

## Advance Copy of KB Article 18824

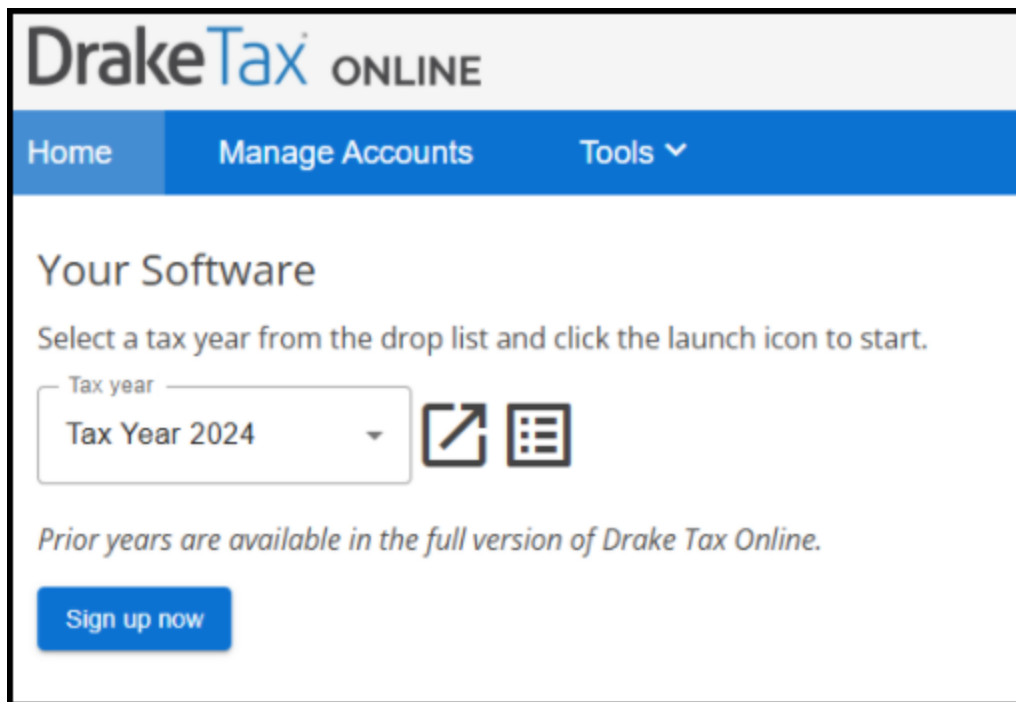
If you are interested in a free trial of Drake Tax Online, please contact the Sales team. They will provide you with detailed information about the program and send you a link to the trial URL.

1. Enter and verify your email address.
2. Click **Send me Access Link**.



The screenshot shows a web form titled "DrakeTax ONLINE". Below the title is the heading "Instant Access to Your Drake Tax Online Trial". A paragraph of text reads: "Start your free trial of Drake Tax Online - no setup required. Just enter your email address below, and we'll send you a secure magic link for instant access to the trial experience." There are two input fields: "Email Address" and "Verify Email Address". Below these is a button labeled "Send me Access Link". At the bottom, there is a reCAPTCHA widget with the text "protected by reCAPTCHA" and "Privacy - Terms", and a circular arrow icon.

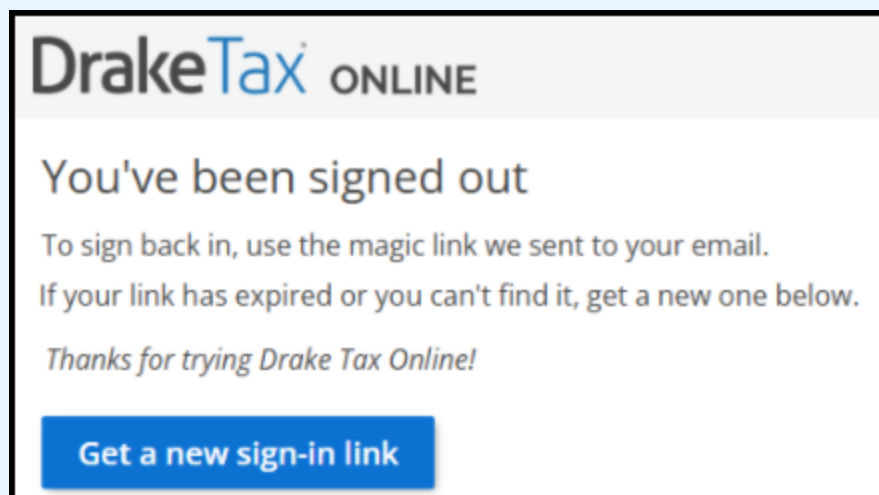
3. Check your inbox for an email from noreply@DrakeTaxOnline.com. Click the link to launch your instance of the Drake Tax Online trial.
  - If you do not see the email in your inbox, check your spam folder.
4. On the **Home** tab, click the arrow icon to launch the year-specific version of DTO.



5. Open or create a test return to explore data entry. You can create business or individual test returns. See [Drake Tax Online - Creating a Return](#) for details.



**NOTE** If you are signed out due to inactivity, use the email link that you received earlier to relaunch the trial.





If the link has expired, click Get a new sign-in link.

**DrakeTax** ONLINE

Your access link has expired

It looks like this magic link is no longer valid, it may have already been used or timed out.

[Get a new sign-in link](#)

## Limitations

As you use the trial, please note that some features are not available, including:

- Manage Accounts tab
- Drake Desktop Integration
- e-Filing

## Internal FAQs

### How can a customer get a free trial of Drake Tax Online?

Verify that they are a good fit for Drake Tax Online. Then, send them the following URL

<https://cloud.drakezero.com/hub/trial-signup>

### Can Support send the customer a link to the trial signup URL?

No, all trial/demo inquiries should be directed to the Sales team.

### What steps should the customer take to complete their trial signup?

The customer should:

1. Enter and verify their email address.
2. Click Send me Access Link.
3. Check their inbox for an email from noreply@DrakeTaxOnline.com.

### What if the customer hasn't received the email with the trial link?

Advise the customer to check their spam or junk folder if the email does not appear in the inbox.

## **How does the customer launch their Drake Tax Online trial?**

- Once the customer receives the email:
- They should click the link in the message to launch their Drake Tax Online (DTO) trial instance.
- On the Home tab, they will need to click the arrow icon to start the version of DTO for the relevant tax year.

## **What can the customer do within the trial environment?**

The customer can open the test return to explore and practice data entry in the platform.

## **What happens if the customer is signed out due to inactivity?**

The customer should use the original email link to relaunch their trial session.

## **What should the customer do if the sign-in link has expired?**

The link expires after an hour. The customer can click Get a new sign-in link to get a new access link. If they use the same email address, their prior test entries will still be visible.

## **Are there any limitations in the trial version?**

Yes, the following features are not available in the free trial:

- Manage Accounts tab
- Drake Desktop Integration
- E-Filing

## **What device must the customer use for the trial?**

Drake Tax Online supports access from any internet-enabled device.

## **Will the customer's trial data be transferred to the full version upon purchase?**

No, the trial is limited to test returns. No live data or configurations will be carried over to the full version of DTO after purchase.

## **How can the customer purchase the full version of Drake Tax Online?**

The customer should contact the Sales team to complete their purchase.