



Financial Data Management



ktx



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Welcome to KudTax

Kudtax is an AI-powered innovative accounting platform designed primarily for **accountants and e-commerce sellers**. The platform streamlines the process of managing **invoices, documents, and transactions** by integrating multiple platforms such as Amazon, eBay, EasyBill, Stripe, and PayPal. Kudtax simplifies accounting operations by automating data fetching, processing, and exporting, ensuring users can efficiently manage their financial data from a single interface.

Vision

To be an innovative platform that **automates financial processes** for e-commerce businesses, minimizes tax burdens, and makes accounting management effortless.

Mission

As Kudtax, we bring together the financial and accounting data (invoices and transactions) of **e-commerce users** from different platforms such as Amazon, Etsy, eBay, Stripe on a single application. In this way, we organize our users' data, facilitate business processes and reduce accounting burdens.



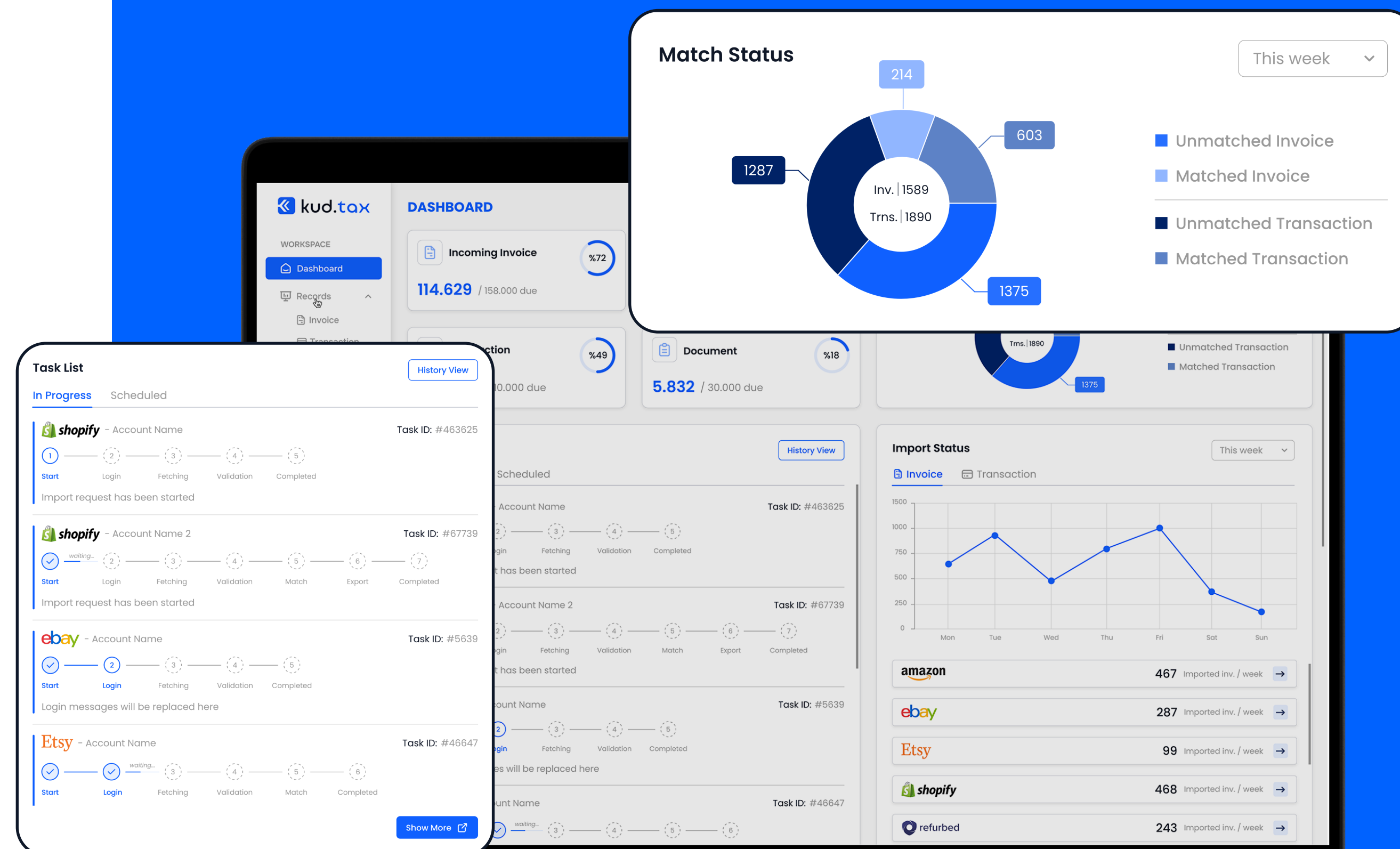
Key Features

Dashboard

KudTax's dashboard visualizes your financial data on e-commerce platforms on a single screen, allowing you to easily track your;

- Credit situation of the subscription
- Match data status
- Task list
- Import (fetch) status

Users can quickly track invoices, transactions, task statuses, and subscription summaries in one place, ensuring efficient financial management at a glance.





Key Features

Records from Accounts

The platform streamlines the process of managing [invoices](#), [documents](#), and [transactions](#) by integrating multiple platforms such as Amazon, eBay, EasyBill, Stripe, and PayPal. Kudtax simplifies accounting operations by automating data fetching, processing, and exporting, ensuring users can efficiently manage their financial data from a single interface.



Document



Invoice



Transaction

All invoice, transaction and documents fetched from various platforms are organized under the [‘Records’](#) section in separate tables, allowing users to efficiently track and manage their financial data.

DOCUMENT LIST

Channel	Document ID	Name	Invoice ID
stripe	5546298	02f00379-bbf9-4a9a-b194...	664739
amazon			
ebay			
amazon			
stripe			
easybill			

TRANSACTION LIST

Channel	Transaction ID	Total Amount	Open Amount	Status
PayPal				
ebay				
amazon				
stripe				
easybill				

INVOICE LIST

Channel	Invoice ID	Total Amount	Open Amount	Status
amazon	664739	€ 800,00	€ 800,00	Match Process
Kaufland	Etsy	€ -542,60	€ 0,00	Matched
stripe	ebay	€ 1.220,98	€ 0,00	Matched
amazon	easybill	€ 257,35	€ 257,35	Excluded
stripe	299308	€ -122,55	€ -122,55	Match Process
Etsy	884902	€ 2.089,42	€ 0,00	Matched

Key Features



Account Creation

The system allows users to seamlessly integrate their **e-commerce and payment platform accounts** such as Amazon, PayPal, Etsy, Shopify, and more. The process follows three simple steps:

1- Select an Account – Users choose an invoice or transaction integration from supported platforms.

2- Configure Account Details – Enter credentials, tokens, currency preferences and select the options to be activated in this account

3- Manage & Automate – Once connected, KudTax continuously fetches and organizes financial data, enabling automated invoice matching and export preparation.

 **shopify** 




Acc. NameAccount ID: #6784594


Incoming

Doc. Fetch

Created At: 12.08.2024
Last Entry: 17.08.2024

Status: ☒






stripe 

Acc. NameAccount ID: #6784594

Created At: 12.08.2024
Last Entry: 17.08.2024

Status: ☒



Key Features

Task Creation: A Core Functionality in KudTax

Allowing users to automate and streamline financial data processing across multiple accounts. It ensures that invoices, transactions, and related data are efficiently fetched, matched, exported, or imported based on user-defined settings:

Types of Tasks

Non-Repetitive: One-time actions that users execute as needed for specific data processing

Repetitive: Run at predefined intervals, ensuring continuous data synchronization without manual intervention.

Key Processes in Tasks

Fetch: Retrieves data (invoices, transactions, etc.) from the connected platform.

Match: Links transactions with corresponding invoices to ensure accuracy.


Export: Prepares and sends processed data in accordance with appropriate export templates for external use or reporting.

Import: Allows users to manually upload external data into the system.


CREATE TASK

Select one or more account to create tasks for


☐ All Invoice Accounts

shopify


account name here...

shopify


account name 2 here...

ebay


account name here...

amazon

account name here...


amazon

account name 2 here...


stripe

account name here...


☐ All Transaction Accounts

mollie


account name here...

mollie

account name 2 here...

stripe

account name here...

paypal

account name here...

Nonrepetitive

Repetitive

Process: ☒ Fetch | ☐ Match | ☐ Export | ☐ Import

Selection Settings: ☒ Creates separate tasks for each selected account.
☐ Creates a single task that covers all selected accounts. ⓘ

Date Range of Fetching

Run Date

Start Now ☒

Select* 06.08.2024 - 08.08.2024 ⓘ

Select* ⓘ

☒ Data was fetched on these dates before ⓘ

Account Settings: ☐ Default (Each task will directly use its own account settings)
☒ Custom (These settings will apply to all created tasks)

ⓘ There are previously fetched data within the selected date range. Please select the method to be applied below.

☒ Delete existing data and fetch the selected date range.
☐ Do not overwrite duplicate data; only save the differences.
☐ Overwrite duplicate data and save differences as new data.
☐ Keep existing data and fetch all selected date range of data again

Would you like to include the following processes?
☐ Start the matching process after the data has been fetched.

Create

Preview

1

2

3

4

5

6

Start

Login

Fetching

Validation

Match

Completed

Key Features




Non-Repetitive Tasks

A non-repetitive task is a one-time process that the [user manually initiates](#) whenever needed. Unlike repetitive ones, which run automatically at scheduled intervals, non-repetitive tasks allow users to [fetch](#), [match](#), [export](#), or [import](#) data for a specific time range on demand.

For example;

a user may need to [fetch invoices from Amazon](#) for the last month or export matched transactions for a quarterly report—these actions are executed once and do not repeat unless the user creates a new task.

 Non-repetitive tasks provide flexibility and control



Account NameTask ID: #3427

Nonrepetitive

Date Range: 01.08.2024 – 30.09.2024

Run Date: 02.10.2024

FetchMatchExport

12h : 08m : 10s left

Start Now

Key Features

Repetitive Tasks

A repetitive task is an automated process that runs at [regular intervals](#) based on the user's preferences. Instead of manually initiating tasks each time, users can set up a repetitive task to just [fetch and export](#) data on a scheduled basis.

For example;

a user can configure a task to [fetch PayPal transactions](#) every week or automatically [export invoices from Shopify](#) at the end of each month. Once set, the system executes these actions consistently, ensuring that the latest data is always processed without manual intervention.

 Automate workflows, save time and keep data synced.

Etsy



Account Name 2

Task ID: #7831

[Repetitive](#) | Period: Daily

Date Range: 03.08.2024 - 16.09.2024

Run Date: 16.09.2024

Export

5 days left

Start Now



Key Features

Task History

It provides users with a detailed overview of their tasks. This table-based interface tracks each [task's status, execution details, and results](#). Users can see the start and end times of each step, the associated account ID, the number of invoices and transactions retrieved, and a [step-by-step breakdown](#) of the process. Each stage—fetch, validation, match, export etc.—is timestamped, allowing users to monitor the exact progress of their tasks. If a task succeeds, users can access the extracted data directly from the details view.

ebay

+ Create Issue

Task ID: #66472

Account Name: Account 123

Account ID: 44252712

Date Range: 07.07.2024 - 01.09.2024

Period: 2 days | Repetitive

Run Date: 14.08.2024 - 12:15 am

Finish Date: 14.08.2024 - 12:45 am

Fetch Match Export

Data Count

345 invoice | 336 document

Export

History Details

Start

Login

Fetching

Validation

Match

Export

Finish

14.08.2024 - 12:15 am

14.08.2024 - 12:16 am

14.08.2024 - 12:16 am

14.08.2024 - 12:16 am

14.08.2024 - 12:16 am

570 transaction

Cancel Message: Lorem ipsum dolor sit amet Lorem ipsum dolor sit amet

Key Features

Export: Another Core Functionality in KudTax

This feature is a key functionality designed to give users full control over their data exports. Within the Flow Template section, users can navigate between Export and Import tabs.

In the Export tab, users can generate data using either a custom-built "[Kud.tax Export Template](#)" or the pre-configured "[DATEV Export Template](#)." The DATEV template is particularly valuable for users who work with the [DATEV accounting system](#), ensuring seamless integration and compliance with its standardized format.

The Import tab allows users to bring in data based on their own predefined templates, ensuring a structured and automated approach to data handling.



DATEV Export Integration

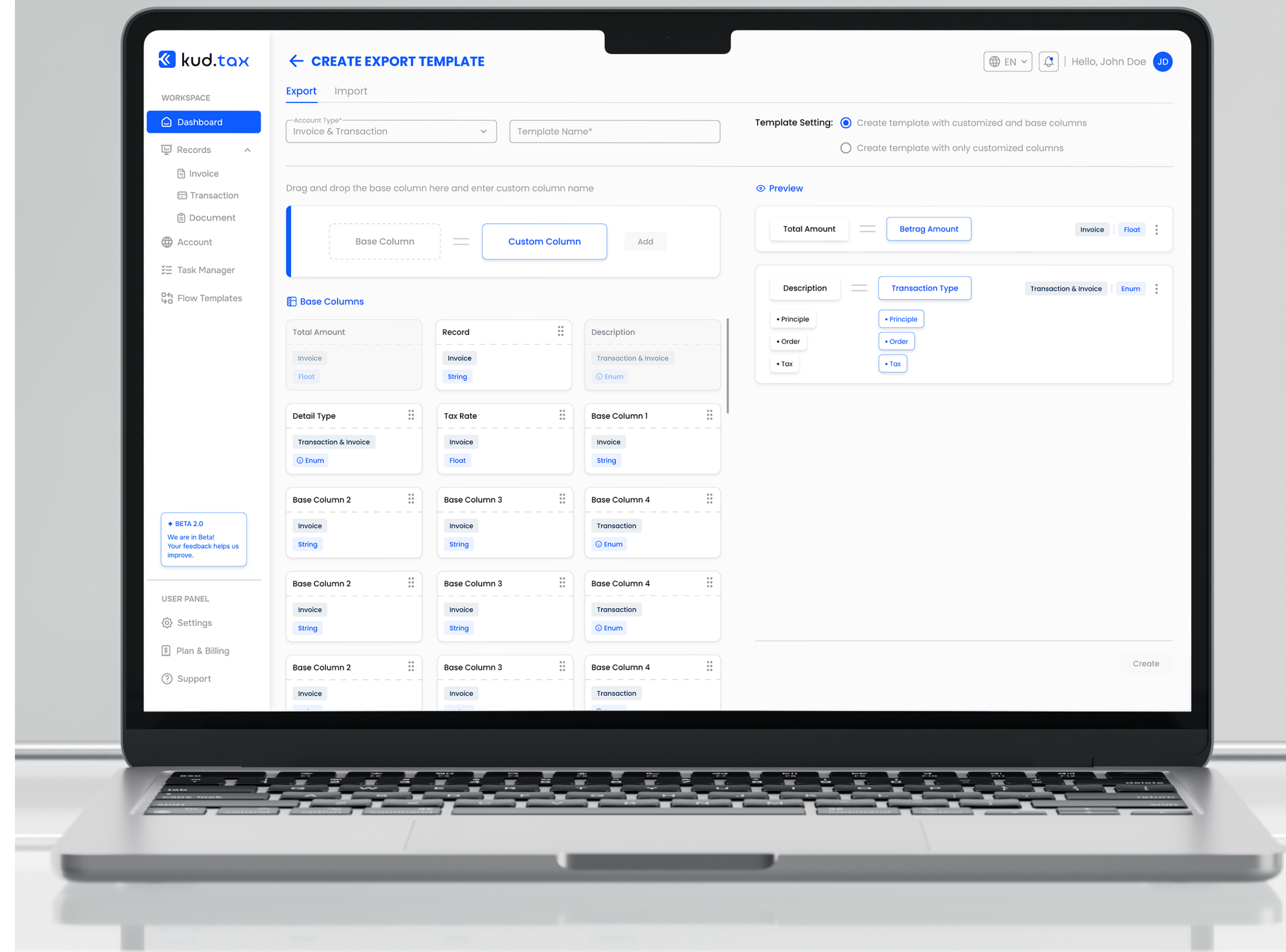


KudTax Export

With KudTax Export Template, users can rename exported data fields to match their specific needs. This means that instead of using predefined field names, users can define their own labels for a **more personalized and structured export format**.

This flexibility ensures that exported files align perfectly with the user's internal accounting systems, making data processing and reporting more seamless.

This feature is especially useful for businesses that need to comply with specific naming conventions, software integrations, or custom reporting formats—ensuring that data is always structured exactly as required





Key Features

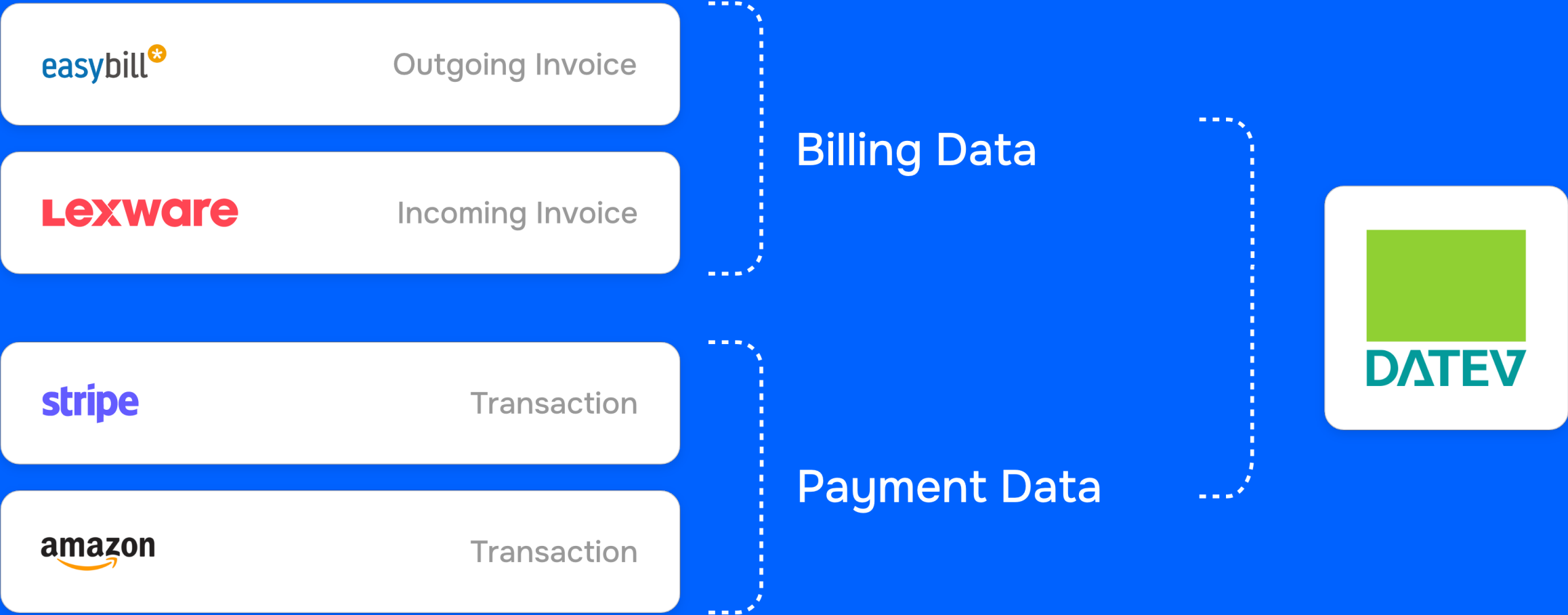
DATEV Export Integration

The DATEV Export feature in KudTax is designed to simplify financial data transfer for businesses using the DATEV accounting system. With our DATEV Export Template, **users can effortlessly format their transaction and invoice data to meet DATEV's strict standards**. The export process ensures that data is structured correctly for direct import into DATEV, allowing accountants to work with it immediately.

💡 This eliminates the need for manual adjustments, reducing errors and saving time.



DATEV Export Integration



Support Service

KudTax provides a dedicated support system where users can open tickets for issues they encounter. They can categorize their tickets as [Error](#), [Suggestion](#), or [Question](#) and communicate directly with our support team within the ticket details. Additionally, from the task history, users can quickly report an issue by clicking a button that opens a create issue modal—automatically filling in the Task ID—to ask questions or highlight concerns efficiently. They can also upload documents related to their issues

CREATE ISSUE

Type*

Task ID

Account ID

Issue Subject*

Type your message here...

0/1000

Upload (optional)

⬆

Drag and drop your files to import here

Select Files

Create

KudTax Support Team responds to issue tickets as quickly as possible. Whether it's an error, suggestion, or question, our team is dedicated to providing efficient and helpful solutions.

Type:

ⓘ Error

Creation Date: 20.02.2025 16:40

Issue ID: #67b730d572dc67af243d93c7

Account ID: #14

Task ID: #12

- JE

John E

20.02.2025 18:52PM

We tried to upload a CSV file exported from DATEV, but the system throws an error. Please check and let us know how to proceed."
- ST

Support Team

20.02.2025 20:47PM

We have analyzed the issue and confirmed that the CSV file format does not match the expected schema. The system requires specific column names and order for successful import.

[Complete Issue](#)

Type your message here

➤



Our Packages

STARTER

1.000 credits for monthly ⓘ

€ 249 /monthly

- ✓ Creating unlimited accounts from portals
- ✓ Creating scheduled and real-time tasks
- ✓ Automatically fetches data at predefined intervals without human actions.
- ✓ Matching transactions, invoices, and documents using AI
- ✓ Document archive
- ✓ Export data as DATEV files in CSV and XML formats
- ✓ Kudtax Export + Core Data Integration

PLUS

5.000 credits due for monthly ⓘ

€ 449 /monthly

- ✓ All starter plan features included
- ✓ User-specific customizable export options
- ✓ Prioritized support service

PRO

10.000 credits due for monthly ⓘ

€ 749 /monthly

- ✓ All plus plan features included
- ✓ Direct connection to DATEV Unternehmen Online (coming soon)
- ✓ Direct connection to Microsoft Dynamics 365 Business Central (coming soon)
- ✓ Preparing reports for One-Stop Shop (OSS) (coming soon)

ENTERPRISE

Contact us for pricing

Let's Talk!

- ✓ All pro plan features included
- ✓ Personal customer advisor
- ✓ Implementation + onboarding



Thank you for choosing KudTax - Your Partner in Smart Accounting