

CONTINUOUS MONITORING | FOR CPA & ACCOUNTING FIRMS

Keep Every Client Audit-Ready Every Day. Not the Week They Call.

A live connection to your client's billing and accounting systems that checks every transaction the moment it posts.

A study is only right on the day you deliver it. Between engagements, clients cross new thresholds, change products, and get hit with rule changes, so a nexus study that was correct at delivery quietly drifts out of date. Exposure builds up in the background, from a new state crossed, a product miscategorized, or a certificate left to lapse. By the time the next study catches it, the liability has grown.

Exactera and L3i connect directly to the client's billing and accounting systems and check every transaction as it posts. You see nexus thresholds coming before the client crosses them; taxability is confirmed on every line, and exemption gaps show up before an auditor ever would. The result is an audit-ready record that stays current on its own. If an audit comes, defending it means handing over what you already have, not rebuilding it under pressure. The platform also learns as it watches: every call your team makes on a flagged transaction is captured, so it sharpens over time and one expert judgment becomes knowledge the whole firm keeps.

OUR APPROACH

01

Connect at the Source

Connect directly to the client's billing, purchasing, and accounting systems, including NetSuite, SAP, and Oracle. Every transaction flows in as it happens and lands in one clean, compliance-ready place the moment it posts.

02

Score and Flag in Real Time

Every transaction is checked automatically as it arrives, not a sample. You watch nexus thresholds approach in real time taxability is confirmed on every line, and exemption gaps are flagged before an auditor could ever find them.

03

Stay Audit-Ready

Issues come straight to your firm with an alert, while an audit-ready record builds itself across every state in the background. When an auditor shows up, the documentation is already there, and easy to hand over.

WHO WE SERVE

- Multi-state clients that are growing fast or picking up nexus in new states
- Clients who want exposure caught as it happens, not discovered at audit
- Clients running NetSuite, SAP, Oracle, or similar billing and accounting systems

Exposure caught the day it happens, not the day it's assessed.

Compliance Grade AI, Verified by Design

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