



1040SCAN vs. Lacerte Tax Scan & Import Comparison











[1040SCAN](#) automates more than three times the documents of Lacerte Tax Scan & Import. 1040SCAN includes our award-winning workpaper system, [SPbinder](#), to reduce preparer and reviewer time. Only SurePrep offers an optional OCR data verification service to maximize efficiency. When combined with SurePrep's newest 1040 productivity solution, [TaxCaddy](#), 1040SCAN delivers the most automated and streamlined 1040 process for both you and your clients.

Here's how 1040SCAN and Lacerte TSI compare:

1040SCAN automates more than **3X** the documents of Lacerte TSI

*Based on current Lacerte documentation

Optical Character Recognition	1040SCAN	Lacerte TSI
Organizer Pages		
Source Document Types	39	11
Brokerage Statements	546	136
Grantor Letters	42	0
State K-1s	22	0
Functionality	1040SCAN	Lacerte TSI
Integrates with TaxCaddy		
RESTful API available		

Functionality	1040SCAN	Lacerte TSI
Eliminates human verification for native PDFs ^[1]		
Includes SPbinder ^[2]		
Free Pre-Verification ^[3]		
Optional Verification Service ^[4]		
Optional Full Preparation Service		

1. 1040SCAN PRO and 1040SCANverify only.
2. SPbinder is SurePrep's award-winning workpaper system that integrates with PDF, Excel, Word and Outlook emails. Lacerte TSI offers PDF workpapers only.
3. In order to discover new 1099-B formats as early in the tax season as possible, SurePrep offers a Pre-Verification program at no cost.
4. With any scan-and-populate software, it's a best practice to verify OCR'd source document data for accuracy before it gets exported to tax software (Lacerte). Optionally, SurePrep can perform this verification for you.

What are Lacerte users saying?

SurePrep is the leader in 1040 productivity for CPA firms. We deliver seamless integration with Lacerte to automate and streamline the entire 1040 process for both the taxpayer and CPA. Our solutions are used by more than 19,000 tax professionals ranging from Big 4 firms to sole practitioners to reduce administrative costs, automate workpaper preparation, maximize review efficiency and improve client service.

Our award-winning solutions deliver meaningful savings to the bottom line. But don't take our word for it, we used a third party to survey our customers who use Lacerte.

SUREPREP CUSTOMER STATISTIC

SurePrep increases profitability for Lacerte users

67% of surveyed Lacerte users reported increased 1040 realization rates of 10% or more.



Source: TechValidate survey of 21 users of SurePrep

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 SurePrep®

 TechValidate

View customer quotes at sureprep.com