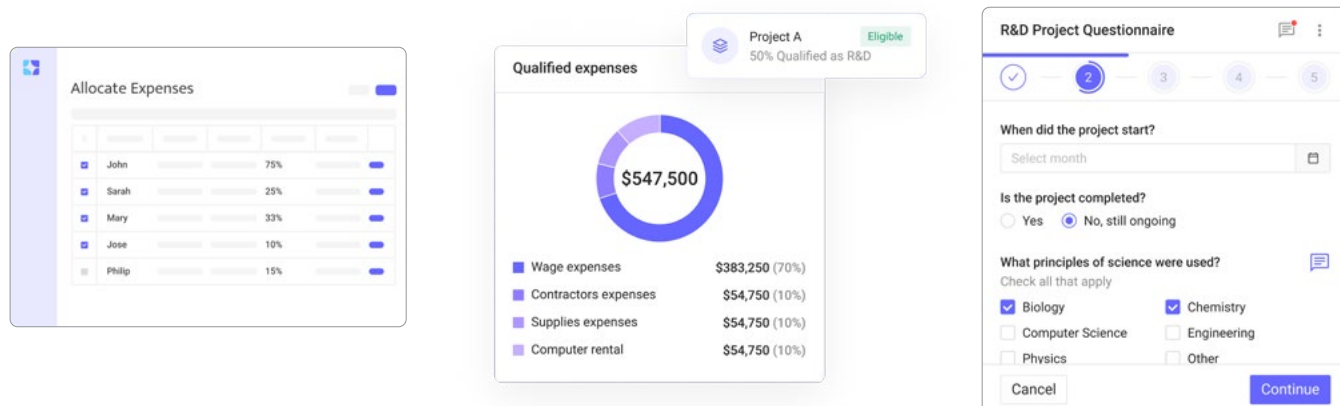


Introducing

Exactera's Next Generation R&D Software Solution

Exactera has upgraded its R&D tax credit software and services—here's what it means for you.

While we're not a full DIY platform (yet), our enhanced technology-driven R&D tax credit services offer smarter automation, streamlined processes, and expert guidance to maximize your credits with less effort.



Starting for tax year 2025, work with
Exactera's R&D tax credit team, and you can:



Customize your R&D tax credit claim experience.



Add efficiency to your R&D tax credit claim process.



Access more functionality.



Experience ease of use and more streamlined services.

Clients can enter information directly. Engineers can record hours, expenses, and other relevant details.

New for Tax Year 2025



Provided By Client (PBC)

- Information Data Requests and secure transfer functionality are now integrated into the R&D technology solution.
- The PBC portal serves as a progress dashboard so that our clients can monitor the progress of their engagement in real-time.
- The PBC portal also allows for automated email follow-ups to nudge data collection. This is fully customizable by the client.



Quantitative Surveys

- Quantitative QRE surveys have been upgraded with a user-friendly look and feel.
- Functionality, such as sorting and filtering, is now available.
- Similar to PBC, customized reminder emails can be used to reach out to Subject Matter Experts (SMEs).
- For an additional fee, surveys can be customized to tailor to a customer's needs.
- Due to Form 6765 changes, employee allocations can now also be split between Direct, Supervision, and Supporting R&D activities.



Qualitative Surveys

- Qualitative surveys have been upgraded with a new look and feel, and they have been customized to focus on the most common industry activities of our clients.
- The user experience has been substantially enhanced to allow for more clarity in communicating with the SME.
- SMEs can ask questions directly in surveys to receive guidance from Exactera experts.
- Project documentation can be securely uploaded directly to the portal—no more SharePoint uploads or access issues.
- Delegation of surveys can be done with ease.
- Like PBC, customized reminder emails can be used to reach out to SMEs.
- For an additional fee, the surveys can be customized to tailor to a customer's needs.



Reporting

- Our new platform allows for more detailed data to be compiled and presented in the reports.
- The reports have been refreshed for ease of review.
- Separate reporting is provided for meeting the new Form 6765 requirements.

If you have any questions or would like to see a demo of the updated platform, please reach out to your Exactera Project Manager or Mark McGee at mark.mcgee@exactera.com. Keep a lookout for additional enhancements to our UK, Canada, and Puerto Rico services in the near future.