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Specialty Tax Compliance & 1040 Enhancer Products

Drake Software is offered as an all-inclusive system, combining federal and state individual compliance modules with those for 1120, 1120S, 1065, 1041, 990, 706 and 709, as well as all states and taxing municipalities. The 1040 module alone houses more than 300 forms, schedules and worksheets. Unlimited electronic filing is included in the base price of the program, along with research via a collection of materials available through RIA's Checkpoint, and a free website for the tax firm. The full price of Drake Software is \$1,395 per site license, which allows all computers in a single office to use the same networked system at no additional cost. Pricing discounts of up to \$400 are available when purchased or renewed earlier in the calendar year. A pay-per-return package is also available.

Lisa Fort, CPA, uses Drake Software in her small firm in Detroit, Michigan.

She especially appreciates the vendor's customer service. "I have found Drake to be incredibly responsive to customer needs," she said.

"They are also quick to incorporate suggestions made by users."

Fort selected Drake Software based on the excellent feedback she received from other users of the product. "I visited a seminar for those interested in reviewing the software, and I was impressed." She decided to give the software a try, and that was about 10 years ago. "I have never regretted my decision," she said.

Learning Curve — 4 Stars

All of Drake's modules share the same general interface, opening to a clean master window that provides access to primary system functions such as the e-filing menu, reports, prior-year data, the system's built-in appointment scheduler and print functions. The client selection screen, accessed via either

the File pull-down menu or the Open icon, appears in a subwindow that allows

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The modern look and feel of the system continues to newly designed data-entry screens that provide full Windows functionality. The data-entry screens include line-specific assistance and even an SSN validation function. Similarly, the main client information menu, called the "Data Entry Selection Menu," is primarily a character-based screen, meaning it relies mostly on a plain text menu, but is supplemented with a handful of icons (for calculating, viewing the form, printing, or splitting a return) and tabs for accessing key information sections, including General, Income, Adjustments, Credits, Taxes and Other. Data entry is performed on interview-based sheets that generally resemble the actual form in terms of layout, with employee name and address information automatically populated from general information entries. One aspect of data entry is that the screens have no "save" button. Rather, the user must click "Esc" or the close screen "X" to save and exit. Several hot-key shortcuts provide alternative navigation throughout the system. The system does not provide forms-based data entry but does provide a general view-only function.

Use/Workflow & Productivity Tools — 4 Stars

Drake's simplified interface actually may be a productivity enhancer, providing an easy-to-understand menu system and data-entry sheets that ease moving between various entry tasks. The system's new client management screens offer a smart, central "client information" center from which a user can view summary information on multiple clients at the same time. The system also offers a few nice features that aid the preparer, such as a ZIP Code database that automatically populates city/state on input sheets, as well as an SSN validator. The program automatically computes withholding amounts as income is entered, but all calculated entries can be overridden by the user. The system notes overridden fields with either field label indicators or colored

text, depending upon user preferences. Drake also offers a general diagnostics

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Integration/Import & Export — 4 Stars

All of Drake's modules generally share information as needed, and its new K-1 transfer utility allows data to flow from pass-through entities to 1040s. Drake has recently added a separate client write-up program that integrates with the Drake Tax program. The system integrates with the user's mail program to allow simplified client communication via e-mail from within the program. New for 2005, Drake has added a document management system that enables paperless management of client files, including support for scanned documents. The company offers free data conversions from many competing systems and can print directly to *.PDF format, aiding in paper reduction.

Support/Training & Help System — 4.5 Stars

The Drake system is exceptionally easy to learn, so formal training will likely not be necessary for most users. The company includes both a printed manual as well as online support, in addition to a reasonably strong built-in Help utility that includes line and content-sensitive guidance. Drake also provides several free online tutorials, and offers CPE-eligible live training sessions across the country. The online support center includes a variety of training tools and a knowledgebase, as well as user forums and marketing tools. The free firm website included with the tax package includes templates to assist novice users. Telephone-based support is included with the package price.

Relative Value — 4.5 Stars

Drake's straightforward pricing that includes every module, all states and cities, and unlimited e-filing is very attractive at \$1,395 or less, depending upon how early in the year a professional purchases the system. The program is simple to use because it provides the essentials and is generally strong for simple individual and business returns, and provides free research, scheduling

and billing functions. That said, smaller firms with mostly non-complex return

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