

FEATURE COMPARISON

Active powered by Business Fitness is a platform that automates and standardises accounting processes. We deliver practical, powerful products that automate accounting work and harness data. Active Documents will play a supporting role in this process, along with Active Workpapers and Active Ledger & Reporting on the Active Platform.



AVAILABLE IN 2026



RETIRING IN 2027

ACCESS & USER EXPERIENCE	<ul style="list-style-type: none"> • 100% cloud environment 	<ul style="list-style-type: none"> • Files are stored in a cloud environment, accessed via desktop app or browser
SECURITY <ul style="list-style-type: none"> • Enterprise-grade security • Single sign-on options • 2FA • Disaster recovery • Database backup 	✓ ✓ ✓ ✓ ✓	✓ ✓ ✓ ✓ ✓
AUDIT TRAIL & VERSION CONTROL	<ul style="list-style-type: none"> • Detailed audit logs to track uploads, opens, deletions, and status changes 	<ul style="list-style-type: none"> • Available, with limited flexibility
PRACTICE MANAGEMENT INTEGRATION <ul style="list-style-type: none"> • XPM • MYOB • APS • FYI Elite • Kloud Connect • Karbon 	✓ ✓ ✓ ✓ ✓ ✓	✓ ✓ ✓ X X X
DOCUMENT UPLOADING & EDITING <ul style="list-style-type: none"> • Bulk document uploading • Drag and drop functionality • No EditApp required • Multiple users can work simultaneously in MS Office documents (Excel, Word, PPT), bypassing check-out processes 	✓ ✓ ✓ ✓	X X X <ul style="list-style-type: none"> • When editing a document record, the file is locked - limiting real-time collaboration



SEARCH FUNCTIONALITY	<ul style="list-style-type: none"> • Full text searching 	<ul style="list-style-type: none"> • Meta data including keywords
TEMPLATE MANAGEMENT <ul style="list-style-type: none"> • Master style letter templates • Global styling feature – Ability to set default brand/style • Merge documents • Create & edit templates 	<ul style="list-style-type: none"> ✓ ✓ • Extensive merge capability • User-friendly with built-in template editor that supports system and custom data 	<ul style="list-style-type: none"> ✓ X • Contact data and AskData via wizard • Process creation required
INTERNAL DOCUMENTS / KNOWLEDGE <ul style="list-style-type: none"> • Secure uploads / management • Access restrictions 	<ul style="list-style-type: none"> ✓ • Client and office-based cabinet security 	<ul style="list-style-type: none"> ✓ • Team-based cabinet security only
EMAIL MANAGER <ul style="list-style-type: none"> • Outlook desktop • Outlook browser • Improved profiling and workflow features – Including conversation threads and preview functionality • Configured email templates • Ability to send documents directly to binders 	<ul style="list-style-type: none"> ✓ ✓ ✓ ✓ ✓ 	<ul style="list-style-type: none"> ✓ X X X X
CLIENT PORTAL [RELEASE DATE TBD] <ul style="list-style-type: none"> • BYO e-signature - Mid 2026 • Secure document sharing 	<ul style="list-style-type: none"> ✓ ✓ 	<ul style="list-style-type: none"> X ✓
OTHER INTEGRATIONS [DISCUSSIONS UNDERWAY WITH INTEGRATION PARTNERS] <ul style="list-style-type: none"> • ATOmata • ATO SmartDocs • FuseDocs 	<ul style="list-style-type: none"> ✓ ✓ ✓ 	<ul style="list-style-type: none"> ✓ ✓ ✓

The system is designed to facilitate a smooth transition from HowNow to Active Documents. While the majority of documents will migrate seamlessly, minor adjustments to certain templates may be necessary to accommodate technological enhancements. All HowNow Smartlinks will be maintained during the migration to Active Documents.

