

# Pleo AI Access terms

This lets users in your organisation connect AI agents — such as Claude or ChatGPT — to their Pleo account. The agent acts on their behalf, within their existing Pleo permissions.



## How it works

The agent can only do what the user can already do in Pleo. You can configure the agent to ask before making any changes. **Every action is logged in Pleo** so you can review what happened and when.

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## What AI tools cannot do

No agent — regardless of provider — can take these actions through the Pleo MCP. They're blocked by design.

- Initiate payments or move money
- Issue, freeze, or change cards
- Change spending limits

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## Before you enable this

As the admin, you are confirming that:

- ✓ You have the authority to allow users in your organisation to share Pleo data with the AI tools they choose to connect.
- ✓ You will let your employees know that their expense data — including **names, email addresses, merchant details, and receipt content** — may be processed by their chosen AI tool and its provider.
- ✓ You have considered whether employees should use a personal or a company AI account for this, and will put a policy in place if needed.
- ✓ Your organisation's use of any connected AI tool complies with applicable law, including data protection law.

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## A note on data

Expense records contain personal data and may occasionally include **sensitive information, such as medical receipts**. When a user connects an AI tool, their data is processed by that AI provider under the provider's own terms and policies.

If the provider is based outside the UK or EU, that is an **international data transfer** and you, as the data controller, are responsible for ensuring you have a lawful basis for it. Pleo transmits the data your users request; we do not control what the AI provider does with it afterwards.

Pleo is **not liable for the outputs or actions** of any connected AI tool.

- 🔄 You can disable this at any time in [Settings → General → Pleo AI](#). Users can revoke their own connections independently.