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Mary Girsch-Bock • Aug. 18, 2016



From the [2016 reviews of Document Management and Document Storage systems](#).

Best Fit: The product is best suited for small to mid-sized accounting firms that are looking for a complete tax and accounting system that includes solid document management capability, as well as offices already using Drake Software products.

Product Strengths:

- Product integrates with all Drake Tax applications as well as third-party add-ons
- Product is available as a desktop or hosted application
- Drake Documents is included with purchase of Drake Tax program
- An add-on portal is available for sharing documents

Potential Limitations

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Basic System Function: 4.5 Stars

Drake Documents is a basic document management system which is included in Drake Software Tax applications. The product is available as a desktop installation, or as a hosted desktop, which provides easy anywhere access. Drake Documents completely integrates with the other applications in Drake Software, making it easy to manage tax returns and other client documents in the system. The document manager product is considered part of their workflow applications, and is available at no additional cost.

Because of the seamless integration, users can easily save and manage documents directly from the tax software interface, or access the product separately through a product shortcut. Users can quickly create this product integration by clicking on the document manager Integration Options, where they can indicate where Drake Tax Software can access the document manager system. Users can also customize the folder structure, or use the default structure as recommended.

Core Document Storage Function: 4.25 Stars

Drake Documents has an easily navigated user interface with the ability to perform a series of tasks from the interface, including adding new clients, new folders, backup, and email.

Drake Documents uses a standard Windows Explorer tree structure, with file folders arranged alphabetically for easy access. Users can simply open a file in Drake Tax Software, click on print options, and print to the document manager print driver, which will automatically save the document in the requested folder. Users can also choose to use any TWAIN compliant scanner to scan documents into the system. The system allows users to easily password-protect all scanned documents, and users can also choose to attach a watermark to a document. Users can also identify each

document by its version; Draft, Review, or Final. Drake Documents also contains a

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encrypted for additional security. The product also contains allows users to securely send any stored documents to clients and other third parties via email.

Integration: 4.5 Stars

Mentioned earlier, Drake Documents is a completely integrated system, with all applications working together. The product also integrates with various third party document markup applications such as TicTie Calculate and E-Sign, which allows users to sign documents electronically. Drake Documents also integrates with GruntWorx, which works with both Drake Tax and Drake Documents to organize and label scanned documents, populate tax forms, and aid workflow.

Support/Help: 5 Stars

Drake Documents offers a variety of resources for new users, including access to the Quick Start Video Tutorial, the e-Training Center, and a variety of document downloads. Additional videos are available as well, with some videos also available in Spanish. User manuals are also available for download as needed, and the Drake Support option allows users to quickly access product support, manage their account, and access additional online support options. Product support is also available via telephone during regular business hours.

Summary and Pricing

A good choice for firms already using Drake Tax Software, or that plan to, Drake Documents provides basic document management functionality. The system is not available as a stand-alone product, but is included in Drake Tax Software at no cost. Drake Tax Software's Unlimited Version is \$1,295 per year and includes all federal and state tax packages, e-filing, and Drake CWU, which is an accounting and write-up package that includes bookkeeping, payroll, contractor payments, accounts payable and accounts receivable modules. The unlimited version also includes Drake

Documents and Drake Tax Planner. There is also a Pay-Per-Return option, which

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