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866-670-8471

www.drakesoftware.com

The Drake DMS application has been offered free to Drake customers since 2005. It can be used on a stand-alone basis, but from a practical perspective its inherent value is in its tight integration with the Drake tax preparation, tax planning and client write-up applications.

Core Functionality

The methodology used to organize the files is a cabinet > drawer > folder model. In the client's drawer, the system displays a folder representing each letter of the alphabet with individual client sub-folders within each letter. The default folder configuration for each client is a folder for the specific Drake application such as tax, with a sub-folder for each year. You can add custom folders to the individual client folders as desired.

The Drake PDF print driver includes the ability to password protect and encrypt the tax return file as part of the process. There is also an option to print a pre-defined watermark that defaults to "Client Set" or "Preparer Set," which you can customize and then save the return automatically to the client's folder. 4.5

Integration

All Drake clients are integrated into the DMS by default. When printing a tax return, you pick and choose the entire return or selected forms to be published to a PDF document. A folder will automatically be created for the new year when you print to the DMS.

Files can be imported from anywhere via the file browse command. You can link to a

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file, such as when you want to add a signed copy of the form 8879. 4.25

Advanced Functionality

An audit trail report shows the history of document activity, including who accessed the document, what action they took with it and a date/time stamp. The DMS files are all stored inside the Drake DM folder in Windows Explorer. Therefore, you need to apply Windows security to that folder to protect it from access to the DMS files directly through Windows Explorer.

A built-in backup feature automatically archives the document database to a secondary storage device. Document search capability is limited to the file name. 3.5

Summary & Pricing

If you're a Drake software user, this is the most logical choice for your document storage solution. The scope of features and functions is quite reasonable, the integration with all of the Drake applications is very direct and the fact that the software is free makes this a pretty compelling option. If you don't use the Drake tax and write-up application, the value is minimized.

2010 Overall Rating 4

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