

DrakeTax[®] ONLINE

QUICK START GUIDE

INTRODUCTION

Drake Tax Online (DTO) is an online platform that delivers flexible, up-to-date tools for preparing and managing tax returns.

- Access from any internet-enabled device
- Interview based and customized data entry
- In-App messaging
- Integrates with Drake Portals and e-Signatures

See the [Drake Tax Online Overview](#) video.

SETTINGS

Easily access setting up your office, software settings, and pricing in step-by-step prompts.

Access Drake Tax Online - Quickly access your [Drake Tax Online Dashboard](#) directly through Drake User Manager. From the DTO Dashboard, manage preparers access, specific tax years, history, and link to Drake Portals.

Set Up Business Information - Upon the initial launch of [Set Up Tax Year](#) from the DTO Dashboard, you'll be guided through a series of required setup prompts. The prompts will include mandatory information, as well as setup preferences and pricing options.

Manage Preparers - Once a preparer has been entered on the DTO Dashboard, be sure to complete [Preparer Set Up](#) in the Drake User Manager to link their DTO Dashboard profile and grant them access to the software.

HOW TO

Prepare Returns - The interview-based interface makes [Return Processing](#) simple by walking preparers through each step. If you prefer, bypass the interview and access specific forms directly to complete the return.

Seamlessly switch between online and desktop data entry, for additional features and forms. (video: [Desktop Integration](#))

Offer Bank Products - Provide bank products to increase revenue and offer additional refund options to your customers. (video: [Banking](#))

Collect Payments - Accept payment instantly through Credit/Debit Card, Refund Pay, or ACH at the time of service. (Knowledge Base article "[18794](#)")

Utilize Tools - Quickly view your EF Database, use interoffice messaging, and provide customers with a fast tax estimate. (video: [General Tools](#))

Generate Detailed Reports - View and filter reports directly within a specific tax year from DTO. (video: [Reports](#))

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Professional Tax Solutions