USER GUIDE

Drake Hosted
User Guide

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Support.DrakeSoftware.com
(828) 524-8020

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1 Introduction

Welcome to the Drake Hosted User Guide. Before you begin using the Drake Hosted service, please read this introduction, which includes an overview of the Service and the Account Manager Portal.

About Drake Hosted

Drake Hosted is designed to allow a firm's preparers to run the Drake desktop applications in the cloud. These applications include the Drake Tax Software, Client Write-Up, and the Drake Document Manager. Other applications available to be run in the cloud include: Microsoft Outlook, Microsoft Word, Microsoft Excel, Microsoft PowerPoint, Microsoft OneNote, and Microsoft Publisher. Using Drake Hosted provides access to these programs, and their data, from anywhere, at any time. You can also use your local peripherals, such as printers and scanners, with these programs. Because all data created using a Drake Hosted application is stored on Drake's servers, this data is always backed up and secure.

Signing Up to Use Drake Hosted

To sign up to use Drake Hosted, go to http://www.DrakeHosted.com. On the Drake Hosted page, click **Sign me up!** Once you submit basic information about your business, a Drake Account Setup Representative will call you to answer any questions you might have about Drake Hosted. They will also assist in setting up your account. After that, you will receive an order confirmation email, as well as a welcome email containing instructions on how to set up your account and install the Citrix Receiver. See "Installing the Citrix Receiver" on page 3.

IMPORTANT

Once you sign up to use Drake Hosted, you will receive an email detailing how to access the Account Manager Program (AMP) and how to set your AMP password. The link in the email for setting your AMP password expires in 24 hours.

Important Drake Hosted Terminology

Term — With Drake Hosted, you have the option of three auto-renewing terms for use of the Drake Hosted services on each station: monthly, biannually (6 months), or annually (12 months).

Site — A site is a tax office location that has agreed to the terms of the Drake Software license agreement and the Drake Hosted Agreement.

Station Username — This is a unique login name used to access the Drake Hosted Environment in conjunction with its corresponding Password. Do not think of a "Sta-

tion" as a specific computer. Think of it as an access login to the Drake Hosted environment. Just as you can log into your email account from any computer, you can log into Drake Hosted from any computer using your assigned Station Username. A unique Station Username can be used by multiple individuals from any supported device, but the system prevents a Station Username from being used simultaneously from different devices. A Station Username is unique to a site and cannot be shared among multiple sites, even if the sites are set up under the same Company. Each site can purchase up to 99 station Usernames.

Contacting Drake Support

Drake offers unparalleled telephone and e-mail support. Use one of the following methods to consult a member of the Drake Support team:

- **e-mail Support —** *Hosted@DrakeSoftware.com* — Recommended for simpler Drake Hosted questions.
- **Telephone Support —** (828) 524-8020 — Recommended for more complicated Drake Hosted questions.
- **Fax Support** — (828) 349-5718 — Drake replies to faxes with faxes, not phone calls.

Drake Support Hours	
December – April Monday – Friday, 8 a.m. – 10 p.m. EST Saturdays 8 a.m. – 6 p.m. EST	**May – November** Monday – Friday, 8 a.m. – 9 p.m. EST Saturday 9 a.m. – 5 p.m. EST

NOTE

To view the Drake Hosted Customer Service Agreement, go to: https://amp.drakehosted.com/PDF/Service_Agreement.pdf.

To view the Drake Hosted Billing Policy, go to: https://amp.drakehosted.com/PDF/Billing_and_Payment_Policy.pdf.

For the most up-to-date system requirements, go to: https://amp.drakehosted.com/PDF/System_Requirements.pdf.

2 Station Setup

Installing the Citrix Receiver

The Citrix Receiver is the gateway to the Drake Hosted environment and must be installed on each computer that will be accessing Drake Hosted.

IMPORTANT

Important Installation Notes

- Check to see if you already have a Citrix Receiver by going to Control Panel > Uninstall (or Add/Remove) Programs. If you have Citrix installed and are actively using it to access another service, contact Drake Hosted Support (*hosted@drakesoftware.com* / 828-524-8020) before proceeding with the installation. If you no longer use Citrix to access another service, uninstall the receiver, reboot your computer, and then proceed with our receiver installation instructions below.
- Complete the receiver installation on each computer you plan to use.
- Have your Station Username and Password available. You might need it during installation. You can locate this information in the Drake Hosted Account Manager. To access the Account Manager, see "Signing in to the Account Manager Portal (AMP)" on page 11.

To install the Citrix Receiver:

1. Go to http://receiver.citrix.com/.
2. Click the **Download Receiver for Windows** button.
3. After the file has been saved, access the **Downloads** folder through your browser.
4. Select *CitrixReceiver.exe* from the **Downloads** folder and click **Run**.
5. Click **Start** on the "Welcome to Citrix Receiver" screen.
6. Accept the license agreement and click **Next**.
7. Click **Next**. (*Do not select "enable single sign-on;" it does not apply to Drake Hosted.*)
8. Select whether or not you want to send data and usage statistics to Citrix. Then click **Install**. Please wait while the receiver installs.
9. When installation is complete, click **Add Account**.
10. Enter this server address: https://castle12.drakehosted.com, and click **Add**.
11. Enter your Station username and password, and click **Log On**.

Logging in to Drake Hosted

To log into Drake Hosted:

1. Click the Citrix Receiver icon from the desktop, program list, or sysem tray.
2. Enter your station user name and password.

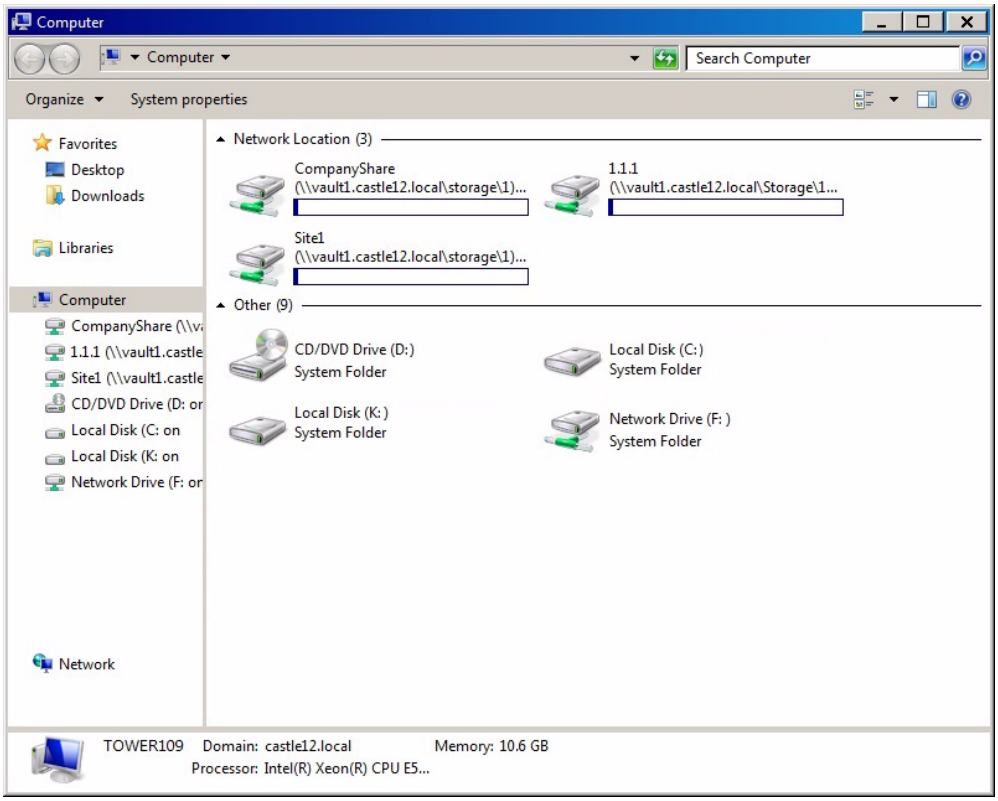
3 Running Applications in Hosted

File Browser Setup

The default view of the File Browser (Figure 3-1) does not display the full path (and drive letter) of the Drake Hosted drives (Figure 3-2).

Figure 3-1: Receiver **Home** window

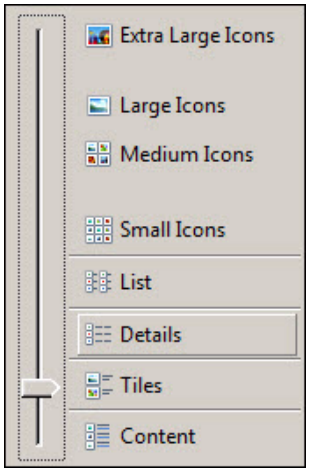
Figure 3-2: File Browser default view



To change the view of the File Browser, and see the full path of the Drake Hosted drives:

1. Right-click an open space on the File Browser window.
2. Select **View > Details**. Alternatively, click the **View** drop list near the top right side of the File Browser window, and select **Details** (Figure 3-3).

Figure 3-3: View options



3. Drag the column divider (Figure 3-4) between the **Name** and **Type** header to the right to widen the **Name** column and display the full path and drive letters.

Figure 3-4: Expand the Name column

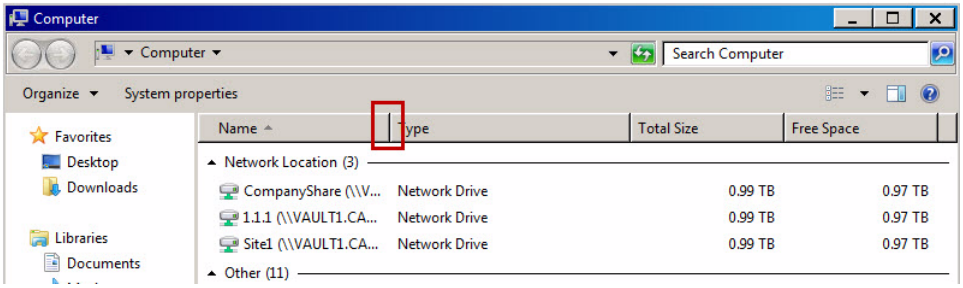
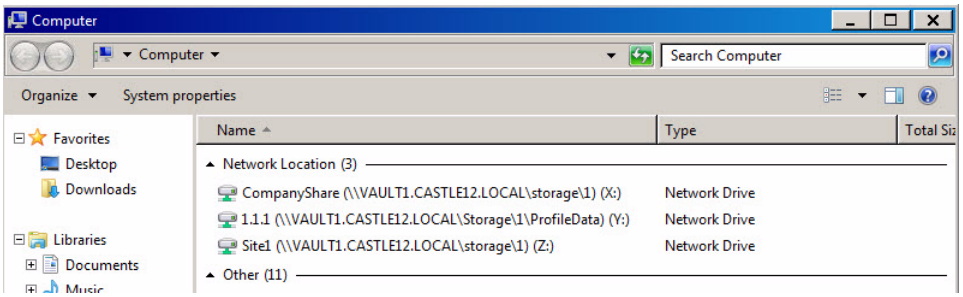


Figure 3-5: File Browser with columns widened to show full path and drive letters



Drive **X:** is the Company Share location. This location can be used to share files among multiple sites.

Drive **Y:** is the Station Profile location. Each Station has a unique, private Profile location for storing files.

Drive **Z:** is the Site storage location, and is accessible by each Station within the Site. Store files in this location if they need to be shared among all Stations. This is where the Drake programs are installed.

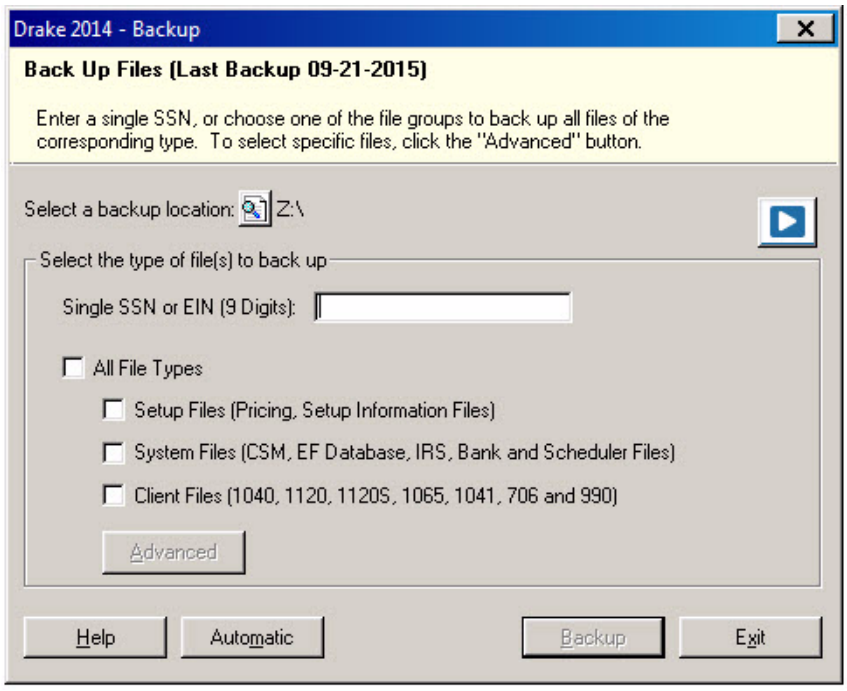
Backing Up Drake Hosted Files

When backing up files in Drake Hosted, both the Hosted drives (X:, Y:, and Z:) and the local drives are available.

To backup Drake Hosted files:

1. From the Drake Hosted **Home** page, go to **Tools > File Maintenance > Backup**. The Backup window displays (Figure 3-6).

Figure 3-6: Backup window



NOTE The automatic backup feature is not available in Drake Hosted.

2. Select the icon to select a backup location.
3. Click **OK** to return to the **Backup** window.
4. Select the file or file types to back up by entering the SSN or EIN, or by selecting **All File Types**, **Setup Files**, **System Files**, or **Client Files**.

5. If you marked a box, click **Advanced**. The **Advanced Backup** dialog box lists all files of the selected type. Filter or sort files as needed using the date and type filters on the right side of the **Advanced Backup** window.
6. Click **Backup**.

Moving Drake Data to Drake Hosted

Moving Drake data into the software in the Drake Hosted environment is a two step process.

1. Backup Drake files in desktop Drake
2. In Drake Hosted, restore the backed up files into Drake

Backing Up Desktop Drake Files

To backup Drake files from your desktop Drake environment:

1. From the Drake **Home** window, select **Tools > File Maintenance > Backup**.
2. Click **Select a backup location** and browse to the file-storage location. Select any location for these backup files.
3. Click **OK** to return to the **Backup** window.
4. Select the file or file types to back up by entering the SSN or EIN, or by selecting **All File Types**, **Setup Files**, **System Files**, or **Client Files**.
5. If you marked a box, click **Advanced**. The **Advanced Backup** dialog box lists all files of the selected type. Filter or sort files as needed using the date and type filters on the right side of the **Advanced Backup** window.
6. Click **Backup**.

NOTE

To backup Drake Document Manager files from the desktop Drake Archive Cabinet, click the **Backup** icon from the **DDM Archive Cabinet** toolbar. The default backup location is the DDMBackup folder on the same drive where desktop Drake is installed.

Restoring Drake Files into Drake Hosted

To restore Drake files into Drake Hosted:

1. Using the Drake Hosted File Browser, copy the local backup folder and paste it to the Drake Hosted Z: drive.
2. From the Drake Hosted **Home** window, select **Tools > File Maintenance > Restore**.
3. Click the button and browse to the backup folder on the Drake Hosted Z: drive.
4. Choose to **Restore All Files in Folder** or **Restore Select Files in Folder**.
5. Click **Restore**.

NOTE It is recommended to delete the backup folder that was copied to the Z: drive once the files have been restored.

Restoring DDM Files into Drake Hosted

To restore DDM files that were backed up from desktop Drake into Drake Hosted:

1. Using the Drake Hosted File Browser, copy the local DDM backup folder. The default location for these files is the **DDMBackup** folder on the same drive where desktop Drake is installed.
2. Still using the Drake Hosted File Browser, paste the folder to the Drake Hosted Z: drive.
3. Click the **Drake DDM** icon on the Citrix Receiver **Home** window.
4. Click the **Backup** icon on the **DDM** toolbar.
5. Click the **Restore** tab.
6. Click the icon to navigate to the location of the backed up Drake DDM files on the Drake Hosted Z: drive.
7. Use the **Select a Backup to Restore** drop list to select a backup to be restored.
8. Click **Start**.

NOTE It is recommended to delete the backup folder that was copied to the Z: drive once the files have been restored.

Bringing Prior Year CWU Clients into Hosted CWU

To bring prior year client information from the local version of Client Write-Up into the current year Drake Hosted Client Write-Up environment, you will use the Update Prior Year Clients function.

In the Hosted CWU, complete the following:

1. Go to **Tools > Update Prior Year Clients**.
2. Click the browse icon ( ) and navigate to the location of the local CWU program.
3. The client files in the selected location are displayed at the bottom of the dialog box. Select the individual client files by clicking the box, or click **Select All** to convert all clients in this location.
4. Click **Update**.

Copying Current Year CWU Clients into Hosted CWU

To bring current year client information from the local version of Client Write-Up into the current year Drake Hosted Client Write-Up environment, you will use the Backup/Restore feature.

1. In the local version of Client Write-Up, go to **Tools > File Maintenance > Backup**.
2. Select the clients to be backed up by clicking the boxes in the **Client Code** column.
3. Click **Backup**.
4. In the Hosted File Browser, browse to d:\CWUyyyy\CLIENTS\ (substitute the correct drive letter for the drive where local Client Write-Up was backed up in step 3, if not 'd', and "yyyy" represents the appropriate year of the CWU software).
5. Copy the **Backups** folder.
6. Paste the **Backups** folder into the Hosted location, Z:\CWUyyyy\CLIENTS\ (where "yyyy" represents the appropriate year of the CWU software).
7. In Hosted Client Write-Up, restore the backup by going to **Tools > File Maintenance > Restore**.
8. Select a client from the list at the top of the window. The files that have been backed up for the selected client display in the bottom portion of the window.
9. Select a file to restore.
10. Click **Restore**.

Setting Up Hosted CWU to Upload W2/1099 Information

In order to upload W2, 1099, and state wage report information electronically, the submission files must reside on either a local or a network drive. To set up CWU so that this happens automatically, complete the following in Hosted CWU:

1. Go to **Firm > Firm Info./Global Settings**.
2. Select the **Use Drake Hosted** check box. This makes the **Hosted to Local Path** field active.
3. Click the browse icon ( ) beside the **Hosted to Local Path** field and browse to the root drive of the local machine. It is not necessary to select a folder, just the drive.
4. Click **Save**. A folder named "CWUHosted_yy" (where "yy" indicates the two-digit year of the CWUHosted program) is created on the specified drive. The upload files will be created and reside in a client folder created under the CWUHosted_yy folder.

4 Account Manager Portal

The Account Manager Portal, or "AMP", is used by the administrator to manage the Drake Hosted experience. Use AMP to:

- Add and deactivate sites to the Drake Hosted service
- Add and deactivate stations at each site
- Add and remove applications to be used by each station
- Set up billing information for Drake Hosted services

Signing in to the Account Manager Portal (AMP)

To sign in to the Account Manager Portal, go to https://amp.DrakeHosted.com and sign in to AMP by entering your Account Manager **Username** and **Password**. Then click **Sign In**.

NOTE The first time you log in, you will be prompted to create a Station Nickname and Station Password for Station 1. This is required.

Figure 4-1: Account Manager Portal Sign-In screen

Once you set up your Drake Hosted account with Drake, you will receive an e-mail with instructions on setting your AMP password.

Lost AMP Username

If the Account Manager's username is lost or forgotten, click **Forgot username?** on the AMP login screen. Drake will send the username to the email address that is current in the Company Setup.

Lost AMP Password

If the Account Manager's password is lost or forgotten:

1. Click **Forgot password?** on the AMP login screen.
2. The Account Manager will be prompted to enter his or her AMP **Username** and click **Submit**. A link to reset the password is sent to the email address that is current in the Company Setup.
3. Click the link in the email to go to the **Set Account Manager Password** screen.
4. Answer the security question (see "General Settings" on page 16 for information on establishing the security question and answer), then enter, and repeat, a new Account Manager AMP password.

NOTE

The Account Manager's password must be between 8 and 25 characters long and meet at least 3 of the following requirements:

- At least one lower case letter
- At least one upper case letter
- At least one number
- Contain a special character, like !@#$%^&*()-+=.?

5. Once the password has been reset, return to the AMP login screen to login using the new password.

Terminating an Account During the Trial Period

NOTE

It is required that you retrieve your data prior to initiating a termination of account request. (See "Backing Up Drake Hosted Files" on page 7)

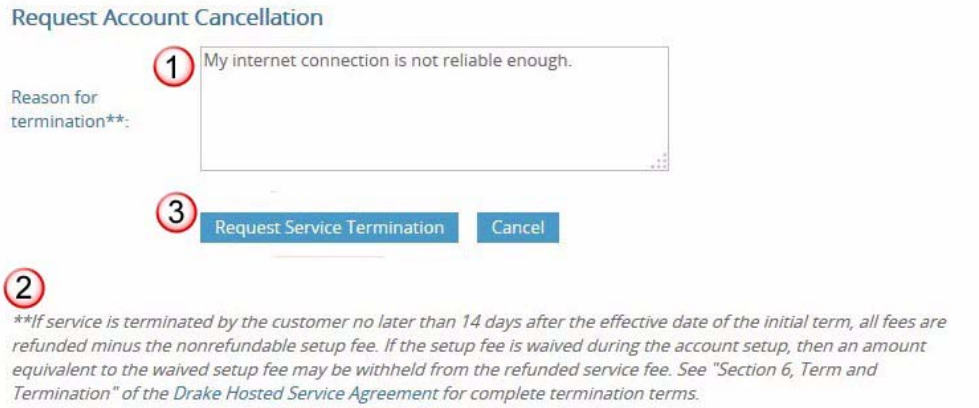
To submit a request to cancel a Drake Hosted account during the trial period:

1. From the AMP **Home** window, click the **Cancel My Account** link located below the Company Account Number at the top right of the window.

Figure 4-2: Cancel My Account During the Trial Period

2. The **Request Account Cancellation** window is displayed. Enter a **Reason for Termination** (#1 in Figure 4-3) and read the termination information at the bottom of the window (#2 in Figure 4-3).

Figure 4-3: Request Account Cancellation window

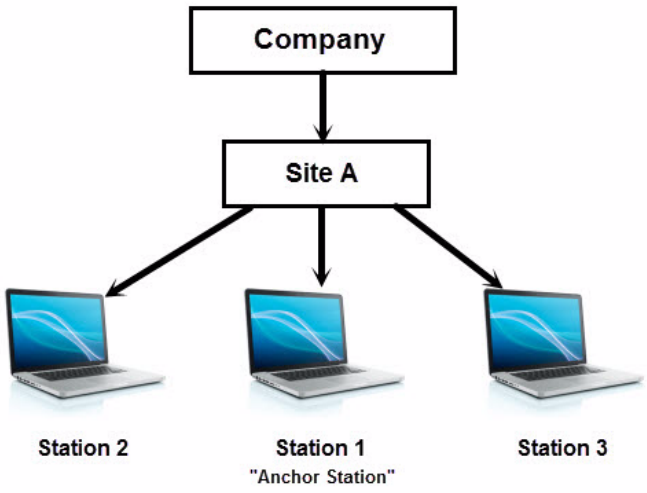


3. Click **Request Service Termination** (#3 in Figure 4-3). The termination request can take up to a week to process. You will receive an email notification once Drake has terminated the account.

5 AMP — Single-Site Setup

Single-Site Configuration

The single-site Drake Hosted configuration has just one site in the company that is using the Drake Hosted service. Set up 1 - 99 stations for each site. In the single-site configuration, the Company and the Site are the same.



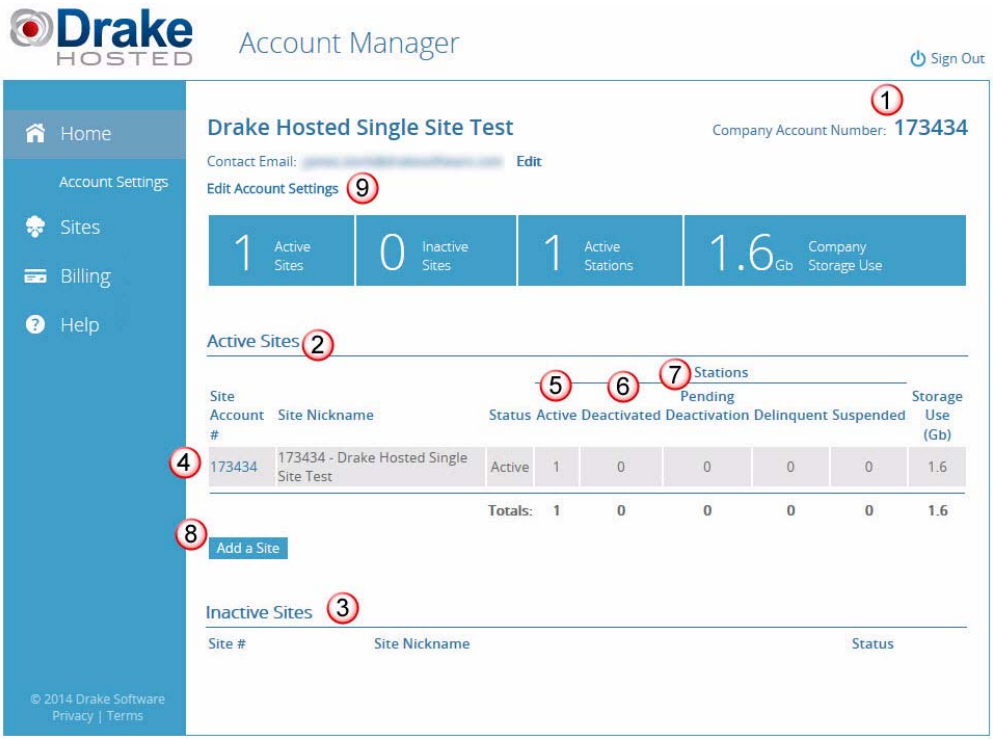
AMP Home Tab

The Account Manager Portal **Home** page, or “Dashboard”, lists:

- The company account number (see item #1 in Figure 5-1). This is also the Drake account number.
- Active sites (see item #2 in Figure 5-1). Only one site is listed in the single-site configuration.
- Inactive sites (see item #3 in Figure 5-1). This applies to the multi-site configuration only.
- Active site numbers, their nicknames, and status (see item #4 in Figure 5-1). The site number is the same number as the company account number in the single-site configuration (#1 in Figure 5-1). The “-1” at the end of the site number indicates the number of the Drake Hosted site for the company.
- Number of active stations at each site (see item #5 in Figure 5-1).
- Number of stations that have been deactivated (see item #6 in Figure 5-1).
- Number of stations with deactivation pending (see item #7 in Figure 5-1).

- There is also a button for adding sites (item #8 in Figure 5-1). This button is not used in the single-site configuration. See "Adding a Site" on page 28 under the multi-site configuration for more information about this feature.
- Edit Account Settings (item #9 in Figure 5-1). See "Account Settings" below.

Figure 5-1: AMP **Home** screen ("Dashboard")



Account Settings

Use the **Account Settings** tab to change the email address of the Account Manager, the Account Manager's password, and add a security question.

To access **Account Settings**, either click the **Home** tab followed by the **Account Settings** tab or click the **Edit Account Settings** link on the **Home** page (item #9 in Figure 5-1).

General Settings

Email — Enter the email address for the Account Manager. This serves as the contact address for the Account Manager when a "Lost Password" request is sent to Drake.

Security Question and Answer — The security question is used to verify the identify of the Account Manager before access is granted to AMP in the case that the Account Manager's Password has been lost or forgotten. Select a security question from the drop list and type an answer to the question. The answer can either be masked or displayed by clicking **show answer**.

Click **Submit Changes**.

Change Password

The Account Manager can change his or her login password to AMP.

To change the password:

1. Go to **Home** > **Account Settings**
2. Enter your current password
3. Enter and reenter the new Account Manager AMP password.
4. Click **Submit Changes**

AMP Billing Tab

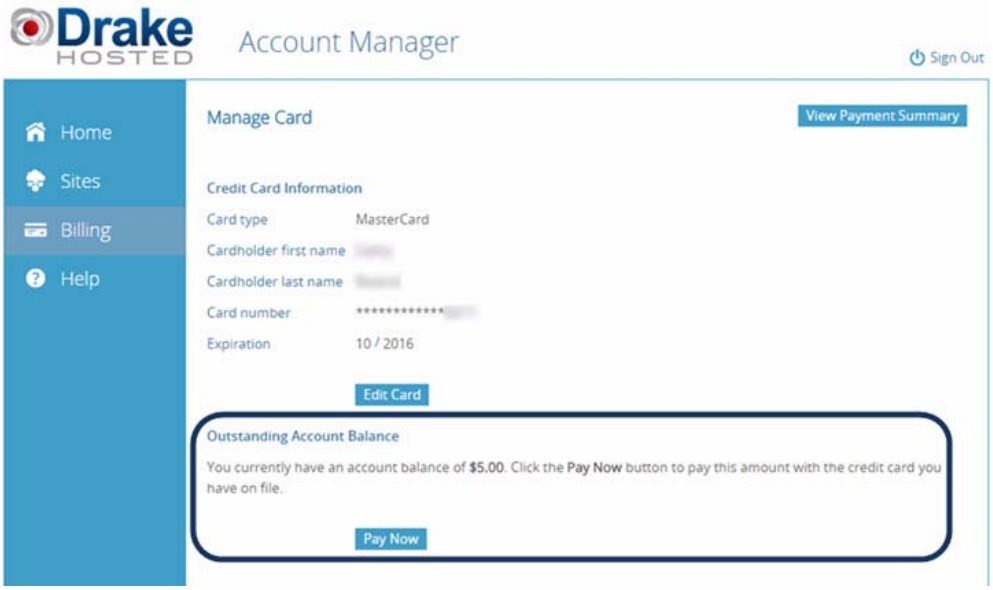
Use the **Billing** tab (Figure 5-2) to record and update the credit card information to be used for the payment of Drake Hosted services. Enter or update credit card information prior to adding sites, stations, or applications.

NOTE

The initial account setup is performed with the help of a Drake Account Setup Representative and includes collecting the credit card information and billing address. Drake Hosted uses an automated, recurring billing process for payments.

A payment summary is also available.

Figure 5-2: AMP **Billing** Tab



Paying an Outstanding Balance

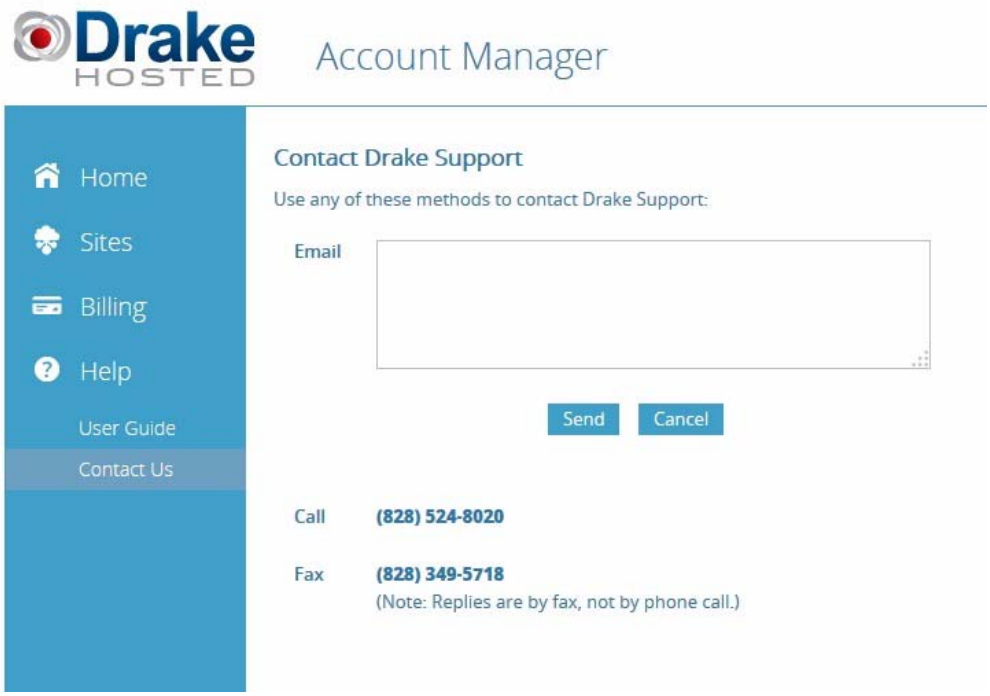
The **Billing** tab can also be used to pay an outstanding balance on the Drake Hosted account. If there is an outstanding balance on the account, the amount is displayed on the **Billing** tab. An outstanding balance can occur if a payment is delinquent (payment is declined one month), or the account is suspended (payment is declined two months in a row.

To pay the outstanding balance, verify that the credit card information is up to date, then click **Pay Now**. If the payment is successful, station statuses are updated.

AMP Help Tab

Use the **Help** tab to access an electronic version of this User Manual and information about contacting Drake Support.

Figure 5-3: Help > Contact Us



Site Management

Use the **Manage Site** window to add stations, make changes to station setup, deactivate a station, and deactivate a site.

To access the **Manage Site** window, either:

- Select the **Sites** tab on the left side of the window. Then select the site to manage from the **Site** droplist on the **Sites** tab.
- From the **Home** window, select the site to manage by clicking the **Site Account #**.

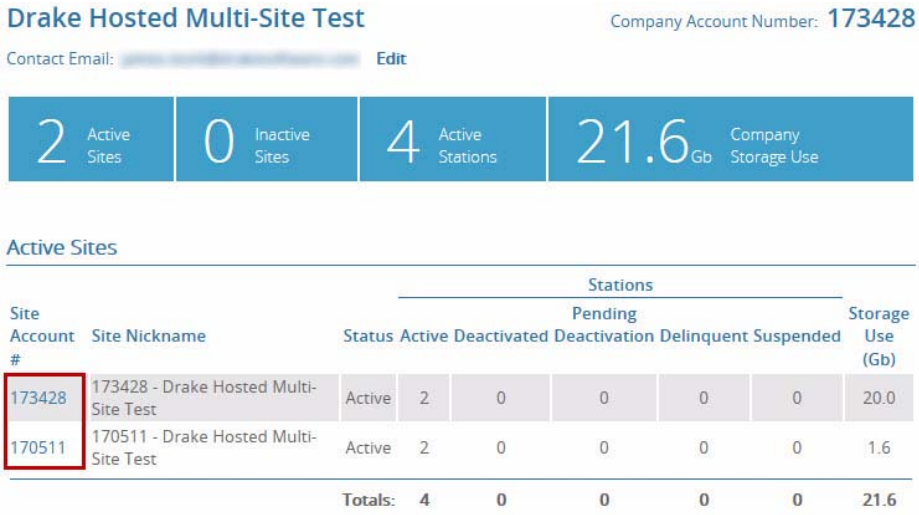
See "Adding a Station" on page 19, "Station Management" on page 21, and "Deactivating a Station" on page 23 for information on these functions.

Adding a Station

To add a station to a site:

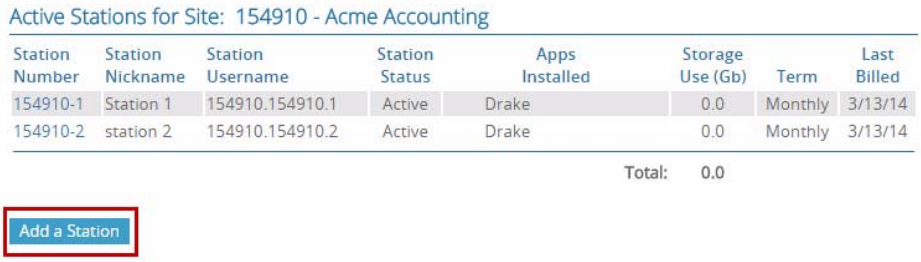
1. From the AMP **Home** window, click the **Site Account #** to go to the **Manage Site** window.

Figure 5-4: Acessing the **Manage Site** window



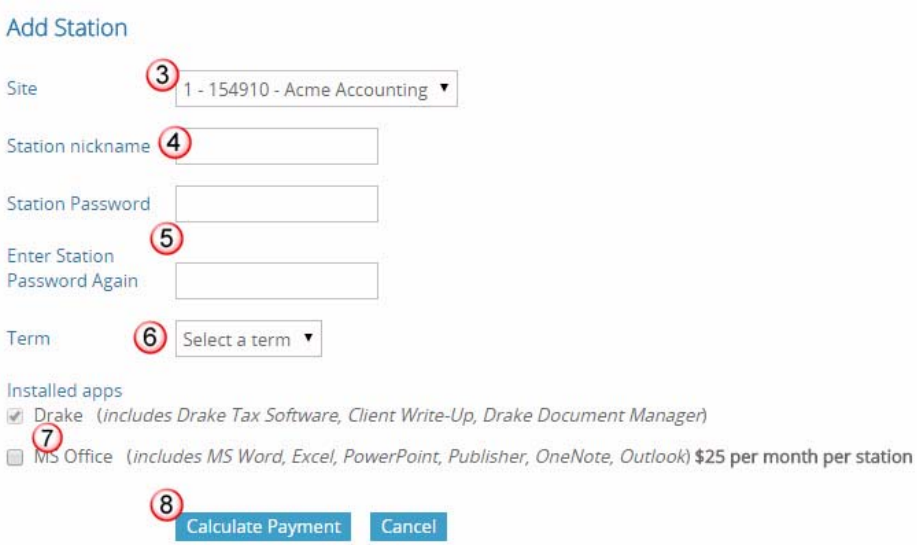
2. On the **Manage Site** window, click **Add a Station**.

Figure 5-5: Click **Add a Station**



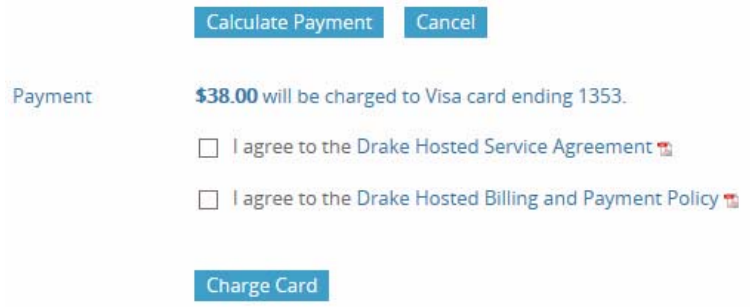
3. Select the site where the station should be added.

Figure 5-6: Adding a Station



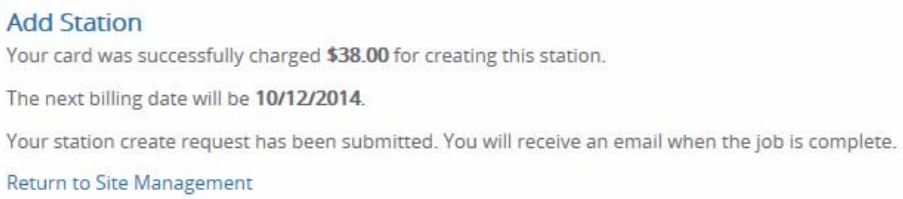
4. Enter the **Station nickname**.
5. Enter, and re-enter the **Station Password**. The station password requirements are the same as for the Account Manager's password. See "Lost AMP Password" on page 12 for password requirement details.
6. Select the term from the **Term** drop list. Select Monthly, Bi-Annual, or Annual.
7. Removing **Drake** as an **Installed App** is not an option. If you are purchasing Microsoft Office programs for this station, select the **MS Office** check box.
8. Click **Calculate Payment**. The amount of the charge is displayed.

Figure 5-7: Add a Station - Calculate Payment



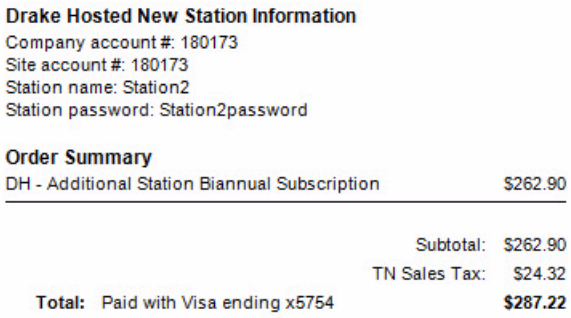
9. If the amount of the charge is correct, select the **I agree to the Drake Hosted Service Agreement** and the **I agree to the Drake Hosted Billing and Payment Policy** check boxes.
10. Click **Charge Card**. The credit card currently setup on the **Billing** tab is charged.
11. A summary of the added station is displayed with the amount of the charge and the next billing date (Figure 5-8).

Figure 5-8: Add a Station Summary



The Account Manager is also sent a confirmation email with information about the added station similar to Figure 5-9.

Figure 5-9: Add a Station Confirmation Email



Click **Return to Site Management** to go back to the **Sites** tab. The new station is added to the **Active Station for Site** list.

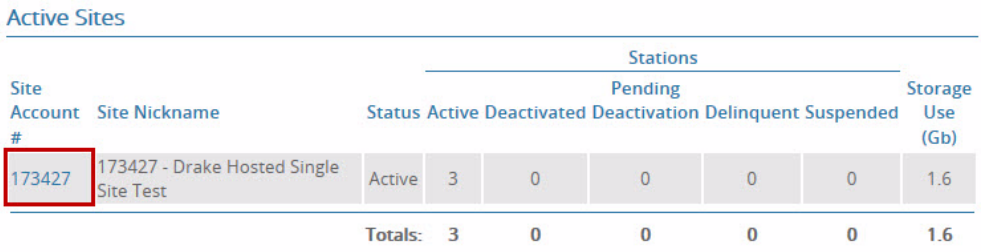
Station Management

"Managing a station" includes changing a station's nickname, password, and term, and adding and removing additional applications. Stations can also be scheduled for deactivation.

To manage a station:

1. From the **Home** window, click the **Site Account #** to go to the **Manage Site** window.

Figure 5-10: Accessing the **Manage Site** window



2. From the **Manage Site** window, click the **Station Number** to edit or manage.

Figure 5-11: Manage Station Selection

Active Stations for Site: 154910 - Acme Accounting

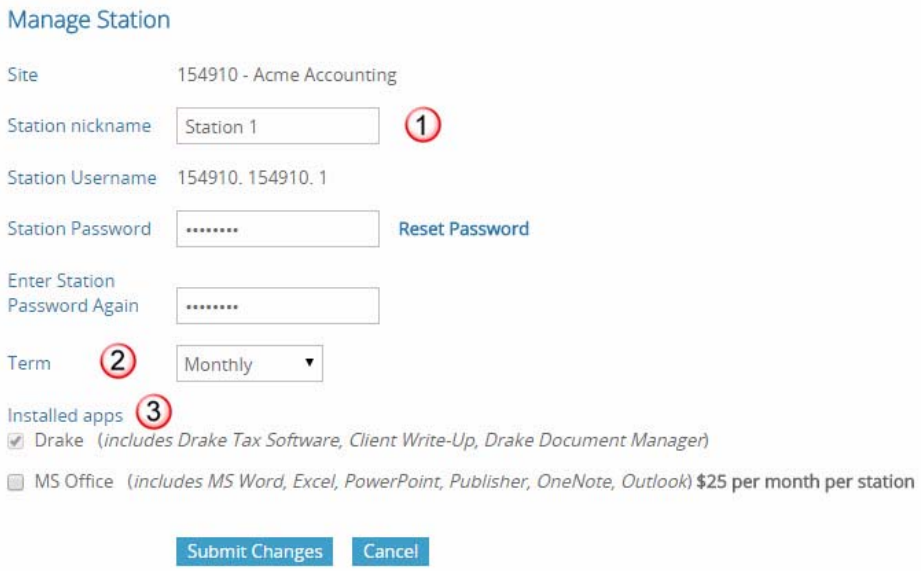
Station Number	Station Nickname	Station Username	Station Status	Apps Installed	Storage Use (Gb)	Term	Last Billed
154910-1	Station 1	154910.154910.1	Active	Drake	0.0	Monthly	3/13/14
154910-2	station 2	154910.154910.2	Active	Drake	0.0	Monthly	3/13/14

NOTE

The **Station Number** ending in "-1" is the "Anchor Station". This indicates the first station to be set up at the site. If this station is deactivated, the site is also deactivated. All other stations at a site can be deactivated without the site being deactivated.

3. The **Manage Station** window is displayed.

Figure 5-12: Manage Station window



- To edit the **Station nickname**, delete the current nickname from the appropriate field and enter the new one. (#1 in Figure 5-12)

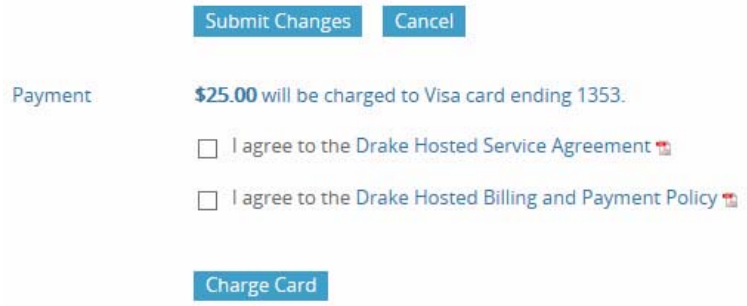
NOTE

If Station Password is forgotten, you can reset it. Enter and re-enter the new station password. Click **Submit Changes**. Click the **Reset Password** link for station password change instructions.

- The **Term** for a station can only be changed during the last month of the current term. Access to this field is available during that time only. (#2 in Figure 5-12). Change the term by selecting from the drop list.
- To add or remove additional applications, select or clear the **MS Office** checkbox. Clearing the checkbox automatically sends a removal request to Drake (once the changes have been submitted). Access to an application is removed at the end of the month the removal is requested. (#3 in Figure 5-12)

4. Click **Submit Changes** once all changes have been made. If a billable event was selected, such as adding an application, payment information is displayed.

Figure 5-13: Billing Information



5. To complete the transaction, select the **I agree to the Drake Hosted Service Agreement** and **I agree to the Drake Hosted Billing and Payment Policy** checkboxes, then click **Charge Card**. A summary of the transaction is displayed with the amount of the charge. The Account Manager also receives a transaction confirmation email. Click the PDF icon beside each checkbox to view the agreements.

NOTE

When a station is "upgraded", such as adding an application, the credit card currently setup on the **Billing** tab is charged immediately rather than waiting until the next billing cycle. The amount charged is prorated to the end of the current billing cycle.

Deactivating a Station

NOTES

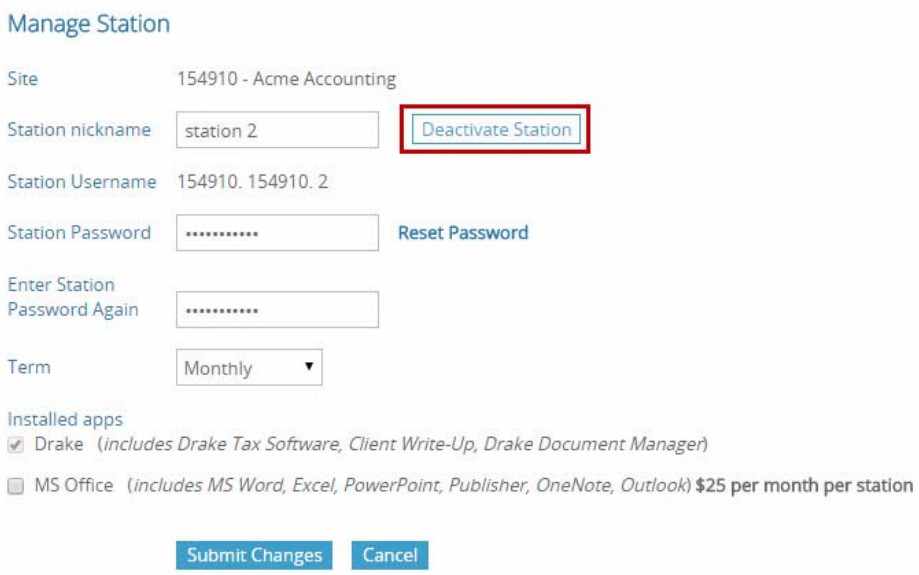
A station can be scheduled for deactivation at any time during the station's term, to be effective at the end of the term. A station's term cannot be changed. A station can continue to be used until the last day of its term.

Deactivating the #1 station, or "Anchor Station", of a site deactivates the site.

To deactivate a station:

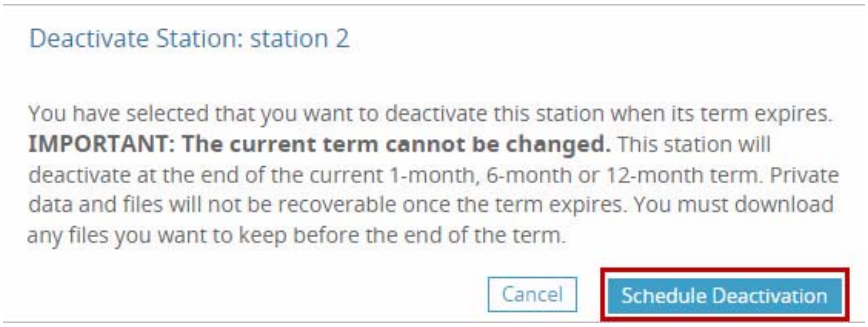
1. From the **Home** window, click the **Site Account #** to go to the **Manage Site** window.
2. From the **Manage Site** window, click the **Station Number** to be deactivated.
3. On the **Manage Station** window, click **Deactivate Station**. This will schedule the Station to be deactivated at the end of the current term.

Figure 5-14: Deactivate Station



4. Click **Schedule Deactivation** on the Deactivate Station Warning window to confirm the deactivation.

Figure 5-15: Deactivate Station Warning



The station is scheduled to be deactivated on the last day of the term. The **Manage Station** window is displayed with the date the station was scheduled for deactivation.

NOTE Station deactivation can be cancelled at any time prior to the day the station is scheduled to be deactivated.

Cancelling Station Deactivation

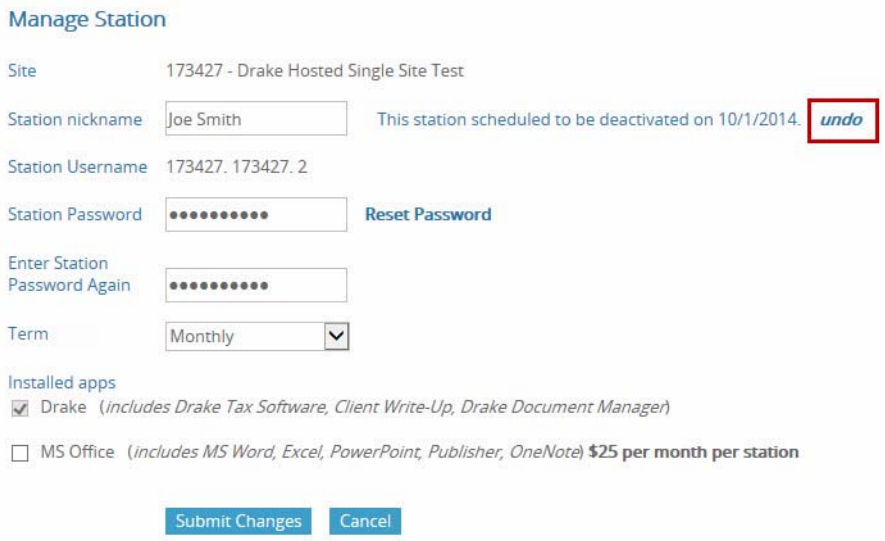
Station deactivation can be cancelled at any time prior to the day the station is scheduled to be deactivated.

To cancel station deactivation:

1. From the **Home** window, click the **Site Account #** to go to the **Manage Site** window.
2. From the **Manage Site** window, click the **Station Number** to be reactivated.

3. On the **Manage Station** window, click **undo**.

Figure 5-16: Cancel Station Deactivation



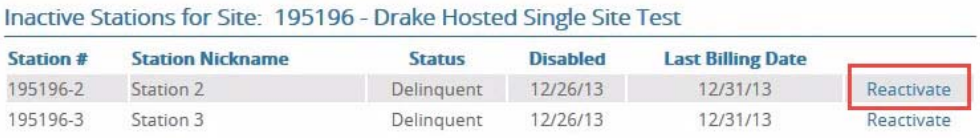
Reactivating a Station

The purpose of reactivating a station is to reuse the Station ID. Reactivating a station does not provide the opportunity to retrieve files that existed prior to station deactivation. You are essentially adding a new station with a previously used Station ID. By reusing an ID, you can maintain some consistency with your Station numbers from year to year for your seasonal staff.

To reactivate a previously deactivated station:

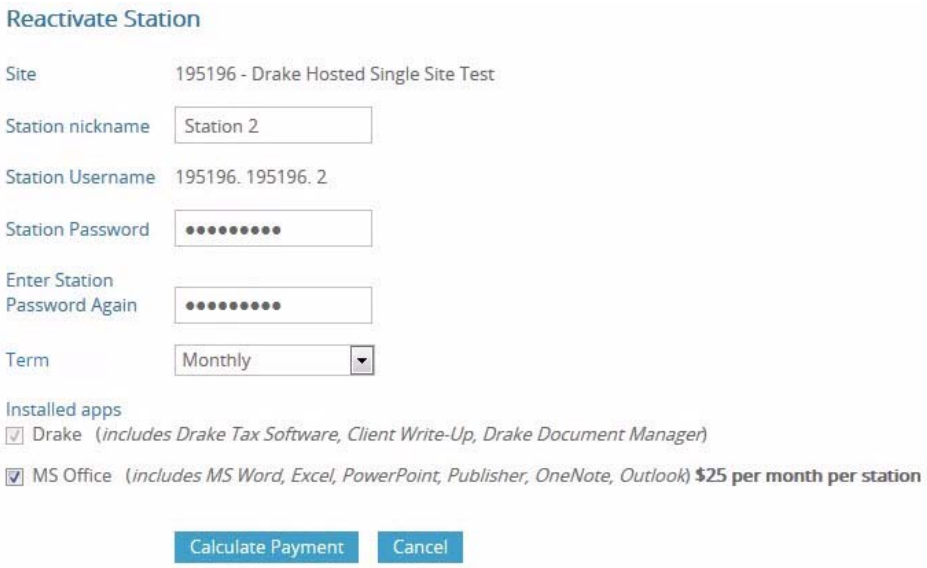
1. From the **Home** window, click the **Site Account #** to go to the **Manage Site** window.
2. From the **Manage Site** window, in the **Inactive Stations for Site** section of the window, click **Reactivate** beside the Station to be reactivated.

Figure 5-17: Select a Station to Reactivate



3. The **Reactivate Station** screen is displayed (Figure 5-18). Make any changes needed for the station and click **Calculate Payment**.

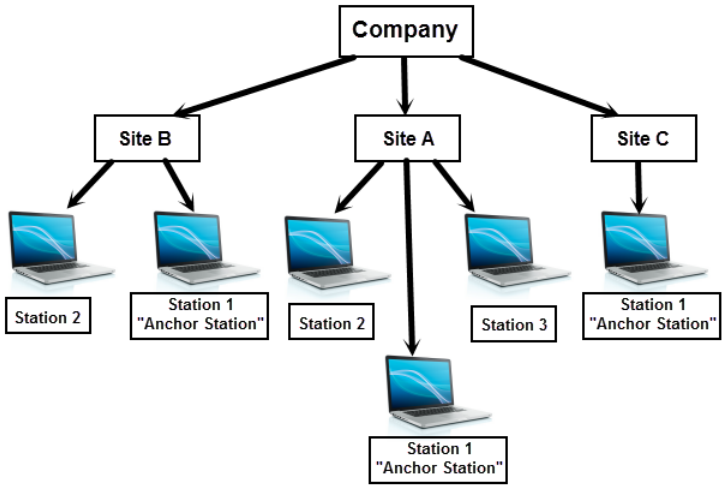
Figure 5-18: Reactivate a Station



6 AMP — Multi-Site Setup

Multi-Site Configuration

The multi-site Drake Hosted configuration has more than one site in the company that is using the Drake Hosted service. There are only minor differences in the administration of the single-site and multi-site Drake Hosted configurations. The primary differences are in specifying which site is being administered.



Site Management

Use the **Manage Site** window to add sites, add stations, make changes to station setup, deactivate a station, and deactivate a site.

To access the **Manage Site** window, either:

- Select the **Sites** tab on the left side of the window. Then select the site to manage from the **Site** droplist on the **Sites** tab.
- From the **Home** window, select the site to manage by clicking the **Site Account #**.

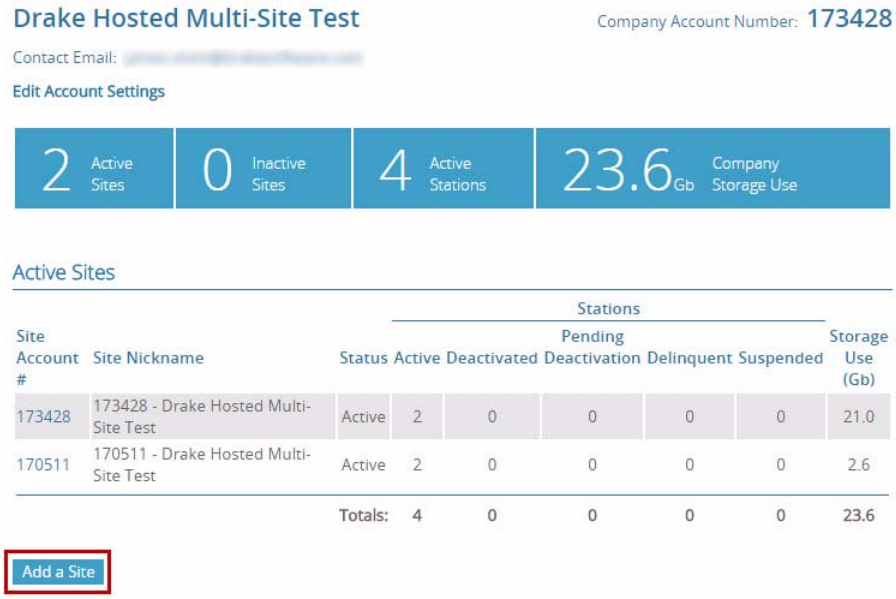
See “Adding a Station” on page 19, “Station Management” on page 21, and “Deactivating a Station” on page 23 for information on these functions.

Adding a Site

To add a site in the multi-site configuration:

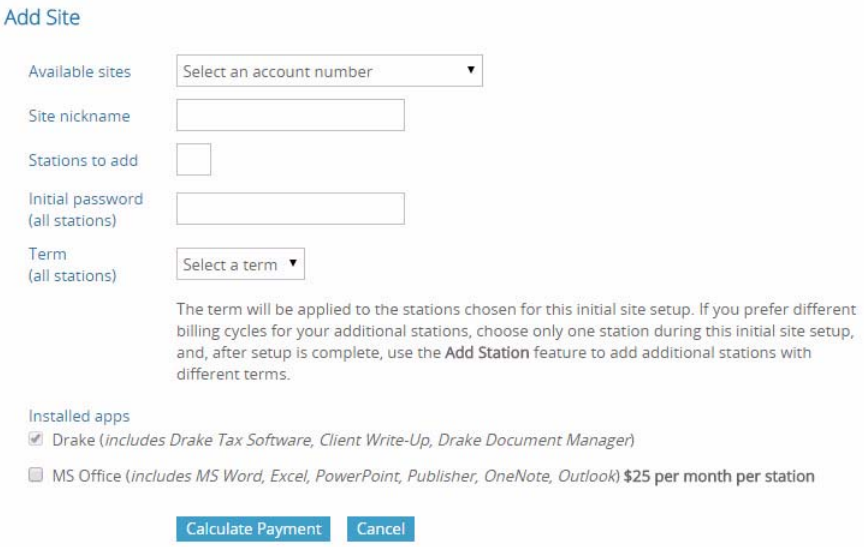
1. Click **Add a Site** from the AMP **Home** window.

Figure 6-1: AMP Multi-Site **Home** window



2. On the **Add Site** window (Figure 6-2), select the site to add from the **Available sites** drop list. This lists the sites associated with the Drake account that have not been added to Drake Hosted services.

Figure 6-2: Add Site window



3. Enter a **Site nickname** and the number of stations to add to the site. More stations can be added at another time if needed (99 maximum per site).

4. Enter the number **Stations to add** for the new site.
5. Enter, and re-enter the initial station **Password**.
6. Select the length of the **Term**. This term will be applied to all stations chosen for this initial site setup. If you prefer different terms for your additional stations, set up only one station during this initial site setup. Then, after setup of this station is complete, use the **Add a Station** feature (see "Adding a Station" on page 19) to add stations with different terms.
7. Selecting the **MS Office** checkbox adds this service to all of the stations being added at this time. Do not select the **MS Office** checkbox if you do not want to add this service to all stations being added at this time. You can add this service to individual stations at a later time. See "Station Management" on page 21 for information on adding this service.
8. Click **Calculate Payment**.
9. The payment summary is displayed. Click the **I agree to the Drake Hosted Terms and Conditions** checkbox.
10. Click **Charge Card**. A summary of the added site is displayed and the Account Manager is sent a confirmation email with information about the added site.

Deactivating a Site

NOTES

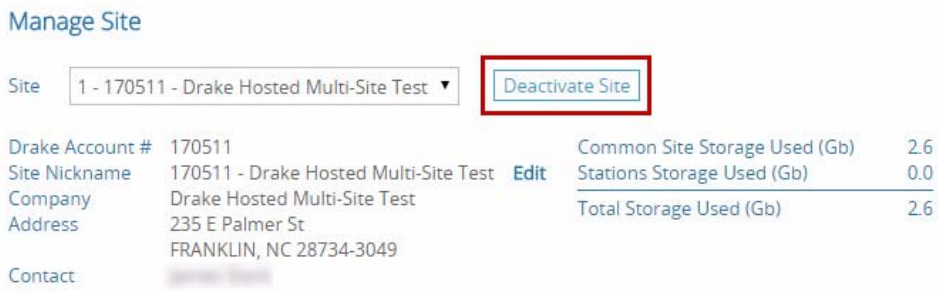
A site can be scheduled for deactivation any time during the site's term. A station's term cannot be changed. A site can continue to be used until the last day of its term.

Deactivating the #1 station, or "Anchor Station", of a site deactivates the site.

To deactivate a site:

1. From the **Home** window, click the **Site Account #** to go to the **Manage Site** window.
2. From the **Manage Site** window, verify that the site to be deactivated is selected from the drop list, then click **Deactivate Site**. This will schedule the Site to be deactivated at the end of the current term.

Figure 6-3: Deactivate Site



3. Confirm the deactivation.

7 Drake Hosted FAQs

Q: I am trying to install updates, but it says someone has the program open?

A: Similar to running the Drake program locally, all users must exit the software in order to run the update. Users can stay logged in to Drake Hosted, but they must close the Drake program. **Note**: The Drake Hosted service automatically installs all program updates for the Drake Tax program every night.

Q: How do I log off/shut down Drake Hosted?

A: First, close all Hosted applications. Then click the Station Username in the top right and select **Log Off** from the drop-down menu.

Q: How do I activate my Drake15 software? It is in Demo mode.

A: Go to **File > Convert Demo to Standard**, and enter your account number and 2015 serial number.

Q: How can I prepare returns if I lose my Internet connection?

A: As a contingency, you can install Drake Software on your local computer and prepare returns. Once the connection issue is resolved, you can then copy the returns you prepared to Drake Hosted.

Caution: Do not transmit returns from Drake Hosted and then also from your local copy of Drake. This will create a database conflict and requires intervention from Drake Support to correct the issue.

Q: Can I remove states to free up space?

A: No – state programs are automatically installed and updated so that they are available when needed.

Q: When I try to install the Citrix Receiver, I get a pop-up window that says “Setup cannot continue because this version of receiver is incompatible with a previously-installed version.”

A: Uninstall the receiver (**Start > Control Panel > Remove Programs**), reboot your computer, and reinstall the receiver using the instructions in this User Guide (see “Installing the Citrix Receiver” on page 3).

Q: In the Account Manager Portal, when I click **Charge card** to add a Station, I get "E00027: A duplicate transaction has been submitted."

A: Allow for at least 3 minutes between each charge event. For example, after adding a station, wait at least 3 minutes before adding another station.

Q: In the Account Manager Portal, when I click **Charge card** to add a Station, I get "E00027: This transaction has been declined."

A: Your credit card may have insufficient funds. Contact your credit card company to check your balance.

Q: When I try to print, it only shows "Send To OneNote 2013", "Microsoft XPS Document Writer", and "Drake PDF Printer" as the available printers. It doesn't display my local printers?

A: Close your Hosted applications and log off of the Citrix Receiver. Then, log back in and try again. If this occurs on a frequent basis, contact Hosted support at *Hosted@drakesoftware.com*.

Q: When I try to launch the Drake Document Manager (DDM), I get the following error: "Drake Document Manager – Working Cabinet (or Archive Cabinet) has stopped working. A problem caused the program to stop working correctly. Please close the program."

A: Close your Hosted applications and log off of the Citrix Receiver. Then, log back in and try again. If this occurs on a frequent basis, contact Hosted support at hosted@drakesoftware.com.

Q: I get an **Open File - Security Warning** box when I click on the **Research** button on the Drake **Home** screen?

A: Click **Run** to continue to the **Search** window. At this time, there is no mechanism for turning off this prompt.

Q: When does planned maintenance (downtime) occur for Drake Hosted?

A: Software updates (Drake Tax and DDM) are performed daily at 4am ET and should last no longer than an hour. System updates are performed weekly on Sunday at 4am ET and should last no longer than two hours. During these scheduled maintenance periods, all users must be logged off.

Q: How do I set up my email account in Microsoft Outlook?

A: View the following article in the Drake Knowledgebase: 13438: Drake Hosted Outlook - Setting Up Email. For specific instructions on setting up Gmail, Yahoo, or Hotmail, contact us at *Hosted@DrakeSoftware.com*.

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