

# FEATURE COMPARISON



## SYSTEM REQUIREMENTS

<b>ACCESSIBILITY</b> Workpaper access Staff user access - Excel Staff user access - Web	Web & Excel Single Multiple	Excel Single No
<b>ADD-IN</b> Add-in deployment Account connections	<u>Web</u> Multiple	Excel desktop Single
<b>CLIENTS</b> Client integration with XPM Client integration with MYOB AE* Client integration with APS*	Yes Yes Yes	No No No
<b>DATA IMPORT</b> Excel Xero MYOB AR MYOB Essentials QBO APS XPA BGL 360 Class View previous years workpapers Rollover from previous year	Advanced Yes Yes Yes Yes No Yes Yes Yes Yes	Basic Yes Yes Yes Yes Yes Yes Yes No Yes
<b>ATO DATA IMPORT</b> BAS Integrated Client & Income Tax Accts Individual Tax Pre-fill	Yes Yes Yes	No No No
<b>INDEX</b> Access Customisation Reconciliation tolerance levels Workpaper recommendations Review mode Customise accounts for preparation	Web & Excel Advanced Advanced Advanced Yes Yes	Excel Limited Basic Basic No No

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## SYSTEM REQUIREMENTS

STORAGE Excel workpapers Source document storage* Source document hyperlinking	Yes Yes Yes	Own system No Yes
Q&A CENTRE Identify incomplete tasks Audit log Privileges to approve	Yes Yes Yes	No No No
MATTERS Workpaper items	Advanced	Basic
JOURNALS Post journals to client file Print balancing journal for client	Yes Yes	No No
EXPORT WORKPAPER	Yes	No
COLLABORATION Email notifications Internal notes & client queries	Yes Yes	No Yes
AUTOMATION Wages automation Income Tax automation	Yes Yes	No No
INVESTMENT	\$55 per user/month	\$40 per user/month

- Smart Workpapers rollover to Active Workpapers is available.
- Training & Implementation costs from \$990 ex GST.

\*Additional costs/ data limits may apply.