avoid information double ups.

SuiteFiles at home set up!

- 1  Make sure staff have access to a laptop or an at-home PC
- 2  Ensure everyone can log into SuiteFiles using their URL and Office365 Credentials
- 3  Install the Chrome Extension & SuiteFiles Drive Apps if on a new computer
- 4  Make sure staff have access to Outlook (either via desktop or web) and that SuiteFiles is installed as an add-in
- 5  Advise clients that you are working remotely and of any process changes
- 6  Set up digital signing and secure sharing for your business to avoid paper files and physical meetings
- 7  Decide on systems used to communicate and make sure staff have access to them
- 8  Make meetings virtual where possible
- 9  Decide on a time to review current practices and provide updates accordingly
- 10  Wash your hands, be kind to people, stay calm when you can. Consider some team activities when this period ends!