Web1040®

QUICK START GUIDE

Set Up Admin User in Hub — Web1040 is a web-based application where firm preparers use an interview-based interface to help determine the appropriate forms for each return Alternatively, if the preparer prefers to bypass the interview process, specific forms can be retrieved and completed. All returns are stored on Drake Software's servers for both security and accessibility. Click here to view a tutorial on how to set up admin users.

Set Up Tax Year — The Web1040 administrator must complete the following setup items for each tax year. After launching the desired tax year from the Hub, complete each of the below items from the SETUP menu. Click here to view a tutorial on SETUP.

- ERO Setup — Use this screen to enter your Electronic Return Originator (ERO) information. ERO setup must be completed to e-file returns.
- Firm Setup — Use this screen to view and manage firms. This information is used to complete tax returns prepared by each firm and must be completed before preparers can begin preparing and e-filing returns.
- Preparer Setup — Use this screen to view and manage preparers. Preparer information entered on this screen will appear on tax returns. It is also advisable, but not required, that each preparer is set up prior to creating the preparer's Hub account.
- Pricing — Use this screen to set or change pricing for federal and state forms.
- Setup Options — Use this screen to access administrative setup options.

Create Hub Users and Link to Preparers — After you set up your preparers for the appropriate tax year, you must create and link their Hub profile to give them access to the software. Click here to view a tutorial on preparer setup.

Return Processing — Next, you will begin processing returns, from navigating the system and linking to DrakePortals® to using e-Signatures and processing client billing. Click here to view a tutorial on return processing.

Banking Setup/Processing — Providing bank products is a popular and simple way to add revenue during tax season, and Drake Software makes it easy to offer your customers additional payment and refund options. Click here for details on bank products. Click here to view a tutorial on bank product setup and processing.

General Tools — Web1040 offers many tools to help in your practice. In this tutorial, we demonstrate how to access and use a few of those tools, including Blank Forms, EF Database, Messages, and the Tax Estimator. Click here to view a tutorial on Web1040 general tools.

Reports — Click here to discover the available reporting options in Web1040.

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For support, call (828) 524-8020 or email Support@DrakeSoftware.com