Drake 101:

Program Settings and Tools

Program Settings and Tools

Course Overview

This is a basic course designed to assist Drake Software users with the required and basic program setup and **Tools** menu in Drake Software.

Learning Objectives

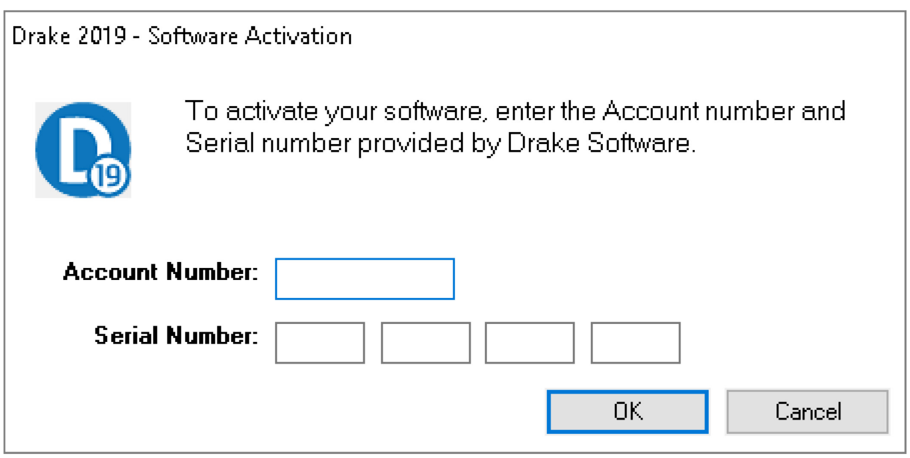
- Log in and set up Drake Tax
- Explain required settings and other setup items listed on the Setup menu
- Discuss several features under the Tools menu used in everyday practice

Logging into Drake Software

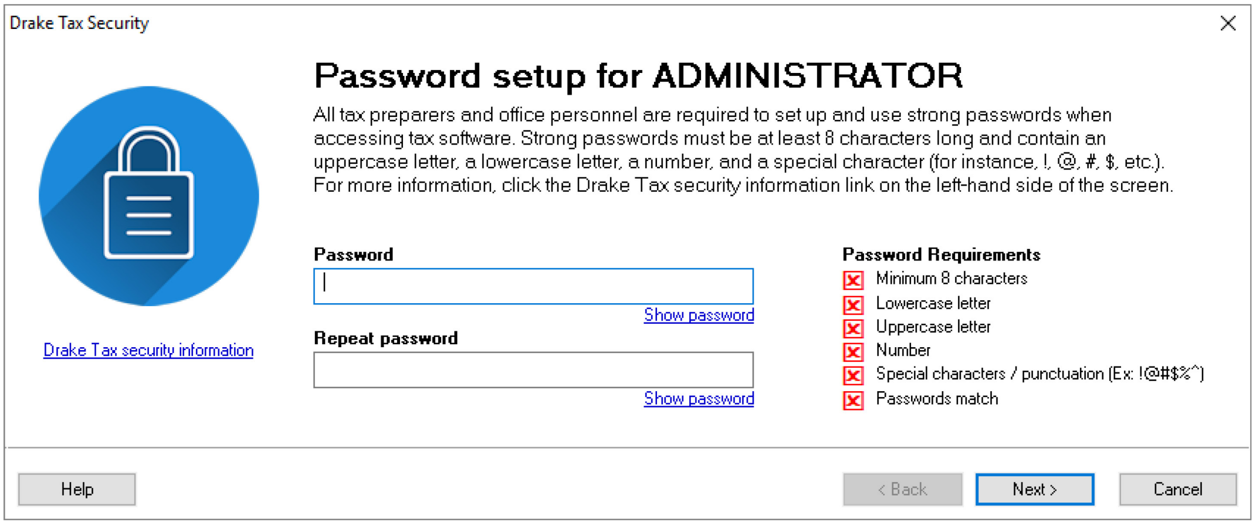
Initial Login

To open and log in to Drake for the first time:

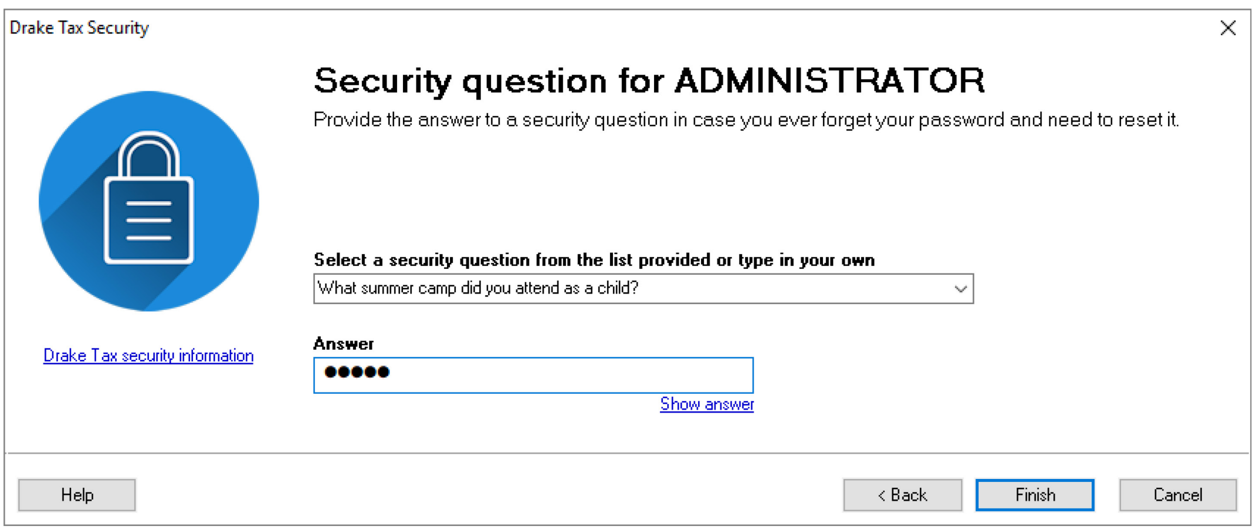
1. Double-click the Drake Tax 2019 icon on your desktop.
2. Enter your account number and serial number in the appropriate fields of the **Software Activation** dialog box.
3. Click **OK**.



4. You will log in first as the Administrator by creating a password for the username, **ADMIN**. The password must be a minimum of eight characters including one lowercase, one uppercase, and at least one special character.



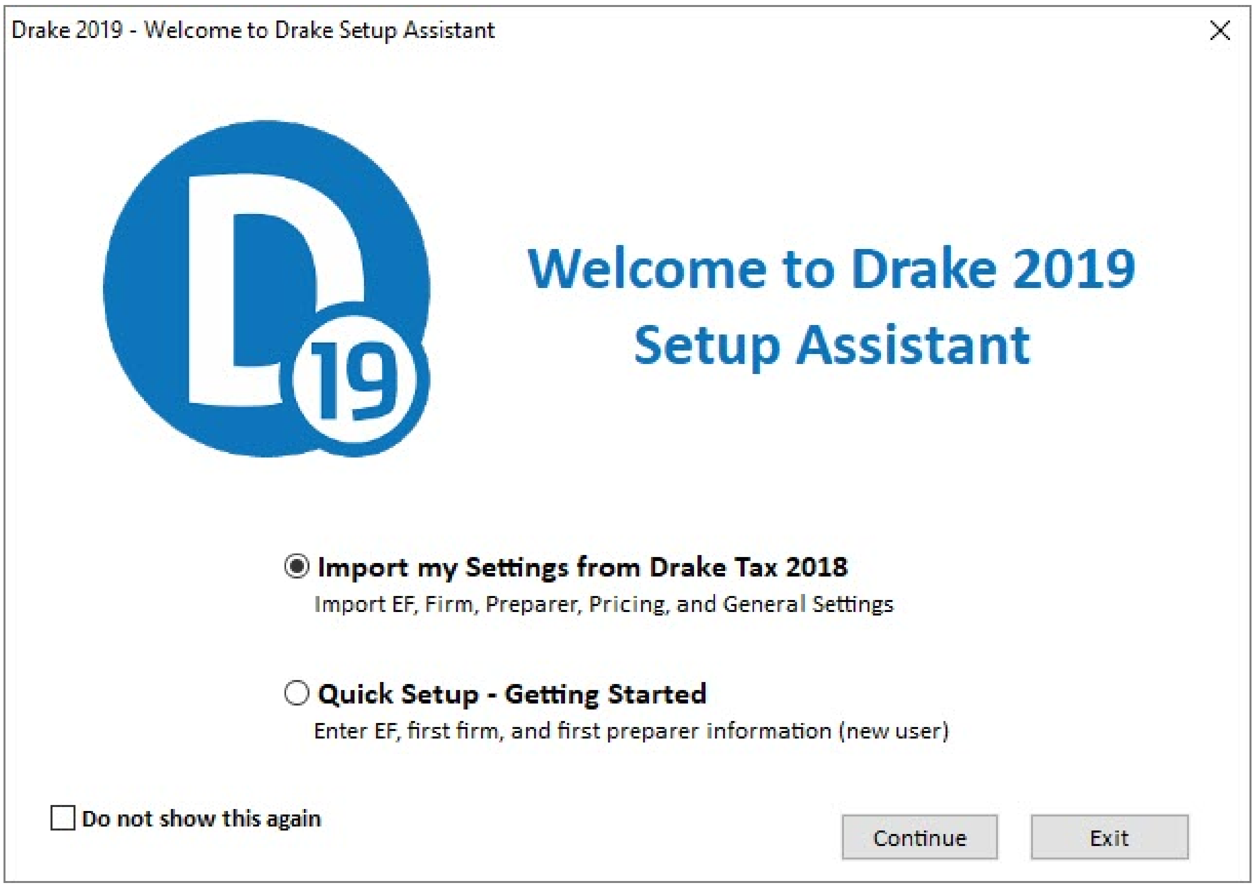
5. Select a security question and provide an answer to the question to use in case you forget your password and need to reset it.



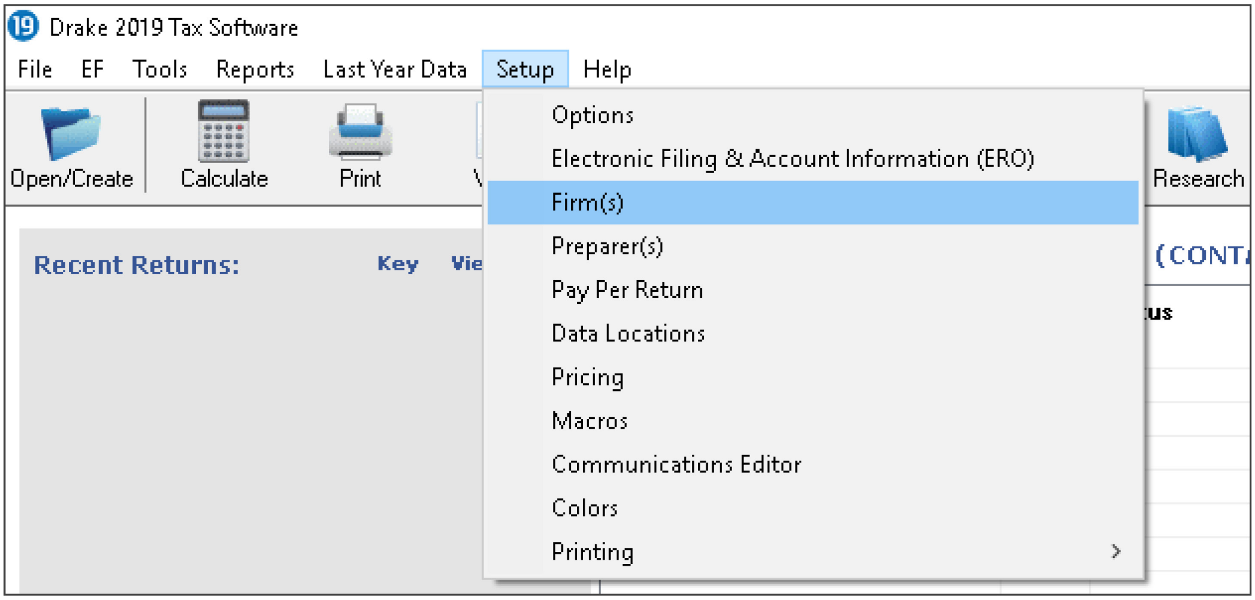
Setting Up Drake Tax

Setup Assistant

The Setup Assistant is opened automatically the first time you log in to Drake. Designed to guide you through the software setup screens, the Setup Assistant appears each time the program is opened until all required setup items are completed. A green check mark indicates that a setup item is complete.



All the items on the Setup Assistant can also be accessed from the **Setup** menu, located on the Drake home screen. There are additional items on the **Setup** menu, not found on the **Setup Assistant**.

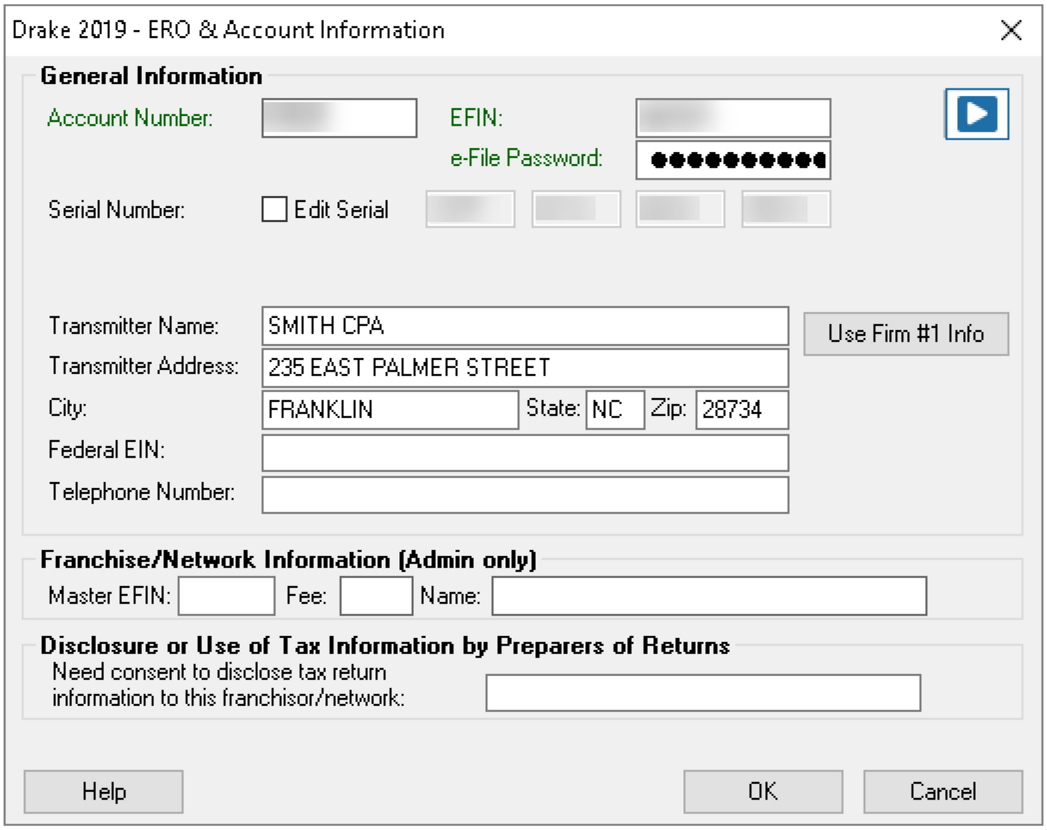


Required Setup Items

The three following items on the Setup Assistant are required screens. You must complete each of these options before you can successfully prepare and transmit live returns.

ERO & Account Information

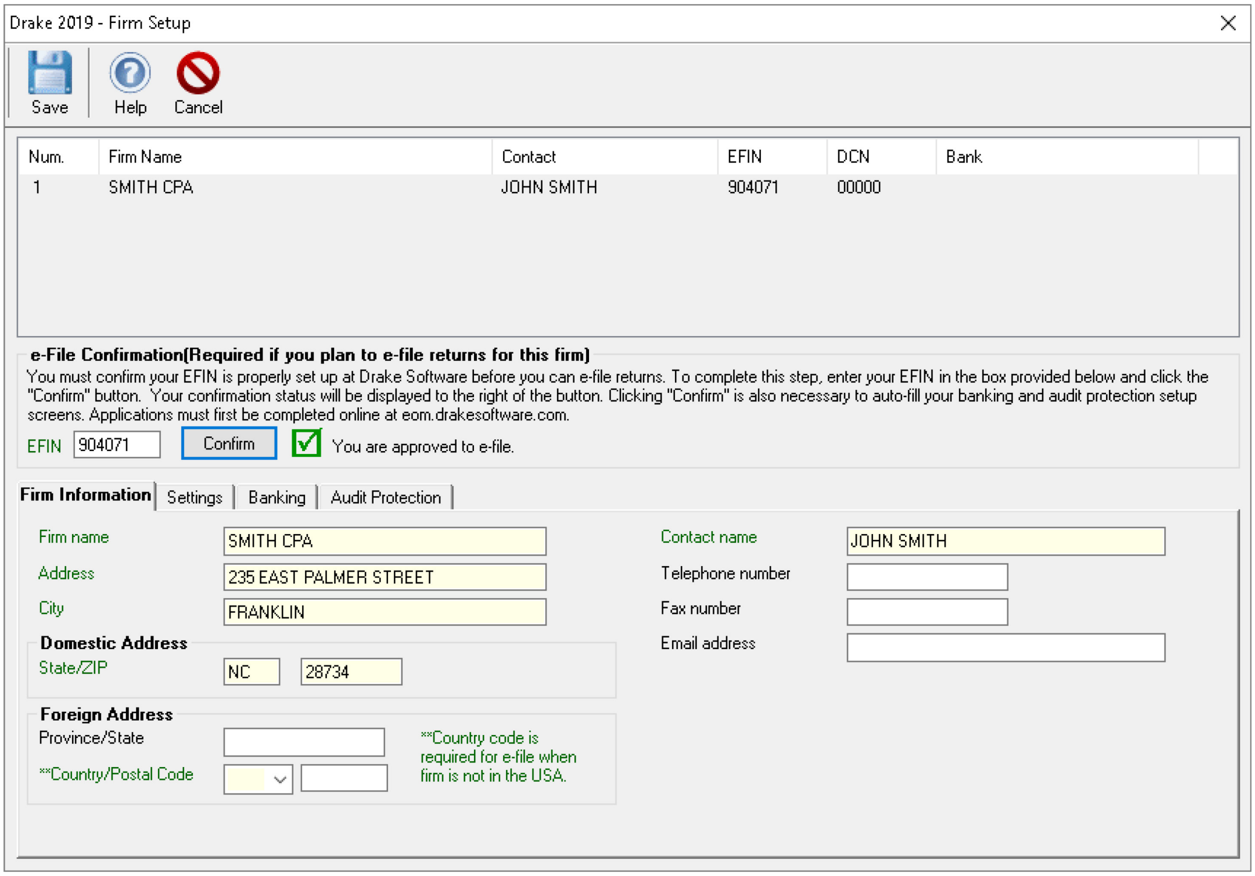
The Electronic Return Originator (ERO) must complete the ERO Setup in order to e-file returns, download software updates, and access the online e-filing database.
Access **ERO & Account Information** from the Setup Assistant or **Setup** menu.



Firm(s)

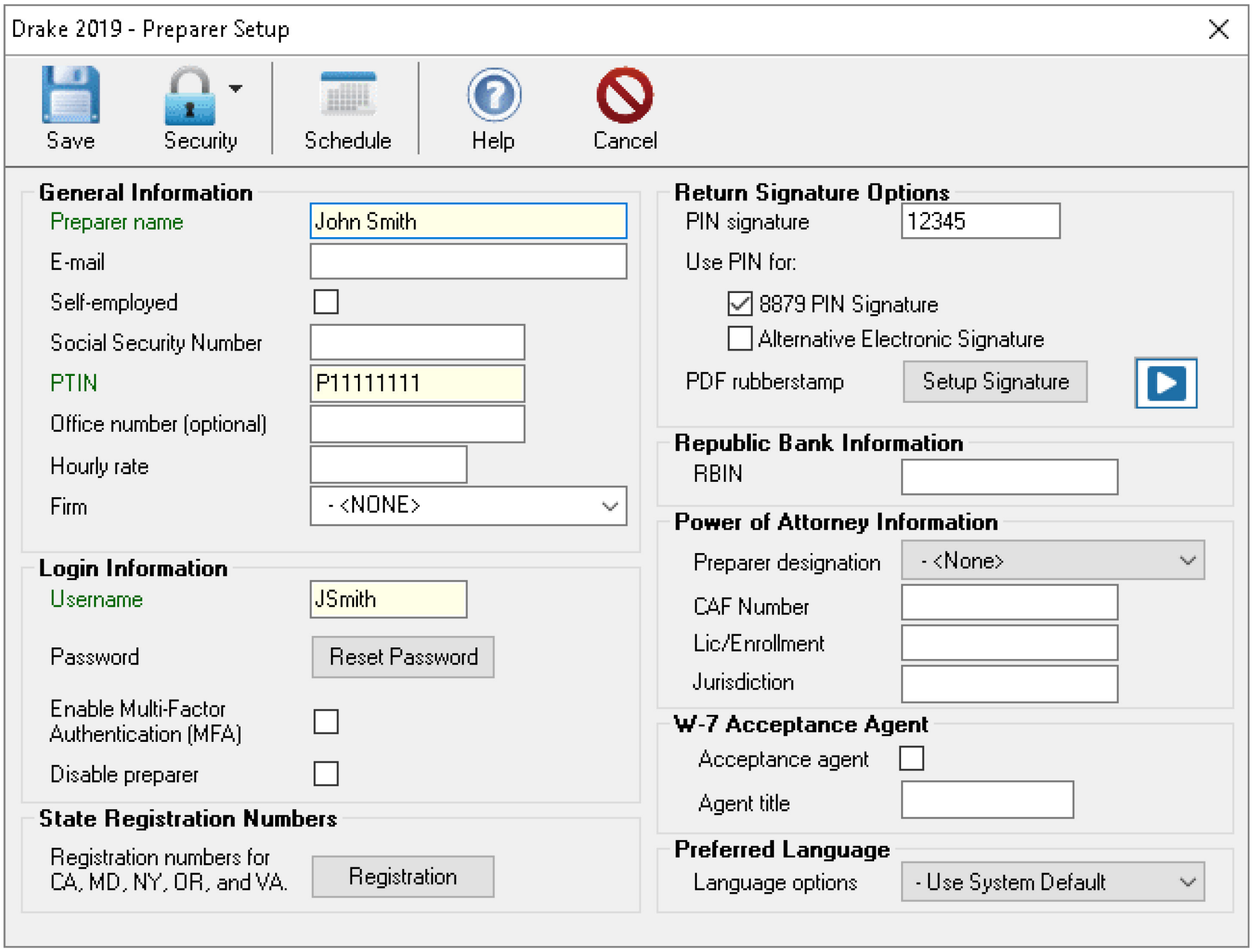
Firm setup must be completed before preparing and e-filing returns. If data is inaccurate or missing, tax returns might be e-filed with incorrect information.

Select **Firm Setup** from the Setup Assistant or **Setup > Firm(s)**.



Preparers

Preparer Setup fields and preparer security must be completed before a preparer can begin preparing and e-filing returns. All preparers must be entered in Preparer Setup. Data-entry operators and anyone who needs access to Drake Tax should also be setup.



Preparer Setup can be accessed from Setup Assistant or **Setup > Preparer(s)**.

Preparer Security Options

Only administrative users can set security rights. Settings must be established before a preparer can begin working in Drake Tax.

Security Option	Description
Set Security to Allow No Options	Employee cannot access any part of the program.
Set Security to Allow All Options	Employee can access all parts of the program, except for ADMIN-only features.
Set Security Equal to Existing Preparer	Employee is given security settings to match those of another preparer on the list.
Add Preparer to Security Group	Add preparer to a pre-established security group. (See "Setting Up Group Security," following.)
Front Office (Scheduling Only)	Employee can access the Scheduler only.
Administrator (Full ADMIN Rights)	Employee can access all parts of the program, including administrator-only features.

To remove security rights from *all* preparers (other than administrative users), go to **Setup > Preparers**, click **Remove Rights**, and click **Yes**. To remove rights for an individual employee, set that person's security to **Set Security to Allow No Options**.

A preparer will be prompted to confirm his or her account and set up a password when logging in to the software for the first time.

Additional Setup Items

The following items are optional setup items and can be found on the **Setup** menu, located on the Drake **Home** window.

Printers

Use Printer Setup to:

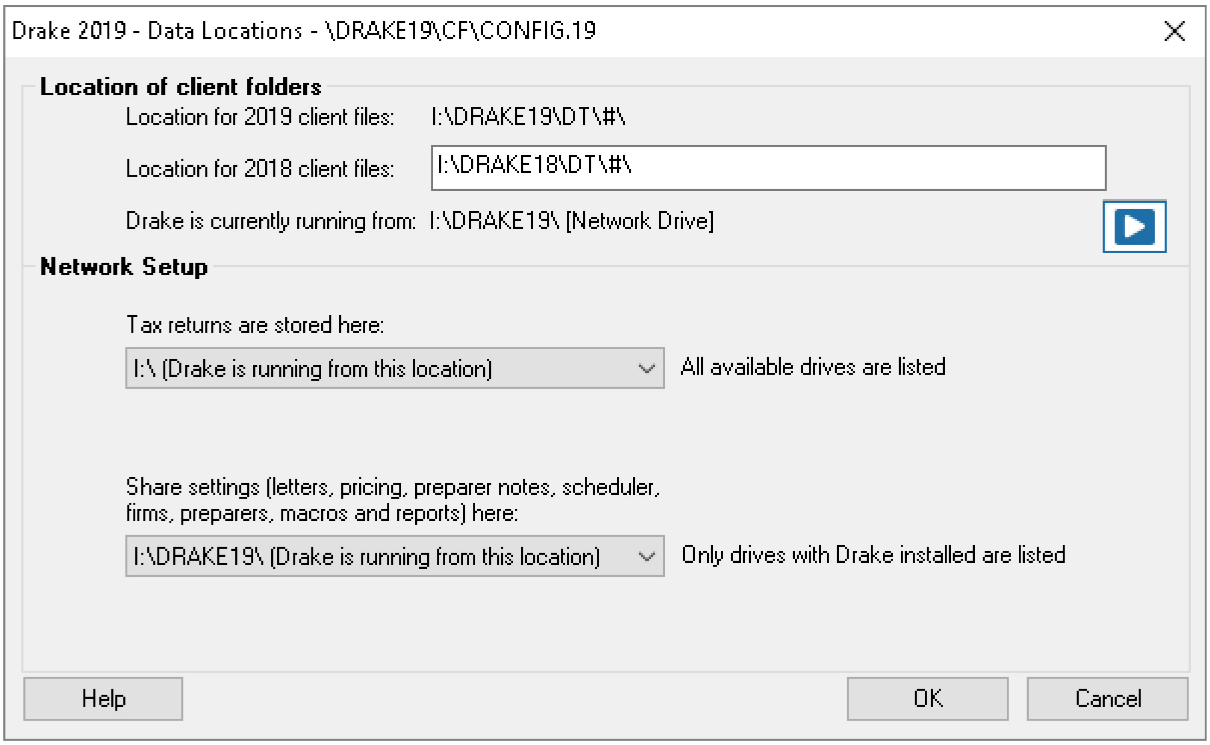
- Establish the printer to be used with Drake Tax
- Establish "sets"
- Set up advanced printing options not related to a specific printer

Access **Printer Setup** from the Setup Assistant or **Setup > Printing > Printer Setup**.

Data Locations

Drake Tax can be used on a single workstation or your choice of network configurations and users have the options of changing data location to conform to a particular network setup. To setup data paths, access the Data Locations screen, go to **Setup > Data Locations.**

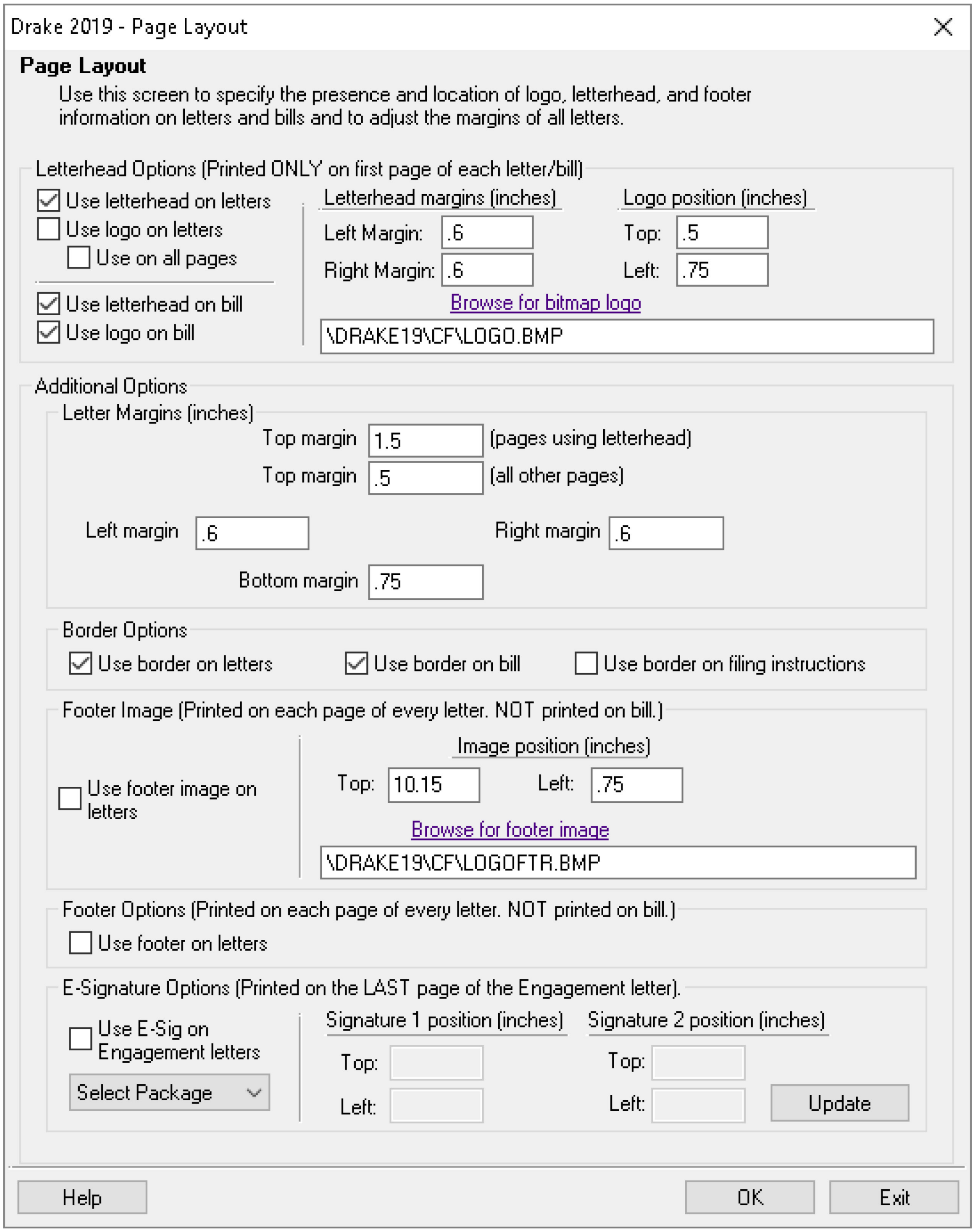
To access the Data Locations screen go to **Setup > Data Locations.**



Letterhead

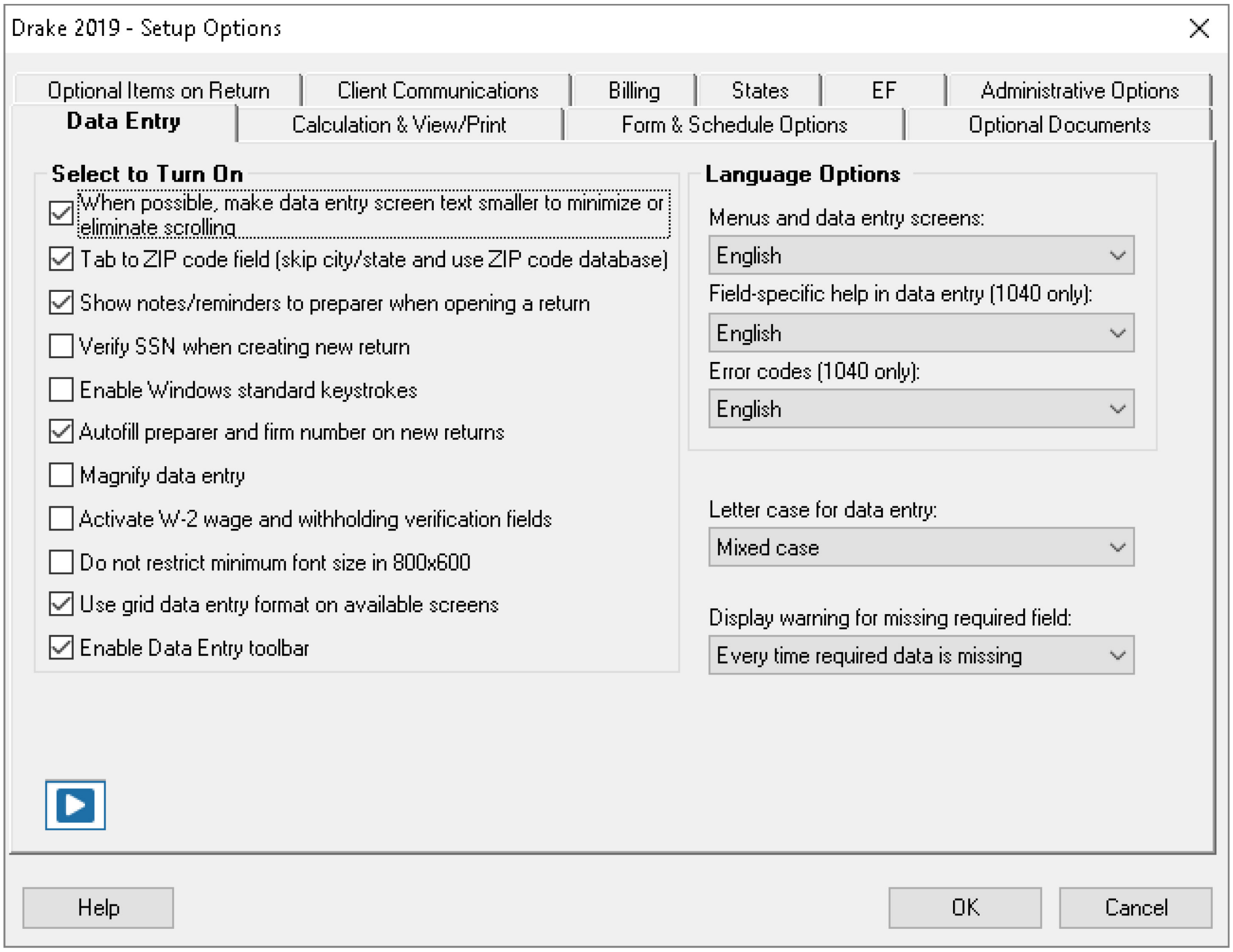
Customize the look of Drake-generated letters and client bills with **Letterhead, Margins, and Border Setup**. Use this setup screen to specify the presence and location of logo and letterhead information on the letters, and to adjust margins.

Access **Letterhead, Margins, and Border Setup** from the Setup Assistant or go to **Setup > Communications Editor > Setup**.


Drake 2019 - Page Layout
Page Layout
Use this screen to specify the presence and location of logo, letterhead, and footer information on letters and bills and to adjust the margins of all letters.
Letterhead Options (Printed ONLY on first page of each letter/bill)
Use letterhead on letters
Use logo on letters
Use on all pages
Use letterhead on bill
Use logo on bill
Letterhead margins (inches)
Left Margin: .6
Right Margin: .6
Logo position (inches)
Top: .5
Left: .75
Browse for bitmap logo
\DRAKE19\CF\LOGO.BMP
Additional Options
Letter Margins (inches)
Top margin 1.5 (pages using letterhead)
Top margin .5 (all other pages)
Left margin .6
Right margin .6
Bottom margin .75
Border Options
Use border on letters
Use border on bill
Use border on filing instructions
Footer Image (Printed on each page of every letter. NOT printed on bill.)
Use footer image on letters
Image position (inches)
Top: 10.15
Left: .75
Browse for footer image
\DRAKE19\CF\LOGOFTR.BMP
Footer Options (Printed on each page of every letter. NOT printed on bill.)
Use footer on letters
E-Signature Options (Printed on the LAST page of the Engagement letter).
Use E-Sig on Engagement letters
Select Package
Signature 1 position (inches)
Top:
Left:
Signature 2 position (inches)
Top:
Left:
Update
Help
OK
Exit

Options

When installed, the most common preferences are set as defaults in Drake. Use options setup to view or change the defaults for the various options available. The options are categorized and displayed on different tabs in options setup. Access **Setup Options** from the Drake **Home** window under **Setup > Options**.



Data Entry Options

Option	Description
Size text on data entry screens	Automatically size the text on screens to minimize or eliminate scrolling.
Tab to ZIP code field (skip city/state and use ZIP code database)	Press the TAB key while entering an address in data entry to bypass the **City** and **State** fields and go directly to the **ZIP** field. **City** and **State** fields are completed automatically based on the ZIP code entered.
Show notes/reminders to preparer when opening a return	Show all notes and reminders from the **NOTE** and **PAD** screens every time you open a client file that contains notes or reminders.
Verify SSN when creating new return	Require double entry of SSN or EIN, helping eliminate erroneous entries.
Enable Windows standard keystrokes	CTRL+X = cut; CTRL+C = copy; CTRL+V = paste; SHIFT+CTRL+X = autofill amended screen; SHIFT+CTRL+C = calculate return; SHIFT+CTRL+V = view return
Autofill preparer and firm number on new returns	Automatically enter the firm number and preparer number where required on data entry screens.
Magnify data entry	Enlarge the active field for easier reading.
Activate W-2 wage and federal withholding verification fields	To ensure accuracy of data entry, require wage and withholding amounts be entered twice on the **W2** screen and of federal and state distributions and federal withholding amounts at the bottom of screen **1099**.
Do not restrict minimum font size in 800x600	This is a sizing option for computers using an 800x600 resolution. If this option is selected, the program will not attempt a font substitution to retain readability. Text on screens will shrink to fit as needed.
Use grid data entry format on available screens	Type information into a spreadsheet environment, which can result in faster data entry. This feature is available for the **Dependents**, **INT**, **DIV**, **8949**, **D**, and **4562** screens.
Enable Data Entry toolbar	Mark the check box to activate the data entry screen toolbar; clear the check box to disable the data entry screen toolbar. (See "Data Entry Toolbar" on page 105 for details.)
Language Options (1040 package only)	Choose between English and Spanish for menus, data entry screens, field help text, and error codes (EF Messages).
Letter case for data entry	Choose between all uppercase letters and mixed case.
Display warning for missing required fields	Choose to receive a warning: whenever a required field is empty; once per data entry session; not at all.

Calculation & View/Print Options

Option	Description
Autocalculate tax return when exiting data entry	Returns are automatically calculated every time you exit the return.
Display client fee on Calculation screen	Allow the fees charged for return preparation to appear on the **Calculation Results** window.
Print only one overflow statement per page	Each overflow statement is printed on a separate piece of paper.
Go directly to form when accessing View or data entry mode	Go from a data entry screen to the corresponding form in View mode when you go to View/Print mode. When the **Data Entry** button is clicked in View/Print mode, the program returns to the data entry screen.
Audible notification of calculation error messages	When calculating a return, the program produces a "beep" to indicate an EF Message.
Mask SSN, EFIN, PTIN	Masks taxpayer's, preparer's, and ERO's identification number on printed sets. Use caution when masking SSNs and providing payment vouchers from Client and Preparer Sets. When choosing this option be aware that the SSN will not be printed on the payment voucher or on the estimated tax payment voucher in either the "Client" or "Preparer" sets. If a voucher is sent to the IRS or a state tax agency without the taxpayer's SSN, the taxing authority will be unable to process the payment. Ensure the correct version of the voucher is used; these can be found in the "Federal" and "State" sets.
Layout for depreciation schedule	Select **Portrait** to produce the depreciation schedule vertically using 8.5 x 11 paper; select **Landscape** to produce it horizontally.
Pause option for calculation	Choose the circumstances under which the **Calculation Results** window appears, allowing a review of calculation results before proceeding to View mode.
Number of days to store print files	Select to store print files from 1 to 9 days, or to have them removed once the return is selected for e-file. If a return is needed after the print file is removed, recalculate the return to re-create the print file.
Print sort options for Interest/Dividends	Choose how items entered on the **INT** and **DIV** screens are sorted when printed on Schedule B: alphabetically, numerically, or not at all.

Form & Schedule Options

Option	Description
Print Schedule A only when required	Produce Schedule A only when taxpayer qualifies to itemize.
Print Schedule B only when required	Produce Schedule B only when taxpayer has enough interest income to require filing Schedule B.
Print Form 4562 only when required	Produce Form 4562, Depreciation and Amortization, only when the tax return requires it.
Print Form 6251 only when required	Produce Form 6251, Alternative Minimum Tax, only when the tax return requires it.
Next year depreciation schedule	Produce a depreciation schedule for next year in addition to the one for this year.
W-2/1099 forms	Produce and display in View/Print mode all W-2 and 1099-R forms with the return.
Print two W-2/1099-Rs per page	If return has more than one W-2 or 1099-R form, print two per page.
Carryover worksheet	Produce any carryover worksheets associated with the return.
Print page 2 of Schedule K-1...	Produce page 2 of Schedule K-1 for Forms 1120S, 1065, and 1041.
Print ES vouchers...	Prints ES vouchers only when screen ES exists.
Always show reason for no EIC	Generate Return Note explaining reason taxpayer not getting EIC.
Always show tax computation worksheet	Generate Tax Computation Worksheet showing how the program calculates the tax on line 44 of the 1040 return
Print shareholder's/partner's adjusted basis worksheet	Make this selection to automatically print a partner's or shareholder's adjusted basis worksheet.
1040A/EZ suppress	Automatically suppress Form 1040A or 1040EZ.
Suppress EZ forms and schedules	Choose to automatically suppress Schedule C-EZ, Form 2106-EZ, or Form 2555-EZ.
Form 8879 bank account options	Select option for printing bank account information on Form 8879.
Select to Turn On ___ list if greater than...	Produce lists of these items (W-2, W-2G, 1099-M, 1099-R, federal withholding summaries (see "NOTES," next page), dividends, interest, K-1) when the selected number in the drop list is exceeded.

Optional Documents

Option	Description
Folder coversheet	Generate a folder cover sheet on which is printed the taxpayers' names and the name, address, and phone number of the preparer's firm.
Prior year(s) comparison form	Produce a comparison sheet containing data from the current-year and prior-year returns.
Return summary	Produce a return summary with every return prepared.
Bill summary	Produce a summary of the taxpayer's bill with each return.
Federal filing instructions	Display detailed federal filing information, including: the date to file, form to be filed, address to file, and payment amount. The instructions are listed as FILEINST.PG in View mode. Printed by default. Clear the check box to disable, or use the **PRNT** screen to activate or disable on a single return.
State filing instructions	Display detailed state filing information, including: the date to file, form to be filed, address to file, and payment amount. The instructions are listed as "STINST.PG" ("ST" refers to the state abbreviation; for example, OHINST.PG for Ohio instructions). Printed by default. Clear the check box to disable, or use the **PRNT** screen to activate or disable on a single return.
Labels	Print a sheet of "mail to" addresses on Avery 5160 labels
Envelope Sheet (address drop lists)	Choose the size of the envelope on which to print the addresses of the taxpayer, the IRS Service Center, the state tax department, the city tax office, and for Forms K-1.
Estimated payment coversheet	Print coversheet with the address for estimated payments to Nelco ENV500 envelope dimensions for 1040 and 1041 returns with quarterly taxes.
NELCO hyperlink	Click this link to go to the NELCO website to order such Drake-compatible products as envelopes, IRS forms, and checks.
Letter Options (all packages)	Select the client results letter templates to be used for each package. The selected template will be generated with each return in that package. For more information on each template, see Table 2-13 on page 70.
Include privacy letter with returns	Select this option to print the privacy disclosure letter with every return.
Include engagement letter with returns	Select this option to generate engagement letters for all packages when the return is calculated. At the end of the letter template are spaces for client and preparer signatures. Engagement letters can also be produced prior to completion of the return using **Tools > Letters > Letters**.
Include customized supplemental letter with returns	Print a customized letter that can be used for various purposes. (See Table 2-13 on page 70.)
Include K-1 letter with returns	Print the cover letter for individual K-1s (1065, 1120S, and 1041 packages).
Referral Coupons (3 per sheet)	Enter the number of sheets per return or the coupon amount.

Optional Items on Return

Option	Description
Date on return	Mark this box to have the current date printed on the return. To change the date printed on the return (or the due date on letters and filing instructions), enter the desired date on the **PRNT** screen (accessible from the **Miscellaneous** tab of the **Data Entry Menu**).
Print dates for taxpayer and spouse signatures (excludes 1040)	Select this option to print the signature dates for taxpayer and spouse signatures on the return (excluding 1040).
Taxpayer phone number	Select this option to print the taxpayer's phone number entered on screen **1**.
Third party designee	Select the preparer number of the preparer designated as the third-party designee to be printed on the main form of the return.
Interest and Penalty Calculation	Calculate penalties and interest on returns filed after the due date based on interest rates entered. For more information, see "Penalty and Interest Calculation" on page 277.

Billing Options

Option	Description
Select Bill format:	
	Comprehensive Bill: Generates an itemized client's bill. (All packages)
	Summary Bill: Generates a summarized client's bill. (All packages)
	Classic Bill: Use the same format and features as prior years of Drake Tax.
Options for all billing formats:	
– Show preparer fees withheld from bank product	Print the preparer fees withheld from the bank product amount on the bill.
– State sales tax rate – Local sales tax rate	Enter state and local sales tax rates to add to each bill as a decimal or a whole number. Number must be greater than "1." For example, "4.5" represents a sales tax rate of 4.5%.
– Billing statement format	Select from among seven formatting options, including: - Bill by time (preparing bill based on time spent preparing return multiplied by preparer's hourly rate as defined in **Setup > Preparers**) - Bill by form (preparing bill based on forms necessary to complete return by price entered in **Setup > Pricing**); program prepares a bill summary along with the option selected here unless the **Bill summary** check box is cleared at **Setup > Options**, **Optional Documents** tab.
– Header on bill	Select among options for the header to be printed on the bill.
Options for Classic Bill only:	
– Print taxpayer's phone number on the bill	Print the taxpayer's phone number (entered on screen **1**) on the bill.
– Print taxpayer's e-mail address on the bill	Print the taxpayer's email address (entered on screen **1**) on the bill.
Custom Paragraph Options	
– Options	Choose to have a custom paragraph printed at the top of the customer's bill or at the bottom.
– Paragraph Content	Write the custom paragraph you want added to the customer's bill in the supplied text box.

e-File Options

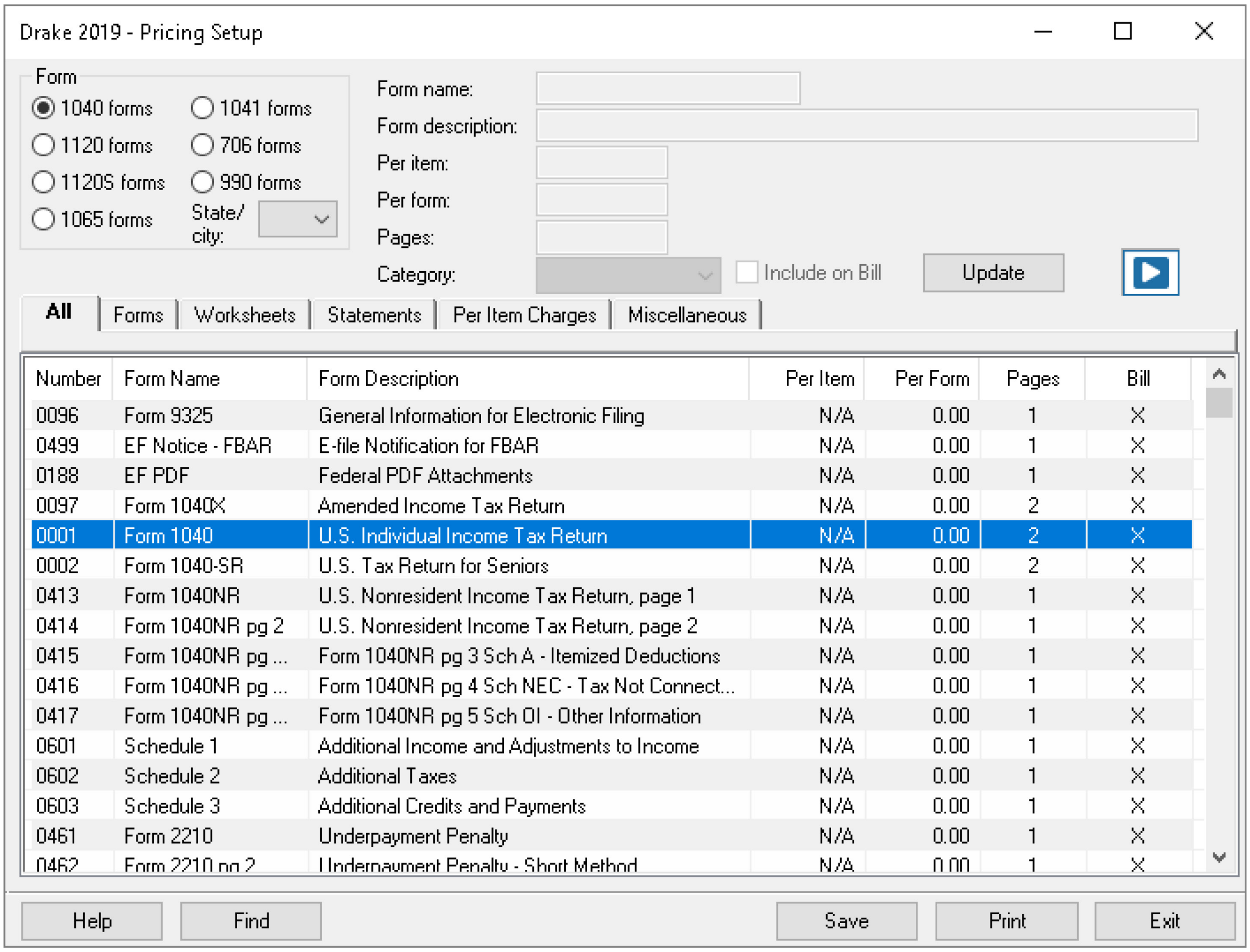
Option	Description
Auto-generate taxpayer(s) PIN	Have the program assign a randomly generated PIN (1040 only).
Require 'Ready for EF' indicator on EF screen	Require the **Ready for EF** indicator on the **EF** screen to be marked before a return can be selected for e-file.
Lock client data file after EF acceptance	Generate a reminder that the return has been filed and accepted when next you open the file.
Print 9325 when eligible for EF	Print Form 9325, Acknowledgment and General Information for Taxpayers Who File Returns Electronically, for every eligible return.
Suppress federal EF	Prevent e-file of federal return.
Print EF status page	Generate the **EF Status** page for any return that is eligible for e-file.
Alert preparer when bank product is not included	Alert the preparer via an EF Message that a return does not include a bank product. (To override, see "Overriding Bank-Product Alert" on page 351.)
Activate imperfect return election in data entry	Activate **Imperfect Return Election** check box on **EF** screen in data entry.
Allow selection for EF from the 'Calculation Results' screen	Allow preparer to send the currently active return directly from the **Calculations Results** window to the e-file queue.
Enable prompting before automatic transmission of 'Check Print Records'	Allow the program to notify you before it transmits the Check Print records.
Email 9325 Notice to Taxpayer (automatic from Drake Processing Center)	Form 9325, Acknowledgment and General Information for Taxpayers Who File Returns Electronically, is automatically emailed to taxpayer when return is accepted. (Client's email address must be present on screen **1**.) Override this selection on the **EF** screen.
Require E-Signatures on all electronically signable forms (1040 only)	Require all preparers to take advantage of Drake Tax's e-Signature capabilities For details on these capabilities, see "Electronic Signatures" on page 305. Override this selection on the **EF** screen.
Disallow EF for DoubleCheck flag	Requires all DoubleCheck flags in View/Pint mode be removed before return is EF-eligible. (See "DoubleCheck and LinkBacks" on page 301.)
Default ERO	Choose a preparer number, **Paid Preparer**, or **None** to indicate the ERO name that should appear on return documents. Override this selection on screen **1** and the **PREP** screen in data entry.
Combine EF steps (Select, Transmit, Post Acks)	Combine all e-file steps. From **EF > Transmit/Receive**, clicking **Send/Receive** transmits selected returns, picks up new acknowledgments, and processes acknowledgments in one step.
Transmit return data to Drake for multi-office web reports	Send Client Status Manager (CSM) data automatically to the Multi-Office Manager (MOM) during the EF process.
State EF	Suppress e-file of all state returns, or select states to suppress while other state returns remain eligible.

Administrative Options

Option	Description
Use customized data entry selection menu	Make certain forms or screens accessible to any user other than those with administrative rights. See "Locking Screens" on page 57.
Customize user-defined data entry fields	Create option lists for the **Miscellaneous Codes** fields on screen **1** and the **Adjustments**, **Percentage**, and **Payments** fields on the **BILL** screen. See "Customized Drop Lists" on page 57.
Use customized flagged fields on all returns	Select this box, click **Flag**, and select a package type. When the **Data Entry Menu** is opened, click the desired screen and click each field to flag. Click a field a second time to clear it. Press Esc to save your changes. **Note**: This option is available for federal packages only.
– Lock fields	Select **Use customized flagged fields on all returns**, click **Flag**, and select a package type. When the **Data Entry Menu** is opened, click the desired screen, right-click a field, and select **Lock Field**. No one without Administrator access can enter data in a locked field. Click the field or right-click and select **Unlock Field** to remove the lock. Press Esc to save your changes.
Apply current-year Admin flag settings when updating from prior year	Flags set globally in 2016 are set globally after updating data from **Last Year Data > Update from 2016 to 2017**.
Print all due diligence assistance documents	Print due diligence documents generated from the **DD1** and **DD2** screens. (To generate these documents on a per-return basis, go to **PRNT** screen and select **Print DDASSIST**.)
Require due diligence assistance screens to be completed	Require that applicable fields on the **DD1** and **DD2** screens be completed before the return can be e-filed.
Enable logged in preparer's Personal Client Manager	Display the Personal Client Manager on the Drake **Home** window for the logged-in preparer (check box is marked by default).
Display program update availability to:	Select which preparer groups can view update availability. Selections are **Administrators** (users with administrative rights) and **All/Update Rights**.
Bank Products - State laws regarding fees: Charge ALL taxpayers the same fees	Select this box to charge all clients the same supplementary fees (software, franchise/network, and additional fees), regardless of whether a bank product is included. For more information, click the **Program Help** link.
Drake PDF Printer Password Options	Choose to automatically password-protect any generated PDF documents. Passwords can be assigned to PDF documents that are sent through Drake Tax. The default password format is the first four characters of the client's name plus the last five digits of the client's ID. The **Default password** drop list includes other format options. These settings can be overridden during printing from the **Print Selection** dialog box.
Return Status Notification Programs	Use this option to receive return status notification through ABCvoice. Select to generate 7216 consent forms for the customer to sign. Select to require contact information (phone number and/or email address on screen **1**, or on the **ABCV** screen, available from the **Miscellaneous** tab of the **Data Entry Menu**. (RefundPoint from the **CALL** screen is no longer an option in Drake Tax.)

Pricing

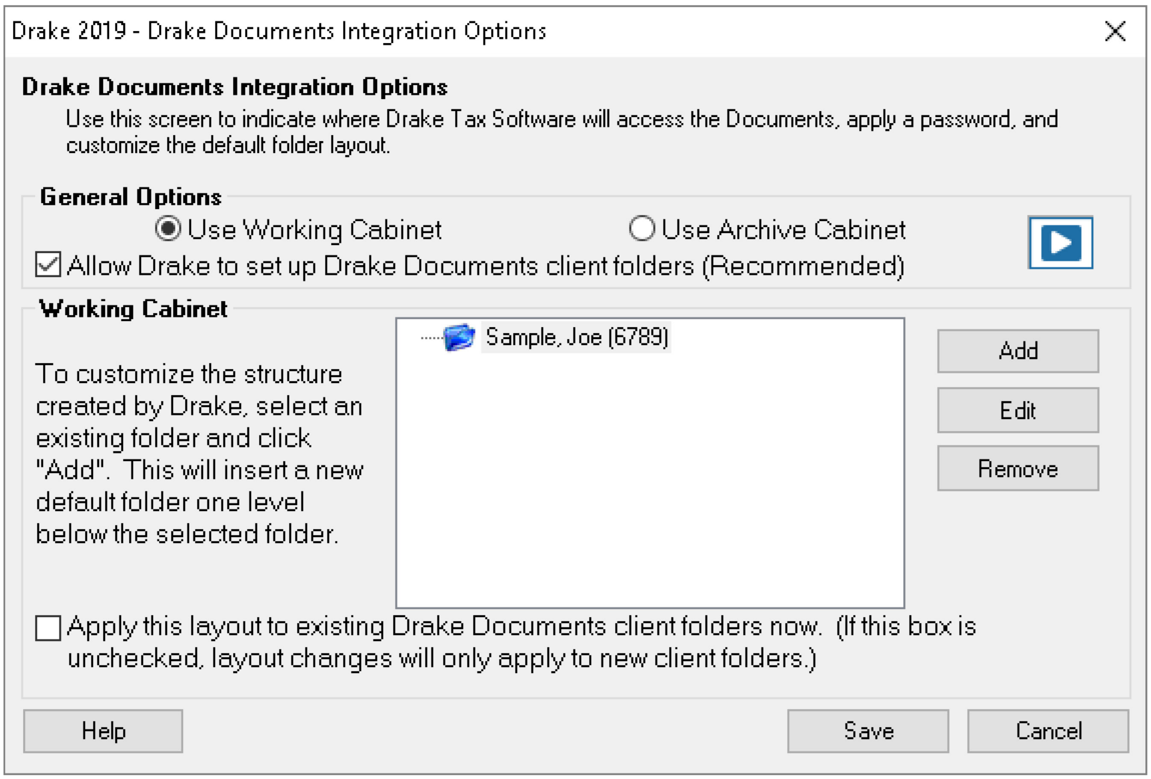
Setting up pricing will allow Drake to calculate charges and generate a client bill. Prices can be defined for each form, and on some forms, for each item. Minimum and maximum charges can be set for completed returns.



Access **Pricing Setup** from the **Home** window of Drake under **Setup > Pricing**.

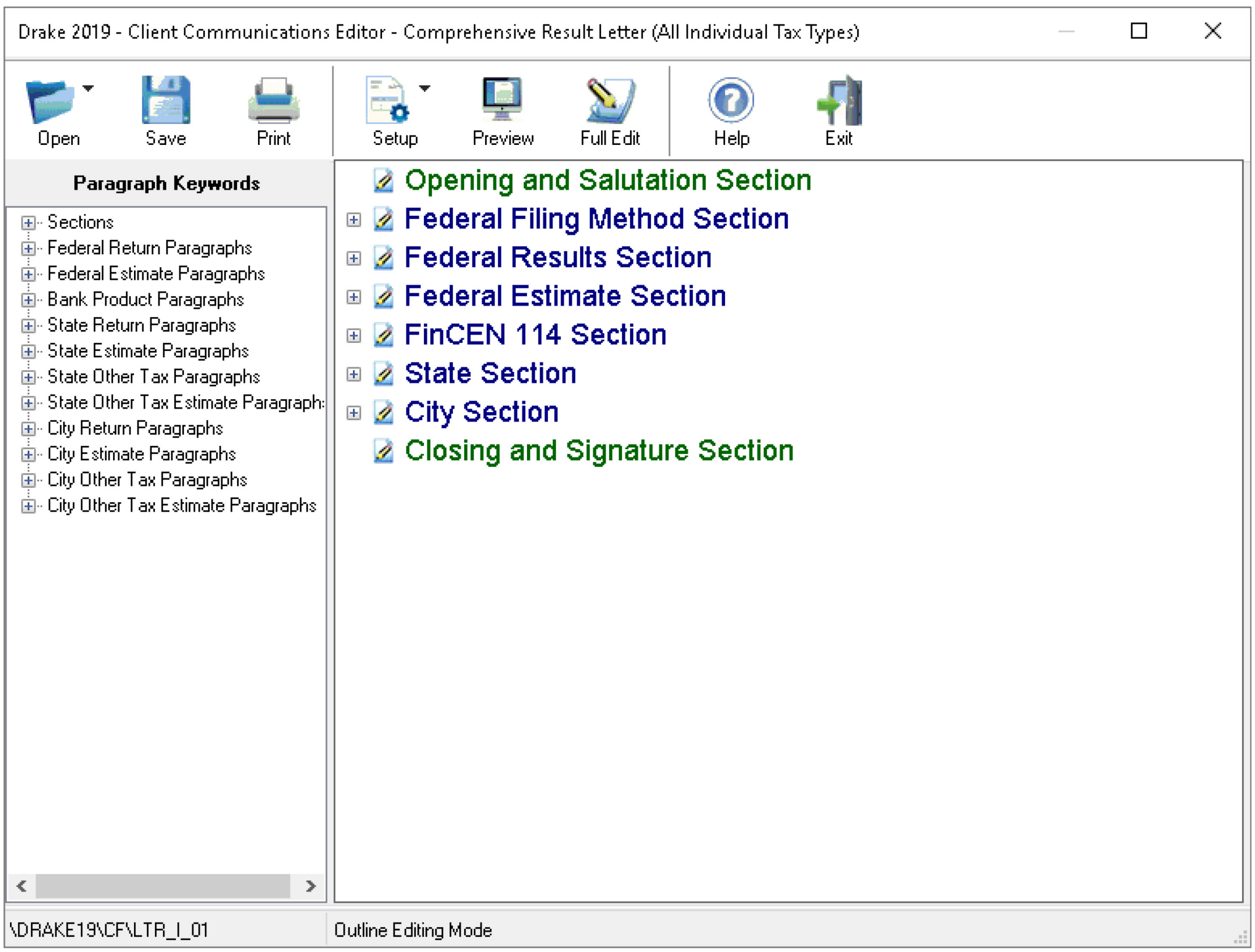
Drake Documents

Choose Drake Document integration options. This setup screen determines how Drake Tax Software will interface with Drake Documents. Use this screen to apply a password and customize the folder layout. Access Document Manager Integration Options from the **Home** window of Drake under **Setup > Printing > Drake Documents**.



Letters

Access the Client Communication Editor to edit letters generated by Drake Tax, many of them based on data from the tax return and the clients' filing, payment, or refund preferences. There are also engagement letters, extension letters, letters with amended returns, payment reminders, appointment reminders, preseason and postseason letters, cover letters—all of these can be edited and customized in the letters program. Access letters setup from the **Home** window of Drake under **Setup > Communications Editor**.



Drake Software Tools

Updating Drake Software

Downloading regular updates is critical to ensure that your tax program is performing efficiently. The Update Manager obtains and installs files automatically. Updates include modifications to both the federal and state packages to reflect the most recent changes in the tax law.

Beginning with Drake Tax '18, you will have to download and install your updates before you can open and use Drake Tax. Rather than having to sit through the update process every morning when you log on to Drake Tax, you can set the Update Manager to automatically pick up your updates at a time of your choosing – such as when you are out of the office, even in the middle of the night. From the **Home** window menu bar of Drake Tax, go to **Tools > Update Manager**, and select the **Schedule software updates** option, choose an update time, and click **Exit**. The computer designated to receive updates must be left on, and an authorized user must remain logged in, for updates to be automatically downloaded and installed.

Scheduled Updates

The Update Manager can be set to obtain and install files automatically at a set time. To schedule your updates:

1. From the **Home** window toolbar, select **Tools > Update Manager**. The **Drake Update Manager** dialog box is displayed.

2. Choose the **Schedule software updates** option.

3. Choose a time from the option box: Click one of the numbers (hours, minutes, seconds, and **AM** or **PM**) and type in (or use the arrows) to set the time to accept new updates when they are transmitted by Drake Software.

4. From the alert window that is opened, click **OK**.

5. Click **Exit**.

Manual Updates

If you want to download and install updates when you are logging in to the tax program:

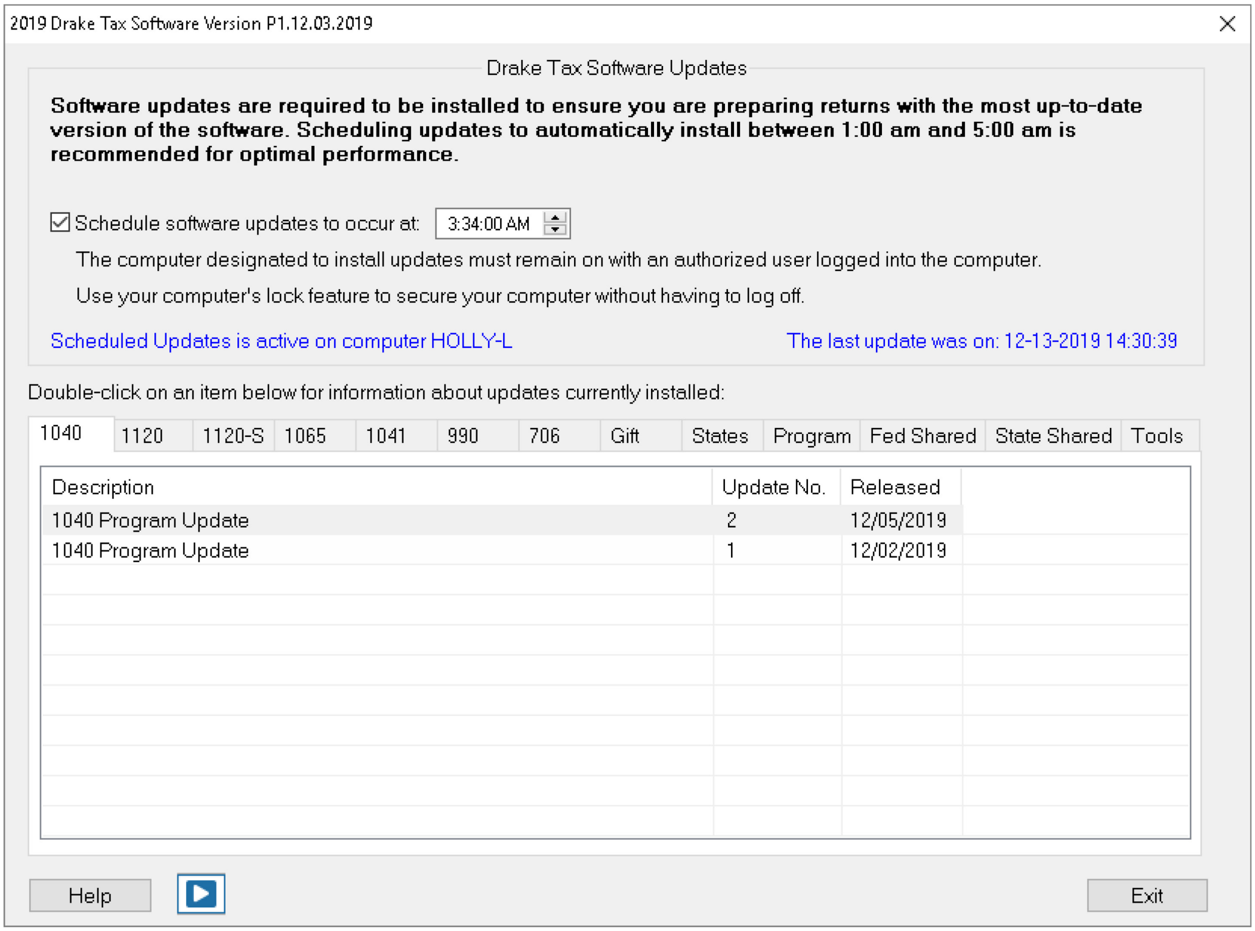
1. From the **Home** window toolbar, select **Tools > Update Manager**. The **Update Manager** dialog box is displayed.

2. Make sure the **Schedule software updates** option check box is cleared.

3. From the alert window that is opened, click **OK**.

4. Click **Exit**.

Remember: If you decide on manual updates in Drake Tax '18, you will not able to use the tax program until the latest updates have been downloaded and installed.
To download and install updates as they come in, from the **Updates** section in the lower left of the Drake Tax **Home** window, click **Install Updates**.



View Release Notes

When updates are installed, the program creates an installation log of the updates. This log is displayed in the **Drake Update Manager** dialog box in tabbed format, by file name, release date, and number of the update. The tabs divide updates into categories, one for each package (1040, 1120, 1065, etc.), one for individual state updates, one for program updates, for updates shared across two or more federal packages, one for updates shared across two or more state packages, and one form updates to Drake tools. Click column headers to sort data in ascending or descending order. To view a release note, double-click the desired row in the **Drake Update Manager** dialog box. Notes are displayed in the Report Viewer, where you can print or export the notes as desired.

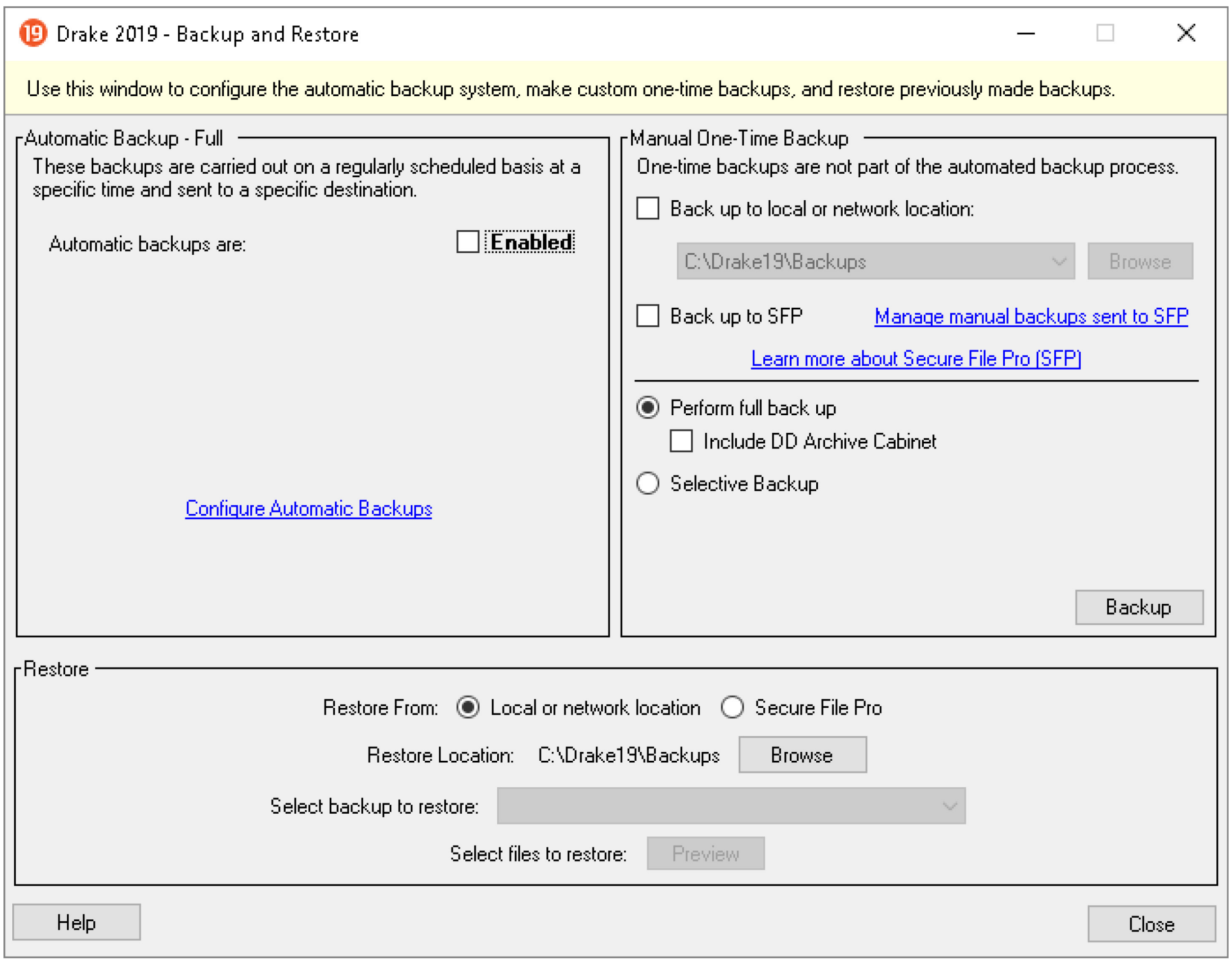
Notification of Updates

You will see, in the **Updates** section of the **Home** window, a notification that program updates are available and ready for download—even if the automatic update feature is activated. This notification appears if all of the following conditions are met:

- The program detects that the machine is connected to the Internet.
- You have security rights to install updates.
- You have permission to see the message regarding the updates ready for download. (You must be an administrator or have the **Display program update availability** drop box at **Setup > Options > Administrative Options** tab set to **All w/ Update Rights**.
- Your system needs the updates.

Backing up and Restoring Drake Files

Use the Backup and Restore tools to prevent loss of client data or to move client files to another machine. Files backed up to other locations can be used to restore lost data. If multiple machines are used for tax preparation in one office, files can be moved to other computers and uploaded to a single machine to create a master file.



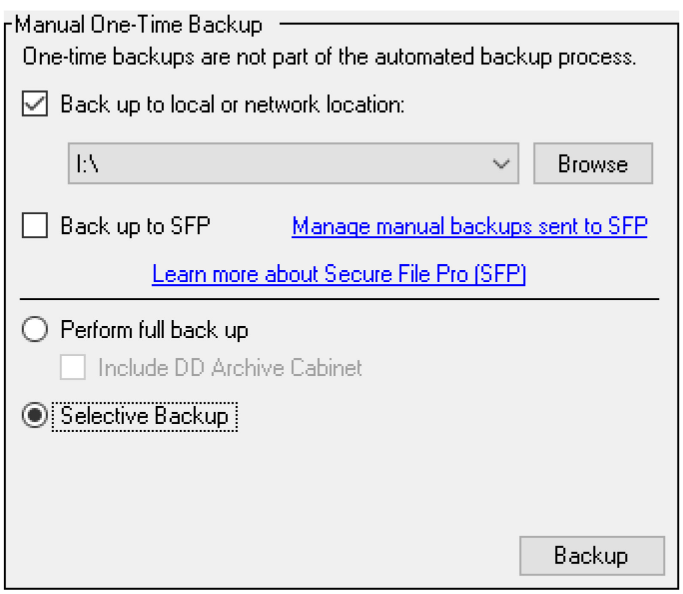
Manual Backup

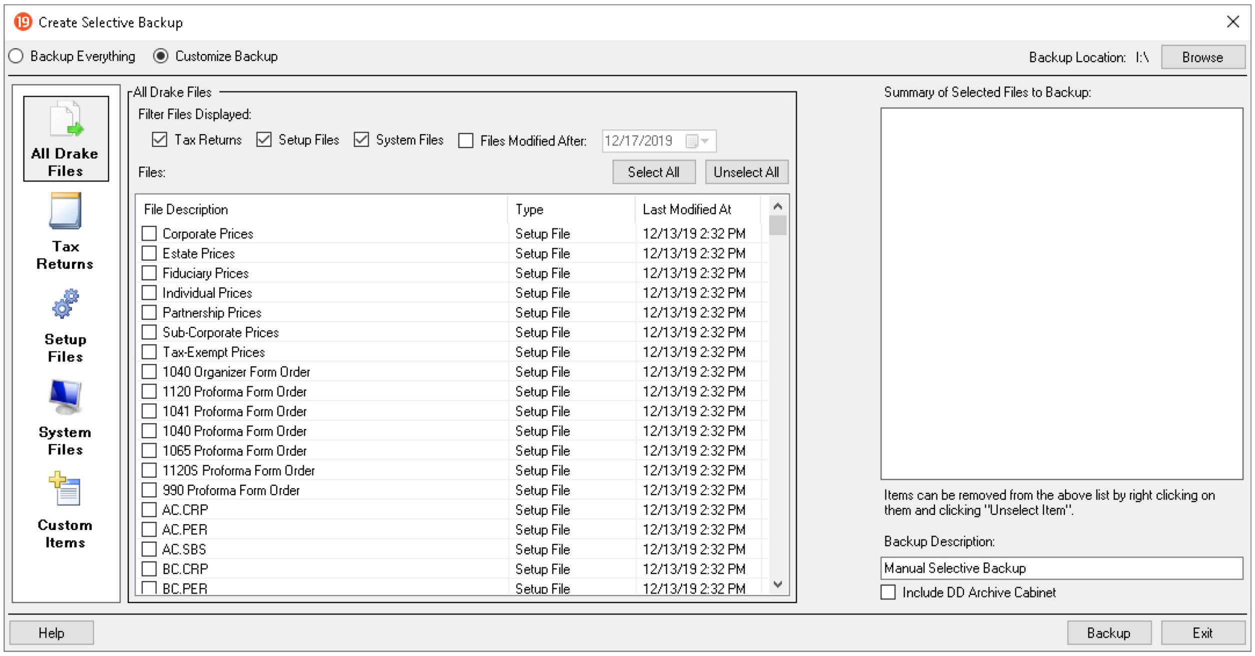
You can choose to perform a full manual backup of all your Drake Tax files, including the files in the Archive cabinet of Drake Documents. Choose to back up to a local device, a separate network location, or off site through SecureFilePro. To Perform a Manual One-Time Backup:

1. Mark the **Backup to local or network location** box and, if necessary, click **Browse** to select a location (such as a server or a "flash" drive) to back your files up to. To back up your files off site, click **Back up to SFP**.
2. Select **Perform full back up**.
3. (Optional) Select to include your Drake Documents Archive cabinet. (The Working Cabinet is backed up automatically with Drake Tax).
4. Click **Backup**.

Custom Backup

If you prefer to choose which files to include in the backup—including any non-Drake Tax files mark the **Backup to local or network location** check box and mark **Selective Backup**. When you click **Backup**, the program opens the **Create Selective Backup** dialog box.



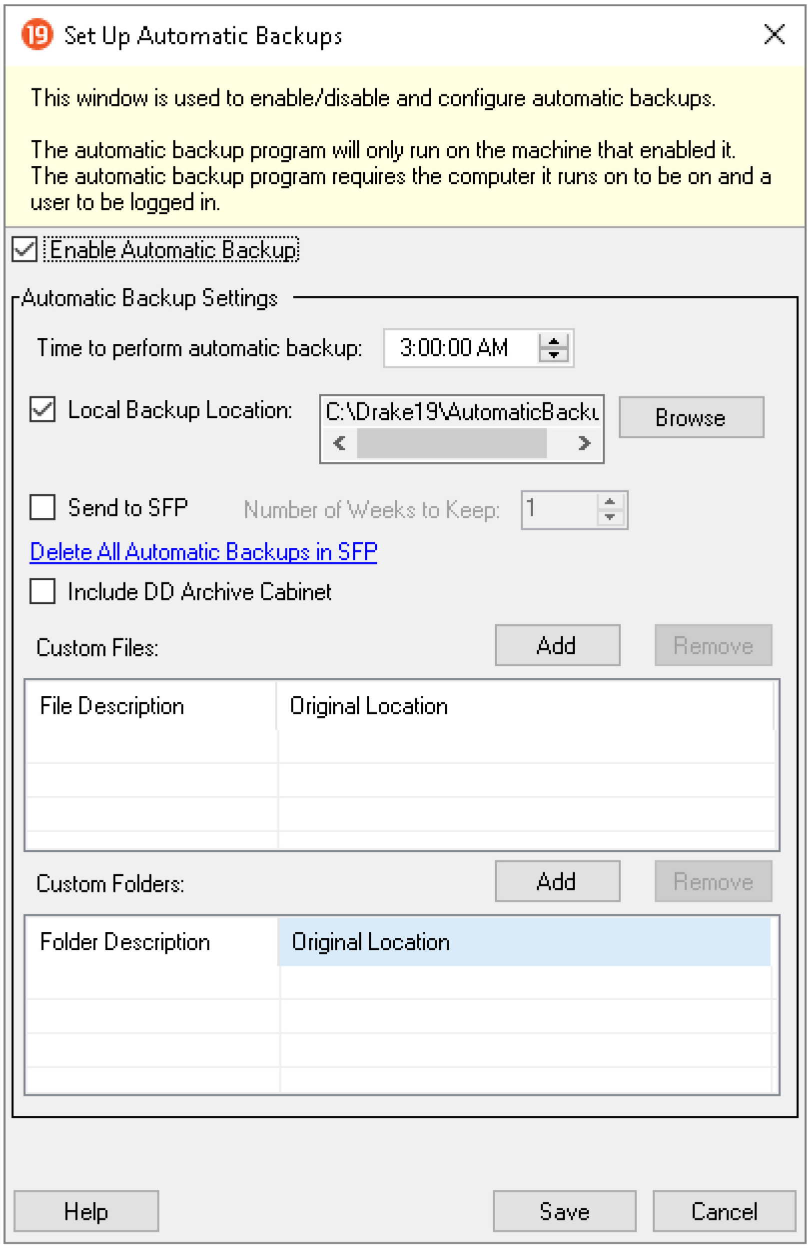


1. At the top left corner of the **Create Selective Backup** dialog box, select **Customize Backup.**
2. At the top right corner of the dialog box, click **Browse** to choose a backup location.
3. Click the icons on the left side of the dialog box and your files will be listed. (By default **All Drake Files** are listed.) The icon you click determines the filter check boxes that appear at the top of the list. Note the check marks in the **ID** column indicate the selected files that will be backed up. The selected files will be listed in the **Summary** pane on the right side of the dialog box.
4. (Optional) The **Custom Items** icon at the bottom left allows you to add non-Drake Tax files to your backup. In the **Customer Files and Folders** window, click **Add** on the **Custom Files to Include** line to include individual files, or click **Add** on the **Customer Folders to Include** line to add entire folders to the backup.
5. At the bottom right of the dialog box, enter a name for the backup in the **Backup Description** field.

6. To include Drake Documents files, mark the **Include DDM Archive Cabinet** check box. You can back up your files to a local or network location and to SecureFilePro at the same time by marking both check boxes in Step 1. Next click **Backup**.

Automated Backup

Use the automated backup feature to have the program automatically back up your files at a specified time each day. Select the **Enabled** check box to turn on the automatic backup feature. Select **Configure Automatic Backups** to open the dialog box. Select a time and location for the backup. Your computer must be turned on at the time of the scheduled automatic backup.

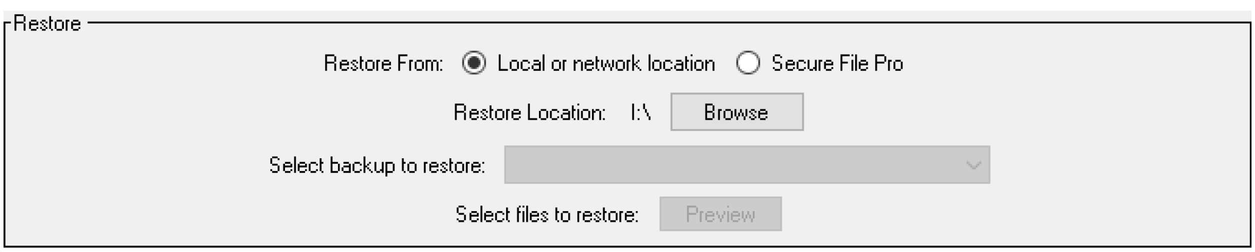


Restoring Your Data

To restore your data from another location, drive, or from SFP:

1. From the menu bar of the **Home** window of Drake Tax, go to **Tools > File Maintenance > Restore**, to open the **Backup and Restore** dialog box.

2. At the bottom of the **Backup and Restore** dialog box, select the location to restore your files from—a local or network location or SecureFilePro.
3. If from a local or network location, click **Browse** and find the backup you want to restore. Select the name of the backup you want to restore.
4. Click **Preview**. This opens the **Restore Items Form Backup** window, where you can choose to **Restore Everything** or choose **Custom Restore**.
5. For a custom restore, click the buttons on the left side of the window to find the files on your computer or network. The button you click determines the filter check boxes that appear at the top of the list. Select the items to be restored in the middle pane by placing a check mark in the box to the left side of the pane. (Note that selected files appear in the **Summary** pane to the right.) For non-Drake Tax files click **Custom Items** from the buttons on the left. When you're satisfied with your selections, Click **Restore**.



Changing a Client's ID Number

Changing a client's SSN, ITIN or EIN in the program requires more than simply making the change in data entry. To change a client's SSN, ITIN or EIN in the software go to **Tools > File Maintenance > Change ID Number on Return**.