Drake Documents
Drake Software
www.drakesoftware.com

From the 2018 reviews of Document Management and Documents Storage Systems for accounting firms.

Drake Documents, part of Drake Tax is best suited for small to mid-sized accounting firms that use Drake Tax or plan to do so in the future. Part of Drake Software's suite of applications, Drake Documents is not sold as a separate application, but instead, is intended to be used as an all-in-one tax preparation, practice management and document management solution in conjunction with all Drake Tax modules and Drake Accounting.

Drake Tax is available as an installed desktop solution or users can opt to use Drake Hosted, which offers all of the features found on the desktop application and includes Drake Tax, Drake Accounting, and Drake Documents.

Drake Documents offers a Working Cabinet and an Archive Cabinet, making it easy to

product is designed to work with Drake Tax, users can simply save prepared tax returns, client documents and other documents directly into Drake Documents.

Users can also use Drake Documents with any TWAIN compliant scanner, with users able to scan documents one page at a time, or use a document feed to scan multiple documents.

Users will need to use SecureFilePro in order to share documents securely with clients. SecureFilePro is considered an add-on and is purchased separately from Drake Tax. All documents in SecureFilePro are exchanged in PDF to prevent unauthorized changes on any document that is shared. While traditional SecureFilePro is web-based, SecureFilePro Connect is fully integrated into Drake Documents. This integration allows for secure document management without ever leaving Drake Documents. SecureFilePro Connect offers the same functionality as traditional SecureFilePro, but with an enhanced interface that includes secure drag-and-drop file transfer to and from clients, messaging, client signature management, and several other functions without switching applications.

Administrators can set up group security, using as many security groups as desired, with three levels of access available, Admin, Full, and Front Office. All client files can be password-protected if desired, eliminating the possibility of unauthorized access. For those using Drake Hosted, all documents are securely encrypted, with enterprise firewalls and antivirus protection available for all documents. The Drake network is monitored 24×7 and daily offsite backups help protect files at all times. For added security, users have the option to add a watermark to documents to ensure authenticity. In addition, a complete history of all system activity is available including when documents were accessed, and who accessed them.

Drake Documents is part of Drake Software, which also includes Drake Tax and Drake Accounting, which offers AP, AR, and GL accounting capability, as well as a payroll

module. A variety of workflow tools are also offered, including SecureFilePro,

courses. Both classroom training and webinars are offered, along with software seminars. A complete user's manual is also available to access or download if necessary. Users can also access the Drake Knowledgebase, remote assistance, chat support, and the comprehensive Drake Help file directly from the Drake Documents. Product support is included in the product pricing, with users able to contact support during regular business hours, as well as on Saturday, with support available via telephone, email, or chat.

Drake Documents is part of Drake Tax and offers small to mid-sized accounting firms a completely integrated tax preparation, practice management, and document management solution. Currently, the desktop edition of Drake Tax is available for $1,595, with Drake Tax, Drake Accounting, and Drake Documents included in the price. For those that prefer an online solution, Drake Hosted starts at $70 per month for a single station, with addition stations available to purchase. Users can also add Microsoft Office or additional storage, with prices varying depending on the number of stations purchased.

2018 Rating – 4.5 Stars

Firm Management

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