

Drake Documents and Drake Portals Webcast

This three-hour webcast covers the ins and outs of Drake Documents and Drake Portals (previously SecureFilePro). Upon completion of this webcast, you will be able to:

- Understand the benefits of using Drake Documents and Drake Portals to streamline and secure workflow and digital storage.
- Know how to access, customize, and use Drake Documents to electronically store files and create a paperless office.
- Use Drake Portals to work remotely with clients to prepare tax returns from start to finish, and customize Drake Portals to meet your needs.
- Know when and how to use Drake Portals Guest Exchange.
- Differentiate between two electronic signature options; either in-person with a signature pad or online using Drake Portals.
- Use Drake Portals to backup Drake Tax, Drake Documents, and other files on your system.

Individual attendees fee is \$59. Register by midnight (Eastern Time) 30 days prior to the date of the class and receive 5% off.

Agenda

1:00 PM – 1:50 PM Introduction, Drake Documents

1:50 PM – 2:00 PM BREAK

2:00 PM – 2:50 PM Drake Portals

2:50 PM – 3:00 PM BREAK

3:00 PM – 3:50 PM Drake e-Sign, Drake Portal as off-site backup

All times listed in Eastern Standard Time