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Drake Document Manager

800.890.9500

www.DrakeSoftware.com

From the [July 2013 review of Document Storage](#) systems.

Best Firm Fit: Firms who use the Drake Enterprises suite of applications for professional tax, accounting, and bookkeeping firms.

Strengths

- Simple to use and included with the budget-priced Drake suite.
- Good integration with Drake's add-on services for customers, including GruntWorx tax document organization tool and the SecureFilePro client portal service.
- The addition of the new Drake Hosted option gives users of this suite access to data over a remote desktop connection from anywhere.
- Users can specify password patterns (e.g. last name plus last 5 digits of SSN) which are applied when creating PDF versions of confidential documents like tax returns.

Potential Limitations

- There is not a web version of the application, although it can be accessed on a hosted basis through a pilot program called "Drake Hosted", which will be widely available for customers next tax season.
- No add-ins for Microsoft Office applications or document markup tools are included with the application, although users can purchase third-party markup tools like cPaperless' Tic, Tie and Calculate.
- The search tool will only search for clients by name, and will not search for words within the files stored in the application.

Overview

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menu shortcut.

Files are organized in a familiar Windows-Explorer style “tree” structure, with a folder for each letter, and then clients organized within each folder. Folders can be template-based and added by the tax application, or subfolders can be manually added to each client folder.

A full document history is tracked on each document filed within this software, and users can review the history to see any activity performed on the stored file using DDM. Files are stored in standard Windows folders, and the underlying folders can be opened without logging by sophisticated users who navigate the application's Windows file structure.

DDM Files can be added to DDM by printing with the included PDF print utility, manually adding files to the system, or by dragging and dropping items into a DDM window. The application is compatible with TWAIN compliant scanners, and does not support ISIS, WIA, or a connection with Fujitsu's popular ScanSnap document scanners.

Drake Document Manager is a good solution which is only available as part of the Drake Tax Suite. The suite has good, integrated solutions for tax document automation via the GruntWorx system, as well as portals (SecureFilePro.com), and client write up (Drake Client Write Up 2013), and is value-priced with good support. This application is a good choice for tax and accounting professionals who use the Drake suite of applications.

Summary and Pricing

Drake Document Manager is bundled with the Drake Tax suite (tax prep, tax planner, write up, and document manager), and is not available for separate purchase. An unlimited version of the 2012 Drake Tax Suite is priced at \$1,095 when discounted

(regularly \$1,495), and other purchase options are described on the company's

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