

HowNow Portal Case Study

HOW NOW

Using Preview & E-signing to facilitate
exchange and signing of documents between
accounting firms and their clients

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26th November 2014

About Business Fitness (HowNow)

Business Fitness has been providing solutions to Australian accountants since 2001. Our primary software is HowNow Knowledge, Document and Email Management system which is sold to accounting firms and other businesses.

We are a small company based out of Brisbane, Australia and have been developing our own software products (primarily server based) since inception of the company. Over the last 12 months, we have been moving to a SaaS environment.

One of the new SaaS products our small team of developers has been creating is the HowNow Portal to facilitate the exchange of documents between accounting firms and their clients. The product is available standalone, but also links directly from HowNow Document & Email Management, making it seamless for users to upload documents to the portal. Two of the features that this new portal needed was Previewing and Signing.

Problem

As a small team, we did not have the capacity to develop previewing and signing ourselves and were looking for a product that would integrate seamlessly into our Portal. It needed to be available as an outright purchase and be tightly aligned to HowNow. We did not want to integrate with a signing application that charged per transaction or where our clients had to sign up for a separate service.

Solution

From the user perspective, the GroupDocs integration is invisible, it just appears that they are using the HowNow product at all times, a very clean experience.

GroupDocs previewing and signing is implemented inside an ASP.NET MVC website to make it easy to use as a viewer for multiple documents. We can pass a URL for a single document.

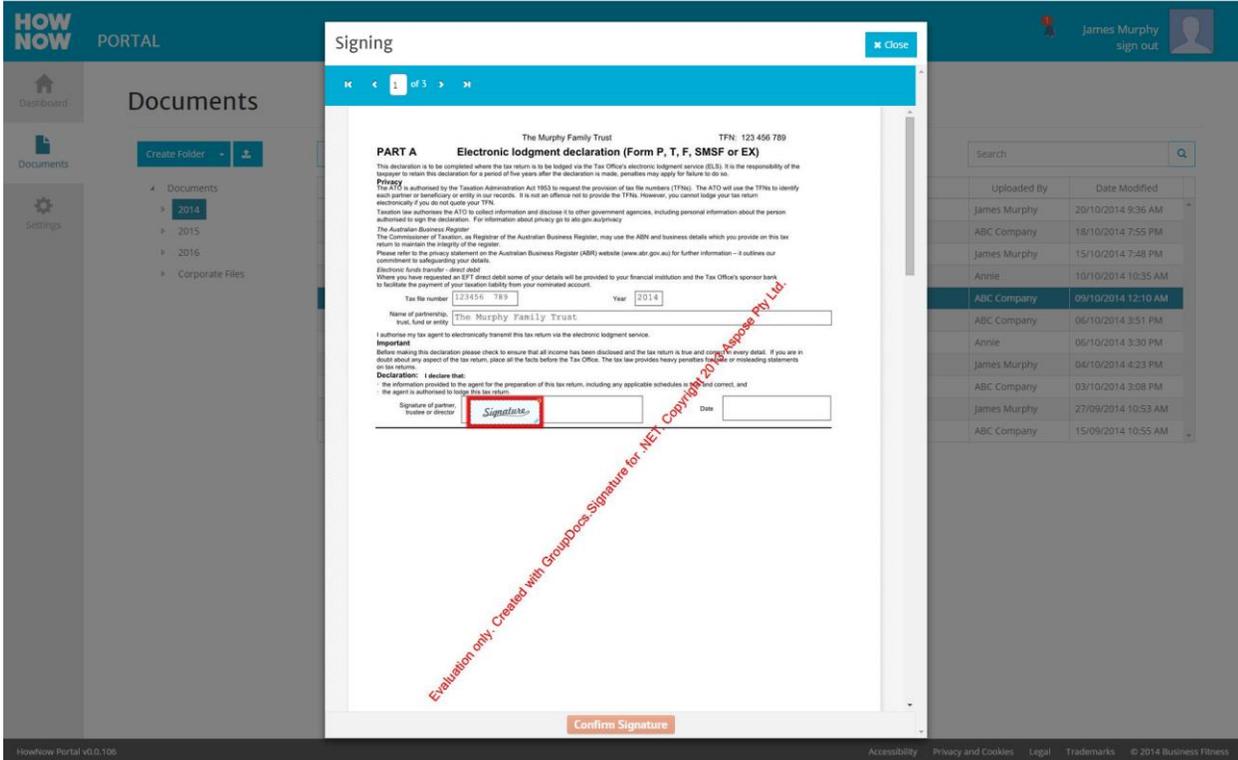


Figure 1: Signing a tax return in the HowNow Portal.

Experience

Finding a solution: Throughout our research, we looked at many products, particularly for an electronic signing solution. One of these products was GroupDocs and we have trialed the product throughout the development period. While we looked at many other products, some of which provided the solutions we needed, they were not available as an outright purchase, which meant our users would have needed to add another subscription to our service. The GroupDocs team has been extremely helpful during the evaluation period and have added extra functionality that we required. We are hoping for more new features in the future!

Implementation: We are still in the implementation stage, but so far have not had too many challenges and where we have the support team at GroupDocs have been extremely helpful.

Outcome: The HowNow Portal is completed to the point of being ready for beta testing in the next month. After that we expect a good take up from existing and new clients.

Next Steps

We are only at stage one of the HowNow Portal, so will be implementing additional features, such as multiple signatures in the very near future. We hope to use GroupDocs.Viewer and possibly other GroupDocs products in HowNow Online, which is our SaaS document and email management system.

Summary

Thanks GroupDocs for your assistance and for allowing for an extended trial so that we were comfortable in our selection of your products to integrate into HowNow Portal. We are looking forward to seeing enhanced features in both of our products.