

## Drake Software Classroom Training Drake Documents and Drake Portals Webcast

**Course Description:** This 3-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 SFP 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

**Course Fee:** \$59.00. **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	3	Internet Based	Computer Software Applications	N/A	103137
CTEC**	0	N/A	N/A	N/A	N/A
IRS	3	Online / Group	Federal Tax Law	FQTGU-T-00362-20-O	FQTGU
TX State Board of Accountancy	3	Internet Based	Computer Software Applications	100307	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.

\*\*CTEC does not allow credit to be awarded for courses that cover tax software topics.

**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. There will be no refund for those who complete the course. For more information regarding the refund policy or to address concerns/complaints regarding this course please contact the Drake Education Department at (828) 524-8020 or [Education@DrakeSoftware.com](mailto:Education@DrakeSoftware.com) or visit [www.DrakeETC.com](http://www.DrakeETC.com).



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