

# CASE STUDY

## Two-Person Tax Firm Solves Drake Collaboration Nightmare and Finally Works as a Team



### FIRM SNAPSHOT

- **Firm:** Sapphire Bookkeeping
- **Owner:** Erin Meise, EA, Certified Tax Resolution Specialist
- **Location:** San Antonio, TX (partner in Huntsville, AL)
- **Staff:** 2 partners
- **Services:** Bookkeeping, business accounting, tax prep, tax resolution
- **Client Base:** 90% virtual, some local
- **Software:** Drake Tax, TaxDome
- **Previous Setup:** Drake installed on separate devices, no collaboration possible
- **Years with Verito:** 2 full tax seasons (2024, 2025)
- **Discovery Source:** NAEA partnership

## THE CHALLENGE

Erin Meise ran her tax practice solo for years. Drake Tax worked fine—until she brought on a partner in Alabama.

Suddenly, they couldn't work together at all.

"I would log in and I could see my side of Drake Tax, and she could log in and see her side. But **we could never collaborate on anyone. Whoever opened that person had them forever.**"

They couldn't hand off returns. They couldn't cross-check each other's work. They couldn't do team reviews without scheduling simultaneous phone calls and screen sharing.

"It wasn't like I could start a return and she could finish it, which we don't do much of, but we do a lot of cross-checking and team review. **That was really difficult** because we would have to be on the call at the same time, share screens. It just was complicated."

As the firm owner, Erin had zero visibility into her partner's workload. "I wanted to be some type of oversight and management as to what she was doing, and **there was no way of me doing that.**"

It took them an entire tax season to even figure out the problem. "Once you're in the midst of tax season, there's no process adjustments. You're just getting through."

They limped through the 2023 season with her partner handling just 10 returns while Erin did the rest. But they knew they needed a real solution before the next busy season.

## WHY VERITO

Erin discovered Verito through **NAEA (National Association of Enrolled Agents)**, where Verito advertises in every journal.

She asked colleagues in online groups what they recommended for Drake hosting. "It sounded like this was the thing to try first."

Drake had a competing solution, but Verito kept coming up as the top recommendation from practitioners who actually used it.

## THE SWITCH

"The setup process was so easy. It seemed so easy."

A Verito technician walked her through the entire setup maybe 45 minutes total. "He basically had me walk through two or three steps, asked me my phone number. I got a text. I downloaded the Duo app. I mean, it was like, **it just wasn't hard.**"

## AT A GLANCE

### FIRM SNAPSHOT

- **Name:** Erin Meise
- **Location:** San Antonio, TX (partner in Huntsville, AL)
- **Staff:** 2 partners
- **Services:** Bookkeeping, business accounting, tax prep, tax resolution
- **Years with Verito:** 2 full tax seasons

### THE CHALLENGE

- Erin's local Drake setup made collaboration impossible each partner could only see their own files, blocking teamwork and cross-checking.
- The lack of shared access created management blind spots and forced clunky workarounds like screen sharing during calls.
- After struggling through a tax season with limited productivity, Erin realized she needed a proper collaborative hosting solution before the next busy season.

### WHY VERITO

- Erin found Verito through NAEA and peer recommendations in online groups when searching for reliable Drake hosting.
- While Drake offered its own hosting option, Verito stood out as the top choice among real practitioners with proven experience.

Most of the time was just waiting for processes to complete. "It was more of him like, 'Okay, just a minute while it does this,' or 'You're going to get a text, just click the checkbox.'"

Her partner's setup was equally simple. "I just remember telling her, 'Call this guy, just follow the directions, and it'll be fine.' **We didn't have to know anything.** Let's put it that way."

## THE RESULTS

**Full collaboration restored.** Erin and her partner can now work on the same returns, review each other's work without scheduling calls, and maintain proper oversight of the firm's workflow.

They've completed two full tax seasons on Verito with seamless teamwork something that was impossible before.

Support response is consistently fast. "Every single time I have an issue, which isn't a lot, but it's multiple times a tax season we'll get locked out, or we'll have simultaneous errors, or we forgot to click the right way. **I literally can call, and within a minute, somebody always answers.** Which is amazing."

The support quality stands out. "They speak English. So within a couple of minutes, my problem is solved. **It's so easy.**"

Integration with TaxDome works smoothly. "It works with our TaxDome. I like that. There was a little learning curve when we implemented TaxDome, but that was more on the TaxDome side of things."

The customer service makes the difference. "I really appreciate when we call, somebody answers, they're always able to solve our problem. **It's always a very quick resolution.** That's what I appreciate the most."

No phone trees. No account verification loops. No language barriers. Just fast problem-solving from people who've seen these issues before.

## THE BOTTOM LINE

Erin went from an entire tax season of isolated work and screen-sharing workarounds to **seamless collaboration with her Alabama partner** with support that actually answers the phone.

**"It's been great. I love it."**

**Want similar results?** Learn how Verito enables real collaboration for remote tax teams using Drake Tax.

## AT A GLANCE

### THE SWITCH

- Verito's technician handled the entire setup in about 45 minutes, guiding Erin through just a few simple steps.
- The process was effortless mostly waiting for installations and quick confirmations like downloading Duo and checking a box.
- Her partner's onboarding was just as smooth; all she had to do was call the technician and follow simple directions.

### THE RESULTS

- Verito restored full collaboration Erin and her partner can now work on the same returns, review each other's work, and maintain real-time oversight of the firm's workflow.
- Verito integrates smoothly with TaxDome, enabling a seamless workflow across tools after a brief learning curve.

