

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 payments with Drake Portals using our seamless [Drake Pay™ integration](#).

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