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business and other entity returns, Drake Tax Solution also includes all states and is available as a traditional purchase or as a pay-per-return system. The fully licensed version of the software supports multiple users on the same network at no extra cost and has no e-filing fees. The flat cost for a four-preparer firm ranges from \$995 to \$1,395 depending on the time of year. Annual license renewals are also \$995 to \$1,395 depending upon the time of year the renewal is received.

Learning Curve – 4 Stars

Despite opening to a modern Windows entry screen for the main menu, most data entry for compliance purposes is accessed from very DOS-like menu screens that allow quick access to various areas of the program, but it's a bit rustic in appearance (a Text version of Tax Solution is also included with the Windows program). Because of this interface style, however, users can easily see virtually all of their options

in a single location, which makes

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a list of other options, allowing users to easily jump around to specific entry areas or go 'line by line.' Although this interview method is easy to follow and should not require detailed training, the addition of a form entry screen would provide another approach for data-entry users, making the program more user friendly. One peculiar aspect of data entry may slow new users at first: Data-entry screens have no Done, Save or other method of completing the page. Rather, the program saves the data automatically as you exit from the screen using the escape key. On a more positive note, the program offers a multitude of key-based shortcuts from most menu screens.

Use/Workflow & Productivity Tools – 4 Stars

Drake's easily navigable interface enables preparers who know what they need to do to move around quickly to various areas of the program. But while the program uses a customary

spreadsheet-style grid for a client

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For data entry, the program offers a few simple features that are worth noting, including a ZIP code database that speeds address entry and automatic computation of FICA withholding.

Overridden entries are not noted or highlighted, and no audit trail of changes is available, so preparers need to keep an eye out for errors in data entry, although most significant errors are called to the preparer's attention on the Notes page of the final document. Following input or at any point during data entry, users can view actual returns and associated forms by right-clicking and selecting View Return or by pressing the View button at the top of the screen. This function calculates the form and provides an overview screen of the client's federal and state returns, as well as billing information. From the View screen, users can also view or print the actual forms, notes, billing and cover letters, but these documents are not interactive. In

other words, no data entry or linking

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system, alerting users to pending appointments. Additionally, icons on the main menu link users to key features of the software, including online access to 'The U.S. Master Tax Guide Plus' from CCH and the ability to split an MFJ with one click. The program also includes an asset management system; bank products; customizable reports, letters and billing; and client organizers. All Drake users are provided with a web address at 1040.com that includes calculators and other tools.

Integration/Import & Export – 4.5 Stars

Drake Tax Solution includes all states and municipal/school district forms and transfers data directly to these forms as needed. The program allows multiple state returns (unlimited number of states can be done on the same return). Free conversions are available to retrieve data from ATX, Creative Solutions, Dunphy, Lacerte, Orrtax, ProSeries and Taxworks. Prior year data is kept close at hand through a link on the main

menu screen and moves easily into

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and most users will likely be satisfied with the included 400-page user manual, quick-start guide and built-in tutorial program. However, Drake Software and its dealers offer one-day update training sessions in cities across the country, helping users grow accustomed to new features and general operation as well as changes in tax law. These courses can earn up to eight hours of CPE credit. The company also hosts demonstration seminars specifically geared toward new users.

The Help utility within the program provides good context-specific help from virtually any line in the program, linking the user to either a function-related answer or to the line instructions for the return being completed.

Drake offers phone-based, fax and e-mail support, as well as a searchable online knowledgebase at its support web site. Phone support is available during tax season Monday to Friday 8 a.m. to 10 p.m., and Saturday from 8 a.m. to 6 p.m. Drake has

also set up a new online forum for

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the program with right-click menus and other features that the 32-bit Windows environment made available.

The company has also been proactive in the bundling trend, offering all of its software and unlimited e-filing for a flat fee that enables firms to more easily monitor costs.

This year's introduction of an online forum for users and inclusion of CCH's research products extends Drake's Internet integration, which had been previously limited to online FAQs and support contact functions.

'We offer many services via the web and will continue to build and improve these features for our clients,' said Marketing Director Mike Wooten.

'Long term, we believe there have been great strides made with ASP and Remote Access technologies, and once high-speed access becomes more available and reliable and bandwidth becomes much greater, we will be able to expand on these areas as well.' These additions

show Drake's intent to keep

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the pricing much simpler. Drake Tax Solution provides good basic preparation for individuals, businesses and other entities, along with included associated applications for fixed asset management, appointment scheduling, billing and tax research. It is ideally suited to smaller firms looking for an all-inclusive tax package that requires little training. Its DOS-like interface is a little rustic and does not always offer intuitive navigation, but it is easy enough to figure out.

2004 OVERALL RATING:

This review section examines tax software that did not meet one or more of the requirements. That is not intended to diminish the quality of the software in this review.

We had to draw the line somewhere regarding our prototype office's needs, and these products here simply take a different approach to their offerings. For this review, there is no prototypical firm because each of the products is quite different

in their form support and feature

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as well as our support team, and therefore direct comparisons were not always possible. Each product in the review is examined and given a score in several areas that users and vendors determined were key aspects in using tax preparation software, aiding professionals in comparing those aspects and making a purchasing decision. The products in this review section received scores in the following six areas:

Learning Curve addresses the ease with which new users are likely to grow comfortable and proficient with the program.

Use/Workflow & Productivity Tools involves the intuitiveness of the user interface (how well a user can get around) and the way work is handled from start (interview) to finish (receipt of return). This includes tools that help professionals keep track of client and IRS status for returns, as well as additional tools such as integrated calculators and cross-form linking that streamline the entire process.

The **Integration/Import & Export** rating assesses the program's capability to use data between modules, how it exchanges data with software from other vendors, and how the program retrieves existing data from the previous year.

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technological culture of the company and its product development history.

Relative Value will provide a subjective determination of the dollar-value ratio of the software. While it is often said that, 'you get what you pay for,' the most expensive option does not necessarily guarantee the best value, nor is the product with the lowest sticker price always the greater bargain. On this line, we will look at the value of the features and tools provided in a software suite and provide a judgment on how well its price matches its offerings.

Finally, the **Overall Rating** will provide the reviewer's general assessment of the product. An Executive Summary follows the review section, providing a brief synopsis of the reviews along with a summary chart with products and their scores in each area.

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