



WHAT'S IN THIS SHIPMENT

Drake Software CD, including:

- Software for sending live transmissions to the IRS and approved states.
- Federal and state tax compliance programs. Most state forms and packages are live on this CD. Refer to your resident state shipment letter for more details. (All state letters are included on this CD in PDF form and through the software at **Help > Online Resources.**)
- Software tools, reports, setup, and Drake Document Manager.
- The *2014 Drake Software User's Manual* in electronic format. If you prefer a hard copy, you can print one from the CD or order one directly from Drake for \$25 (plus tax, shipping, and handling). To order, go to *Support.DrakeSoftware.com > Training Tools > Manuals* and click the link in the right side of the window.
(**Note:** The manual on this CD contains new and revised content since the previous software release. If you have already saved a PDF version of the 2014 manual to your computer, you should save a new copy from this CD.)
- The initial release of Client Write-Up 2015, Drake's payroll and write-up program. CWU is free to full-version tax software customers (\$295 for PPR customers).

SOFTWARE INSTALLATION

1. Close all open programs on your computer.
2. Insert the 2014 Drake CD into the CD drive. Wait for the **Drake 2014 Software Programs** window to be opened, displaying two installation options: **Install 2014 Drake Tax Software** and **Install Drake Client Write-Up**.
3. Click the icon to **Install Drake 2014 Tax Software**.
4. Read and accept the Drake Software 2014 License Agreement. Click **Next**.
5. The **Install Drake 2014 Tax Software** and **Install State Tax Programs** options are selected by default. Clear the **Install State Tax Programs** check box if you want to install states later. Click **Next**.
6. Select the drive on which to install the software, or select **New** to install it to a new location.
 - a) Installing test returns is automatic with new installations but is optional when replacing existing Drake installations.
 - b) If this is the initial installation, you will be asked to enter your account number and the serial number from your packing slip. (Save your packing slip! You will need your serial number and account number for subsequent installations.)
7. Click **Next**.
8. If you chose **New** in Step 6, select the drive on which to install Drake. Click **Next**.
9. If you chose to install states in Step 5, select the states to install and click **Next**.
10. Select a cabinet for use with the DDM. If you choose the Archive Cabinet, select the drive where your DDM files will be stored. (Working Cabinet files are stored within the software.) Click **Next**.
11. Click **Install** and wait for installation to be completed.

REMINDER: Save your packing slip! You will need your serial number and account number when installing subsequent Drake CDs. In addition to your EFIN, your account number – and

password – on your packing slip must be entered on the ERO setup screen along with your EFIN (**Setup > ERO**).

To retrieve a misplaced serial number, go to *Support.DrakeSoftware.com*, and from the blue menu bar on the left, click **My Account > My Serial Numbers**. The Drake account number and the Drake and Client Write-Up serial numbers for the logged-in EFIN will be displayed.

DOWNLOADING DRAKE SOFTWARE

The software is also available for download from the Drake Support website. Go to *Support.DrakeSoftware.com*, and from the blue menu bar, click **Resources > Download Center > Drake Software 2014**. Scroll down and click the blue **Download** button.

To download state programs, open Drake's tax software to the **Home** window, go to **Tools > Install State Programs**, and choose the option to install states from the Internet.

ELECTRONIC FILING

In accordance with IRS regulations, you cannot submit electronic returns to the IRS until you have received all W-2, W-2G, and 1099-R forms from the taxpayer.

IMPORTANT DATES

- January 2, 2015:
 - Drake begins receiving 1040, 1120, 1120S, 1065, and 990 returns for 2012 through 2014
 - Drake begins receiving 1041 returns for 2013 and 2014
 - Drake begins transmitting to the CA Franchise Tax Board
 - Drake begins receiving 94X returns
- January 9, 2015: Drake begins transmitting 1120, 1120S, 1065, 990 and 1041 returns to IRS
- January 20, 2015: Drake begins transmitting 1040 returns to the IRS; customers begin receiving first IRS 1040 acknowledgements and bank acknowledgements

NEW DIRECT DEPOSIT RESTRICTIONS

New IRS restrictions allow you to directly deposit *no more than three refunds* into any one bank account or pre-paid debit card. Any subsequent refunds using the same routing/account information will be refunded with a check mailed to the address of record for the SSN/EIN. Taxpayers will also receive a notice informing them that the account has exceeded the direct deposit limits.

FORMS, SCREENS, AND FEATURES

For descriptions of the latest forms, screens, and features in the program this year, read "New for 2014," on the **FAQ** screens in the various packages.

ORGANIZE LITE

GruntWorx's new Organize Lite product allows you to take advantage of the Organize product with two key differences: turn-around time and price. For \$99 (unlimited for one tax season) Organize Lite provides all the features and benefits of the original Organize product, minus the human data validation. With acceptable scan quality, you receive an organized, searchable PDF document in minutes, and it is stored directly in your client's folder within Drake.

As with Gruntworx's traditional Organize feature, you take a stack of client source documents and scan them as-is into a PDF file to be automatically organized for you. No organizing the documents pre-scan, and no pulling out documents that are irrelevant to the tax return. All you have to do is pull out any staples or paper clips before scanning, upload the documents to GruntWorx, and receive a PDF with those documents classified, organized, and bookmarked.

MERCHANT CREDIT CARD PROCESSING

Sign up with e-Pay to accept your customers' credit and debit cards as payment for your services. Even if you are already taking credit cards, check out the e-Pay program – it's integrated with Drake and you may be able to save some money.

To learn more, go to *Support.DrakeSoftware.com* > **Resources** > **E-Pay Merchant Card Processing**, or contact EPS Financial by email (*merchantsales@EPSfinancial.net*) or by phone at (844) 244-1787.

To accept a payment, click e-Pay from the **Data Entry Menu** toolbar inside a return, and either swipe a card or enter the card information.

See Chapter 6 of the *2014 Drake Software User's Manual* for more details on using this feature.

AUDIT PROTECTION

Drake is again making Protection Plus audit assistance available to you and your customers.

Your benefits include increased revenue, relief from audit headaches, and reimbursements to the taxpayer of up to \$2,500 in event of a legitimate preparer error. Protection Plus's bilingual professionals work directly with your client and the IRS.

Your customers benefit by having professional help with IRS audits, denied credits, tax debt relief assistance, and IRS identity theft assistance. Covered customers can receive up to \$2,500 reimbursement for legitimate preparer errors.

Cost to the tax preparer: \$0. Nothing. Cost to the taxpayer: a minimum of \$39.95. You can add up to \$20 to the fee to charge for your services related to this audit assistance product.

For more information about Protection Plus, go to *MyProtectionPlus.com*, or call (866) 94-AUDIT.

SECUREFILEPRO

SecureFilePro, a secure file-sharing site, allows you to send and receive documents on your own secure Web portal. Customize your e-mail, brand your site, manage folders, and upload files. Your customers can upload files to you, download files from you, and manage their own private portal.

To sign up for SecureFilePro, go to *SecureFilePro.com* and click **Sign Up**.

Tutorials are available at *Support.DrakeSoftware.com* > **Training Tools** > **Tutorials**.

See Chapter 13, "Suite Products," in the *2014 Drake Software User's Manual* for more information on SecureFilePro.

STAFF TRAINING

Take advantage of the following Drake tools to learn Drake Software and train your staff:

DRAKE UPDATE SCHOOL WEBINARS

See the Drake Update Schools content in webinar format. These webinars cover the same great content as the update schools: *What's New in Drake* and *2014 Tax Law Updates*. CPE credits are available for these webinars. Go to the Drake e-Training Center at *DrakeETC.com* to view the dates and times for these webinars. (See "Drake ETC," following, for details on logging in.)

DRAKE UPDATE SCHOOL DVD

If you missed the Update Schools, purchase our Update Video to view on your computer or DVD player. To order the video, go to *Support.DrakeSoftware.com* > **Resources** > **Supplemental Resources**. For only \$39.95 (plus tax and shipping), this DVD includes "What's New in Drake," "Tax Law Updates," and "Current Events in the Tax Industry."

CPE credits are not available for the DVD format.

DRAKE ETC

Drake's e-Training Center (ETC) is your site for Drake Software training and Continuing Professional Education (CPE). Drake ETC offers a variety of interactive webinars, tax courses, videos, online tutorials, and practice returns, each designed to help develop your knowledge of Drake and federal tax topics. Track your progress, earn CPE credits, and print CPE certificates online.

Drake ETC's webinars cover many Drake Software and tax-related topics, with new webinars added every month. Webinars are presented with panelists available to answer viewers' questions during the event. CPE credits are available (no test required).

To access Drake ETC, go to *DrakeETC.com*. You'll need your EFIN and Drake password to set up an account which you'll use to log in to Drake ETC. From the ETC "Welcome" page, go to the blue menu bar and click **Webinars > Available Webinars** for a list of upcoming webinars. Keep up with webinars you've viewed, and with your CPE progress, at **Webinars > My Webinars**.

EARN MORE WITH DRAKE HEALTH REFERRAL PROGRAM

DrakeHealth is an incentive-based program that gives you an opportunity to earn revenue by referring people to affordable health insurance options through eHealth, a Drake partner and the nation's leading online source of health insurance. eHealth provides a gateway to more than 180 insurance carriers offering more than 13,000 plans.

You receive a \$50 referral fee for each completed application for an eligible plan properly submitted to and received by eHealth. (The referral fee is for a completed *application*; it is not contingent on the purchase of health insurance.) Drake will deposit referral earnings in your bank account (if you offer bank products) or mail a check directly to you (if you do not offer bank products).

For details, go to *DrakeHealth.com*.

Spanish Support: Si le gustaría hablar con alguien en Español, llame al (828) 349-5500, y trataremos de conectarle con uno de nuestros agentes de apoyo que hablan Español.

Note: If you received a damaged or bad CD, contact Drake Software Support at (828) 524-8020; by fax at (828) 349-5718; or by e-mail at *Support.DrakeSoftware.com*. Include your name, company name, and EFIN with your request.

For the latest news and information on the tax-preparation industry, follow Drake Software on Twitter (www.twitter.com/drakesoftware) and Facebook (www.facebook.com/drakesoftware), and at Taxing Subjects (<http://TaxingSubjects.com>).