

2017 Drake Software Classroom Training: Drake 101: Setup and Tools

Course Description: This seven-hour course introduces tax preparers to Drake Software setup and the tools used daily in a tax practice. Upon completion of this course, participants will be able to:

- Install the software and convert data from prior years
- Complete required setup items
- Use the Update Manager and the backup utility
- Generate reports using various features in Drake Tax
- Customize Drake Tax using program options and macros
- Generate invoices using Drake's Pricing Setup

Course Fee: \$149.00. Register by midnight 30 days prior to the date of the course and receive a 5% discount.

How to Register: Log in to www.Support.DrakeSoftware.com and select **Training > 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	7	Group-Live	Specialized Knowledge and Applications	N/A	103137
CTEC*	0	N/A	N/A	N/A	3038
IRS*	7	In Person	Federal Tax Law	FQTGU-T-00197-17-I	FQTGU
TX State Board of Accountancy	7	Group-Live	Specialized Knowledge and Applications	100177	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 or visit www.DrakeETC.com.



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



Drake Software is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

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.