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Documents is included in Drake Tax and is not offered as a separate document management ...

Mary Girsch-Bock • Sep. 16, 2019

Drake Documents

Drake Software

www.drakesoftware.com

From the 2019 reviews of Document Management and Storage systems for accounting firms.

Drake Documents is part of Drake Tax, and is well suited for small to mid-sized accounting firms that currently use other Drake Software applications. Drake

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files such as tax returns, correspondence, and other related documents directly into the application. The product offers two storage options; the Archive Cabinet, and the Working Cabinet. This allows staff to easily store documents currently being worked on in the Working Cabinet, while also offering better integration with Drake Tax, as all Working Cabinet files are stored in the tax program. The Archive Cabinet functions more as a long-term storage repository, with all client documents for multiple years stored in the Archive Cabinet. Drake Documents includes a default file structure, or users can choose to create a custom file structure for an individual client, or for all clients. Subfolders can also be created if necessary, with users able to add individual subfolders for any client. Default descriptions can be set up in the application, standardizing the file naming process. All files are stored in Drake Documents as PDFs, with a print driver included for easy saving in any folder.

Drake Documents integrates with any TWAIN compliant scanner, with users able to scan one page or multiple documents if desired. If sharing documents with clients is desired, users will need to purchase SecureFilePro, an add-on application sold separately, that allows clients and firms to share documents in PDF format securely.

All Drake Software applications offer good security options, with administrators able to create multiple security groups, with all documents and files able to be password protected as well. All documents are saved as a read-only PDF to ensure there are no changes made to any document, and Drake Hosted also securely encrypts all documents, with both enterprise firewalls and antivirus protection available. The network is monitored around the clock, and offers daily backups of all files. Drake Documents also offers a complete system history, which includes detailed document access information.

As part of Drake Software, Drake Documents offers easy integration with other Drake applications which include Drake Tax, Drake Tax Planner, Drake Scheduler, Organizers, Drake Conversion Software, and Drake Accounting, which offers GL, AP,

and AR accounting functionality as well as a complete payroll module. Along with

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available, and a variety of software seminars are available for both new users and those already using Drake. A fully searchable knowledgebase is available and users can download a user manual or an evaluation guide from the Drake Software website. Product support is included in the price of the product, with support available in both English and Spanish. Support is offered during regular business hours, with extended support hours offered during tax season, and is available via telephone, email, or chat.

Drake Documents is included with the purchase of Drake Tax, and is not sold as a separate application. The product is best suited for small to mid-sized accounting firms that use Drake Tax in their practice. Drake Tax offers several packages to choose from, including Drake Tax Unlimited, which retails for $1,595; the Power Bundle, which includes Drake Accounting Pro, and runs $1,695, and a Pay-Per-Return option for those that process less than 15 tax returns annually, which starts at $330, with additional returns extra. Also available is Drake Hosted, an online solution, with prices starting at $70.00 per month, on a month-to-month basis, with prices decreasing to $50.00 for a 12-month agreement. Users can choose to add Microsoft Office, additional stations, or additional storage, with prices varying depending on the options chosen.

2019 Rating – 4.5 Stars

Firm Management

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