

DATA MODELING | FOR CPA & ACCOUNTING FIRMS

Every Tax Answer Starts with the Right Data.

Turn a client's scattered systems into a living foundation that learns from your team and answers questions about the work you've done.

Most indirect tax exposure is really a data problem in disguise. A client's transaction records are usually incomplete, inconsistent, and scattered across different systems like NetSuite, SAP, Oracle, and Dynamics, and the formats drift over years and system changes. Every piece of work that follows, whether a nexus study, an exposure analysis, a VDA, or audit defense, is only as good as the data under it. Build a nexus study on bad data and you have to do it twice.

Exactera and L3i build that foundation first, then make it work for you. The platform connects to the client's systems, pulls the line-item detail from every transaction, and fixes the missing fields, duplicates, and format problems across the client's entire history, not a sample. This is far more than a clean place to store data. It is an intelligent platform that learns as your team works: every answer your professionals give, every correction they make, and every question they ask is captured, so the knowledge that used to live in one expert's head becomes something your whole firm can use. Ask it what you concluded for this client last year, or why, and it answers. Your data goes in once. The knowledge it builds compounds on every engagement after.

OUR APPROACH

01

Unify Transaction Data

Bring the client's raw records from their billing, purchasing, and accounting systems into one organized place. The platform handles the different formats, pulls the line-item detail, and maps every transaction to the fields advisory work needs.

02

Resolve Gaps and Inconsistencies

Find and fix the messy data, missing fields, duplicates, and format problems across every transaction the client has. Nothing is sampled. The full history is reviewed, so nothing is left unchecked.

03

Turn It Into Living Knowledge

Deliver more than clean data: an intelligent layer that powers every engagement after it, from nexus and exposure to VDAs, audit defense, and M&A diligence. It learns from the work your team does and answers questions about it, so your firm builds on what it already knows instead of starting over.

WHO WE SERVE

- Clients whose financial data is scattered across disconnected systems
- Firms that want their experts' knowledge captured and reusable, not stuck in one person's head
- Teams preparing for nexus, exposure, VDA, audit defense, or M&A diligence

It's not just where the data lives. It's where your firm's knowledge grows.

Compliance Grade AI, Verified by Design

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