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## SurePrep — 1040SCAN PRO, 1040SCAN Organize

**2011 OVERALL RATING** ★★ ★★ ★★ ★★ ★★



CORE PRODUCT FUNCTIONS/FEATURES



PAPERLESS WORKFLOW



INTEGRATION



HELP/SUPPORT/TRAINING

800-805-8582

[www.sureprep.com](http://www.sureprep.com)

2011 Overall Rating 4.75

**Best Fit**

- Firms where more than one person is involved in the return preparation process.

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using these tools, and this experience gives them immediate, direct feedback on how screen changes impact the data-entry process.

- There are a variety of product offerings (1040Scan Organize, **1040SCAN TRADES** and **1040SCAN Pro**) for the individual needs of each return.

## Potential Limitations

- Data-entry interface used to validate data extracted from scanned images is proprietary to **1040SCAN**, and is different from the tax applications.

SurePrep was one of the earliest entrants into the tax document automation field, and has evolved and extended its offerings to meet the demands of practitioners. SurePrep's **1040SCAN** application is focused on reorganizing the workflow inside of tax and accounting firms. Although there are portions of the application that are installed on a user's local computer, the actual source document recognition is handled at SurePrep's secure onshore data center. The application provides its own input screens for supported applications, which include GoSystem Tax, Global *fx*, Lacerte, ProSystem *fx* Tax and UltraTax CS. This design simplifies the use of data-entry clerks to validate the data extracted by the application, and also eliminates the need for these personnel to work directly with the tax application.

## Executive Summary & Pricing

SurePrep was one of the earliest entrants into the tax document automation field, and has evolved and extended its offerings to meet the demands of practitioners. SurePrep's **1040SCAN** application is focused on reorganizing the workflow inside of tax and accounting firms. Although there are portions of the application that are

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**1040SCAN TRADES – \$20/return (regardless of the number of trades)**

**1040SCAN Pro – \$30/return**

Significant discounts to these rates are available to users based on transaction volume and multi-year purchase commitments. A list of SurePrep's 1040SCAN Supported Forms can be found at <http://corp.sureprep.com/SUPPORT/FAQ.aspx>.

**Core Product Functions/Features – 5**

**Paperless Workflow – 4.5**

**Integration – 4**

**Help/Support/Training – 5**

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