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The logo for Drake Software, featuring the word "Drake" in a dark grey sans-serif font and "Software" in a light blue sans-serif font, with a registered trademark symbol (®) at the end.

Drake Documents

www.drakesoftware.com

From the 2020 reviews of Document Storage and Document Management systems.

Drake Documents is one of the workflow tools offered by Drake Tax. Best suited for small to mid-sized accounting firms, Drake Documents is included as part of Drake Tax and is not offered as a stand-alone document management application. Available as an on-premise application, with an optional Drake Hosted online backup utility.

Drake Documents allows users to save client files such as source documents, tax returns, and other correspondence directly into the application. Drake Documents

offers two document storage options: the Archive Cabinet, where all historical client

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all files as a PDF; users are able to convert a file to PDF easily using the included print driver.

Drake Documents includes good search capability, including the ability to search for documents using a document name or portion of a name, with the application searching all documents and all folders. Drake Documents also integrates with TWAIN compliant scanners, which scan a single page or multiple documents into the application. Those interested in sharing documents with clients will need to purchase SecureFilePro, an add-on application that allows firms and clients to easily exchange documents in PDF.

Drake Documents is part of Drake Software, integrating with all other Drake applications including Drake Tax, Drake Tax Planner, Drake Scheduler, Organizers, Drake Conversion Software, and Drake Accounting. The application also integrates with third-party applications including SecureFilePro, GruntWorx, Drake E-Sign, and TicTie Calculate, which provides easy workpaper annotation capability for PDF documents.

Drake Documents is included with the purchase of Drake Tax, and is not sold as a stand-alone document management application. Drake Tax offers several plans 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 fewer than 15 tax returns annually, which starts at \$330, with additional returns extra. Drake Documents is included in all three plans.

Strengths:

- Excellent solution for Drake Tax users
- Good integration with third-party applications

Potential Limitations:

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