

AI CONNECT · EXACT ONLINE

Your Exact Online accounts, one question away

AI Connect plugs the AI assistant you already use, whether that's Claude, ChatGPT, Copilot, Gemini or any other MCP-capable assistant, straight into Exact Online. Ask in plain English, get answers from your live figures, and have postings drafted for you to approve.



Live figures, not exports

Pulled straight from Exact Online through the official API. No spreadsheets, no middle layer.



Works in the assistant you already use

Any AI assistant that supports MCP, including Claude, ChatGPT, Copilot, Gemini, Perplexity and Grok. Nothing new to learn.



Nothing changes without your say-so

The assistant drafts entries and actions. You review and confirm before anything touches Exact.



ISO 27001 certified, hosted in the EU

Independently penetration tested, with your data kept in Europe.

01 HOW IT WORKS

From question to action

AI Connect sits between your AI assistant and Exact Online. Setup takes a few minutes: you choose which administrations to include, then ask questions the way you'd ask a colleague.

THE FLOW

YOU · IN YOUR AI ASSISTANT

Ask the question

"Which invoices are more than 30 days overdue?" or "Reconcile this week's bank transactions."

- In Claude, ChatGPT, Copilot, Gemini or any other MCP-capable assistant
- Plain English, no report builder



AI CONNECT

Fetches, works it out, drafts

Picks the right data in Exact Online, pulls it live within your permissions and comes back with an answer, an analysis or a draft posting.

- Only the administrations you've connected
- Every change waits for your go-ahead
- Every action is logged



EXACT ONLINE

Stays the source of truth

Your accounts stay exactly where they are. AI Connect works through the official Exact Online API and never changes anything behind your back.

- Nothing to install in Exact
- UK, Dutch and Belgian editions

— Questions and answers go through your AI assistant

— Figures come live from Exact Online

FOR THE OWNER

Run the business on numbers

- *Who are my top 10 customers by revenue this quarter?*
- *Where does our cash stand, and what can we afford to spend this month?*
- *Which customers always pay late?*

FOR THE FINANCE TEAM

Get through the day faster

- *Check the scanned purchase invoices for duplicates and post them.*
- *Reconcile this week's bank transactions.*
- *Which overdue invoices need chasing today?*

FOR THE CONTROLLER AND ACCOUNTANT

Review and close with confidence

- *Run the month-end close: suspense accounts, VAT reconciliation and depreciation.*
- *Which postings don't fit the pattern of the last six months?*
- *Build me a 13-week cash flow forecast.*



Rather not set it up yourself? Your Exact partner connects the administration, configures the skills and agrees with you what the assistant may do for each role.

02 PLANS

Two plans, one connector

Pricing is per user per month. Essentials suits anyone who wants to query and update the day-to-day books; Analytics is for those who manage on margins, trends and analysis across the whole administration. You can mix both within one organisation, chosen per user.

PER USER PER MONTH	Essentials Control over your daily administration	Analytics Drive on numbers, margins and trends
Ask questions about your accounts	✓	✓
Create, edit and delete, always with confirmation	✓	✓
Financial reports and overviews	✓	✓
Analysis	On request, per customer or period	Across the whole administration, including large volumes
Trends and period-on-period comparison	–	✓
Margin by item, customer and period	–	✓
Month-end close with anomaly checks and dashboards	–	✓
Administrations included	1	1
API requests per month A question typically uses a handful of requests; plenty for everyday use	5,000	15,000
Cancel any month 10% off on an annual contract	€ 29 € 26.10 on an annual contract	€ 79 € 71.10 on an annual contract

EXTRA ADMINISTRATIONS

PER MONTH	ESS.	ANAL.
2 to 10	€ 15	€ 25
11 to 25	€ 12	€ 20
26 or more	€ 10	€ 15

One fee covers all users. Your first administration is included, and a higher band applies to every extra administration.

TRY IT

30 days free

Every feature, no card details

You get the full Analytics functionality on up to three administrations. At the end you pick a plan or simply stop; nothing is charged automatically.

NO SURPRISES

€ 0 setup fees

Cancel any month

Nothing to install in Exact Online and no setup fees for the connector. Users, administrations and each user's plan are all managed by you in the control panel.

03 SKILLS AND SETUP

Your way of working, captured as a skill

A skill is a written-down way of working that your assistant follows the same way every time: which checks, in what order, within which limits. The skills below come with the connector. Adapt them, or capture your own.



Month-end close

Suspense accounts cleared, VAT reconciled, depreciation and payroll journals checked and unusual entries flagged, in one overview with open points.



Reconciliation

Bank, card and payment providers such as Stripe and Mollie: open items identified and matched, the rest put in front of you.



Cash flow forecast

13 weeks ahead, built from open invoices, recurring costs and history, with base, best and worst case.



VAT check

The return compared with the ledger, differences and EC sales flagged, and the correction prepared for you.



Credit control

Aged debtors, payment behaviour per customer, and draft reminders you sign off before they go out.



Purchase invoices

Scanned and e-invoices read, checked for amount, duplicates and period, and posted once you approve.

DASHBOARDS AND REPORTING

Your numbers at a glance, no BI tool required

Alongside skills, your assistant builds dashboards and reports on your live figures and refreshes them on request. Share them with your team, accountant or bank.

- Weekly cash flow forecast with scenarios
- Month-end close with the open checkpoints
- Revenue and margin by customer, item or period
- Debtors: ageing, payment behaviour and risk

WHAT YOU NEED

- **Exact Online** (UK, Netherlands or Belgium) and a user whose permissions match what the assistant should be able to do
- **An AI assistant** that supports MCP, which most now do: Claude, ChatGPT, Microsoft Copilot, Google Gemini, Perplexity, Grok, Mistral and others. Pick a business plan with a data processing agreement so your data isn't used for training
- **A few minutes** to connect. After that it's there in any chat you switch it on for

GOOD TO KNOW

- Direct questions work straight away. For analysis over longer periods, part of your data is synchronised once at the start, usually within a day
- Several administrations under one Exact licence share a single connection; just ask to switch
- Any skills and dashboards you or your partner build stay yours

04 SECURITY AND GETTING STARTED

Securely connected, live in three steps

Access	You authorise the connector with your own Exact Online login (OAuth). The assistant can never do more than you can, only works in the administrations you've chosen, and you can revoke access at any time.
Your data	On Essentials, data passes through live and nothing is stored. On Analytics, part of the administration is synchronised, encrypted, to our own data warehouse in the EU so heavier analysis can run there; it is deleted the moment you revoke access.
Hosting	The connector runs on Google Cloud in the Amsterdam region, so all processing and storage on our side stays within the EU.
Certification	Our information security is certified to ISO/IEC 27001:2022 and audited externally every year. The connector has been independently penetration tested.
AI model	Which AI assistant you use is up to you, and that use is covered by your own agreement with that provider. We never train models on your data.
Changes	Every write action (an invoice, a posting, a contact) is shown as a proposal first and only carried out once you confirm. Everything is logged.
Terms	The data processing agreement is part of our standard terms and applies from the moment you start the trial or subscription, so there is nothing separate to sign.
Documentation	Security questions from IT or your accountant? Our security brochure and ISO certificate are available on request through your partner.

01

Start your trial

30 days, every feature, no card details. Nothing is charged automatically.

02

Authorise Exact Online

Log in with your own account, pick the administrations to include and click Allow.

03

Connect and ask

Add the connector to your AI assistant and ask your first question, for example "Which invoices are outstanding?"



ISO/IEC 27001:2022 certified

Certificate number TA-01-CCBV-260924 · [verify at certcheck.ukas.com](https://certcheck.ukas.com)

Ready to get started?

Your Exact partner sets up the trial, connects the administration and configures the skills. Find out more about AI Connect, watch the demo video and browse the knowledge base at iwebdevelopment.com/en.