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.

	Dc DOCUMENTS DOCUMENTS CORE NOW AVAILABLE	HowNow RETIRING IN 2027
PURPOSE BUILT FOR ACCOUNTING FIRM WORKFLOWS	✓	✓
ACCESS & USER EXPERIENCE	100% cloud environment	Files are stored in a cloud environment, accessed via desktop app or browser
SECURITY • Enterprise-grade security • Single sign-on options • 2FA • Disaster recovery • Database backup	 ✓ ✓ ✓ ✓ ✓	 ✓ ✓ ✓ ✓ ✓
AUDIT TRAIL & VERSION CONTROL	Detailed audit logs to track uploads, opens, deletions, and status changes	Full audit on document profile
PRACTICE MANAGEMENT INTEGRATION • XPM • MYOB • APS • FYI Elite • Kloud Connect • Karbon	 ✓ ✓ ✓ ✓ ✓ ✓	 ✓ ✓ ✓ X X X
DOCUMENT UPLOADING & EDITING • 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 When editing a document record, the file is locked - limiting real-time collaboration

	DOCUMENTS DOCUMENTS CORE NOW AVAILABLE	HowNow RETIRING IN 2027
SEARCH FUNCTIONALITY	Expanded filter options for search	Meta data including keywords
TEMPLATE MANAGEMENT		
• Master style letter templates	✓	✓
• Global styling feature – Ability to set default brand/style	✓	✓
• Merge documents	✓	✓
• Create & edit templates	✓	✓
INTERNAL DOCUMENTS / KNOWLEDGE		
• Secure uploads / management	✓	✓
• User permissions	✓	✓
EMAIL MANAGER		
• Outlook desktop	✓	✓
• Outlook browser	✓	X
• Email profiling	✓	✓
• Conversation threads	✓	X
• Configured email templates	✓	X
• Ability to send documents directly to workpapers	✓	X
CLIENT PORTAL		
• BYO e-signature (Annature & FuseSign)	✓	X
• Request & Share	Active Documents Plus subscription required	✓
OTHER INTEGRATIONS (3rd party development required)		
• ATOmate	Coming soon	✓
• ATO SmartDocs	Coming soon	✓
• FuseDocs	Coming soon	✓

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