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users must print to the included document management print driver which will automatically save the documents to the folder indicated. With easy integration with ...

Mary Girsch-Bock • Dec. 18, 2017

The logo for Drake Software, featuring the word "Drake" in a bold, black, sans-serif font, followed by the word "Software" in a blue, sans-serif font. A registered trademark symbol (®) is located at the end of the word "Software".

Drake Document Manager

www.drakesoftware.com

From the Dec. 2017 Review of Document Management & Storage Systems.

Drake Documents is best suited for small to mid-sized accounting firms that are looking for an all-in-one tax preparation, practice management and document management solution. Available in conjunction with other Drake Software products including Drake Tax, Drake CWU, and Drake Tax Planner, Drake Documents is not available as a separate application.

Drake Software is available as a desktop solution, or users can choose Drake Hosted for easy anytime product access. Drake also integrates with Secure File Pro to provide both firms and clients with an easy way to share and access documents.

Drake allows users to store documents of any kind. Files can be saved and stored in a variety of formats. With easy integration with Drake applications, users can easily

manage all prepared tax returns and related client documents prepared in other

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Drake Documents works with any TWAIN compliant scanner, so users can easily scan other documents directly into the application as well.

For firms that wish to share documents with clients, Drake Documents integrates with SecureFilePro, which is a client file exchange portal that can be purchased as an add-on module. SecureFilePro allows easy document exchange, with the ability to store a variety of document types and protecting them from unauthorized changes.

All Drake Document files are securely encrypted, and firms can create password protected documents for additional protection. A watermark option is also available to add to any documents. All documents stored in Drake Documents are easily identified by version; with Draft, Review, and Final versions available. A complete history of all document activity is also available, so managers can easily see what documents have been accessed. In addition, users can also choose to send documents securely to clients, associates or outside parties via email, if desired.

A completely integrated system, Drake Documents is part of Drake Tax, which offers tax preparation, tax planning, and Drake CWU, which is an accounting and client write-up package that includes bookkeeping, payroll and AP and AR modules. The product also integrates with a variety of workflow tools such as TicTie Calculate which allows users to annotate workpapers, and E-Sign, which allows users to sign documents electronically. Drake Documents also offers complete integration with GruntWorx, which offers complete document organization and labeling capability and works with both Drake Tax and Drake Documents. GruntWorx also automatically populates tax forms, to reduce data entry and eliminate mistakes.

Drake Tax offers a variety of help and support resources. Users can easily access help resources directly from any screen in Drake Tax. Product documentation, software updates and access to the Drake Knowledgebase are available from Drake's website as well.

There are also a variety of materials available to users, including the Drake Tax

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An excellent option for firms using or planning to use Drake Tax Software, Drake Documents offers solid document storage capability. Not available as a stand-alone application, users must purchase the entire system which currently runs \$1,395 for the unlimited version which includes all federal and state tax packages, e-filing, Drake CWU, and Drake Tax Planner. Drake Hosted starts at \$70.00 per month for a single user. A pay-per-return option is also available for those that do not process a high number of returns.

2017 Rating – 4.5 Stars

Firm Management • Technology

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