WHY ACTIVE WORKPAPERS?

KEY BENEFIT	WORKPAPERS	OTHER WORKPAPERS
MAINTAIN CONFIDENCE SOLUTIONS DESIGNED BY ACCOUNTANTS	• Established workpapers catalogue, developed over 25 years. • Developed and continuously updated by our team of qualified CPAs/CAs. • Full suite of workpaper binders including Accounts &Tax, Activity Statement, FBT, Tax Planning, ITR, SMSF. • Easily customise workpapers, add own IP as needed.	• Limited types of workpapers and binders. • Significant time required to maintain own workpapers.
REDUCE RISK HANDLES COMPLEX SCENARIOS AND CATERS TO VARIOUS ENTITY TYPES	• 300+ workpaper templates included in standard subscription. • Templates with technical depth to cover tax compliance scenarios across a wide range of entity sizes and types (including companies, trusts, SMSFs, partnerships, and individuals). • Advanced functionality for complex scenarios, including inter-entity loans and Division 7A. • Templates built in familiar Excel interface, combining the benefits of automation and cloud technology. • Flexibility to import customised workpaper templates.	• Basic workpapers only - templates for more complex scenarios often come at additional cost. • Standard web-based templates with little to no customisation options. • Limited to entity types (eg. Company only) - don't cater to other sizes and types.
SAVE TIME STREAMLINES COMPLIANCE JOBS, AND KEEPS DATA SECURE	• Standardisation leads to faster job turnaround times. • Data flows across binders, and one-step roll-over process. • Built-in document management with version control and bulk upload. • ISO 27001 certification.	• Fall short in supporting consistent and structured firm processes. • Require repetitive data entry into multiple sheets. • No automated rollover.
SAVE TIME INTEGRATIONS THAT OFFER FIRMS THE FREEDOM TO CHOOSE WHAT WORKS BEST	• Multi-ledger integration (Xero, MYOB, QBO, Class, BGL Simple Fund), instantly updating the client file - no matter which software your client uses. • Automated ATO data imports (BAS, ICA, ITA, ITR) reducing manual entry. • Integration with leading Document Management systems (FYI, iManage, HowNowX, SuiteFiles & SharePoint), seamlessly connects your tech stack. • Native practice management integrations (XPM, FYI Elite, Karbon, MYOB PM, Kloud Connect & APS Desktop), bringing greater flexibility.	• Require additional processes for importing non-integrated ledgers. • Repetitive data entry into multiple sheets. • Limited integrations across modern tech stacks.
APPROVE EASILY BUILT FOR GREATER COLLABORATION, VISIBILITY AND TRANSPARENCY	• Allocated reviewers and managers with the appropriate permissions. Mirrored from your firm's chosen Practice Management System. • Multi-level review, partner signoff, and audit trail. • Email notifications for status updates, client group dashboards allow for high level review, query management at group level. • Multiple users work simultaneously. • Audit trails capture all changes by all staff. • Mark-up docs with PDF tools and then review.	• Review and approval status is uncertain. • Limited features and caps on users. • Single-user job access. • Risk of unapproved changes leading to time-consuming rework.
EXPAND SECURELY FITS GROWING FIRMS AND SUPPORTS COMPLEX CLIENT GROUPS	• Intuitive 'Office' structure with advanced security controls like user permissions, client-access restrictions. • Easy to add new users and new offices. • Enterprise-ready – perfect for complex, multi-entity groups.	• Inadequate for firms looking to grow. • Challenges in consolidating files for complex groups.