



# M-FILES FOR TAX ADVISORY – FREQUENTLY ASKED QUESTIONS

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This document answers frequently asked questions about M-Files for Tax Advisory.

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## What is M-Files for Tax Advisory?

**M-Files for Tax Advisory** is an M-Files Industry Solution designed for companies delivering accounting, tax, and advisory services. It provides an AI-assisted and integrated environment for managing client work across engagements.

The solution is built on the M-Files platform and uses standard M-Files technologies. It is delivered as a standalone solution and can be used alongside other M-Files products as part of a broader information management landscape.

## What problem does it solve?

Tax Advisory firms face growing client and market expectations that drive margin pressure and demand faster engagement turnaround. At the same time, fragmented information management and manual processes create operational friction, reduce billable efficiency, and increase compliance risk.

M-Files for Tax Advisory reduces this friction by streamlining how client work is managed and delivered. By freeing time from administrative effort, it helps firms focus on their core business: delivering high-value advisory services to clients.

## How is M-Files for Tax Advisory delivered?

M-Files for Tax Advisory is delivered as a SaaS solution via **M-Files Cloud**.

Professional services such as data migration, integrations, and customer-specific configuration are provided by M-Files or certified M-Files partners.

## What are the key features?

M-Files for Tax Advisory includes the following key features:

- Role based overview dashboards for Partners, Managers, and Associates
- Engagement delivery and task management
- Automation of document centric workflows and compliance processes
- AI-powered insights and assistance

## Does M-Files for Tax Advisory support AI capabilities?

**Yes.** M-Files for Tax Advisory includes built-in AI capabilities that support insights and assist in engagement delivery.

In addition, the **M-Files Aino AI assistant** can be used for document-related tasks such as automated document classification and metadata extraction, document summarization, and natural language interaction with content.

## What integrations are typically used with this solution?

M-Files for Tax Advisory is typically integrated with key business systems to reuse master data and build a rich business context for AI.

Common integrations include:

- **SSO or identity providers** for secure access
- **HRM systems** for employee information (when not sourced from other systems)
- **CRM** for customer information
- **ERP or Practice Management** systems for engagement information

Optional integrations include:

- **E-signature services**, such as DocuSign or Adobe Acrobat Sign
- **Client portals**, such as M-Files Hubshare, for external information sharing
- **Outlook integration**, using M-Files for Outlook, for easy email filing

## Does the solution require data migration?

Any existing documentation that is needed in customer engagement delivery must be migrated into M-Files for Tax Advisory.

In certain cases, it may be possible to manage documents in place using a connector-based approach instead of full migration. Please contact M-Files for guidance on the best method..

## What about an existing customer with Client Information Management vault?

If your current vault follows the same design principles as the M-Files CIM templates, it may be possible to connect M-Files for Tax Advisory directly to the existing vault. Some additional configuration and alias mapping will be required, but this approach can reduce or eliminate the need for data migration. Please contact M-Files for further evaluation.