

This document contains information about downloading, installing, setting up, and installing states for the demonstration version of the tax software.

Download and Install Drake Demo Software

If you received a disk with the demonstration software, insert the disk into your computer. If your computer is setup to auto-run disks, the installation screen will appear – proceed to page 3 for details on finishing the installation.

The process below describes an installation from the Drake Software Download Center. You must have a temporary Drake EFIN and a Drake e-file password to do this. They are supplied when you register your demo software.

*The downloaded demo file installs both Drake Tax Software and Drake Document Manager. To uninstall Drake Tax Software, or Drake Document Manager, simply delete the folders from the drive to which you installed them. **Caution: if you previously installed and used Drake Documents, do not delete the DRAKEDDM folder. It may contain data.***

If you already have a demo, but do not have a temporary EFIN and password, register the demo at [Drakesoftware.com](https://drakesoftware.com) – click **Service and Learning**, and choose **Get Started with Drake**. Click the blue “Register” link to register your demo – you will receive an email containing your temporary EFIN and e-file password. (Registration also is necessary if you plan to use the demo to e-file test returns.) To download the software, use your temporary EFIN and password to log in to <https://support.drakesoftware.com>. Navigate to **Resources > Download Center**:



If you have signed up for a free demo at [Drakesoftware.com](https://drakesoftware.com), you are already registered, and will have received an email with a link directly to the Drake Download Center.

Download and Installation Process

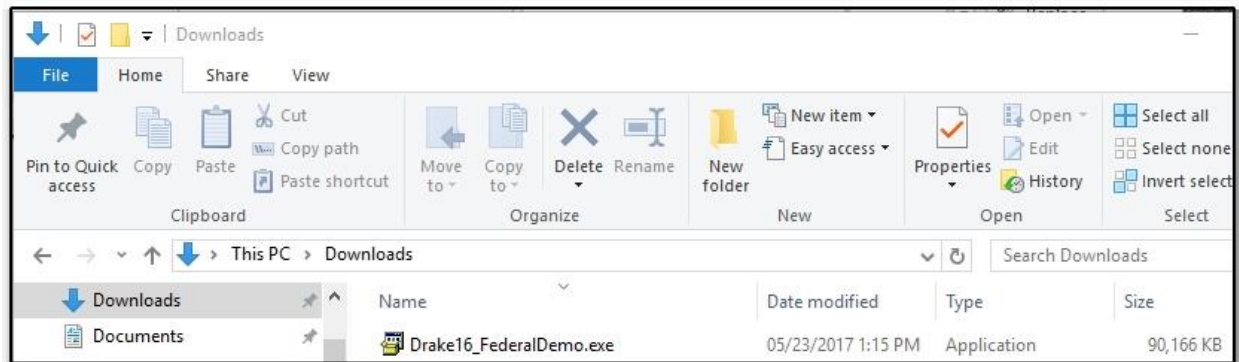
Once you have arrived at the Download Center, click on the software's evaluation version to begin the download:



The next screen displays the Drake License Agreement and explains the download process. When you are ready, scroll to the bottom and click **Download**:

Depending on the web browser you use and your computer's particular settings, the file may be available immediately and allow you to open it in order to begin the installation, or it may require you to first save the file. If you must save the file, choose to save it in a location that is easy to find, noting the file name so you can find it after download.

When the download is complete, look for the downloaded file where you saved, if you are not automatically prompted to open and run the file. In the example below, the file was saved in the 'Downloads' folder. Double click the file to begin installation.



Click **Yes** to confirm installation:

Once the files have completed extraction, the initial installation screen will appear. Select **Install Drake Software**.

Select a location to install the software, whether it be the local hard disk, or a network drive. Install to the root of your hard drive, not to a folder on the hard drive.

Drake Tax must be installed to a lettered drive (i.e., the C: drive, the T: drive, etc.). If the program is not installed to a lettered drive, or is moved to a location that is not a lettered drive, the program will not work properly.

The installation program creates a folder named DrakeYY (where YY is the year of Drake Tax) on the drive. Installation to the primary local hard drive is the default location and the Working Cabinet is the default DDM option. You also have the option to install state programs at this time. You can install all programs by clicking **Select All**, or individual states by clicking on the state name and clicking **Select**. When you have selected the appropriate installation location and any state programs you need, click **Next**.

The next screen displays the license agreement – once agreeing to the license, select the evaluation version of the software to install, and click **Next**, then **Install**. Progress bars will let you know the status of the installation.

You will be prompted once the installation is complete. Click **Finish** to exit.

You will have an icon on your desktop for the Drake 20YY software

You now return to the **Installation Program** screen. Click **Exit** to exit, or use the **Quick Start** or **Drake Resource Center** links for more information about the program.

Your desktop will now have a program icon. Double-click the icon to open the program.

Set Up the Demo Software

When the software opens, you will be prompted to set up a password, as well as security questions that will help you access the software in the event that you forget your password.

Passwords and security answers are case and space sensitive, so it is recommended that these are chosen with care.

The **Installation Assistant** will appear next. Entering your Drake account number, temporary EFIN, and e-file password will allow you to install updates, download state programs from the internet, and test e-file.

The pre-filled **Firm Setup** screen opens. If you intend to test e-file, enter a string of 1s for the firm EFIN, or enter your valid IRS EFIN in the **EFIN** field. Entering your temporary EFIN here will cause an error when you attempt to e-file. Also enter a valid phone number in the **Phone Number** field. When you complete the screen, click **Save**. For an explanation of the available fields, click the **Help** button.

Next, go to **Setup > Preparers**.

The pre-filled **Preparer Setup** screen opens. **ADM**, the administrative login, already exists for administrative functions within the software. The software has also created a demo preparer account for your use. Highlight preparer number **1** and click **Edit Preparer**. Complete the **PIN signature** field, located in the **Return Signature Options** section. Note that the **PIN Signature** is any five-digit number (not all zeros). Create your own PIN number. You will be able to use the **Login Name** to log in to the software as the preparer. For an explanation of the available fields, click the **Help** button. Click **Save**, then **Exit**.

State Program Installation

If you did not elect to install state programs during installation, or need to install an additional state program at a later time, open the software and go to **Tools > Install State Programs**. The **Install State Programs** screen opens. Use the drop list to select **Drake Download Center**. Select the state you want to install, and click the **Select** button.

The selected state moves to the **States Selected for Installation** window.

When you have completed selecting states for installation, click the **Install** button. The software downloads and installs the state program. When the process is complete, "State installation(s) complete!" appears over the progress bar and the **States Selected for Installation** window clears. Click **Exit**.