

Guide Activate iQurrency for Exact

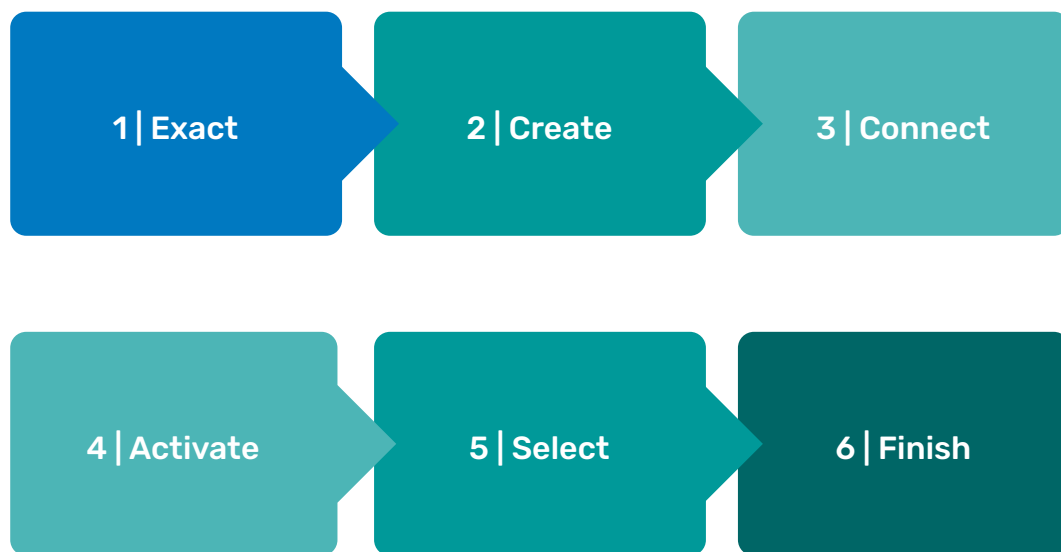
iqurrency.com



Guide Activate iQurrency for Exact

This is the manual for the steps to be taken to activate iQurrency and link it to your Exact administration(s).

Broadly, it will consist of the following steps:



1 | Exact

At a high level, the following setup is required in Exact:

In general terms, the following facilities are required in Exact:

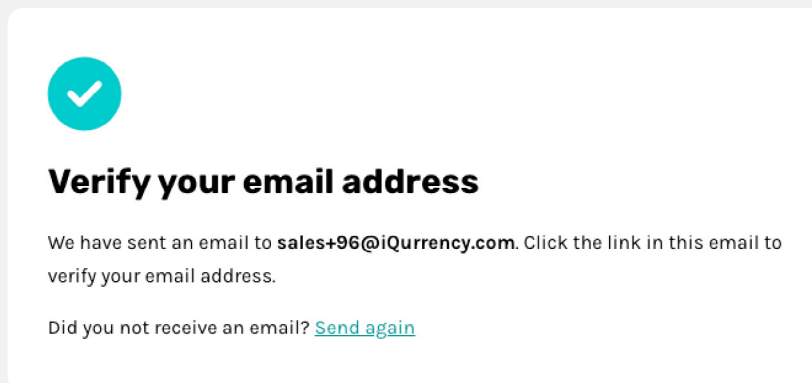
- Set the base and reporting currency in administration settings.
- Create the currency code(s) in Exact that you will use in administration settings.
- Set up the bank account(s) in the respective currency.
- Set up the bank accounts for currency revaluation.

2 | Create an iQurrency account

For daily updates of currency rates, an iQurrency account is needed. You can create one via the iQurrency website (optionally through the Exact App store). After activation, you can use iQurrency for free for the first month.



When requesting a (trial) account, the following screen appears:



Then you will receive an email to confirm your request, and you can set your password.

Welcome to iQurrency!

You have created an account with this email address: sales+96@iQurrency.com

Click "confirm" to verify your email address.

[Confirm](#)

Does the button not work? Paste this link directly into your browser to continue:

<https://app.iqurrency.com/en/sign-up/activate/69548e7e-4d68-497b-9023-ee9d227085d6>

The activation link expires on 10/25/2023.

You did not sign up with us?

Then please disregard this message.

Herenwal 137
8441 BE Heerenveen
The Netherlands

Chamber of Commerce: 82699860
VAT No. NL: 862571819B01

T +31 (0)513 654 445
E support@iqurrency.com

www.iqurrency.com

Secure your iQurrency account

Your email address has been verified successfully. Create a safe password and continue to your iQurrency account.

Password

Your password must contain at least 12 characters.

Confirm password

[Start iQurrency](#)

3 | Make Connection

After setting your password, you will enter the iQurrency 'dashboard':

Your packages

▲ No accounting packages have been linked to your account yet.

Connect your online accounting package
The first month is free of charge, then from € 9,95 per month.

Connect

Here, you link the online accounting package. Choose Exact.

iQurrency now requests permission to read your Exact environment and to add daily currency rates to the administrations you select.

Grant access

Please give your accounting application permissions to let us update the currency rates.


Exact
United Kingdom

Grant access

After clicking on 'grant permission', you are automatically redirected to the Exact login screen. Use an account with sufficient rights (level 2) for the link. You can also choose to create a separate Exact account for this.

After logging in, the following consent screen appears. This describes what you grant permission for:

Permissions requested



Connection details:
Connection details: Exact
Environment: Van der Let & Partners (616323)
User: exact@vdlp.nl

iQurrency uses this connection to:

- Gather administration codes
- Read administration details: name and available currencies
- Read currency exchange rates
- Update currency exchange rates

By accepting you give iQurrency permission to use your administrative data as specified above.

Cancel Accept

After you have granted permission, you will automatically return to the iQurrency dashboard where the package can be set up.

Grant access

Please give your accounting application permissions to let us update the currency rates.

Exact United Kingdom	✔ Access granted at 10/23/2023	Compose your package
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4 | Setting Up the Package

After granting access and establishing the connection between Exact and iQurrency, you continue with the setup of the package. Click on the green button 'Set up your package'.

The screen displays all package settings. Under package description, enter the name of your package as you want it to appear on the invoice. Below, select the administrations and currencies (per administration) to be updated daily.

Edit iQurrency Exact (UK)

Package description
The description of this package as shown on your invoice.

Select your administration(s) Show selected administrations only

Search administrations

<input type="checkbox"/> Van der Let & Partners 39325	No currencies selected	Select currencies
---	------------------------	-----------------------------------

In this example, there is only 1 administration in Exact. In many cases, there are multiple, and you can use the search function.

Tick the administration on the left that needs to be updated daily. Then click on 'Select currency'.

Select your administration(s) Show selected administrations only

Search administrations

<input checked="" type="checkbox"/> iQurrency EQUALMONEYTEST	No currencies selected	Select currencies
--	------------------------	-----------------------------------

In this screen, iQurrency now shows all available currencies of the administration. At the top of the screen, the base currency of the administration appears, and below all currencies that you can update daily. Check the currency and choose the source of the currency rate: European Central Bank (ECB) or Open Exchange Rates (OER).

Currencies to update ✕

iQurrency | EQUALMONEYTEST | Base currency: EUR

🔔 There are no currencies selected with this administration.

Search currencies

🔍 Tap here to search

<input type="checkbox"/> ARS	ECB OER
<input type="checkbox"/> BTC	ECB OER
<input type="checkbox"/> HKD	ECB OER
<input type="checkbox"/> USD	ECB OER

Currency not listed above? Please check the settings in your online accounting application.

Close Submit

After confirming the currency and source choices, you will return to the package-setting screen. Here, the selected currency amounts are shown.

iQurrency
EQUALMONEYTEST

3 currencies

Change currencies

5 | Activate

Once all financial administrations and currencies have been selected, you can move on to the final step: activating the package. To do this, click on the 'Next' button at the bottom right of the screen.

Based on the choices made, iQurrency calculates the monthly cost of the package. On this page, you can confirm that you agree.

If you have not entered a payment method, you will automatically be redirected to fill it in. For a new package, there is a free trial period of 1 month. Only after this will iQurrency charge for use.

Confirm package composition

Activate this package and you get a 1-month free trial.

iQurrency Exact (UK)
1 administration | 2 currencies | Exact United Kingdom | Environment: Van der Let & Partners (616323) | User: exact@vdlp.nl

I agree with the monthly costs of € 9,95 for this package.

Confirm package composition

Activate this package and you get a 1-month free trial.

iQurrency Exact (UK)

1 administration | 2 currencies | Exact United Kingdom | Environment: Van der Let & Partners (616323) | User: exact@vdlp.nl

I agree with the monthly costs of € 9,95 for this package.

In the following screen, you can choose the payment method and enter the billing details:

Payment method *

Card
Pay with VISA, MasterCard, American Express and all co-branded cards.



PayPal
Pay easy and secure with PayPal.



SEPA Direct Debit
Automatic direct debit payment through your bank account.



Invoice information

Organisation name *

To the attention of

Street name + house number *

Postal Code *

City *

Country *

Invoice email address *

I agree with the [terms and conditions](#).

Cancel

Submit

Fields with a * are mandatory.

After all confirmations, you return to the dashboard. There, all created packages are displayed. For each package, you can see which settings are there and whether the package is active.

Your packages

iQurrency Exact (UK)
1 administration | 2 currencies | Exact United Kingdom | Environment: Van der Let & Partners (616323) |
User: exact@vdlp.nl
🕒 Package activated, trial period ends at 11/23/2023

[View package details](#)

Connect your online accounting package
The first month is free of charge, then from € 9,95 per month.

[Connect](#)

6 | Make Changes

At any time, you can make changes anywhere.

It is possible to make changes anywhere at any time. Within a package, you can activate or deactivate administrations and currencies. But the payment method or billing/invoice details can also be adjusted at any time.

7 | Historical Rates

iQurrency can also process historical rates. Please contact iQurrency (support@iqurrency.com) for the terms.

On behalf of the team, we wish you much pleasure and convenience with iQurrency.

If you want to know more or have questions, please check:

Our website:

www.iqurrency.com

More background information about our product:

www.iqurrency.com/product

Would you like to contact someone?

www.iqurrency.com/contact

Want to contact support directly?

www.iqurrency.com/support

More information about rates?

www.iqurrency.com/tarieven

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app.iqurrency.com/sign-up

Want to log in:

app.iqurrency.com