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into the Drake Tax Suite. The application is designed to provide basic document filing and retrieval capabilities from within the Drake Tax application, and has some integration with the other parts of the Drake Tax suite of solutions. Users can access the application's data in two different ways – either the Working Cabinet mode, where DDM is embedded into the tax software, or in Archive Cabinet mode, where DDM is accessed through a separate shortcut on the Start Menu.

**Brian Tankersley** • Aug. 08, 2014



## Overview

Drake Document Manager (DDM) is the document storage tool which is integrated into the Drake Tax Suite. The application is designed to provide basic document filing and retrieval capabilities from within the Drake Tax application, and has some integration with the other parts of the Drake Tax suite of solutions. Users can access

the application's data in two different ways – either the Working Cabinet mode,

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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 (GruntWorx), portals (SecureFilePro.com), and client write up (Drake Client Write Up), and is value-priced with good support. Training, a simplified preparer website, and some CPE-eligible courses are included with purchase. This application is a good choice for tax and accounting professionals who use the Drake suite of applications.

### **Best Firm Fit**

Accounting and bookkeeping firms who use the Drake Tax Suite applications for professional tax, accounting, and bookkeeping.

### **Strengths**

- Simple to use and included with the budget-priced Drake suite, which can be run from data stored on an on-premises computer or using applications and data stored in Drake's secure data center.
- Good integration with Drake's add-on services for customers, including GruntWorx tax document organization tool, the SecureFilePro client portal

service, and the e-Sign feature for digital signatures.

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- The indexing capabilities of the product are limited, and the search tool will only search for clients by name. Users cannot search for text which is within the files stored in the application.
- The Drake Document Manager module is available for installation on local computers or third party hosted servers and is not part of the web-based Drake Zero tax preparation package.

## 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 Drake Tax Suite is priced from \$1,095 to \$1,495, and other purchase options starting at \$300 plus \$20/return are detailed on the Company's website.

## 2014 Overall Rating: 4.25 Stars

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