M-FILES CORPORATION

M-FILES FOR TAX ADVISORY SETUP GUIDE

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VERSION 1.1

Contents

1. Introduction

M-Files for Tax Advisory is an M-Files industry solution for companies that deliver accounting, tax, and advisory services. The solution supports structured client and engagement management, document governance, and secure collaboration. This guide is for administrators who set up and maintain M-Files for Tax Advisory.

This guide describes:

- Available deployment scenarios
- Configurable elements of the solution
- Integration capabilities
- Typical data migration approaches

1.1 Glossary and Acronyms

The following table explains terminology and acronyms used in this document.

TERM	DEFINITION
M-Files for Tax Advisory	The name of the product
Vault	An M-Files repository that stores documents, objects, metadata, and workflows.
Engagement	A commercial engagement between an advisory firm and a client.

2. Deployment scenarios

M-Files for Tax Advisory is delivered as a software-as-a-service (SaaS) solution through M-Files Cloud. The solution supports multiple deployment scenarios depending on the customer's existing M-Files environment.

2.1 New customer

For new customers, the M-Files Cloud team:

- Creates a new M-Files subscription in the required region
- Deploys a production environment for M-Files for Tax Advisory

2.2 Existing customer, new vault

For existing M-Files customers, the M-Files Cloud team can deploy a new, standalone production vault within the existing subscription.

2.3 Existing customer, existing vault

If an existing customer already has a vault that supports the same tax advisory use case, it may be possible to reuse the existing vault.

Reusing an existing vault can:

- Eliminate the need for data migration
- Allow users to transition gradually to the new solution
- Preserve existing configurations as a fallback

For more information, see chapter 4 **Deploying to an Existing M-Files Vault**.

3. Environment setup

After the production environment is available, you can begin configuring M-Files for Tax Advisory to match customer requirements.

- Chapter 3.1 describes which elements of the solution you can configure.
- Chapter 3.2 explains how to integrate external data sources with M-Files.
- Chapter 3.3 outlines typical data migration scenarios.

3.1 Configuring the Solution

M-Files for Tax Advisory provides an out-of-the-box solution for accounting, tax and advisory firms. The following sections describe which parts of the solution you can configure to align with customer-specific terminology and processes.

3.1.1 Terminology

You can rename all business terms used in M-Files for Tax Advisory to match customer preferences. The following table shows common terms and typical alternatives.

TERM	EXAMPLE SYNONYMS
Client	Customer, Account
Engagement	Project, Job, Case, Matter
Service Line	Practice Area, Business Unit, Department
Partner	Executive, Director, Lead

3.1.2 Document Classes and Types

The solution includes a predefined set of document classes and document types that cover most accounting and advisory use cases.

You can rename, add, or remove document classes and types. You cannot change the overall logic that links document metadata to workflows and naming rules:

CONCEPT	IMPACT
Class	Impacts workflows
Document Type	Impacts naming and workflows
Document Purpose	Impacts organization of the content and workflows

The system assigns a document name and selects the appropriate workflow based on the specified metadata. The document purpose determines which workflow is applied.

For example:

- Documents with the purpose **Working / Internal Document** typically use the standard approval workflow.
- Documents with the purpose **Deliverable / Sent to Customer** use the **Firm Review and Client Signature** workflow.

The Managed Properties module from the M-Files Compliance Kit generates document names automatically. Metadata Card Configurations control workflow and metadata behavior.

3.1.3 Object Properties

Each object type and document class includes properties that provide business context. Most properties are typically synchronized from an external system and can be renamed, added and removed. However, the following required properties cannot be modified.

OBJECT	REQUIRED PROPERTIES
Client	Client Name, Country, Partner, Manager, Team Members, Default document access
Engagement	All built-in properties are required. New properties can be added.
Task	All built-in properties are required. New properties can be added.
Employee	Full Name, Service Line, Manager, User Role.

3.1.4 Object naming properties

Most object types are automatically named based on the *Auto Display Name* property. The Managed Properties module in the M-Files Compliance Kit calculates object names using predefined rules. Each object type has its own naming rules.

You can review and modify these rules in M-Files Admin.

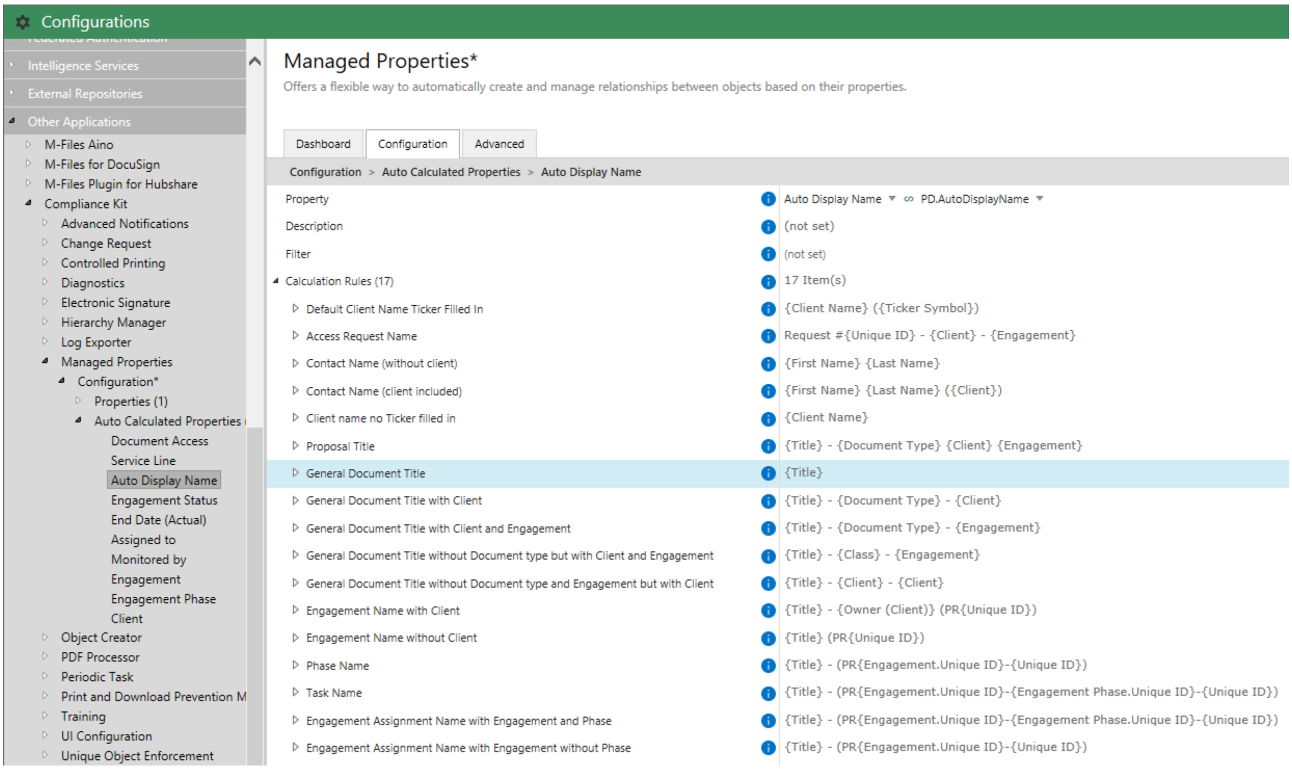


Figure 1: Auto Display Name calculation rules

The rule with the lowest priority number determines the object name.

Client

PRIORITY	RULE NAME	KEY FILTER CONDITIONS	NAME FORMULA (DYNAMICVALUE)
99	Default Client Name Ticker Filled In	PD.Codename not empty	%PD.ClientName% (%PD.Codename%)
—	Client name no Ticker filled in	PD.Codename empty	%PD.ClientName%

Contact person

PRIORITY	RULE NAME	KEY FILTER CONDITIONS	NAME FORMULA (DYNAMICVALUE)
89	Contact Name (client included)	PD.Client not empty	%M-Files.ComplianceKit.FirstName% %M-Files.ComplianceKit.LastName% (%PD.Client%)
90	Contact Name (without client)	PD.Client empty	%M-Files.ComplianceKit.FirstName% %M-Files.ComplianceKit.LastName%

Access request

PRIORITY	RULE NAME	KEY FILTER CONDITIONS	NAME FORMULA (DYNAMICVALUE)
1000	Access Request Name	object type = Access Request	Request #%PD.UniqueId% - %PD.Client% - %PD.Engagement%

Engagement

PRIORITY	RULE NAME	KEY FILTER CONDITIONS	NAME FORMULA (DYNAMICVALUE)
88	Engagement Name with Client	PD.OwnerClient not empty	%PD.Title% - %PD.OwnerClient% (PR%PD.UniqueId%)
99	Engagement Name without Client	PD.Client empty	%PD.Title% (PR%PD.UniqueId%)

Engagement phase

PRIORITY	RULE NAME	KEY FILTER CONDITIONS	NAME FORMULA (DYNAMICVALUE)
88	Phase Name	object type = Engagement Phase	%PD.Title% - (PR%PD.Engagement.PROPERTY_{PD.UniqueId}%-%PD.UniqueId%)

Engagement task

PRIORITY	RULE NAME	KEY FILTER CONDITIONS	NAME FORMULA (DYNAMICVALUE)
88	Task Name	object type = Engagement Task	%PD.Title% - (PR%PD.Engagement.PROPERTY_{PD.UniqueId}%-%Engagement Phase.PROPERTY_{PD.UniqueId}%-%PD.UniqueId%)

Assignment

PRIORITY	RULE NAME	KEY FILTER CONDITIONS	NAME FORMULA (DYNAMICVALUE)
88	Engagement Assignment Name with Engagement and Phase	Class = CL.EngagementAssignment AND PD.Engagement set AND Engagement Phase set	%PD.Title% - (PR%PD.Engagement.PROPERTY_{PD.UniqueId}%-%Engagement Phase.PROPERTY_{PD.UniqueId}%-%PD.UniqueId%)
88	Engagement Assignment Name with Engagement without Phase	Class = CL.EngagementAssignment AND PD.Engagement set AND Engagement Phase empty	%PD.Title% - (PR%PD.Engagement.PROPERTY_{PD.UniqueId}%-%PD.UniqueId%)

Document

PRIORITY	RULE NAME	KEY FILTER CONDITIONS	NAME FORMULA (DYNAMICVALUE)
50	Proposal Title	Class = CL.Proposal	%PD.Title% - %PD.DocumentType% %PD.Client% %PD.Engagement%
94	General Document Title with Client and Engagement	Client set AND Engagement set AND DocumentType set	%PD.Title% - %PD.DocumentType% - %PD.Engagement%
95	General Document Title with Client	Client set AND DocumentType set AND Engagement empty	%PD.Title% - %PD.DocumentType% - %PD.Client% (*JSON has trailing newline*)
96	General Document Title without Document type but with Client and Engagement	DocumentType empty AND Client set AND Engagement set	%PD.Title% - %PROPERTY_{Class}% - %PD.Engagement%
97	General Document Title without Document type and Engagement but with Client	DocumentType empty AND Client set AND Engagement empty	%PD.Title% - %PD.Client% - %MF.PD.Customer%
999	General Document Title	(Only object type = Document)	%PD.Title%

To disable automatic naming:

1. Add the built-in *Name or title* property to the object type
2. Set it as the object's name
3. Remove the *Title* and *Auto display name* properties.

3.1.5 Workflows and approvals

Workflows are part of the solution logic. You cannot modify workflows. If a customer requires additional workflow behavior, contact the product team.

3.2 Integrations

You can integrate M-Files for Tax Advisory with external data sources and document repositories by using standard M-Files platform capabilities.

3.3 Data Migration

You migrate existing data to M-Files for Tax Advisory using the same tools, processes, and best practices as any other M-Files vault.

3.4 Users, roles and permissions

This section describes how users, employee objects, and permissions work together in M-Files for Tax Advisory.

3.4.1 Users and Employee Objects

Each user account in M-Files is associated with an *Employee* object through the M-Files user property definition. For each user account that requires access to vault content, a corresponding Employee object must exist.

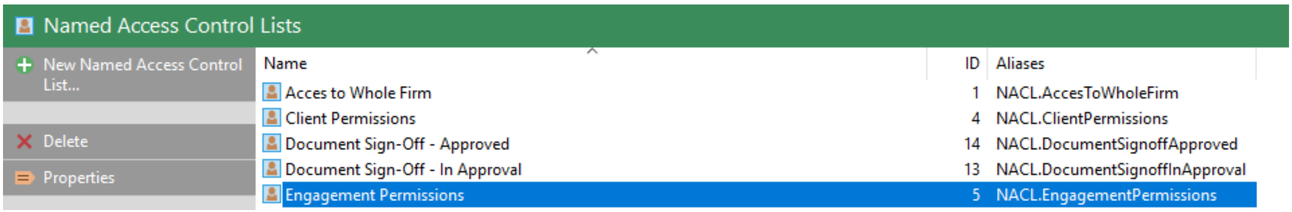
It is recommended to use the User Synchronization module from the M-Files Compliance Kit to automatically create *Employee* objects and link them to user accounts.

To set up users and employee objects:

1. Create user accounts and user groups in M-Files Admin, or synchronize them from Active Directory / Entra ID.
2. Map user accounts to Employee objects and link Employee objects to external parties. Validate that permissions are applied correctly by creating a test contract and linking it to a Client, Supplier or Subcontractor.
3. Verify that named access control lists (for example, Restricted to Engagement Team Only and Restricted to Client and Engagement Team Only) align with the customer's security model.
4. Test access with representative user accounts for each role.

3.4.2 Object Permissions

Objects other than contract documents, such as Clients and Engagements, use dedicated named access control lists. You can modify these access control lists freely to meet customer-specific requirements.



3.4.3 Document Permissions

The solution applies document permissions automatically based on related client and engagement metadata.

You can define team members (Employee objects) in client and engagement metadata.

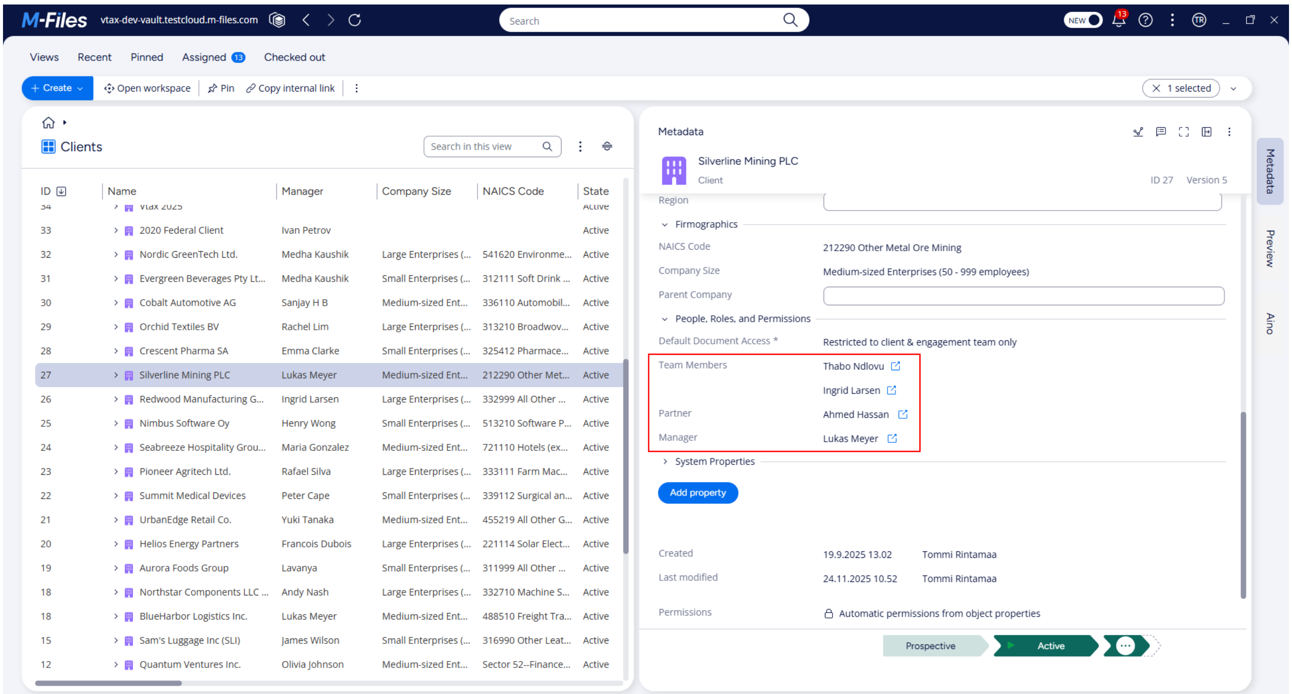


Figure 2: Client team members, partner and manager defined in client metadata.

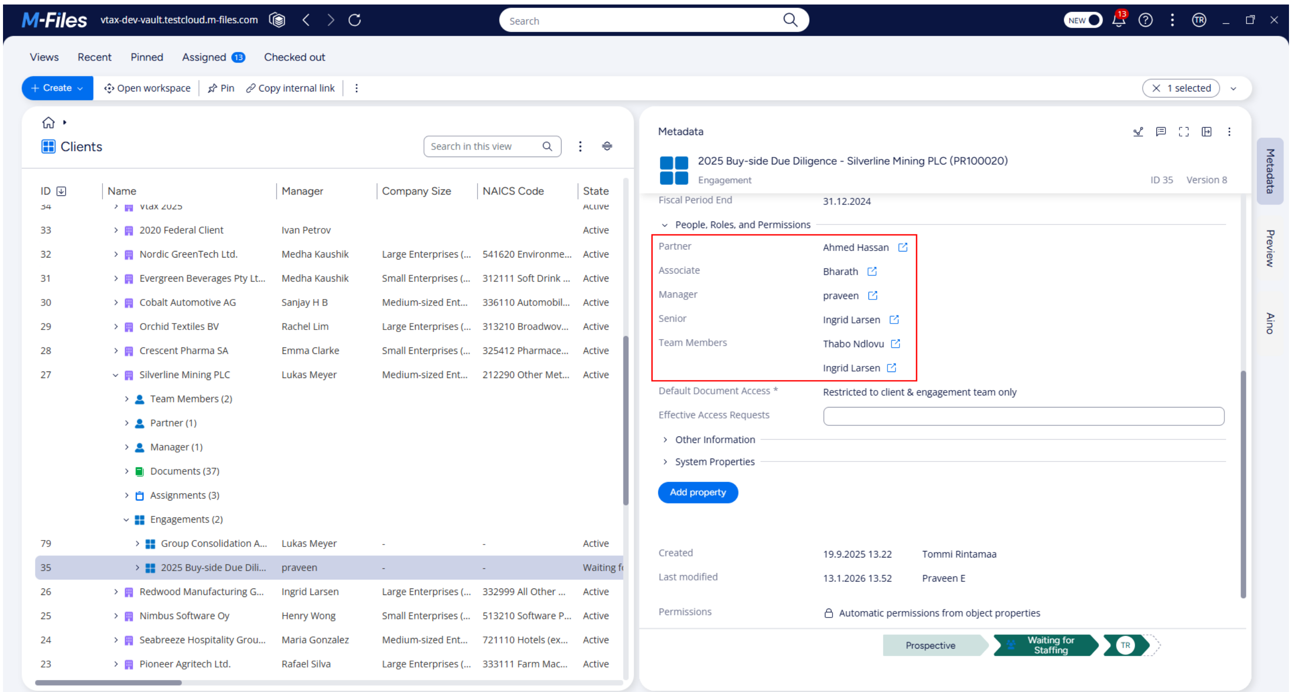


Figure 3: Engagement team members, partner, associate, manager and senior defined in engagement metadata

> **Note:** Permission models are assigned via M-Files user accounts. Employees who require access to view or edit content must have an M-Files user account specified in their Employee metadata.

When you save a document and link it to a client or engagement, the system assigns permissions by copying them from the related object using the following priority:

1. Engagement permissions (priority 1)
2. Linked client permissions (priority 2)

If a document is linked to a client, the permission model comes from the client metadata. Priority 1 states that if a document is linked to both a client and an engagement, the system uses the engagement permission model.

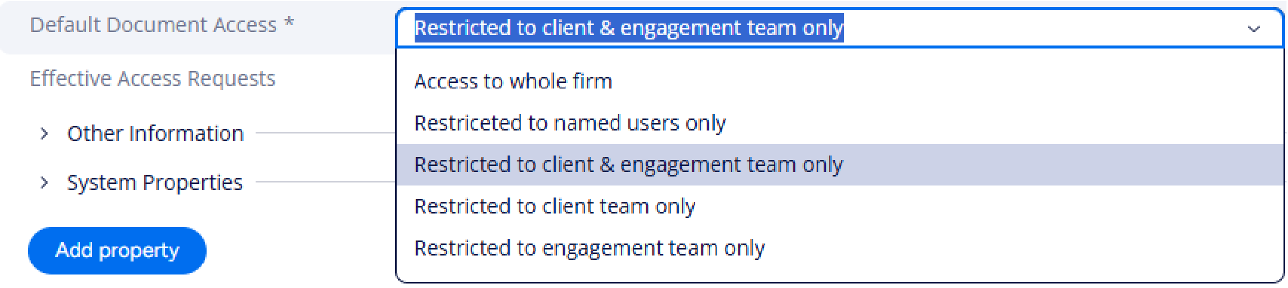


Figure 4: Document access value-list values

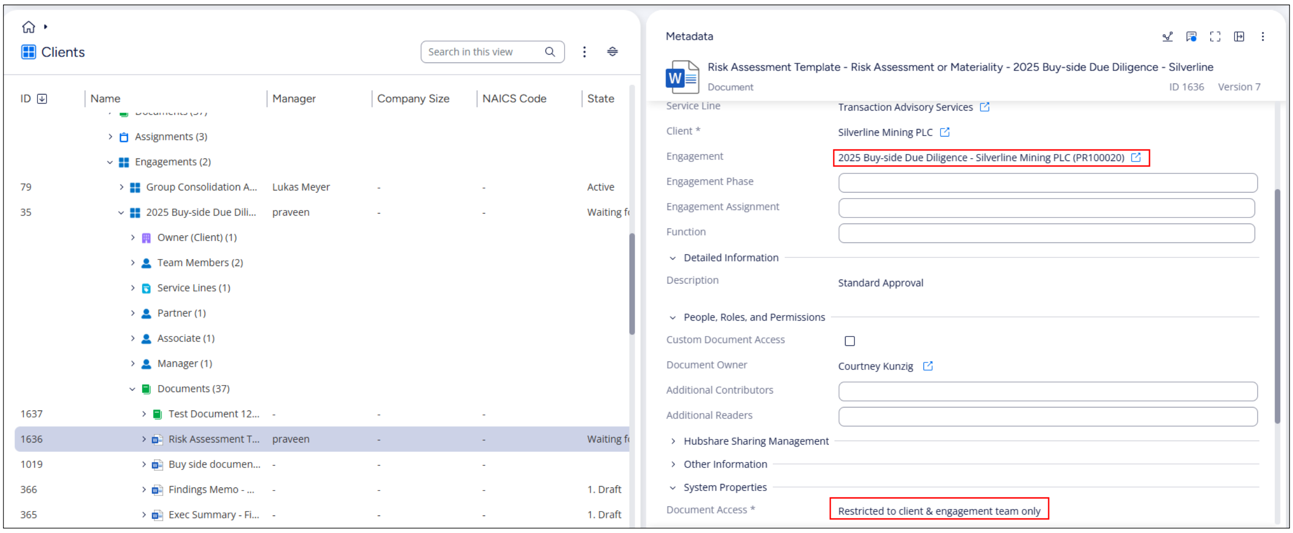


Figure 5: Document linked to an engagement inheriting permission model from engagement object.

You can extend document access by adding employees to the **Additional Readers** or **Additional Contributors** fields on the document's metadata card. These changes apply only to the selected document.

To override automatic permissions for a single document, select **Custom Document Access** and define the required permissions manually.

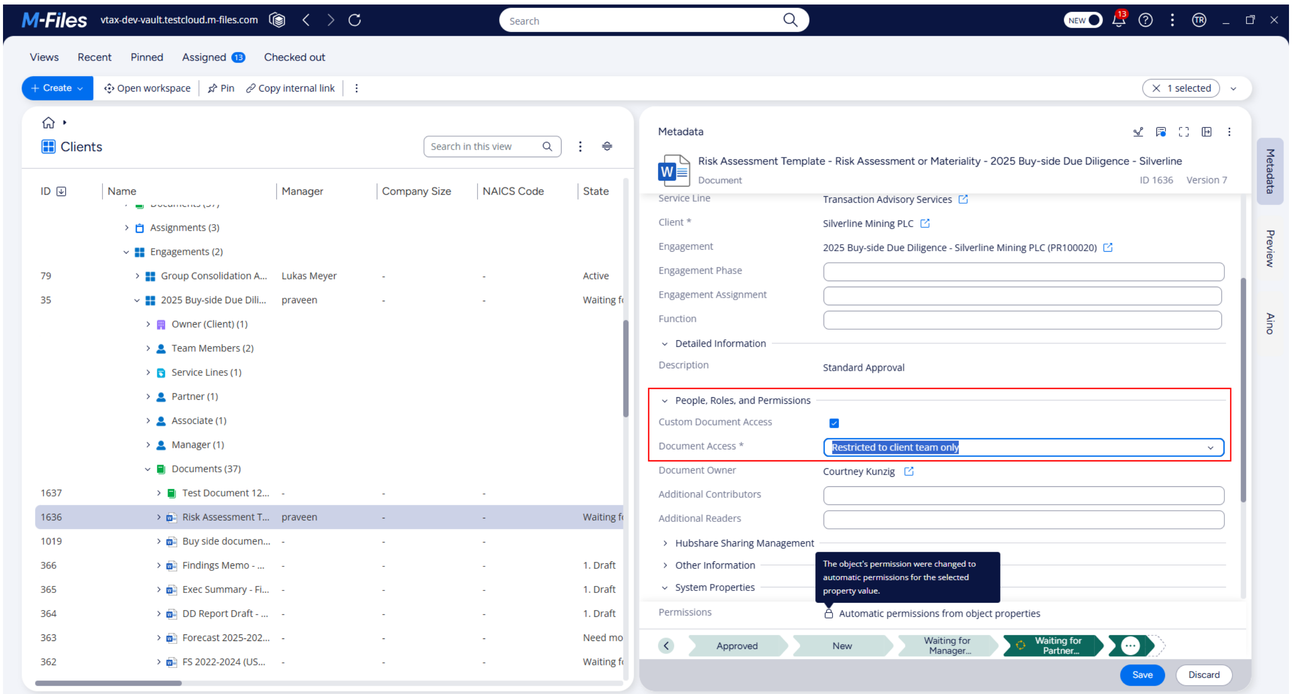


Figure 6: Setting custom document access for a document.

Document permissions are driven by the **Document Access** property, which is based on a value list.

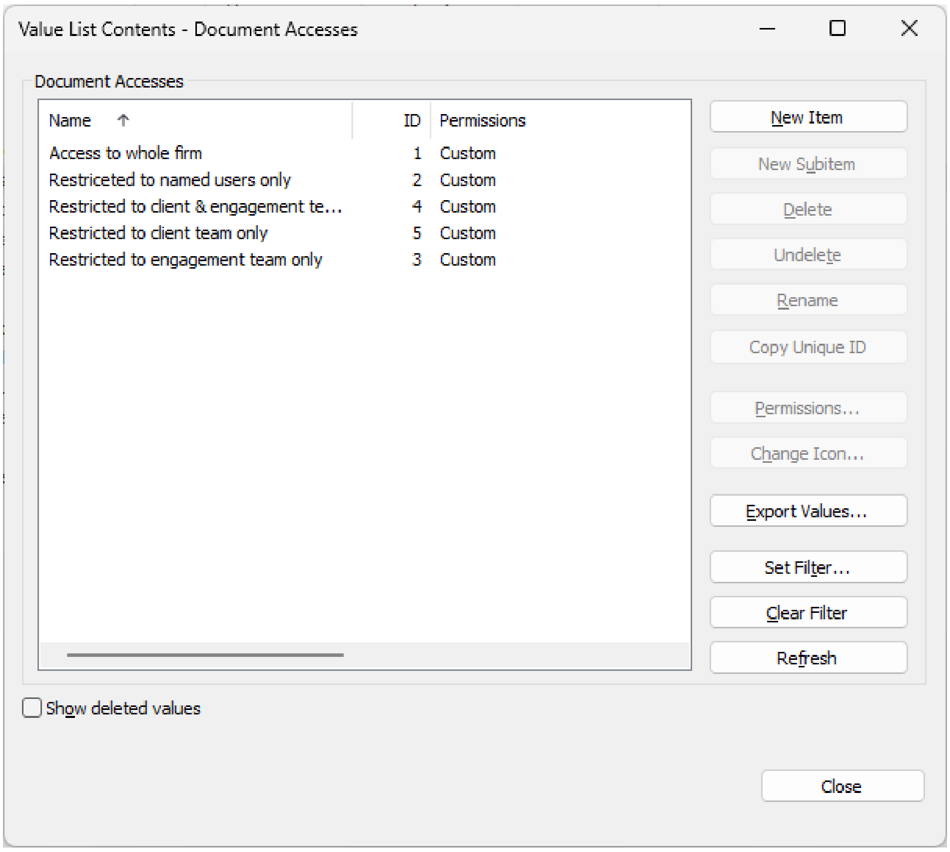


Figure 7: Document access value list

Each value in the list applies permissions using a named access control list with the same name:

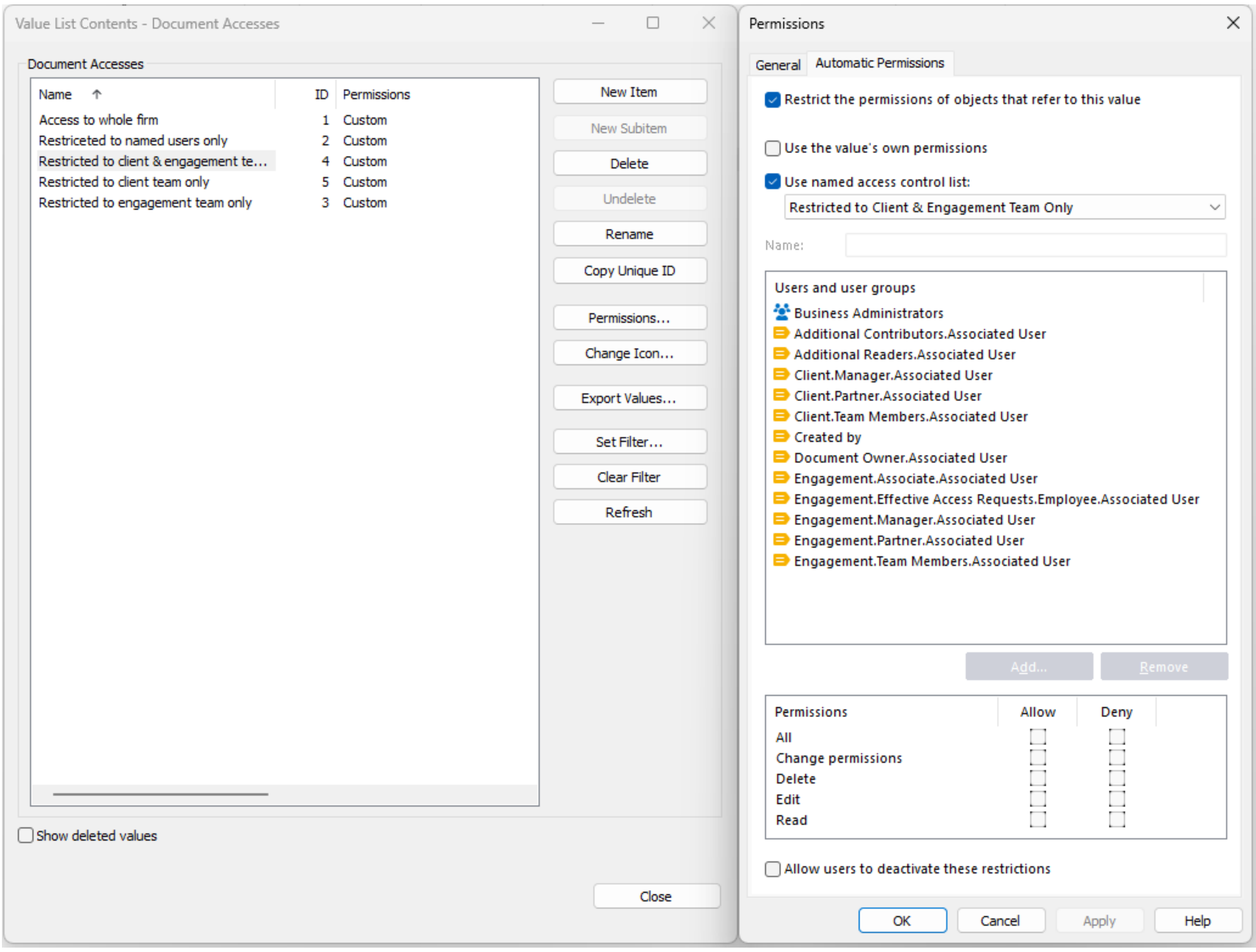


Figure 8: Value list values setting permissions

The **Document Access** property has automatic permissions enabled. When the property is present on a document metadata, the system applies permissions automatically.

The Managed Properties module in the M-Files Compliance Kit copies the **Document Access** value from the related client or engagement object.

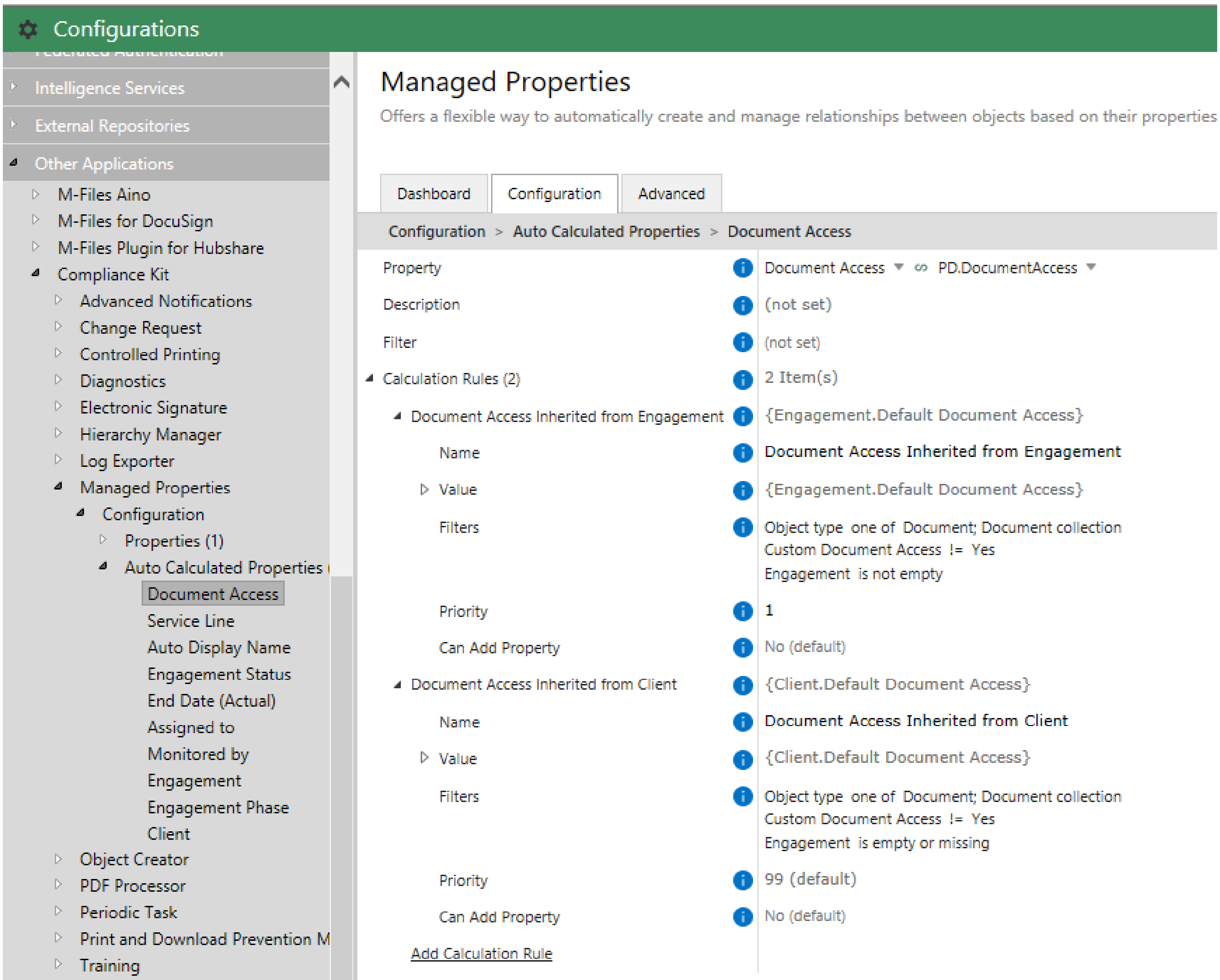


Figure 9: Managed Properties - Document Access

Task: To create customer, supplier, and subcontractor objects in the vault, import or connect an existing database to M-Files. Define **Team Members** and **Managers** for each object and set the **Default Document Access** property to control permissions. The system uses these properties to assign permissions to any document that refers to a customer, supplier, or subcontractor object.

4. Deploying to an Existing M-Files Vault

M-Files for Tax Advisory uses a standard M-Files vault as its document and data repository. Because of this, you can connect the solution to an existing vault.

This deployment approach is suitable in the following scenarios:

- The existing vault already contains a large volume of data that supports the same tax advisory use case. Re-using the existing vault avoids data migration and allows users to transition gradually to the new solution while keeping the existing M-Files platform available as a backup.

- The existing vault includes client data shared across multiple service lines, and only a subset of users will use M-Files for Tax Advisory. This approach allows multiple service lines to access the same client data while providing a differentiated user experience.

4.1 Deployment Process

To deploy M-Files for Tax Advisory into an existing vault, an M-Files administrator must review the current vault configuration and compare it with the data model requirements of the solution.

For each required element, complete one of the following actions:

- Add missing configuration elements to the vault
- Map existing configuration elements by using aliases

The following table shows an example of how object types, classes, and properties are mapped by using aliases.

CATEGORY	NAME	ALIAS
Object Type	Client	VTax.OT.Engagement
Class	Client	VTax.CL.Engagement
Property	Client Name	VTax.PD.Title

For more details and full list of required aliases, contact the product team.

5. Change History

The table describes the changes by document version.

VERSION	DATE	ESSENTIAL CHANGES
1.0	30.1.2026	Initial version.
1.1	10.2.2026	Automated naming added.

6. Reference Documents

Refer to these documents for additional information:

- [Solution Description - M-Files for Tax Advisory]
- [FAQ - M-Files for Tax Advisory]