

## 2018 Drake Software Classroom Training: Drake 101: Workflow Solutions

**Course Description:** This four-hour course explores the productivity features of Drake Software. Participants will learn how to utilize Drake Software's practice management tools to increase office efficiency. Upon completion of this course, attendees will be able to:

- Set-up and use the Document Manager to manage and store client files
- Streamline your paperless workflow by utilizing Drake Documents and SecureFilePro
- Understand the features and benefits of SecureFilePro™ and GruntWorx
- Use import and export tools in Drake Tax to increase efficiency during tax preparation

**Course Fee:** \$79.00. Register by midnight 30 days prior to the date of the course and receive a 5% discount.

**How to Register:** Log in to <https://Support.DrakeSoftware.com> and select **Training Tools > Classroom Training** from the menu on the left side of the web page. Refer to the **FAQs** on the web page for detailed instructions and frequently asked questions.

### CPE Facts:

Affiliation*	CPE Awarded	Delivery Method / Course Format	Field of Study	Course ID #	Sponsor ID #
NASBA	4	Group-Live	Computer Software and Applications	N/A	103137
CTEC	0	N/A	N/A	N/A	3038
IRS	4	In Person	Federal Tax Law	FQTGU-T-00249-18-I	FQTGU
TX State Board of Accountancy	4	Group-Live	Computer Software and Applications	100227	002921

\*Individuals with other professional credentials should check with their state licensing board or accrediting organization to determine if this program meets their continuing education requirements.

**Course Level:** Basic

**Prerequisites/Advance Preparation:** There are no required prerequisites other than a general knowledge of Drake Software.

**Course Policies:** Refund requests must be sent in writing to the Drake Software Education Department via mail, fax, or e-mail. Refunds will not be granted by phone. Drake will make a full refund for any request received 10 business days before scheduled start of the training. Any cancellation received 5-9 business days prior to start will receive 50% refund. No refunds on cancellations less than 5 days before the scheduled start of the training. For more information regarding the refund policy, administrative policies, and complaint resolution, please contact our office at (828) 524-8020 or [Education@DrakeSoftware.com](mailto:Education@DrakeSoftware.com) or visit [www.DrakeETC.com](http://www.DrakeETC.com).



Drake Software is an IRS qualified sponsor of continuing professional education.



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Drake Software is registered with the Texas State Board of Public accountancy as a CPE sponsor. This registration does not constitute an endorsement by the Board as to the quality of our CPE program.