DrakePortals®
QUICK START GUIDE

INTRODUCTION AND BASICS

Learn the Basics — Drake Portals™ has the features you need to provide appointment-free tax preparation:

- Secure client document exchange
- Cloud backup for Drake Tax® files
- Electronic signature capture
- Payment collection
- Instant messaging
- Detailed reporting

See the Drake Portal Overview video for more information about securely serving clients with remote tools.

Set Up Your Drake Portals Preparer Site — Access settings, generate reports, and work with clients while away from your computer by signing in to your preparer site (video: Drake Portals Preparer Site).

Teach Clients How to Use Drake Portals — Share the Taxpayer Portal Basics video with clients to help them learn how to sign in, share files, and adjust account settings—whether using a web browser or the new SecureFilePro® mobile app that can be downloaded on the Apple App Store® and Google Play®.

SETTINGS

Customize Account Settings — Update subscription status, payment options, and more in Account Settings (video: Drake Portals Account Settings).

Adjust Employee Settings — Configure access for office employees with the User Manager.

Manage Client Settings — Create client accounts within Drake Tax or on your branded preparer site, then link them to Drake Documents®, where you can manage and edit Drake Portals clients (video: Drake Portals Client Settings).

Send Customizable Emails — Add your company logo, choose sender information, set an activation link expiration, and more when customizing client emails (video: Drake Portals Email Settings).

HOW TO

Capture Client Signatures Remotely — Make it easier for clients to sign documents remotely with Drake E-Sign – Online (video: Drake E-Sign – Online). To see the remote-signature process from start to finish using a test return, watch E-Sign Online Test Returns.

Collect Payments Remotely — Receive payment with Drake Portals using our seamless Drake E-Pay integration (video: E-Pay and Drake Portals).

Exchange Documents Without Client-Account Setup — Send and receive files without creating a client portal using the Guest Exchange (video: Drake Portals Guest Exchange).

Create Client Accounts in Batch — Streamline client account creation with Batch Client Create in Drake Documents (video: Create Drake Portals Clients in Batch).

Generate Detailed Reports — View reports on Drake Portals activity within Drake Documents and on your preparer site (video: Drake Portal Reports).

DrakeSoftware®
Professional Tax Solutions