



Tax Season Ready: How Drake Users Save Hours with Smarter Document Management



Introduction:

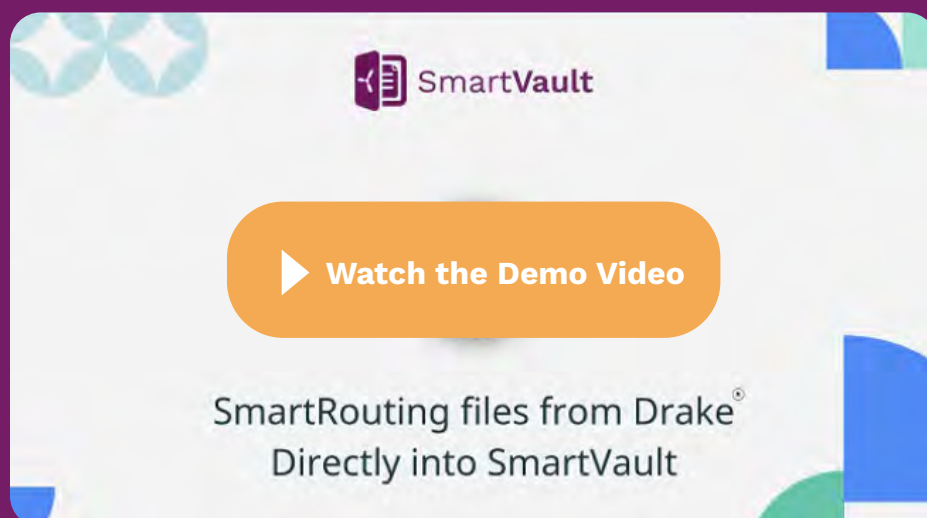
Drake Handles Tax Prep. What About Everything Else?

Drake Tax® is a powerhouse. It's fast, reliable, and built to handle tax returns efficiently. But that's only part of the job. Most of the time drain happens *before* and *after* you open Drake:

- ✗ Clients send W-2s by text at 9 PM
- ✗ Hours disappear digging through inboxes for attachments
- ✗ Files get renamed or lost under multiple versions

It's not Drake's fault. It just wasn't designed to manage the flood of documents, signatures, and client communication that surround every return.

That's where SmartVault comes in. This guide explores how to eliminate the busywork around tax prep so your team can focus on serving clients and preparing returns.



“Why Not Just Use Drake Documents?”

Drake includes Drake Documents®, which works fine as an electronic filing cabinet. If basic storage is all that’s needed, it does the job. But most firms need more than a filing cabinet. They need a way to collect, organize, securely share, and track documents, without constant email back-and-forth.

Here’s how the two compare:

	SmartVault	Drake
Client Engagement		
Client Intake Form	✓	✓
Pricing Engine & Quoting	✓	✓
Engagement Letters w/ eSignature	✓	✗
Accept Payment	✓	✗
Client Onboarding		
Automated Folder Structure Creation	✓	✗
Customizable Client Organizer	✓	✓
Secure Source Document Collection	✓	✓
Document Management		
Cloud-Based 24/7 Access	✓	✗
Print and Auto-Route into DMS	✓	✗
Link multiple clients to one vault	✓	✗
OCR of Scanned Documents	✓	✗
PDF to Print functionality	✓	✓
Integration with multiple tax prep apps	✓	✗
Client Portal		
Included in DMS Price	✓	✗
Custom Branded Portal	✓	✗
Integrated eSignature Workflows	✓	✗
Security & Compliance		
FINRA, SEC, GLBA Compliance Support	✓	✓
SOC 2 Compliant	✓	✓
Platform Reliability		
Specialized for Accounting	✓	✓
Mobile Access	✓	✗
Unlimited Storage and Clients	✓	✗

“

My clients upload documents directly into designated folders. This has saved me countless hours of admin work and given my clients an easy, secure way to submit their paperwork.”

Amanda Leddington
A.H. Financial Management Services



The 7 Document Pain Points Every Drake User Knows

Every tax professional knows these challenges well. They aren't caused by poor processes—they're the natural result of trying to do modern work with tools that weren't built for today's client expectations.

1

Inbox Overload

Fifteen minutes per client disappear just downloading, renaming, and sorting attachments.

2

"Where Do I Send This?"

Clients still email, fax, or drop off paper despite clear instructions.

3

The Missing Document Chase

Returns stall waiting on one form. Follow-ups pile up.

4

Phone-Photo Headaches

Blurry or incomplete W-2 photos waste valuable time.

5

Manual Filing Bottleneck

Drake prints perfectly, but files still need to be manually saved, renamed, and filed.

6

Signature Follow-up Loop

Form 8879 is handled in Drake, but other signatures require manual tracking.

7

Compliance Uncertainty

The FTC and IRS require secure handling, but email attachments create risk.

Identifying these pain points is the first step toward solving them. The next step is knowing what to look for in a tool that truly complements Drake.

What To Look For in Drake-Compatible Document Management

Not every “Drake integration” actually saves time. True integration eliminates manual steps and ensures documents move seamlessly between clients, staff, and Drake. Here’s what defines a best-in-class system:



Must-Have #1: Direct Drake Integration

Print [directly from Drake](#) and have documents land in the right folders, automatically. No saving, renaming, or searching.



Must-Have #2: Secure Client Portal (Branded)

A modern, mobile-friendly experience for clients to upload, sign, and access documents anytime without emailing attachments.



Must-Have #3: AI-Powered Document Collection

Look for a system that can accelerate and personalize document collection. Coming Fall 2025, [SmartRequestAI™](#) will analyze prior-year returns to build personalized document request lists for each client. Instead of a generic organizer, every client receives a tailored checklist, they upload exactly what’s needed, and you get an organized workpaper.



Must-Have #4: Comprehensive E-Signature

Drake covers 8879, but other documents—engagement letters, organizers, disclosures—need secure digital signing with KBA verification.



Must-Have #5: Custom Folder Routing & Templates

Every firm has its own workflow. The right system lets teams configure document destinations and maintain consistency.



Must-Have #6: Security & Compliance You Can Prove

SOC 2 Type 2 certification, encryption, and audit trails ensure compliance documentation is always ready.

Once those boxes are checked, document management stops being an administrative burden and becomes a smooth extension of Drake itself.

SmartVault for Drake: How It Works

SmartVault is the [document management and client portal](#) platform built specifically for accounting and tax professionals. It brings every document, client, and workflow together in one secure place, so you can stop relying on email attachments, network drives, and scattered folders. With SmartVault, firms collect, organize, share, and sign documents through a single, secure system that fits naturally into how accounting teams already work.

It's cloud-based, easy to use, and built to integrate with Drake. The result: smoother collaboration, better compliance, and less manual effort.

That brings us to one of SmartVault's most powerful features for Drake users—[SmartRouting](#), the technology that connects Drake directly to SmartVault for automatic document flow.

SmartRouting: When Documents Organize Themselves

Imagine if documents could organize themselves—no more searching, renaming, or wondering “where did I save that?” That's exactly what SmartRouting does. It connects Drake directly to SmartVault so returns automatically route to the right folders.

What SmartRouting Delivers

Automatic Organization

- Instantly routes Drake output to organized, secure client folders
- Creates standardized folder structures automatically
- Maintains consistent file naming based on your custom conventions
- Reduces time spent filing and tracking documents

Intelligent Processing

- Adapts to your firm's preferred organization style
- Handles both individual and batch processing effortlessly

Error Reduction

- Eliminates manual filing mistakes
- Reduces the risk of misplaced documents
- Ensures consistency across your entire firm

SmartRouting isn't just automation—it's confidence that every file lands exactly where it should. No missing folders. No wasted clicks. No late-night organizing sessions.

More Than Storage: Your End-to-End Workflow Covered

From the moment a client signs their engagement letter to the day their return is archived, SmartVault keeps every step organized, secure, and seamless. Documents flow automatically, signatures happen in seconds, and clients always know where to find what they need. This is about managing your entire process with clarity and control.

Best Practices Across the Workflow



Engage: Start strong by automating client onboarding and engagement. Streamlined proposals, pricing, and engagement letters set expectations early. A secure client portal should be established from day one so document sharing feels seamless and professional.



Collect: Eliminate document chaos by using structured requests and mobile-friendly uploads. Personalized checklists reduce confusion, while tools like mobile scanning ensure even phone pictures become polished, usable PDFs. Progress dashboards help staff and clients stay aligned, reducing the need for manual follow-ups.



Launching Fall 2025, SmartRequestAI uses prior-year returns to generate personalized questionnaires. Clients get clear, relevant requests and can upload from any device. Documents auto-route to the correct client folder, and staff receive organized, review-ready workpapers. [Learn more.](#)



Prep & Review: Documents should flow directly into tax software and be auto-filed into the correct client folders. Review workflows should be structured with role-based access and version control, so collaboration doesn't mean confusion. Scanned files should convert automatically into usable digital documents, saving hours of manual prep.



Deliver: Returns must be delivered securely. Clients should be able to e-sign Form 8879 with KBA verification and access their completed returns in a protected environment. Ideally, invoices and payments can be handled in the same portal, with built-in controls ensuring nothing is released until payment is received.



Archive: A modern workflow ends with unlimited, compliant storage. SOC 2 Type 2 protections, IRS 4557 and FTC Safeguards compliance, and features like advanced search, audit logs, and role-based access mean documents remain accessible, protected, and professionally managed long after filing season ends.

Your Workflow: With & Without SmartVault

Automatically and effortlessly route and organize files with SmartRouting by SmartVault

With SmartVault

Without SmartVault

Onboarding Clients & Requesting Documents

Send a request list showing clients what forms and documents to complete and upload online



Manually request and remind clients to submit documents and forms via email, mail, or bringing them to the office

Track submittal status in a dashboard and quickly send clients reminders



Manually track submittal status and remind clients

Receive a notification when documents are uploaded; they're automatically saved in the correct folders



Manually organize, name, and save documents as clients provide them



Document Organization, Storage, and Staff/Client Access

Documents organized and stored digitally in a DMS and client portal



Documents scattered across folders, computers, and filing cabinets

Accountants, staff, and clients can securely access files anytime, anywhere

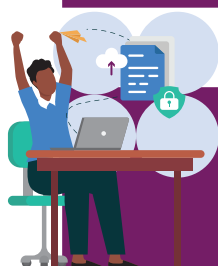


Difficult to find, organize, and share files

Can review, approve, sign, and share docs all through one system



No centralized digital storage for staff or clients to self-serve



Processing Tax Returns

Print returns from Drake to save them directly into SmartVault



Manually save return into DMS

Electronically share return with client to review and sign



Send completed return for client review and signature

Client signs the return electronically; it automatically routes to the correct folder



Clients return signed documents by mail, email, or dropping them off in person

SmartVault Onboarding & Training

Implementing new technology shouldn't feel overwhelming — and with SmartVault, it never does. From day one, our onboarding and training resources are designed to make firms feel supported, confident, and fully equipped to succeed.

A Partner in Your Firm's Success

Every firm receives access to personalized onboarding, best-practice guidance, and a library of live and on-demand learning. Our goal is simple: help your team adopt SmartVault quickly, confidently, and with measurable impact.

What You Can Expect

Training and onboarding options include:

- **Personalized Onboarding:** Work directly with a SmartVault Onboarding Manager to configure your account, map folder structures, and fine-tune workflows that fit your firm's needs.
- **Hands-On Training:** Choose between live expert-led sessions or on-demand SmartVault Academy courses that walk through setup, SmartRouting, and everyday use.
- **Guided Migration:** Transition from FileCabinet CS, ShareFile, or local servers effortlessly — with help preserving folder structures and data integrity.
- **Ongoing Guidance:** Get proactive workflow consultations, best practices for client onboarding, and tailored process recommendations as your firm grows.
- **Support That Knows Accounting:** Our U.S.-based Customer Care team offers real-time help via chat, phone, and email — backed by specialists who understand tax workflows.

Continuous Learning & Community

Every week, SmartVault hosts free educational webinars featuring product experts and industry peers who share practical workflows and success stories. Whether you're new to the platform or an experienced user, there's always something new to learn — and someone ready to help you get the most out of SmartVault.

The Value to Your Firm

SmartVault's onboarding and training programs are built around one idea: your success is our success. From setup to daily use, you'll have the tools, resources, and people to keep your firm efficient, secure, and ahead of the curve.

Your Tax Season, Simplified

Drake handles tax preparation beautifully. But everything before and after—the emails, document requests, signatures, and organization—that's where the hours vanish.

For Drake users specifically, SmartVault eliminates:

- Manual filing after printing returns from Drake
- Email attachments that clients lose or forget
- Separate eSignature tools that don't integrate
- Storage limitations that force you to archive or delete files
- The compliance uncertainty of scattered document storage

The next move is yours. See how Drake + SmartVault work together in a 15-minute demo.

See SmartVault in action

Schedule your demo today.

[Schedule A Demo](#)

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“SmartVault is the best investment I could have made and has provided me with the peace of mind to run my practice with confidence and in the most efficient manner possible.”

Drisa Carrizo, CPA