How MyWork.com Improved Accounting Workflows with Foxit API and PDF Editor SDK

1 Tackling the Challenges of Traditional Document Management in Accounting Firms

MyWork, a cloud-based platform, has spent over a decade helping accounting firms optimize their operations. With thousands of clients across the globe, MyWork has always focused on providing solutions that enhance efficiency and foster growth. However, as their client base grew, the need for a more effective way to handle time- sensitive documents, especially during peak tax seasons, became clear.

This case study showcases how MyWork used the Foxit API and Foxit PDF Editor API to overcome document workflow challenges, improve client operations, and achieve better results for the accounting firms they serve.

2 The Need for Efficient Document Handling in a Time-Sensitive Industry

Before integrating the Foxit API, MyWork explored a variety of electronic signature solutions such as Adobe and DocuSign, but they found these options to be disjointed and inefficient for the fast-paced accounting industry. The manual processes and disconnected systems made it difficult for their clients to manage documents effectively.

As Rohan Dixit, CEO of MyWork, shares -

"We had evaluated Adobe, DocuSign, and some of the other available options, but we were already using Foxit PDF Editor for in-place document editing, and felt that integrating Foxit API was a natural extension of its current use."

Recognizing that a more seamless solution was needed, MyWork turned to Foxit to simplify their workflows and provide their clients with a more cohesive document management experience during crucial tax seasons.

3 | Choosing the Right Tool to Meet Client Needs

Although MyWork was already using Foxit PDF Editor, they understood that integrating Foxit API would further enhance their platform and make document management more efficient. As Rohan explains, *"One of our accounting firm clients initially had recommended the use of Foxit because they were using Foxit PDF services on their desktop within their firm, and that's what first put us on to Foxit."*

The decision to integrate the Foxit API into MyWork's platform in 2022 was driven by the need to create a more unified solution for their clients. MyWork's development team worked directly with Foxit to ensure a smooth implementation, with Rohan noting, *"Our development team worked to integrate the Foxit API with the Foxit team, and we received the adequate support to do it in a very efficient manner."*

4 | Empowering Clients with a Unified Workflow

By integrating Foxit API, MyWork was able to empower their clients with a seamless experience for document editing and eSigning. MyWork leverages Foxit in two critical areas:

In-Place Document Editing: Through the Foxit PDF Editor SDK, MyWork allows clients to edit PDFs directly within their platform, ensuring that all document modifications happen within a single system.

Automated eSigning: The Foxit API and webhooks enable MyWork to automate document signing directly within the platform. For example, when a taxpayer and their spouse need to sign an electronic filing authorization, the process is entirely automated, allowing MyWork clients to focus on other tasks.

Rohan explains,

"Once the signatures have been obtained, we can automatically progress the status of the client within the MyWork platform and notify the accounting firm to proceed."

5 | Making Document Workflows Smoother for Accounting Firms

Many of MyWork's clients were burdened by using multiple tools to handle different aspects of their document management—editing, signing, and tracking. This fragmentation led to delays and inefficiencies, particularly during tax season. MyWork sought a way to bring all these processes into one cohesive system.

Rohan shares,

"Many accounting firms rely on traditional PDF software and manual processes for signature management and document handling. This can involve multiple platforms and often requires switching between tools for editing or signing documents. At MyWork, we were looking for a solution to simplify this time-consuming and inefficient document management workflow that many of our clients faced."

By integrating the Foxit API, MyWork was able to provide their clients with a unified solution for document editing and eSigning, eliminating the need to rely on multiple tools.

6 | Delivering Results: How MyWork Benefited from Foxit API Integration

The integration of Foxit API helped MyWork's clients achieve significant improvements in their document workflows. Here's how MyWork's use of Foxit brought benefits to their accounting firm clients:

- **Unified Solution:** Clients could edit and sign documents in one place, eliminating the need to switch between tools. This enhanced the efficiency of the process and reduced errors.

- **Automated Processes:** By automating document signing through webhooks and integrations, MyWork made it easier for clients to complete tasks quickly and accurately.

- **Security and Compliance:** MyWork's clients could now rest assured knowing their document transactions were secure and compliant with industry regulations.

- **Cost Savings:** Integrating Foxit's PDF and eSignature capabilities into a single platform allowed MyWork to offer a more affordable, streamlined service to their clients, reducing operational costs while maintaining a high level of service.

7 | Building Trust and Closing Deals: How MyWork Leveraged Foxit to Win Clients

One of the key outcomes of MyWork's integration of Foxit API has been its impact on sales and client acquisition. According to Rohan, *"Thanks to our integration of the Foxit PDF suite, we were able to offer that as a key value add component during our sales process. We've heard from prospective clients that this has been a key reason why we've been able to convert them into users of our current MyWork platform."*

The smooth and efficient document workflows enabled by Foxit's integration helped reduce buyer apprehension, as potential clients could immediately see the value of a unified, secure, and easy-to-use document management system. This has ultimately helped MyWork close more deals and expand their client base.

8 How MyWork Delivered Greater Value to Their Clients

By integrating the Foxit API and PDF Editor SDK, MyWork enabled their clients to handle time-sensitive documents more efficiently. This has been especially beneficial during the tax season when every moment counts. With Foxit, MyWork's clients could focus more on their core tasks rather than getting bogged down by manual document handling.

> Rohan adds,
>
> **"We're very grateful to have Foxit's compliance as an added feature to make sure all the information being transferred is secure and handled the appropriate way."**

9 Why Foxit API Was the Right Choice for MyWork's Clients

For accounting firms looking to improve document workflows, Foxit API provided MyWork with the perfect solution. By integrating Foxit's powerful eSignature and PDF capabilities, MyWork was able to:

Simplify document workflows by creating a unified system for editing and signing documents

Automate repetitive tasks to save time and eliminate manual errors

Ensure compliance with secure, legally binding eSignatures

Offer cost-effective solutions that reduce operational expenses for their clients

Foxit API gave MyWork the tools they needed to empower their clients and help them stay competitive during critical periods.

Watch the full interview with MyWork's CEO here.

For more information on how Foxit's API and
PDF solutions can benefit your business,
please visit us.