

WHY ACTIVE DOCUMENTS?



KEY BENEFIT	 DOCUMENTS	OTHER DOCUMENT MANAGEMENT
COLLABORATION EASILY WORK AND SHARE DOCUMENTS WITH YOUR TEAM	- Multiple users can work simultaneously in MS Office documents (Excel, Word, PPT), bypassing check-out processes. No EditApp required. - No file locking or reliance on external editing tools - Bulk upload keeps work moving without friction	- Files often locked or require manual check-in/check-out - Editing happens sequentially, not simultaneously - File storage only, without real-time collaboration capabilities
REDUCE RISK END-TO-END VERSION CONTROL WITH FULL VISIBILITY	- Detailed audit logs track every change across documents and workflows - Centralised environment reduces duplication and manual handling - Enterprise-grade security with structured permissions	- Limited visibility across document changes and history - Higher reliance on manual uploads, filing, and user discipline - Risk of duplicate or outdated documents across locations
STANDARDISATION TEMPLATES THAT PROVIDE CONSISTENCY AUTOMATICALLY	- Web-based template editor with global styling set - Document merging functionality - Consistent outputs across teams without relying on individuals	- Formatting and structure vary by user or team - Less intuitive, desktop-dependent editing - Standards rely on manual adoption rather than system enforcement
CONNECTED PROCESS DOCUMENTS EMBEDDED IN YOUR ACCOUNTING PROCESS	- Emails and documents are filed to a client and linked to a workpaper binder - Integration with practice management for client groups and entities - API and e-signature integrations (external subscription required)	- Manual linking between jobs, documents, and emails - Document storage is separate from workpaper preparation and review processes
SAVE TIME DESIGNED TO SAVE TIME ON MUNDANE TASKS	- Bulk document upload functionality - Email Manager with thread view and preview - Link and attach documents from email directly to Active Workpapers binders	- Admin overhead to maintain structure and keep everything in sync - Switching between systems to manage communications and supporting documents for work
MAINTAIN CONFIDENCE ALIGNED TO THE WAY YOUR FIRM WORKS	- Built-in PDF tools (merge, split, rotate) without leaving the platform - Client collaboration handled in the same environment - One system across documents, emails, and workflow for full visibility - Role-based permissions and controlled access to sensitive/internal documents - Single, organised source of truth for all document types (Microsoft Suite, PDF, PNG & JPEG)	- Multiple tools required for PDFs, collaboration, and document handling - Documents, emails, and workflow managed in different places - Search depends on correct tagging or folder structure