

Administrative Duties in Drake Webcast

This three-hour course walks students through various administrative tasks in Drake Tax including setting up the program, generating reports and client communications, and performing daily processes. Upon completion of this course, users will be able to:

- Install Drake Tax
- Setup Drake Tax including custom setup options
- Update prior year client files and software settings
- Backup & restore data
- Setup and customize bills and letters
- Run various reports
- Manage appointments using the Drake Scheduler

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

Agenda

1:00PM – 1:50PM: Installation, Setup & Daily Processes

1:50PM – 2:00PM: Break

2:00PM – 2:50PM: Client Communications & Reports

2:50PM – 3:00PM: Break

3:00PM – 3:50PM: Software Customization & Drake Scheduler

All times listed in Eastern Standard Time