

# DrakePortals®

## QUICK STARTGUIDE

### INTRODUCTION AND BASICS

Begin with an overview of what Drake Portals can do and how it fits into your workflow.

#### Drake Portals Overview

Get a high-level introduction to features like secure file exchange, e-signatures, payments, and client communication. [WATCH VIDEO](#)

#### Taxpayer Portals Basics

This video walks clients through logging in, uploading documents, e-signing, and more.

*Tip: Send this to clients early to reduce questions and support calls.* [WATCH VIDEO](#)

### STEP 1: Set Up Your Portal

Before working with clients, configure your system and team access.

#### Portals Settings

Set up and customize your portal, including firm details, preferences, and configurations. [WATCH VIDEO](#)

#### Employee Setup

Add users and control employee access to ensure the right level of permissions across your team. [WATCH VIDEO](#)

### STEP 2: Add and Manage Clients

Now that your portal is set up, bring your clients into the system.

#### Client Setup

Learn the different ways to create client portal accounts, including batch creation for efficiency. [WATCH VIDEO](#)

### STEP 3: Work with Clients

Use Drake Portals to exchange documents, collect signatures, and move returns forward.

#### Feature Overview

Get a high-level introduction to features like secure file exchange, e-signatures, payments, and client communication. [WATCH VIDEO](#)

#### Requesting File Approval

Send draft returns and other documents to clients for review and approval. [WATCH VIDEO](#)

#### e-Sign

Enable clients to securely sign documents remotely. [WATCH VIDEO](#)

#### Guest Exchange

Send and receive documents without requiring a full client portal account. [WATCH VIDEO](#)

### STEP 4: Monitor Activity

Track usage and stay informed on portal activity.

#### Portals Reports

View reports on portal usage, client activity, and document workflows. [WATCH VIDEO](#)

### PRO TIPS FOR SUCCESS

- Start by watching the [Overview](#), then move through each step in order.
- Share [Portals Basics](#) with clients to improve adoption.
- Use [batch client creation](#) to save time during onboarding.
- Leverage [Guest Exchange](#) for one-time or quick interactions.