



# Essentials – Part 1

A step-by-step guide to FreeAgent's core functionality

2026



[freeagent.com](https://freeagent.com)

# Welcome!

In this manual, you will:

- learn which types of business FreeAgent is suitable for
- understand how to use your Practice Dashboard
- get to grips with adding clients to FreeAgent
- understand how to use FreeAgent with your clients

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# Your Practice Dashboard

## Clients area

The Practice Dashboard is where you can add your clients, view their details and access their accounts.

When you log in to your Practice Dashboard, the Clients area is the first screen you'll see. This allows you to easily access your clients' FreeAgent accounts without needing a login for each individual account.

On this page, you can switch between 'My clients', 'My group clients' and 'All clients'.

Name	Account owner	Client relationship	Free NMG licence	Status	Bank balance	Alerts	Owner access
A & K Bakery TB Cl Ltd	Regina Pereira regina.pereira@freeagent.com	Practice client	No	Active	£2,300.00	0	Level 7 Edit Switch to...
Bob The Builder Ltd	Bob The Builder eoin.mcnamara@freeagent.com	Practice client	No	Active	£34,949.36	0	Level 8 Edit Switch to...
Builder	Eoin McNamara eoin.mcnamara@fa.com	Practice client	No	Active	£25,259.00	0	Level 8 invite client Edit Switch to...
Clare Brazilian JuuItas Limited	Eoin McNamara eoin.mcnamara@fa.com	Practice client	Could be	Active	£73,041.77	1	No Access Edit Switch to...
Deat Integration	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£196,370.20	0	Level 8 Edit Switch to...
Eoin Demo Sole Trader	Frankie Goodman eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	£46,512.34	1	Level 8 Edit Switch to...
Eoin Prop	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 7 invite client Edit Switch to...
Handy Manny LTD	Marny Esteves Garcia Eoin.mcnamara@freeagent.com	Practice client	No	Active	-£13,700.00	0	Level 8 invite client Edit Switch to...
Lendlord Demo	Dhanika Schneider eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	-£302,177.00	0	Level 8 invite client Edit Switch to...
McNamara & Associates	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£190,000.00	1	Level 8 invite client Edit Switch to...
McNamara Steel LTD	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8 invite client Edit Switch to...
Monopoly Residential	Milburn Pennington eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,117.44	1	Level 8 Edit Switch to...
Payroll Demo Eoin	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£0.00	0	Level 8 invite client Edit Switch to...
Recall Micro Software	Eoin McNamara	Practice client	No	Active	£0.00	0	Level 8 Edit Switch to...

The 'My clients' tab shows you the clients assigned to you as an account manager. The 'My group clients' tab shows you the groups of clients assigned to you. The 'All clients' tab shows you all the clients on the Practice Dashboard.

## Groups

You can add account managers and clients to a group in bulk in FreeAgent.

You can manage groups from both the 'Clients' tab and the 'Account managers' tab.

You must be a senior account manager to create and edit groups.

To access this area, navigate to the 'Account managers' tab and select 'Manage groups'.

The screenshot shows the 'Account managers' page in the FreeAgent system. The page has a green header with navigation tabs: Clients, Alerts, Account managers, Payroll, Reports, CSV imports, Partner Zone, and FA Training. Below the header, there are two buttons: 'Manage groups' and 'New account manager'. A search bar is present with the text 'You can search on all or part of an account manager's name to narrow down the list'. The main content is a table with the following data:

Name	2-Factor Authentication	Last logged in	Clients	
Andrew Gress <span>Senior</span>	Disabled	19 Mar 26 09:04	0 clients	Delete
Ben Morley <span>Senior</span>	Disabled	20 Mar 26 16:02	21 clients	Move clients
Eoin McNamara <span>Senior</span>	Disabled	25 Mar 26 11:03	20 clients	Move clients
Joe Biggs	Disabled	20 Apr 22 14:57	0 clients	Delete
John NonSenior	Disabled	09 Mar 26 15:56	0 clients	Delete
Keith Gray <span>Senior</span>	Disabled	23 Mar 26 09:00	8 clients	Move clients
Keith Gray (NS) <span>Senior</span>	Disabled	08 Dec 25 14:51	1 client	Move clients
Natalie Armstrong <span>Senior</span>	Disabled	06 Mar 26 14:54	1 client	Move clients
Regina Pereira <span>Senior</span>	Disabled	26 Mar 26 06:43	87 clients	Move clients
Tony Stevenson <span>Senior</span>	Disabled	25 Mar 26 10:56	17 clients	Move clients

The footer contains the FreeAgent logo, links for Privacy Notice, Terms of Service, Accountant Knowledge Base, and Cookie Notice, a Practice Support link, and a Help icon.

If you want to create a new group, you can select 'Add new group'.

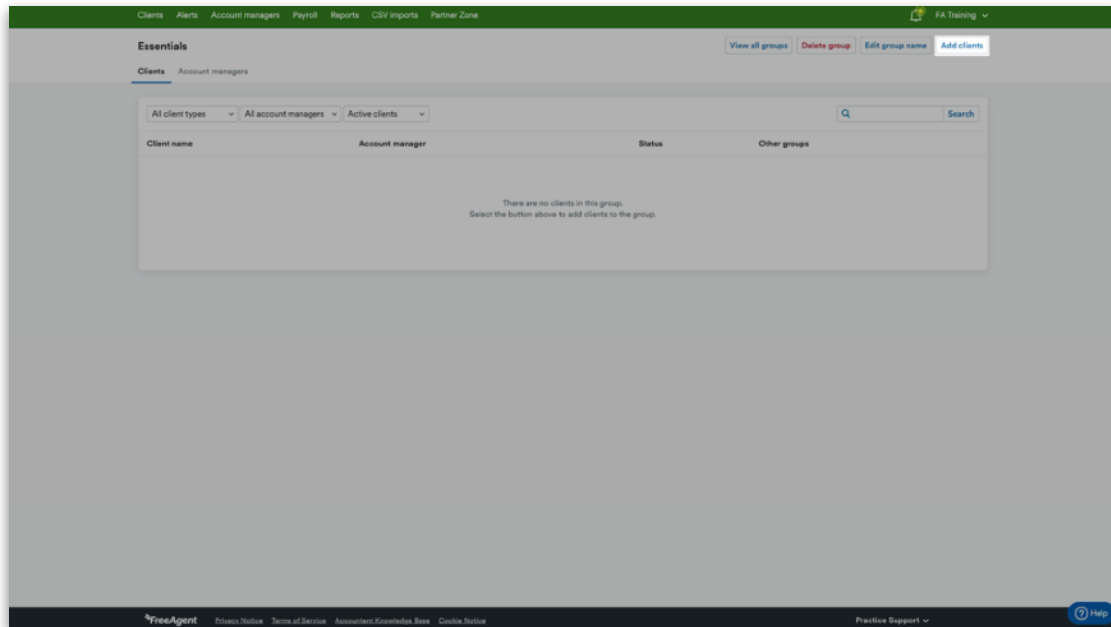
The screenshot shows the 'Groups' page in the FreeAgent system. The page has a green header with navigation tabs: Clients, Alerts, Account managers, Payroll, Reports, CSV imports, Partner Zone, and FA Training. Below the header, there is an 'Add new group' button. The main content is a table with the following data:

Name	Clients	Account managers	
1-FreeAgent Bookkeeping	1	0	Actions
Accounts client	8	2	Actions
All Clients	141	1	Actions
Amazing clients	7	3	Actions
Bookkeeping	8	3	Actions
Eoina Group	46	5	Actions
Essentials training	7	2	Actions
LTD	1	2	Actions
MTD clients	11	3	Actions
North	0	0	Actions
Payroll clients	3	2	Actions
VAT clients	8	3	Actions
Wright Vigar	3	2	Actions

At the bottom of the table, there is a pagination control showing '25 per page'. The footer contains the FreeAgent logo, links for Privacy Notice, Terms of Service, Accountant Knowledge Base, and Cookie Notice, a Practice Support link, and a Help icon.

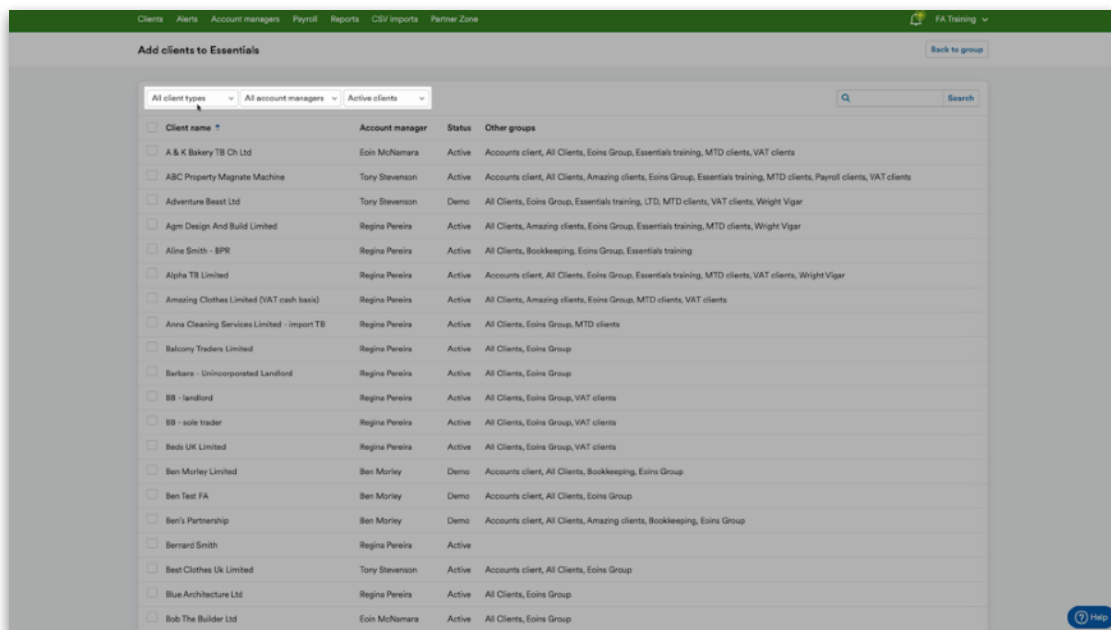
You can click on the name of an existing group to add account managers and clients to that group in bulk.

To add clients in bulk, select the 'Clients' tab and then select 'Add clients'.

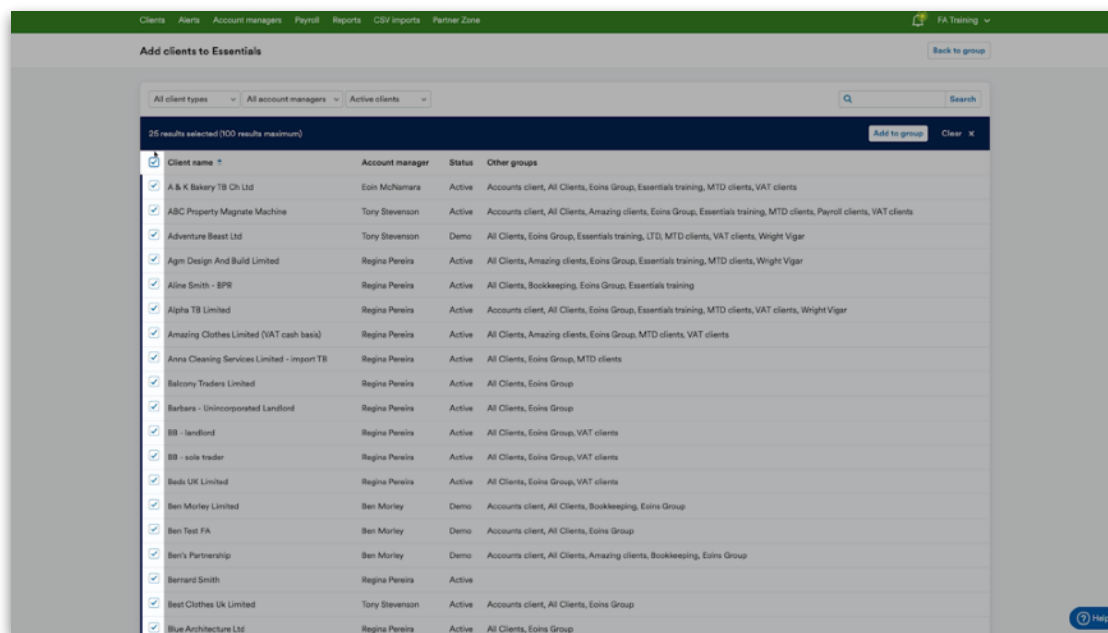


This will then show all clients on the dashboard.

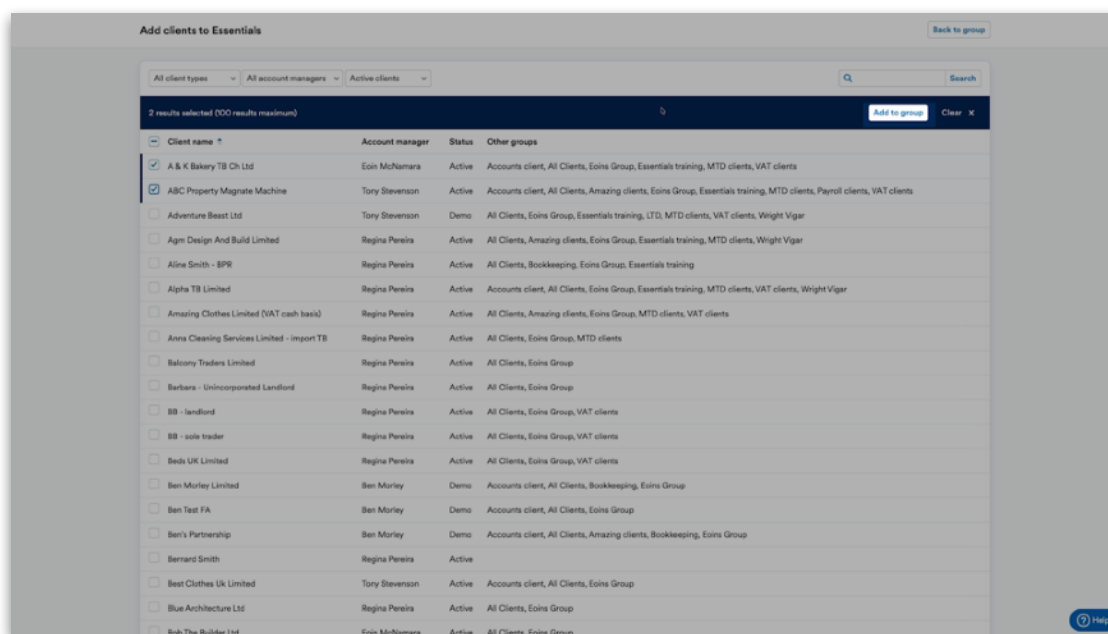
You can filter by licence type, account manager, and client status from the drop-down menus.



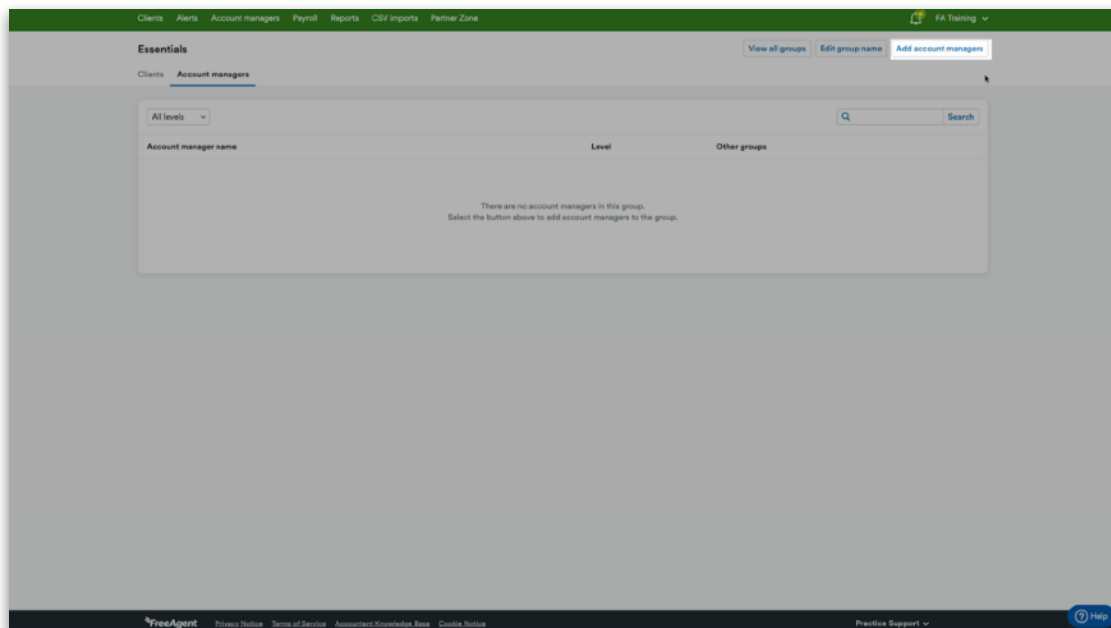
You can select all the clients displayed by selecting the checkbox next to the 'Client name' heading, or you can select the checkbox beside each client you want to add in bulk.



Once you have selected all the relevant clients, select 'Add to group' to add them to the group.

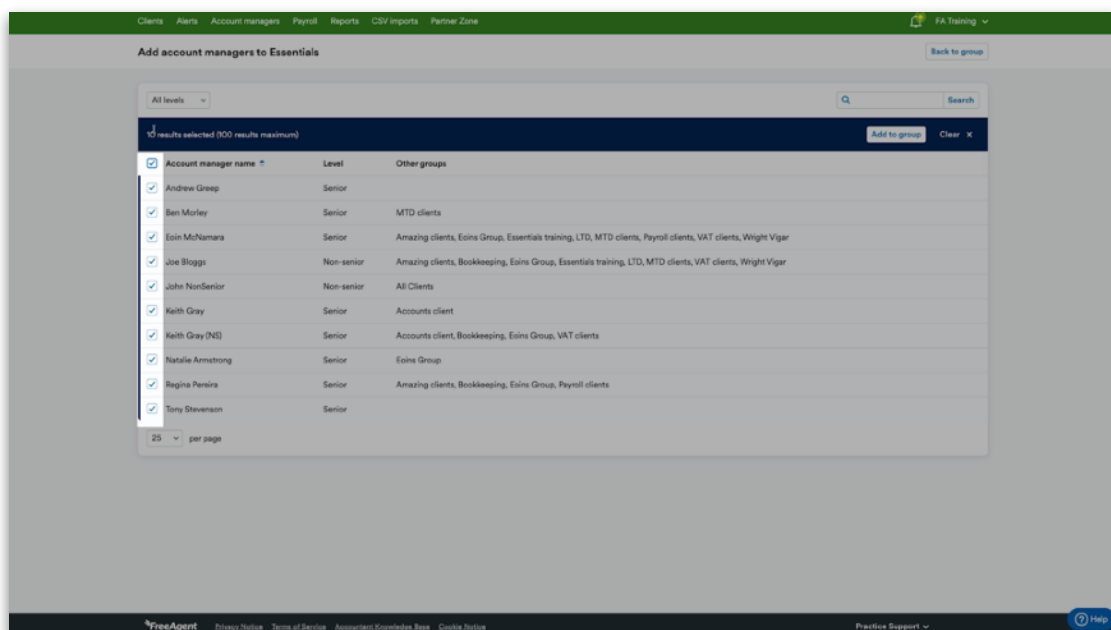


You can also add account managers to a group in bulk by selecting the 'Account managers' tab within the relevant group and then selecting 'Add account managers'.

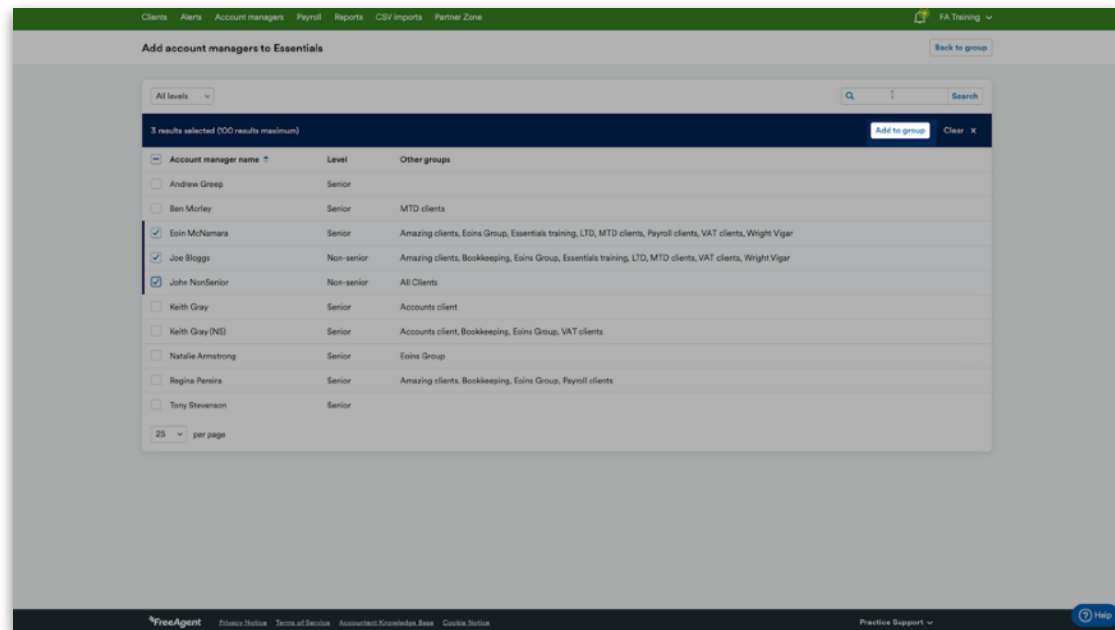


You can filter by level.

Select all the account managers displayed by selecting the checkbox next to the 'Account manager name' heading, or you can select the checkbox beside each account manager you want to add in bulk.

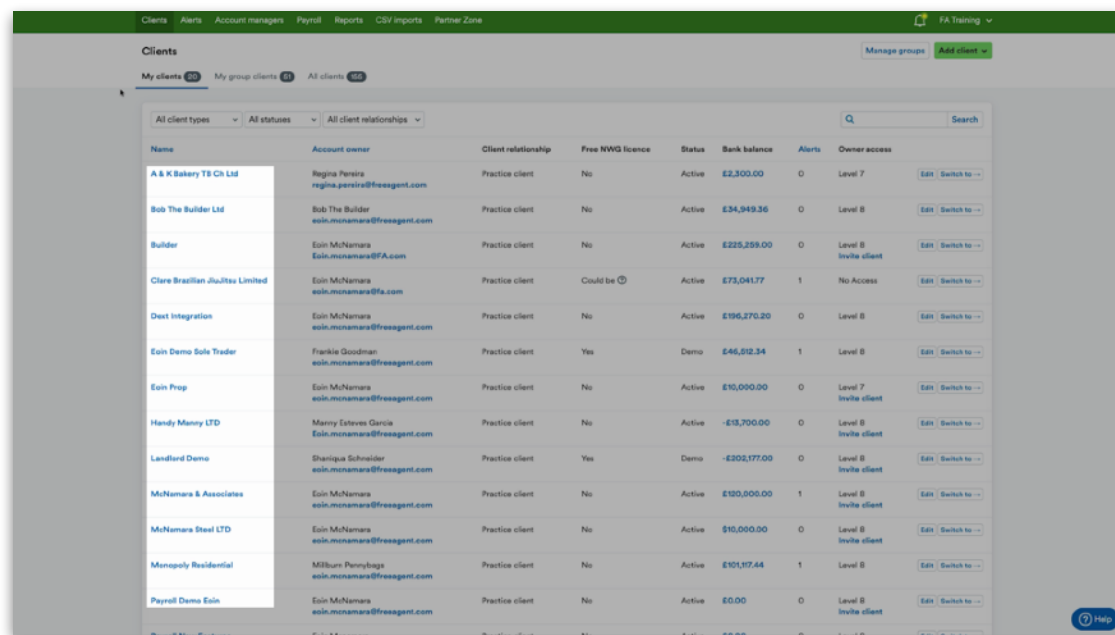


Once you have selected all the relevant account managers, select 'Add to group'.



## Notes

Notes can be added to your client's profile on your Practice Dashboard. Firstly, select the relevant client's name from the list on the 'Clients' tab to view their client profile.



Select the 'Notes' tab.

The screenshot shows the client profile for 'A & K Bakery TB Ch Ltd'. The 'Notes' tab is selected in the top navigation bar. The page is divided into several sections:

- Add-ons:** A table listing add-ons and their status.
 

Add-on	Add-on status	Actions
Amazon UK	Unavailable	Manage
Smart Capture Unlimited	Inactive Practice will be billed if activated	Activate Manage
- HMRC Notice:** A message stating 'You are ready to file VAT via MTD — but is your client?' with instructions and a 'Switch Company to MTD VAT filing' button.
- Profit and Loss for 2025/26:** A summary table.
 

Category	Value
Income	£0
Expenses	£66
Operating profit	£66
Less:	
EO Corp. Tax (est.)	
EO Dividends	
EO Adjustments	
Retained profit	
2025/26 so far	£66
From 2024/25	£52,227
Carried forward / distributable	£52,293
- Client details:** Information about the client, including contact name (Regina Pereira), type (UK Limited Company), registration number (13729999), address (112 Leveny Terrace, London, N3 9LW), and last login (22 May 25 10:04). Buttons for 'Client login' and 'Email client' are present.
- Additional features:** A section for 'Exclude from bulk payroll' with a 'Yes' status.
- Account manager:** Eoin McNamara.
- Groups:** A list of groups including 'Accounts client', 'All Clients', 'Eoin's Group', 'Essentials', 'Essentials training', 'MTD clients', and 'VAT clients'.

Enter the relevant note for the client and select 'Add note' to complete the process. You can also edit or delete notes directly from this page.

The screenshot shows the same client profile page, but with the 'Notes' tab active. A form titled 'Add a note' is displayed, featuring a text input field for the note and an 'Add note' button. The rest of the page content remains the same as in the previous screenshot.

## Account managers

An account manager is anyone from your practice who requires access to a client's FreeAgent licence.

There are two levels for account managers. The main difference between the senior and regular account manager levels is their client access.

A senior account manager can access all of the practice's client accounts in FreeAgent. Non-senior account managers can only view and access the clients who are assigned to them or added to the same account manager and client group.

You can view, add and edit your practice's account managers via the Account Managers tab on the green navigation banner at the top of the screen.

To add additional account managers, click the green 'New account manager' button in the top-right of the screen.

The screenshot displays the 'Account managers' page in the FreeAgent system. At the top, there is a green navigation banner with various menu items. Below the banner, the page title 'Account managers' is visible, along with a 'Manage groups' button and a highlighted 'New account manager' button. A search bar is located below the title, with a placeholder text: 'You can search on all or part of an account manager's name to narrow down the list.' The main content area contains a table with the following data:

Name	2-Factor Authentication	Last logged in	Clients
Andrew Greep <span>Senior</span>	Disabled	19 Mar 26 09:04	0 clients <span>Delete</span>
Ben Morley <span>Senior</span>	Disabled	20 Mar 26 16:02	21 clients <span>Move clients</span>
Eoin McHamara <span>Senior</span>	Disabled	25 Mar 26 11:03	20 clients <span>Move clients</span>
Joe Bloggs	Disabled	20 Apr 22 14:57	0 clients <span>Delete</span>
John NonSenior	Disabled	09 Mar 26 15:56	0 clients <span>Delete</span>
Keith Gray <span>Senior</span>	Disabled	23 Mar 26 09:00	8 clients <span>Move clients</span>
Keith Gray (NS) <span>Senior</span>	Disabled	08 Dec 25 14:51	1 client <span>Move clients</span>
Natalie Armstrong <span>Senior</span>	Disabled	06 Mar 26 14:54	1 client <span>Move clients</span>
Regina Pereira <span>Senior</span>	Disabled	26 Mar 26 06:43	87 clients <span>Move clients</span>
Tony Stevenson <span>Senior</span>	Disabled	25 Mar 26 10:56	17 clients <span>Move clients</span>

At the bottom of the page, there is a footer with the FreeAgent logo, links for Privacy Notice, Terms of Service, Assistant Knowledge Base, and Cookie Notice, a Practice Support link, and a Help icon.

Next, enter their contact details.

If you want this person to be a senior account manager, tick the 'Senior account manager' checkbox.

The screenshot shows the 'New account manager' form in the FreeAgent system. The form is titled 'New account manager' and has a 'Details' section. The 'Details' section contains the following fields and options:

- First name:** A text input field with a red asterisk indicating it is a required field. Example text: 'e.g. Steven'.
- Last name:** A text input field with a red asterisk indicating it is a required field. Example text: 'e.g. Smith'.
- Email:** A text input field with a red asterisk indicating it is a required field. Example text: 'e.g. steven@my-company.com'.
- Phone:** A text input field with a red asterisk indicating it is a required field. Example text: 'e.g. 0127 555 0000'.
- Senior account manager?:** A checkbox with a question mark icon. Below it is the text: 'Should this account manager be able to see all clients for the practice and manage the team of account managers?'.
- Add account manager to group(s):** A checkbox with the text: 'Add this account manager to group(s) if you would like them to share ownership of clients with other account managers.'

At the bottom of the form, there are two buttons: 'Create account manager' and 'Cancel'.

There's no limit to the number of staff you can add to your practice's FreeAgent account; however, it's important to make sure each member of staff is added to the account individually.

Each user has an individual login and password to keep their details secure. This also means we can communicate with all members of your practice about feature updates and improvements, so everyone is kept up to date.

## HMRC Connections

First, you'll need to create an agent services account with HMRC for your practice if you haven't already got one. This will generate a new Government Gateway ID which will give your practice access to HMRC's MTD for Income Tax and VAT services.

Once you have an agent services account you need to request authority to file MTD for Income Tax returns and VAT returns on behalf of your clients.

Once you've successfully created your agent services account and any new clients have authorised your new agent relationship, you'll need to use your agent services account credentials to connect FreeAgent to HMRC.

To do this, log in to your Practice Dashboard, navigate to your practice name and select 'Connections & Add-ons' from the drop-down menu.

The screenshot shows the 'Clients' page in the Practice Dashboard. The user 'Eoin McNamara' is logged in, and a dropdown menu is open, showing 'Connections & Add-ons' as an option. The main content area displays a table of clients with columns for Name, Account owner, Client relationship, Free NWG licence, Status, Bank balance, Alerts, and Owner access.

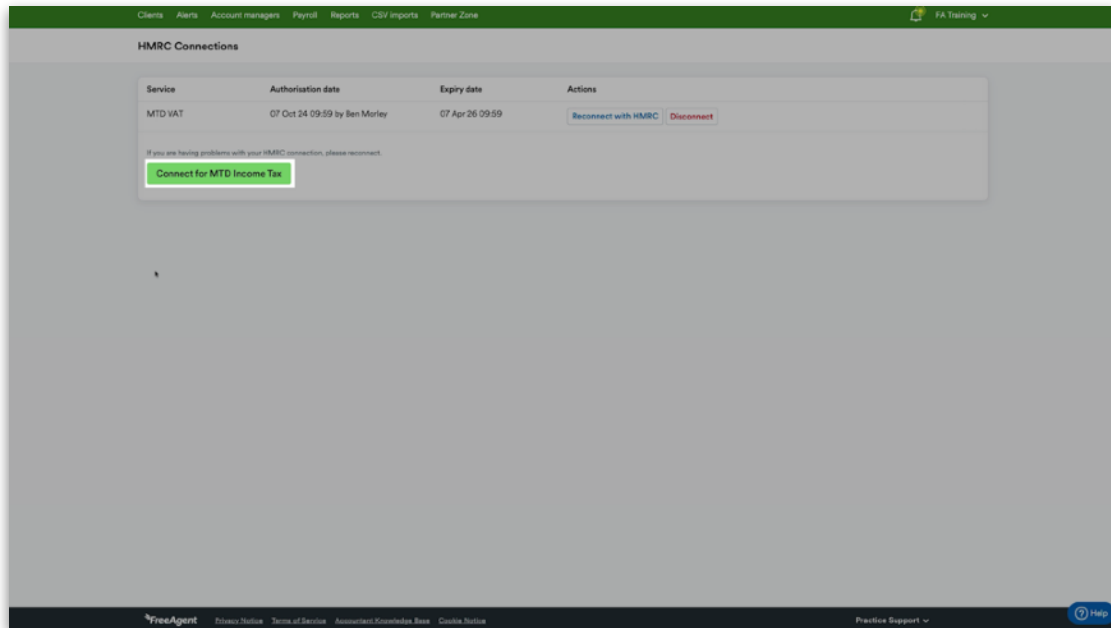
Name	Account owner	Client relationship	Free NWG licence	Status	Bank balance	Alerts	Owner access
A & K Bakery TS Ch Ltd	Regina Perini regina.perini@reagent.com	Practice client	No	Active	£2,300.00	0	Level 7
Bob The Builder Ltd	Bob The Builder eoin.mcnamara@reagent.com	Practice client	No	Active	£34,949.36	0	Level 8
Builder	Eoin McNamara Eoin.mcnamara@FA.com	Practice client	No	Active	£225,259.00	0	Level 8
Clare Brazilian JuuItas Limited	Eoin McNamara eoin.mcnamara@fa.com	Practice client	Could be	Active	£73,041.77	1	No Access
Dext Integration	Eoin McNamara eoin.mcnamara@reagent.com	Practice client	No	Active	£195,270.20	0	Level 8
Eoin Demo Sole Trader	Frankie Goodman eoin.mcnamara@reagent.com	Practice client	Yes	Demo	£46,012.34	1	Level 8
Eoin Prop	Eoin McNamara eoin.mcnamara@reagent.com	Practice client	No	Active	£10,000.00	0	Level 7
Handy Manny LTD	Manny Esteves Garcia Eoin.mcnamara@reagent.com	Practice client	No	Active	-£13,700.00	0	Level 8
Landlord Demo	Shanique Schneider eoin.mcnamara@reagent.com	Practice client	Yes	Demo	-£201,077.09	0	Level 8
McNamara & Associates	Eoin McNamara eoin.mcnamara@reagent.com	Practice client	No	Active	£100,000.00	1	Level 8
McNamara Steel LTD	Eoin McNamara eoin.mcnamara@reagent.com	Practice client	No	Active	£10,000.00	0	Level 8
Manopoly Residential	Milburn Pennybags eoin.mcnamara@reagent.com	Practice client	No	Active	£101,817.44	1	Level 8
Payroll Demo Eoin	Eoin McNamara eoin.mcnamara@reagent.com	Practice client	No	Active	£0.00	0	Level 8

Then, select 'Get started' in the 'HMRC connections' section.

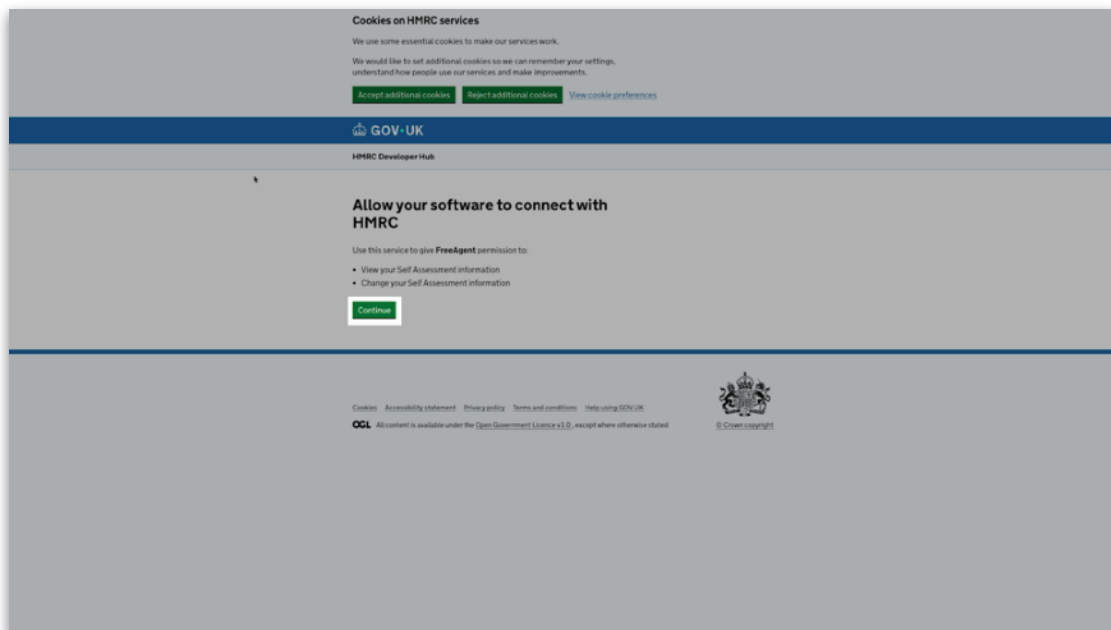
The screenshot shows the 'Connections & Add-ons' page in the Practice Dashboard. The page is divided into several sections: Amazon UK, Smart Capture Unlimited, Bank connections, and HMRC connections. The 'HMRC connections' section is highlighted with a 'Get started' button.

Section	Description	Price	Action
Amazon UK	✓ Automatically import your client's daily sales, fees and returns, supporting a maximum of 200 orders per day ✓ Easily reconcile transactions and fees	£4.20 / month (+VAT)	Manage
Smart Capture Unlimited	✓ Save time on manual data entry with unlimited smart receipt scanning for your clients	£3.50 / month (+VAT)	Manage
Bank connections	✓ Renew your clients' bank feed authentication before their 90-day consent window expires		Manage
HMRC connections	✓ Manage, refresh or disconnect your authorised connections		Get started

Select 'Connect for MTD Income Tax'.



You'll be taken to HMRC's page, where you need to select 'Continue' and follow HMRC's on-screen instructions to complete the process.

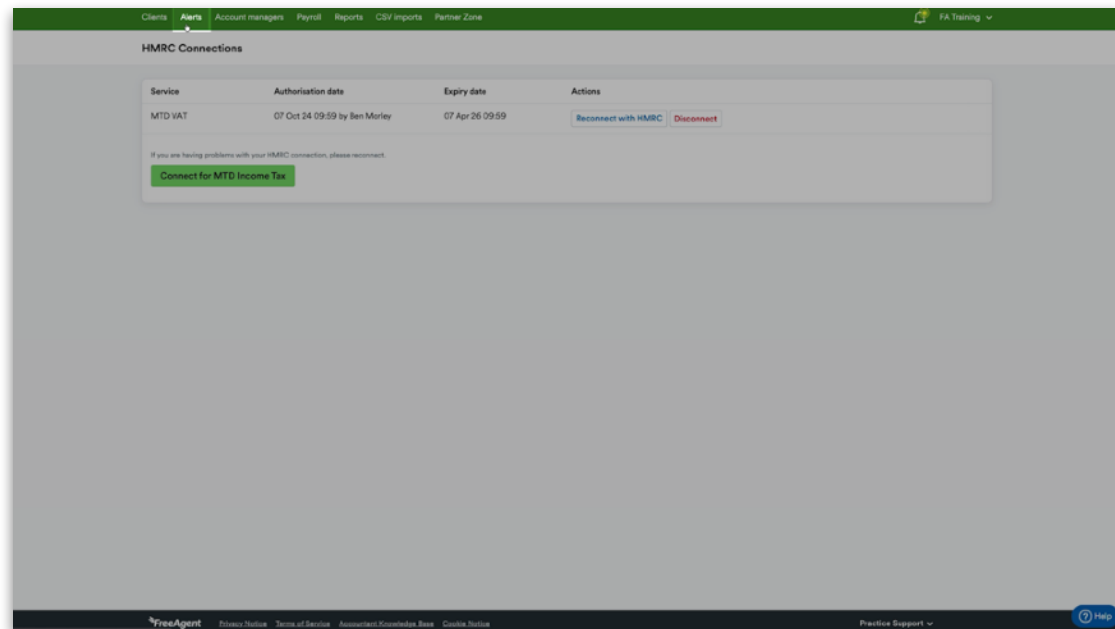


Please note that once you've connected FreeAgent to HMRC, you'll need to update the connection every 18 months. You'll also need to repeat this process for VAT.

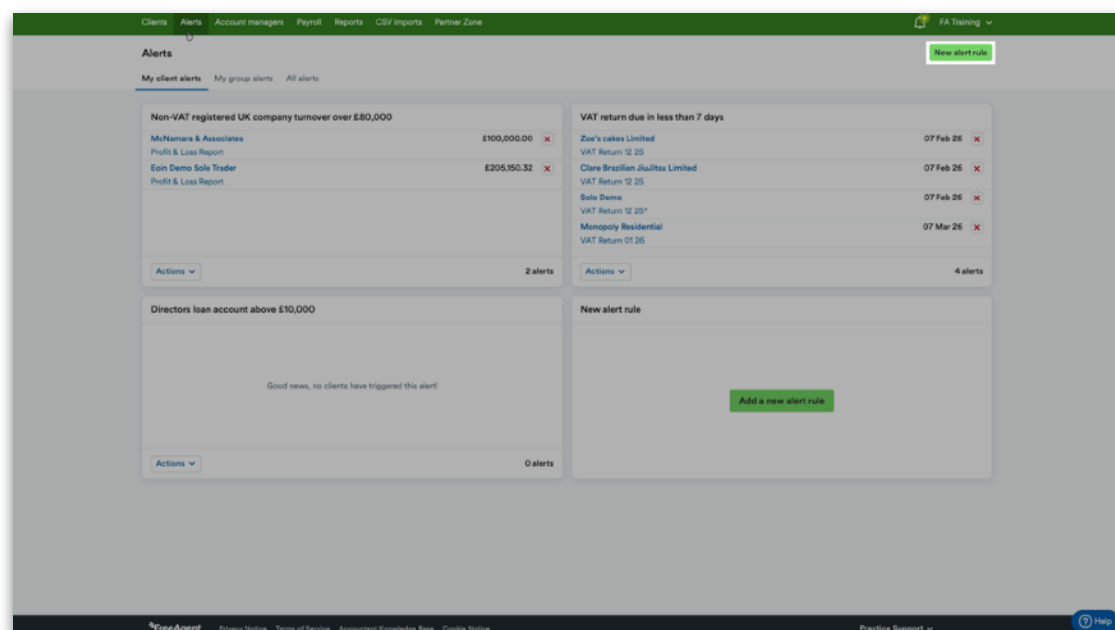
## Alerts

The Alerts tab provides a way for you to track key aspects of your clients' accounts without having to manually access each client's account individually.

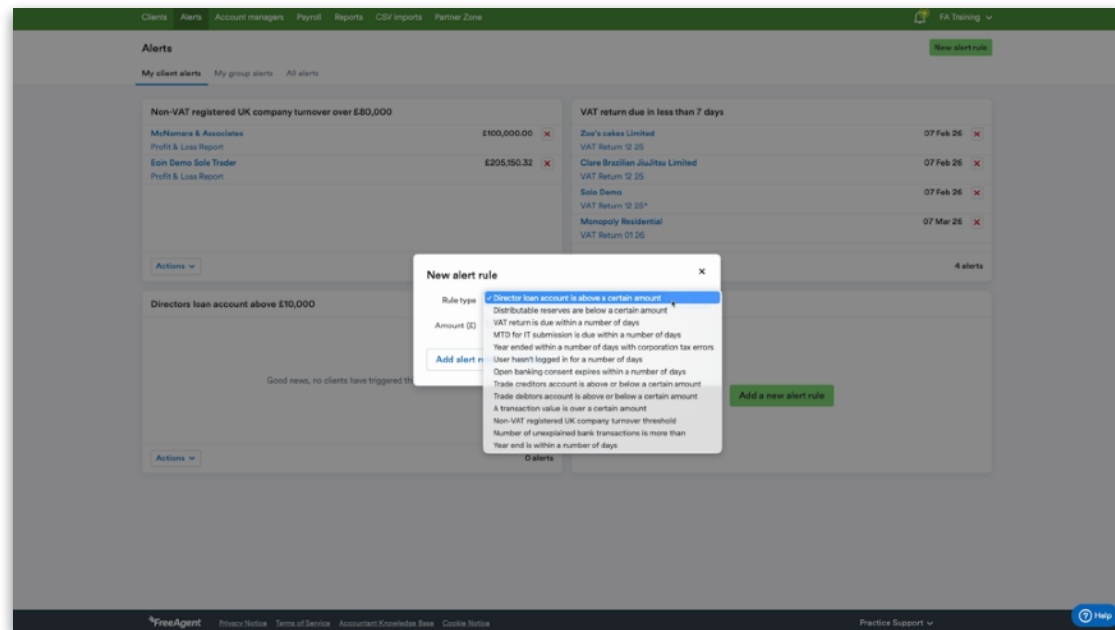
Navigate to the Alerts tab.



To create a new alert rule, click the 'New Alert Rule' button in the top-right of the screen.



In the pop-up window, click 'Rule type' and select which option you'd like to track within your clients' accounts from the drop-down menu.



Two of our most commonly used rules are for tracking turnover for your non-VAT-registered clients and a rule that will alert you when VAT return filing is due for your VAT-registered clients.

## Add-ons

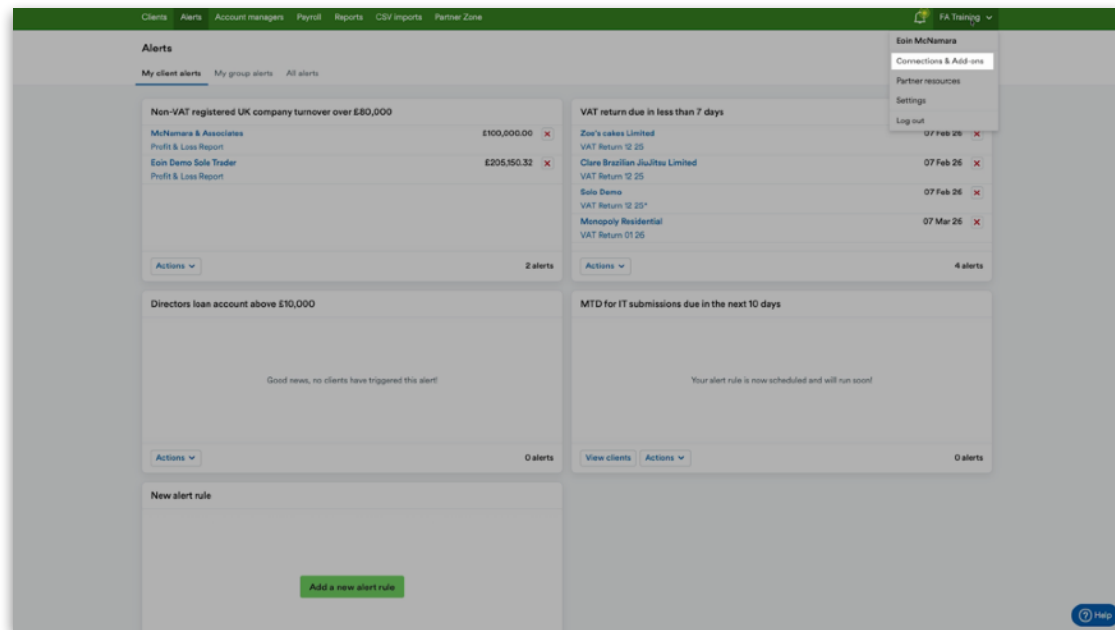
FreeAgent is packed with functionality that makes life easier for you and your clients, but we appreciate that some businesses have particular needs and would benefit from specialised tools. These tools take the form of add-ons that your clients can choose to subscribe to.

You can set up default settings for your practice that control whether your clients can activate add-ons themselves (if they're the account owner or have full (level 8) access to FreeAgent), and whether the subscriptions will be paid for by the practice or by the client. These default settings can be overridden for individual clients.

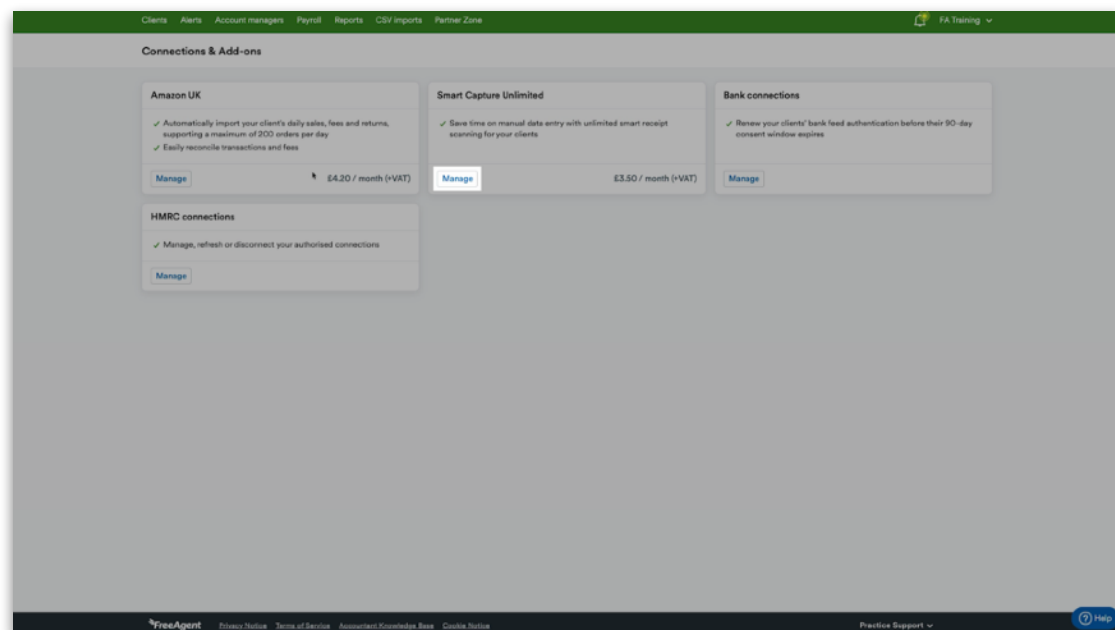
Until the practice's default settings have been confirmed, clients will be able to activate add-ons and be responsible for the cost of the add-on.

A practice's default settings can be confirmed by following the steps below.

Select 'Connects & Add-ons' from the drop-down menu below your practice name.

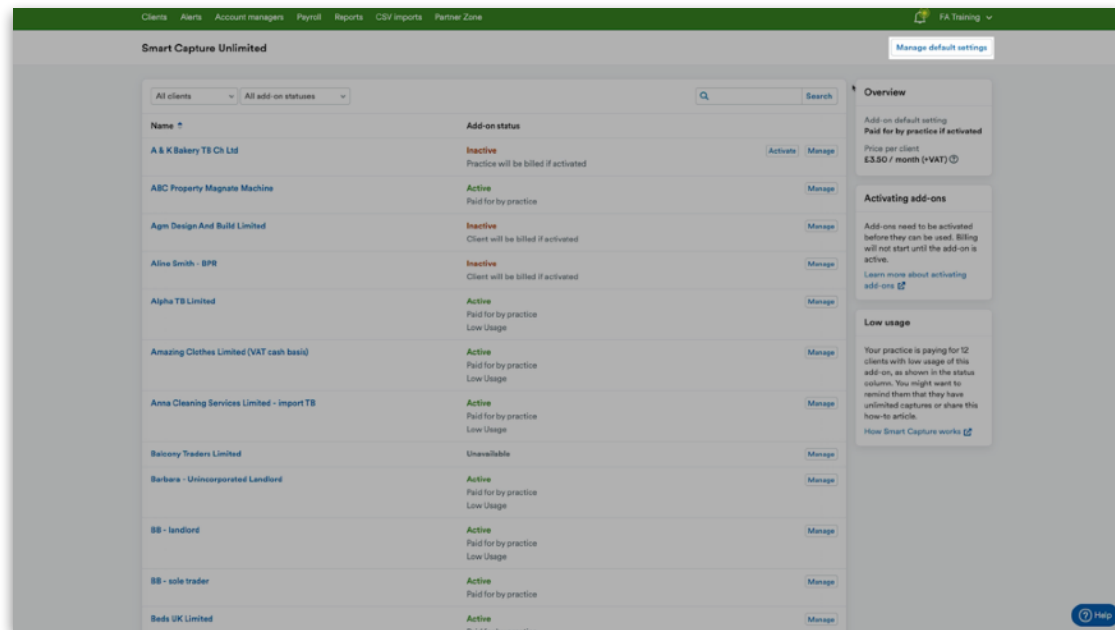


Select 'Manage' on the relevant add-on panel.



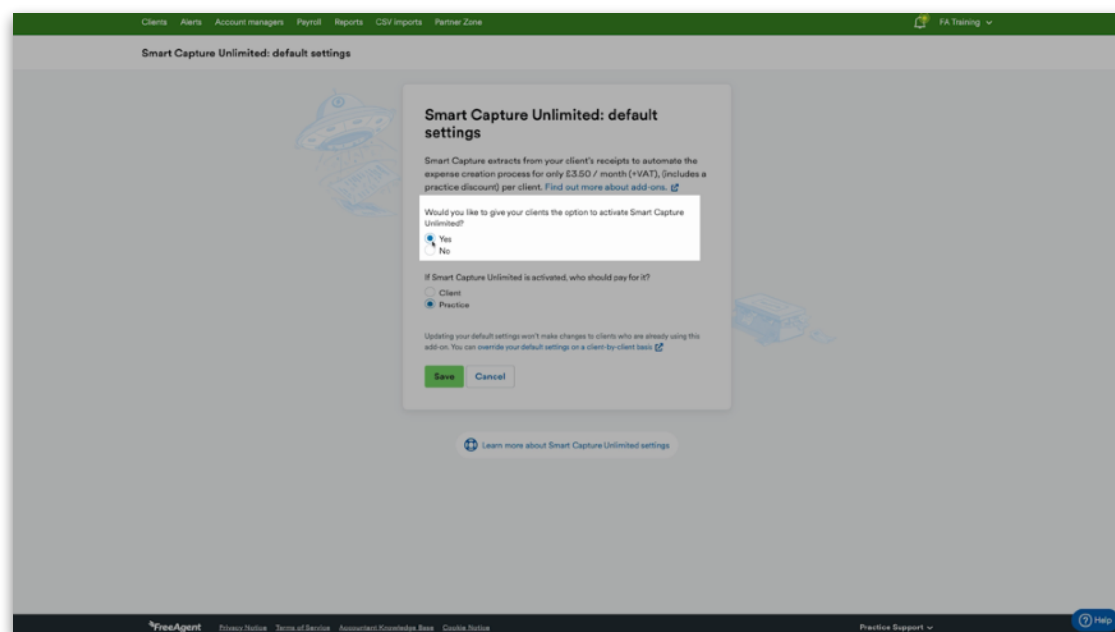
First, select whether or not you'd like your clients to be able to activate the add-on themselves, by default.

Select 'Manage default settings'.



The screenshot shows the 'Smart Capture Unlimited' interface. At the top, there are navigation tabs: Clients, Alerts, Account managers, Payroll, Reports, CSV imports, Partner Zebra, and FA Training. Below the navigation, there's a search bar and a 'Manage default settings' button. The main area displays a table of clients with columns for Name, Add-on status, and Manage. The table lists various clients like 'A & K Bakery TB Ch Ltd', 'ABC Property Magnate Machine', etc. The 'Add-on status' column shows 'Inactive' or 'Active' with brief descriptions. The 'Manage' column contains 'Activate' or 'Manage' buttons. On the right side, there's an 'Overview' panel with information about the add-on, including 'Paid for by practice if activated' and 'Price per client £3.50 / month (+VAT)'. There are also sections for 'Activating add-ons' and 'Low usage'.

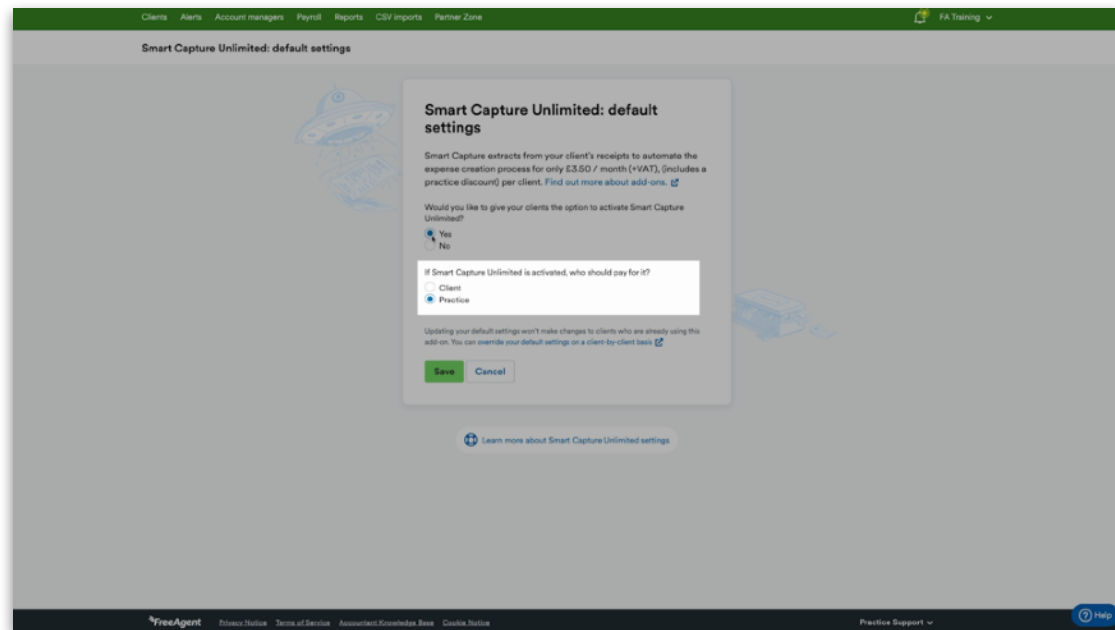
The first question is 'Would you like to give your clients the option to activate [the connection or add-on]?'. Selecting 'Yes' will allow your client to enable the add-on within their FreeAgent account if they're the account owner or have full (level 8) access.



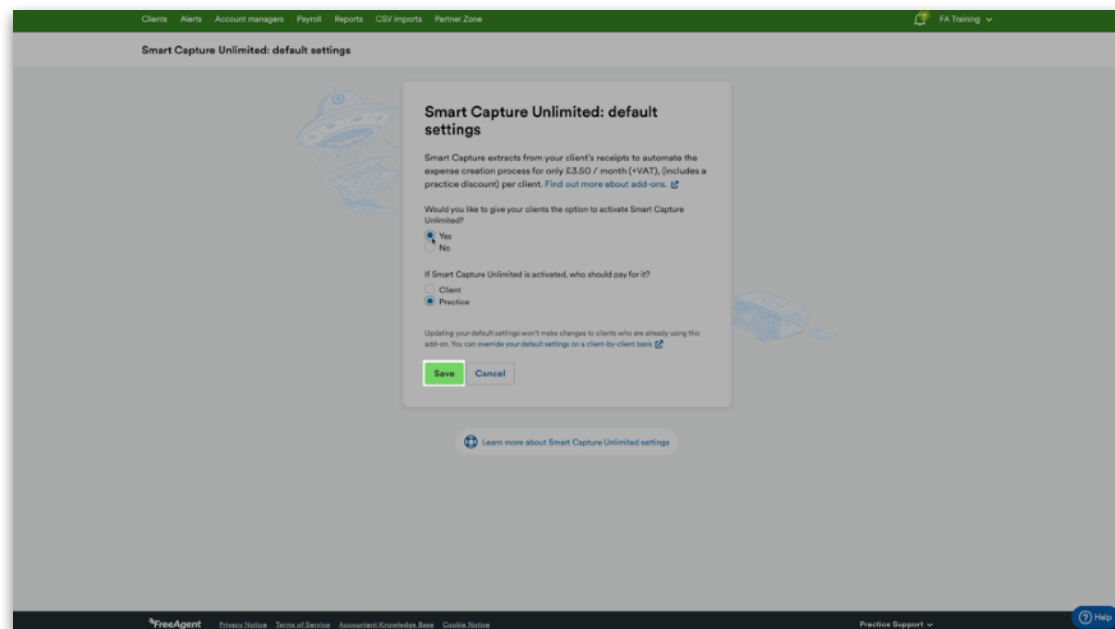
The screenshot shows the 'Smart Capture Unlimited: default settings' dialog box. The dialog has a title 'Smart Capture Unlimited: default settings' and a description: 'Smart Capture extracts from your client's receipts to automate the expense creation process for only £3.50 / month (+VAT), (includes a practice discount) per client. Find out more about add-ons.' Below this, there are two questions: 'Would you like to give your clients the option to activate Smart Capture Unlimited?' with radio buttons for 'Yes' (selected) and 'No', and 'If Smart Capture Unlimited is activated, who should pay for it?' with radio buttons for 'Client' and 'Practice' (selected). At the bottom, there are 'Save' and 'Cancel' buttons. A link 'Learn more about Smart Capture Unlimited settings' is also present.

When this is set to 'No', your client will still be able to see and access the add-on within their account, but if they try to enable the add-on they'll be presented with a message informing them that the add-on has been disabled and to contact their accountant directly.

Next, select whether you'd like the add-on subscription to be paid for by the client or the practice, if the add-on is activated, by default.



Once the default settings have been chosen for the add-on, select 'Save' to complete the process.

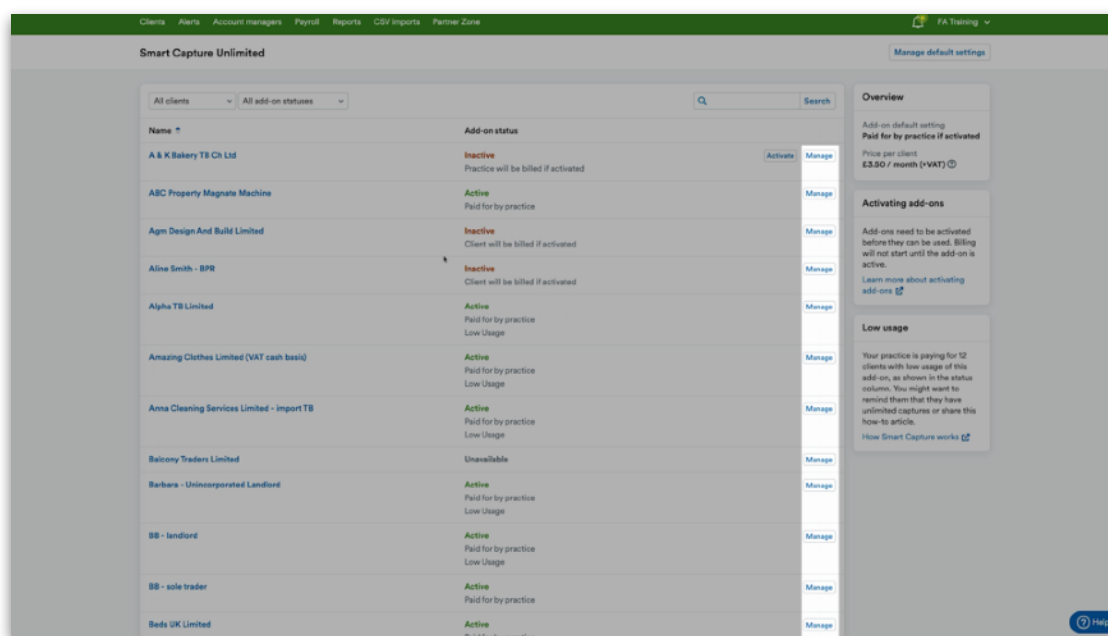


This will display the add-on status for each of your clients. The status will initially be set to 'Inactive' until the add-on is activated.

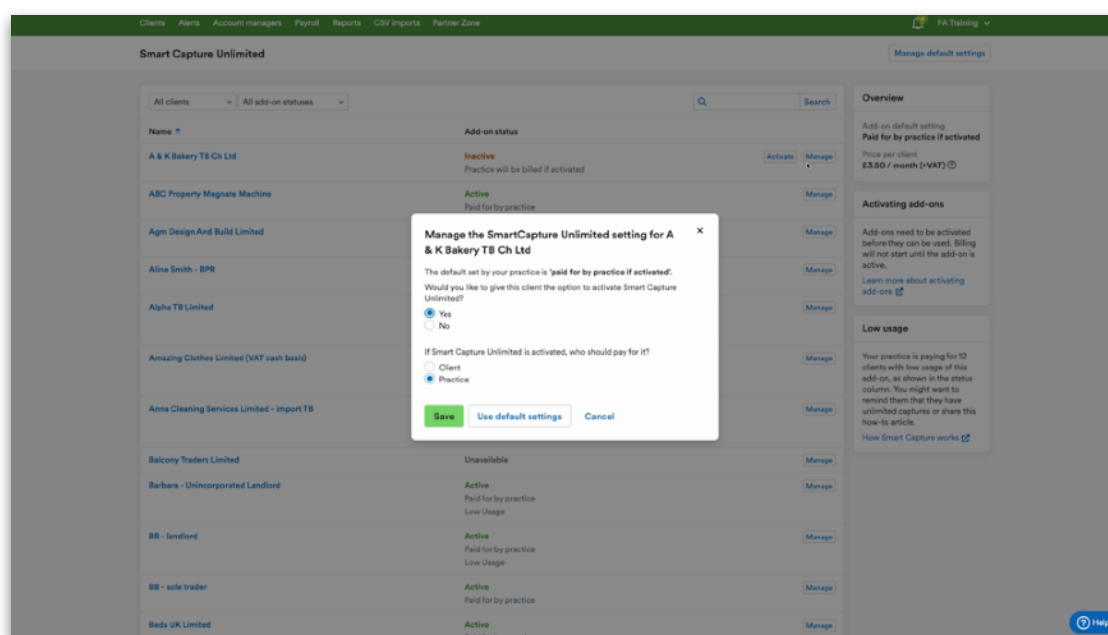
The practice's default add-on settings will be applied to all clients, however, you can set specific settings for individual clients, choose whether they can

activate add-ons themselves and whether the cost of the add-ons will be paid for by the practice or the client.

To edit Add-on settings for an individual client, click 'Manage' next to their name in the add-on's client list.

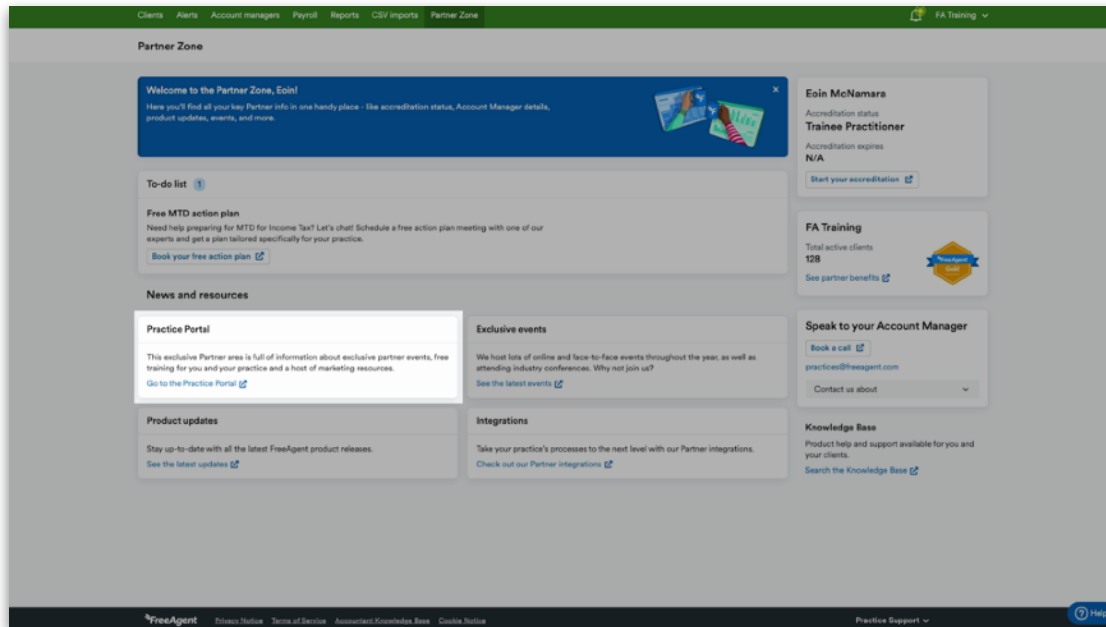


Make the required changes to whether the client can activate add-ons themselves (if they're the account owner or have full (level 8) access to FreeAgent), and whether the subscriptions will be paid for by the practice or by the client in the pop-up window. Select 'Save' to complete the process.



## Practice Portal

You can find the Practice Portal and other valuable resources for your practice and your clients in FreeAgent's Partner Zone. Select the 'Partner Zone' tab. To access the Practice Portal, select, 'Go to the Practice Portal' from the page.



Here, you can access a wealth of support for you and your clients, including downloadable guides, marketing resources, videos to share with your clients and the latest information about FreeAgent's innovations. In addition, you'll also find invitations to attend regular webinar events as well as any recordings of events you may have missed.

Partner resources are split into two sections in the Practice Portal, via the 'For my practice' and 'For my clients' drop-down menus.

## For my practice

‘For my practice’ contains resources directly related to your practice. Here you’ll find resources to help you get started with FreeAgent as well as information about your partner benefits, event invitations, videos, blogs and information about the FreeAgent mobile app and FreeAgent for Landlords.

The screenshot shows the 'For my practice' dashboard on the FreeAgent website. At the top, there's a navigation bar with 'Home', 'For my practice', 'For my clients', 'Help', and 'Practice Dashboard'. Below the navigation, a welcome message says 'Welcome back, Eoin McNamara'. The 'Your partner info' section identifies the user as a 'Trainee Practitioner of FreeAgent Training'. A dropdown menu is open, listing options like 'Get started', 'Learning and accreditation', 'Partner benefits', 'Practice insights', 'FreeAgent mobile app', 'Events', 'Preparing for MTD', 'FreeAgent for Landlords', 'Blog', and 'Videos'. The 'Practice insights' option is highlighted. Below this, the 'This month's featured content' section includes a large graphic for 'Partner Roadshows | Get MTD done: essential steps to practice success' and a smaller graphic for 'MTD client success checklist'. The bottom of the page has a section for 'Recommended actions this month'.

The ‘Practice insight area has three unique downloadable reports that will show you exactly how your clients are using FreeAgent.

This screenshot is identical to the one above, showing the 'For my practice' dashboard. The 'Practice insights' option in the dropdown menu is highlighted, indicating the focus of the text below.

The first is the 'Onboarding' report, which lets you see when clients are carrying out key actions within their first 45 days using FreeAgent.



FreeAgent [Home](#) [For my practice](#) [For my clients](#) [Help](#) [Practice Dashboard](#)

## Discover how your clients use FreeAgent

Download your practice insights and open the CSV files in your spreadsheet software to explore the data.

Download your insights [What's in the report?](#)

**Onboarding**

Sorry, this report isn't available as your practice hasn't added any new clients in the past 45 days.

[Add clients to FreeAgent](#)

**Banking**

Sorry, this report isn't available because there are no clients on your Practice Dashboard yet.

[Add clients to FreeAgent](#)

**Mobile app**

Sorry, this report isn't available because there are no clients on your Practice Dashboard yet.

[Add clients to FreeAgent](#)



**Spot who needs help**

Understand which clients aren't yet using FreeAgent to its full potential, meaning you can focus your efforts on getting them up and running.

Share [getting started/resources](#) with clients.

**Create good habits**

Encourage clients to engage with FreeAgent early on so they master the technology more quickly, saving you time in the long run.

Find out more about [educating your clients](#).

**Make the most of your practice insights**

Bookmark this page and put a reminder in your calendar to come back regularly and check your progress.

Check out the video below for a guide to using your practice insights, and for more information, speak to your account manager. You'll find their contact details on the [Practice Portal homepage](#).

The 'Banking' report shows you how many bank feeds each of your clients have set up, which can help you identify any that aren't using a bank feed yet.



FreeAgent [Home](#) [For my practice](#) [For my clients](#) [Help](#) [Practice Dashboard](#)

## Discover how your clients use FreeAgent

Download your practice insights and open the CSV files in your spreadsheet software to explore the data.

Download your insights [What's in the report?](#)

**Onboarding**

Sorry, this report isn't available as your practice hasn't added any new clients in the past 45 days.

[Add clients to FreeAgent](#)

**Banking**

Sorry, this report isn't available because there are no clients on your Practice Dashboard yet.

[Add clients to FreeAgent](#)

**Mobile app**

Sorry, this report isn't available because there are no clients on your Practice Dashboard yet.

[Add clients to FreeAgent](#)



**Spot who needs help**

Understand which clients aren't yet using FreeAgent to its full potential, meaning you can focus your efforts on getting them up and running.

Share [getting started/resources](#) with clients.

**Create good habits**

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Find out more about [educating your clients](#).

**Make the most of your practice insights**

Bookmark this page and put a reminder in your calendar to come back regularly and check your progress.

Check out the video below for a guide to using your practice insights, and for more information, speak to your account manager. You'll find their contact details on the [Practice Portal homepage](#).

The 'Mobile app' report details which of your clients are not using the FreeAgent mobile app and the clients that have previously used it, but have not logged in to the app for a while.

FreeAgent Practice Portal Home For my practice For my clients Help Practice Dashboard

## Discover how your clients use FreeAgent

Download your practice insights and open the CSV files in your spreadsheet software to explore the data.

Download your insights What's in the reports?

**Onboarding**

Sorry, this report isn't available as your practice hasn't added any new clients in the past 60 days.

[Add clients to FreeAgent](#)

**Banking**

Sorry, this report isn't available because there are no clients on your Practice Dashboard yet.

[Add clients to FreeAgent](#)

**Mobile app**

Sorry, this report isn't available because there are no clients on your Practice Dashboard yet.

[Add clients to FreeAgent](#)

**Spot who needs help**

Understand which clients aren't yet using FreeAgent to its full potential, meaning you can focus your efforts on getting them up and running.

Share [getting started resources](#) with clients.

**Create good habits**

Encourage clients to engage with FreeAgent early on so they master the technology more quickly, saving you time in the long run.

Find out more about [educating your clients](#).

**Make the most of your practice insights**

Bookmark this page and put a reminder in your calendar to come back regularly and check your progress.

Check out the video below for a guide to using your practice insights, and for more information, speak to your account manager. You'll find their contact details on the [Practice Portal homepage](#).

The insights from these reports will enable you to have more tailored conversations with your clients, identify ways to improve the efficiency of your practice and help with the onboarding of new clients.

## For my clients

The 'For my clients' area of the portal hosts a wealth of downloadable resources you can share with clients who are either brand new to accounting software or just getting started on their FreeAgent journey. You'll find our tips for introducing FreeAgent to your clients, including shareable videos and email templates, as well as step-by-step guidance for onboarding new clients to FreeAgent.

FreeAgent Accounting Software

Home For my practice For my clients **Practice Dashboard**

Onboard clients  
Get free resources

### Discover how your clients use FreeAgent

Download your practice insights and open the CSV files in your spreadsheet software to explore the data.

Download your insights **What's in the report?**

**Onboarding**  
Sorry, this report isn't available as your practice hasn't added any new clients in the past 45 days.  
[Add clients to FreeAgent](#)

**Banking**  
Sorry, this report isn't available because there are no clients on your Practice Dashboard yet.  
[Add clients to FreeAgent](#)

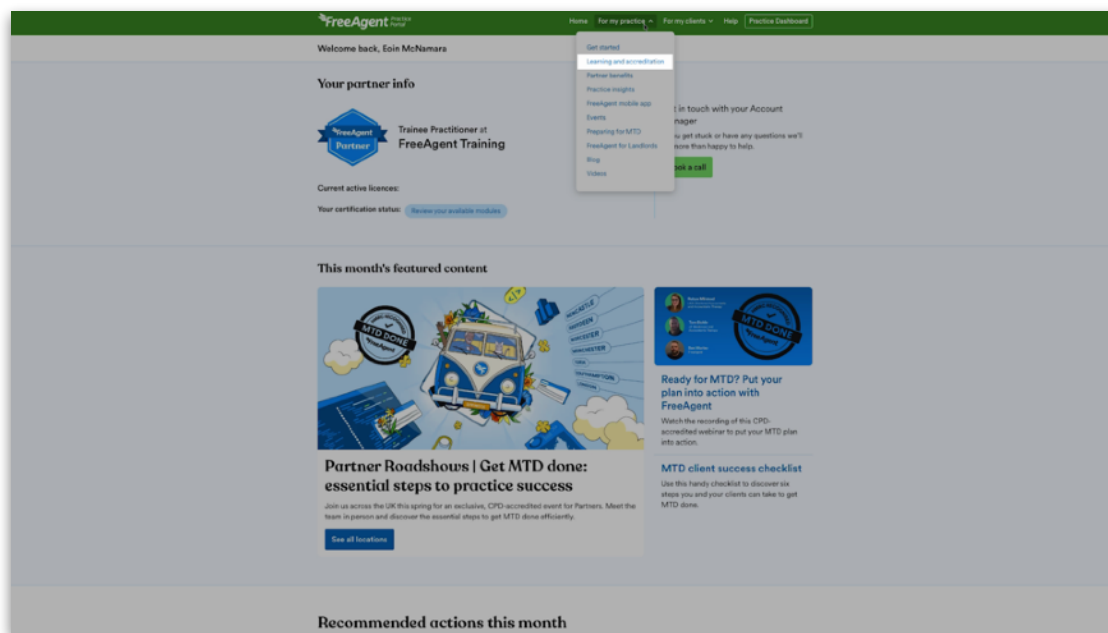
**Mobile app**  
Sorry, this report isn't available because there are no clients on your Practice Dashboard yet.  
[Add clients to FreeAgent](#)

- Spot who needs help**  
Understand which clients aren't yet using FreeAgent to its full potential, meaning you can focus your efforts on getting them up and running.  
Share [getting started resources](#) with clients.
- Create good habits**  
Encourage clients to engage with FreeAgent early on so they master the technology more quickly, saving you time in the long run.  
Find out more about [educating your clients](#).

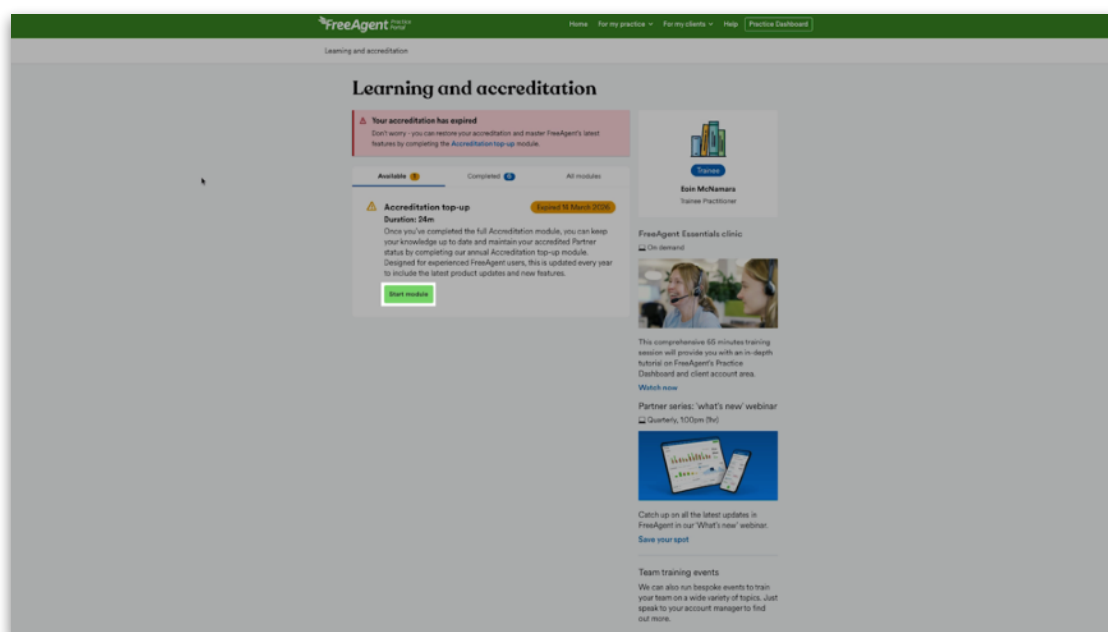
**Make the most of your practice insights**  
Bookmark this page and put a reminder in your calendar to come back regularly and check your progress.  
Check out the video below for a guide to using your practice insights, and for more information, speak to your account manager. You'll find their contact details on the [Practice Portal homepage](#).

## Accreditation

The Learning area within the Practice Portal is personalised for each individual account manager who has access to your Practice Dashboard. To navigate to the Learning area, click 'Learning and accreditation' from the 'For my practice' drop-down menu.



This is where you can access all of the learning modules - including this one - that will aid you on your FreeAgent journey. Select 'Start module' to begin.



Each module includes guided videos of FreeAgent that you can watch to increase your knowledge of FreeAgent. There are also downloadable PDF manuals that cover all of the material from each module.

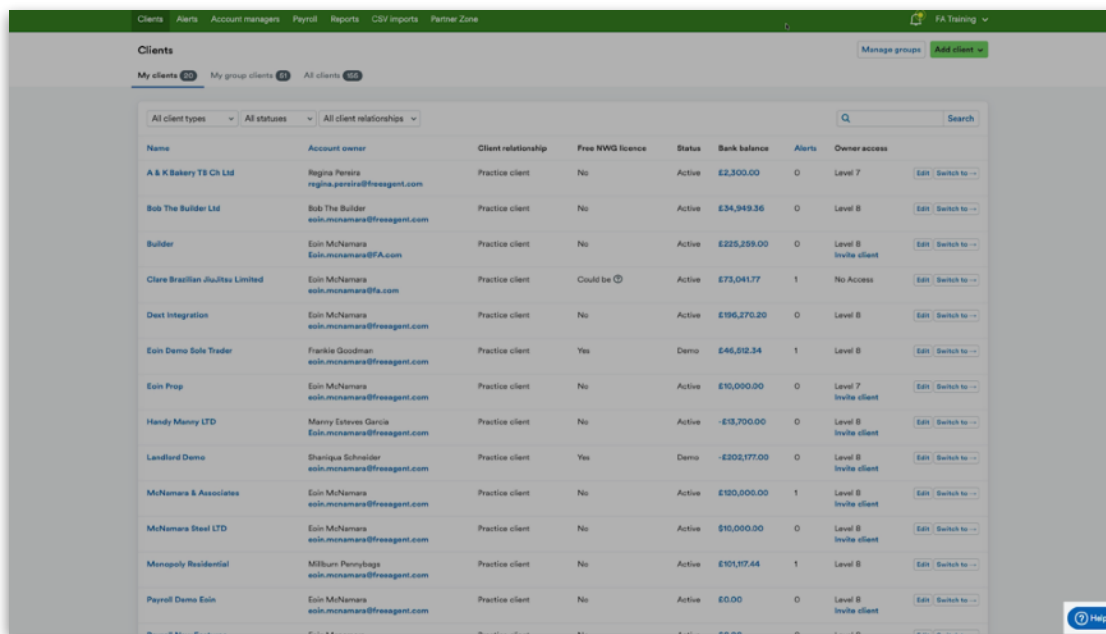
Once you're comfortable with the material, click 'Take exam' at the bottom of each module to take a short multiple choice exam. You will need to correctly answer 80% of the questions in an exam to pass.

The screenshot shows the 'Accreditation top-up' module page on the FreeAgent website. The page is divided into several sections:

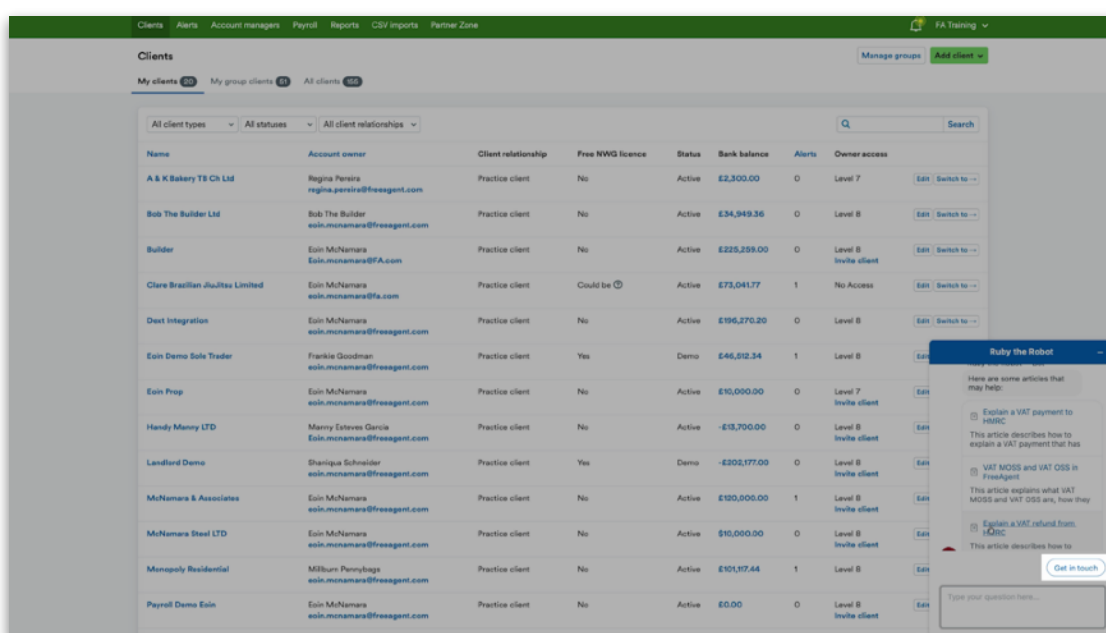
- Accreditation top-up:** A blue header section with the title and a brief description: "This module allows you to retain your accredited partner status and provides a full update on FreeAgent's new features as well as improving your knowledge of core functionality." Below this is a 'Need a refresher?' section with a play button icon and text: "Review the FreeAgent Essentials and the FreeAgent Accreditation modules before you tackle the Accreditation module."
- Learn:** A grey box with the text: "Learn in the way that suits you best by watching videos or downloading our easy-to-follow manual."
- Sit the exam:** A grey box with the text: "When you're ready, sit the open book exam. If you don't pass first time, you can always try again."
- Next steps:** A grey box with the text: "When you pass the exam, you'll get a CPO certificate to download. We'll also send you a digital FreeAgent Accreditation certificate and badge, confirming that you're an officially accredited FreeAgent Partner."
- Self-paced learning:** A section with the title "Self-paced learning" and the text "Short videos to take you through FreeAgent's new features at your own pace." Below this is a video player for "1 Accreditation top-up" with a duration of "Runtime: 26:35" and a play button icon.
- Learning manual:** A section with the title "Learning manual" and the text: "If you prefer to learn from a more traditional manual, we've got you covered! Just download our PDF and print or learn on screen. It includes key information from our videos as well as reminders about some of FreeAgent's core functionality. You can have the manual next to you when you take our open book exam for extra reassurance." Below this is a "Download PDF" button and an image of a tablet displaying the "LEARNING MANUAL" for FreeAgent.
- Ready to take the exam?:** A section with the title "Ready to take the exam?" and the text: "You can sit the open book exam anytime. If you don't pass first time, you can always try again." Below this is a green "Take exam" button.

## Knowledge Base, Practice Support and Ruby the Robot

If you ever need a hand or have questions about managing your clients in FreeAgent, there are a few different ways you can access support. You can start by clicking the 'Help' button at the bottom-right of the screen when logged in to your Practice Dashboard or from within your client's account.



A chat window will pop up. Use the chat to ask our automated assistant - Ruby the Robot - a question. Ruby will attempt to suggest an article from our Knowledge Base to help answer your query. If Ruby is unable to help, click 'Get in touch' to contact our dedicated Practice Support team.



You will be given the option to connect with our Practice Support team by live chat if it's during support hours, or to leave a message if it's outside of support hours. Our phone lines have the same opening and closing hours as our chat, which are 9am to 5pm Monday to Thursday, and 9am to 4pm on Friday.

You can find the phone number to contact the Practice Support team by clicking 'Practice Support' in the bottom-right corner of the screen.

The screenshot shows a table of clients in the FreeAgent system. The table has columns for client name, contact details, client type, status, and financial data. A dropdown menu is open over the 'Practice Support' link in the bottom right corner, displaying contact information for the support team.

Client Name	Contact	Type	Status	Balance	Level	Support
Eoin Demo Sole Trader	Frankie Goodman eoin.mcnamara@freeagent.com	Practice client	Yes	Demo £46,012.34	1	Level 8 Edit Switch to...
Eoin Prop	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active £10,000.00	0	Level 7 Invite client Edit Switch to...
Handy Manny LTD	Manny Esteves Garcia Eoin.mcnamara@freeagent.com	Practice client	No	Active -£13,700.00	0	Level 8 Invite client Edit Switch to...
Landlord Demo	Shaniqua Schneider eoin.mcnamara@freeagent.com	Practice client	Yes	Demo -£202,177.00	0	Level 8 Invite client Edit Switch to...
McNamara & Associates	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active £100,000.00	1	Level 8 Invite client Edit Switch to...
McNamara Steel LTD	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active \$10,000.00	0	Level 8 Invite client Edit Switch to...
Monopoly Residential	Milburn Penrybags eoin.mcnamara@freeagent.com	Practice client	No	Active £101,97.44	1	Level 8 Invite client Edit Switch to...
Payroll Demo Eoin	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active £0.00	0	Level 8 Invite client Edit Switch to...
Payroll New Features	Eoin McNamara Eoin.mcnamara@FA.com	Practice client	No	Active £0.00	0	Level 8 Invite client Edit Switch to...
Sam Subbie	Sam Subbie Sam.subbie@fs.com	Practice client	No	Active £100.00	0	Level 7 Invite client Edit Switch to...
Servage and Marley	Ebenezer Servage eoin.mcnamara@freeagent.com	Practice client	No	Active £103,200.00	0	Level 8 Invite client Edit Switch to...
Sole trade demo	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active £10,000.00	0	Level 7 Invite client Edit Switch to...
Solo Demo	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	Could be	Active £148,856.31	1	Level 8 Invite client Edit Switch to...
Universal Eoin	Eoin McNamara Eoin.mcnamara@freeagent.com	Practice client	No	Active £10,000.00	0	Level 8 Invite client Edit Switch to...
Zoe's cakes Limited	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active -£100.00	1	Level 8 Invite client Edit Switch to...

FreeAgent practice support  
 Email: practice.support@freeagent.com  
 Phone: 0800 025 3800  
 Account manager ID: 53004

This is also where you'll also find the Practice Support team's email address, which you can use any time. If our offices are closed, you'll receive a response when our offices reopen.

This is an identical screenshot to the one above, showing the FreeAgent client list and the 'Practice Support' dropdown menu with contact information.

You'll also see your unique Account Manager ID.

Eoin Demo Sole Trader	Frankie Goodman eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	£46,012.34	1	Level 8	Edit Invite client	Switch to →
Eoin Prop	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 7	Edit Invite client	Switch to →
Handy Manny LTD	Manny Esteves Garcia eoin.mcnamara@freeagent.com	Practice client	No	Active	-£13,700.00	0	Level 8	Edit Invite client	Switch to →
Landlord Demo	Shaniqua Schneider eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	-£202,177.00	0	Level 8	Edit Invite client	Switch to →
McNamara & Associates	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£100,000.00	1	Level 8	Edit Invite client	Switch to →
McNamara Steel LTD	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8	Edit Invite client	Switch to →
Monopoly Residential	Miliburn Pennington eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,117.44	1	Level 8	Edit Invite client	Switch to →
Payroll Demo Eoin	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£0.00	0	Level 8	Edit Invite client	Switch to →
Payroll New Features	Eoin McNamara Eoin.mcnamara@fa.com	Practice client	No	Active	£0.00	0	Level 8	Edit Invite client	Switch to →
Sam Subbie	Sam Subbie sam.subbie@fa.com	Practice client	No	Active	£100.00	0	Level 7	Edit Invite client	Switch to →
Sprunge and Marley	Ebenezer Sprunge eoin.mcnamara@freeagent.com	Practice client	No	Active	£103,300.00	0	Level 8	Edit Invite client	Switch to →
Sole trade demo	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 7	Edit Invite client	Switch to →
Solo Demo	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	Could be Ⓢ	Active	£148,856.31	1	Level 8	Edit Invite client	Switch to →
Universal Eoin	Eoin McNamara Eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8	Edit Invite client	Switch to →
Zoe's cakes Limited	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	-£100.00	1	Level 8	FreeAgent practice support Email practicesupport@freeagent.com Phone 0800 025 3800 Account manager ID 53004	Switch to →

100 per page

FreeAgent Privacy Notice Terms of Service Assessment Knowledge Base Contact Us PracticeSupport Help

Whichever way you decide to get in touch, you may be asked to provide this ID code as it's used to identify who you are and locate your Practice Dashboard.

## Licence setup

### Which businesses is FreeAgent suitable for?

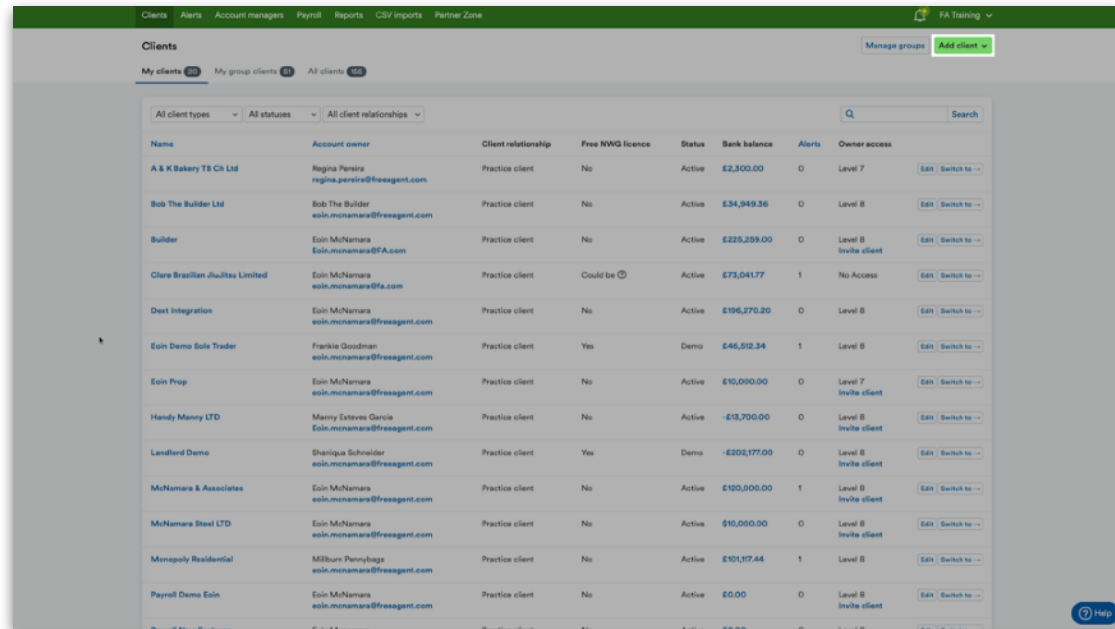
Business type/required functionality	Suitable	Suitable with minor workaround	Extensive workaround required
Traditional trades	✓		
Professional services	✓		
Service businesses	✓		
Creative and technology	✓		
Retail and hospitality	✓		
Landlords	✓		
Low stock business	✓		
Property inside a limited company licence		✓	
CIS for contractors		✓	
Both subcontractor and contractor		✓	
Business with intangible fixed assets		✓	
Business operating OSS		✓	
Up to two cost centres		✓	
More than two cost centres			✓
VAT margin scheme			✓
VAT retail scheme			✓
Adjustment to accounting year end			✓
Manufacturing			✓
High stock trading business			✓
Charities			✓
Business registered for international sales tax			✓

FreeAgent supports cash basis accounting for sole trader, partnership and unincorporated landlord accounts, as well as traditional accruals basis accounting.

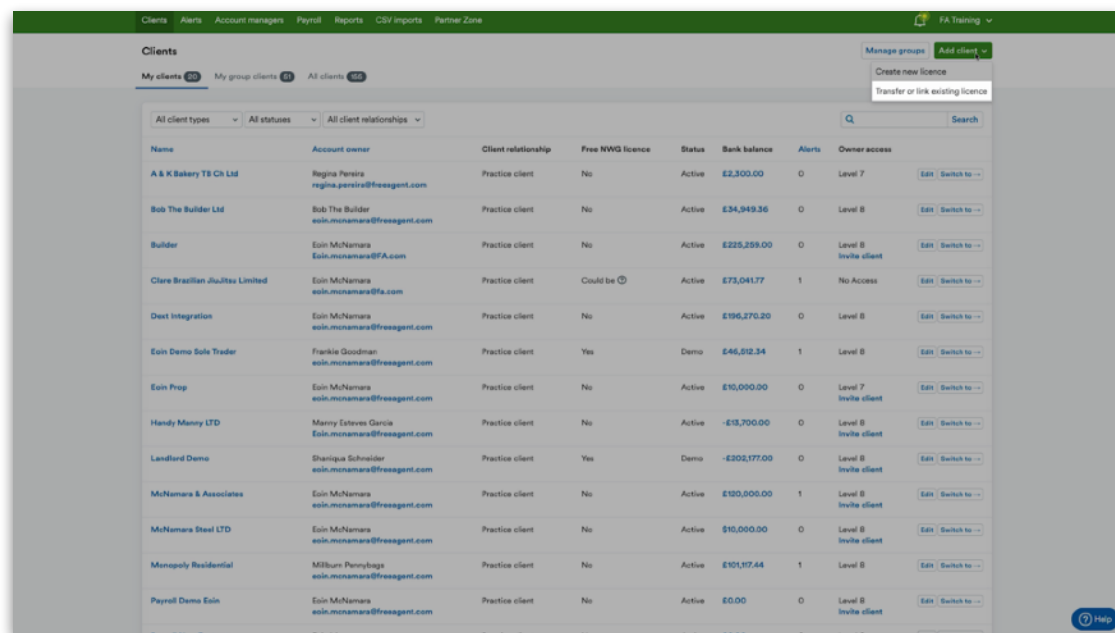
If you have any queries about a client's suitability for FreeAgent, ask your Account Manager for further information.

## Transferring licences to your Practice Dashboard

If a client already uses FreeAgent, you can add them to your dashboard. To do this, navigate to the 'Clients' tab in your dashboard and select 'Add client'.



Select 'Transfer or link existing licence' and enter the email address that your client uses to log in to FreeAgent along with their FreeAgent subdomain. Their subdomain can be found within the URL that is displayed when your client is logged into FreeAgent.



Select the option to send this client an invite to 'Transfer their account'.

The screenshot shows the 'Transfer or link existing licence' page in the FreeAgent dashboard. The 'Client details' section contains the following information:

- Send this client an invite to:**
  - Transfer their account (practice manages subscription)
  - Link their account (client manages subscription)
- Account owner email address:** solk.mcnamara@freeagent.com
- Subdomain:** https://clients1323.freeagent.com

Below the subdomain, there is a note: "Your client can find their subdomain in the browser's address bar when they're logged in to FreeAgent. Send your client this 'How to find your FreeAgent subdomain' article, if they need help." At the bottom of the form, there are two buttons: "Send invite" (highlighted in green) and "Cancel".

On the right side, there is a 'Transfer or link?' section with two options:

- Transfer:** gives you full control over the client's account and your practice becomes responsible for their licence costs.
- Link:** gives you access to the client's account but the client retains overall account ownership, including responsibility for any payments.

A "Learn more" link is provided below the 'Link' option.

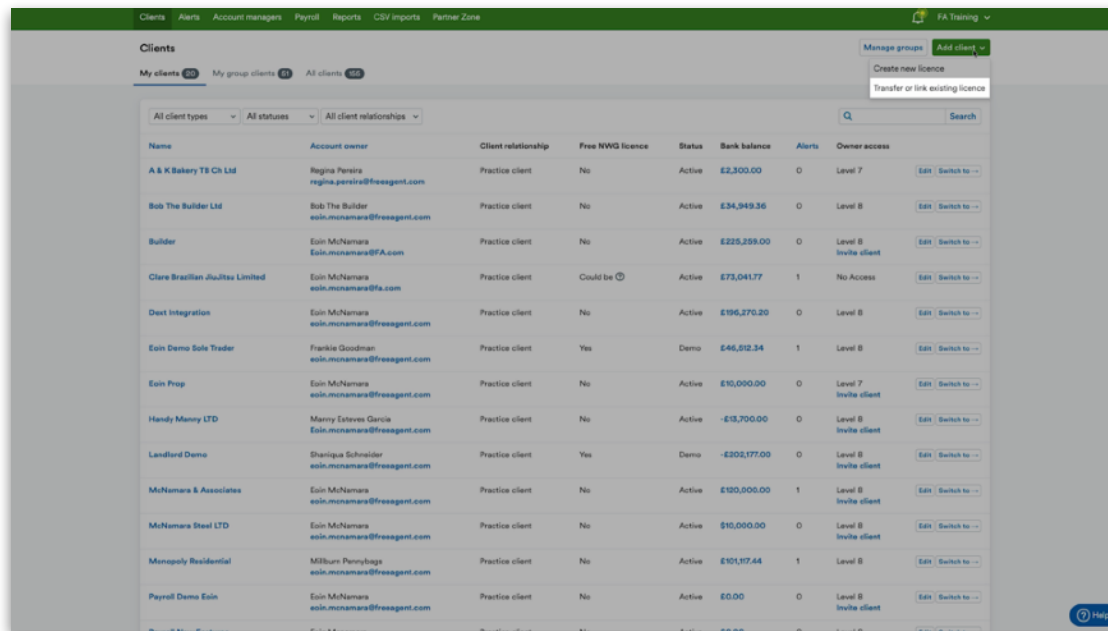
Select 'Send invite' to complete the process.

This screenshot is identical to the one above, showing the 'Transfer or link existing licence' page. The 'Send invite' button is highlighted in green, indicating the next step in the process.

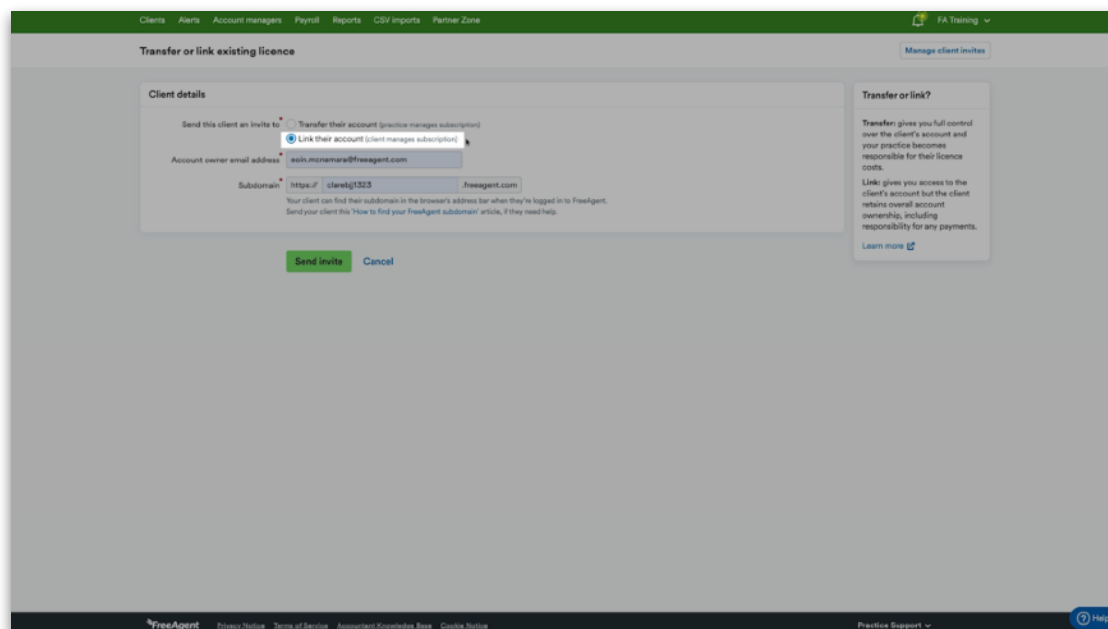
By transferring a client with an existing FreeAgent licence onto your dashboard, your practice takes over commercial ownership of the licence and it will appear on your invoice from FreeAgent as either: a free licence, if they get FreeAgent for free with a NatWest, Royal Bank Scotland, Ulster Bank or Mettle account; or a paid for licence, if they currently pay for their account. If you have any queries or questions around billing, please contact your FreeAgent Account Manager

## Link clients to your dashboard

You can link your client's account from the 'Clients' tab of the Practice Dashboard. Then, select 'Add client' and then 'Transfer or link existing client'.

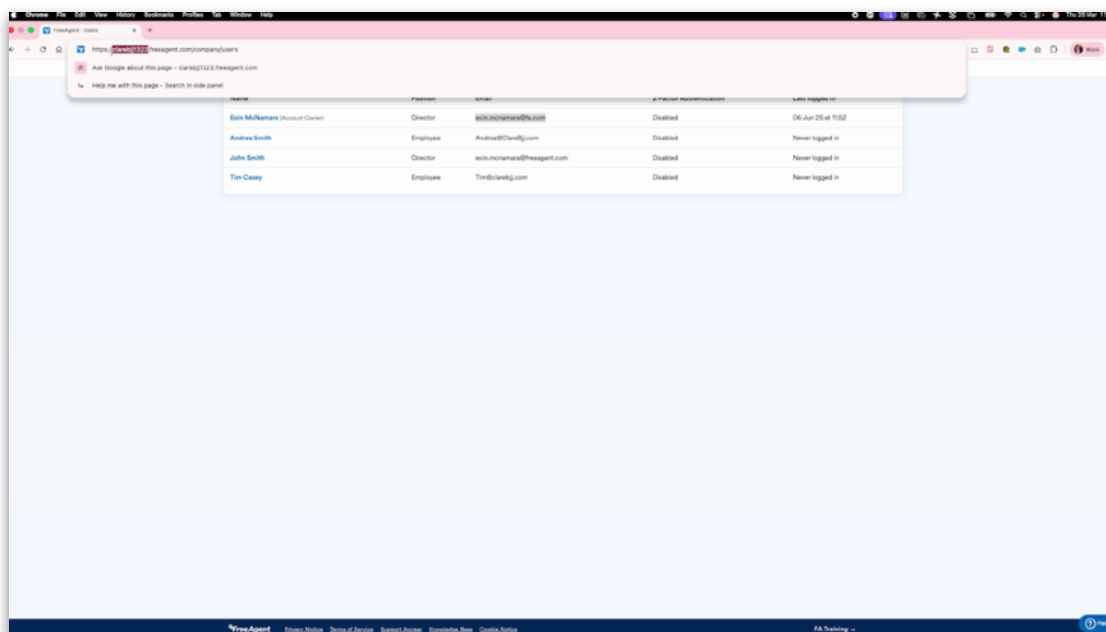


Select the option to send them an invite to 'Link their account'.

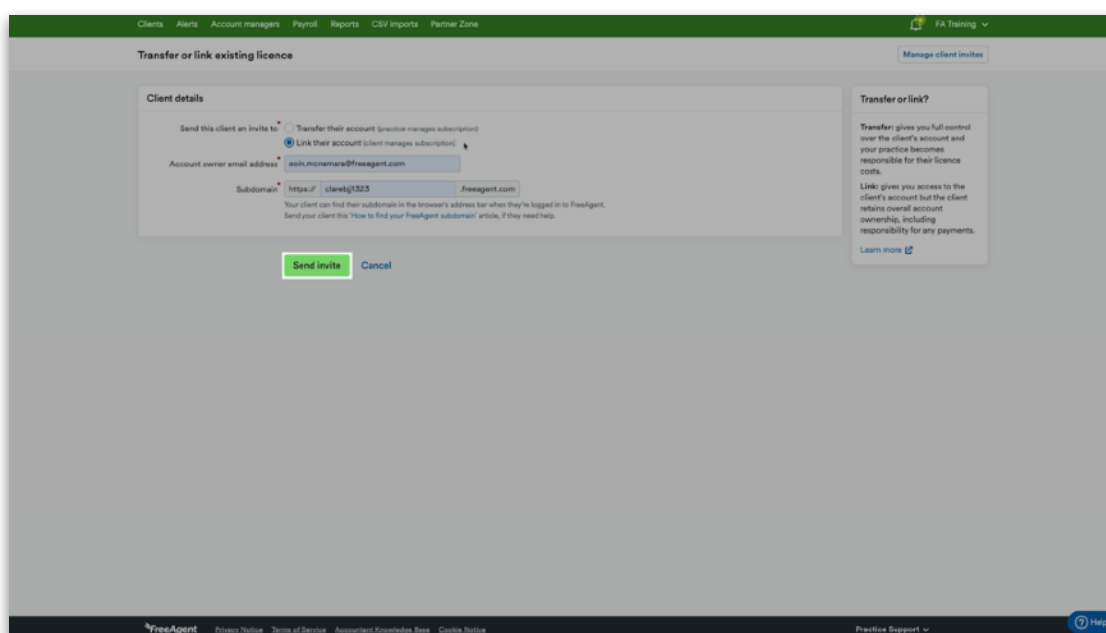


You must enter the 'Account owner email address' and their 'Subdomain'. Your client can find these pieces of information in their account by navigating to the 'Settings' area and then selecting 'Users'. The user with '(Account Owner)' beside their name will have the necessary email.

They can copy their email from this window, and the subdomain is located in the web address bar at the top of the window and send it to you. It's the letters and numbers after 'https://' and before the '.freeagent'.



Once you've filled in those two pieces of information, select 'Send invite'.

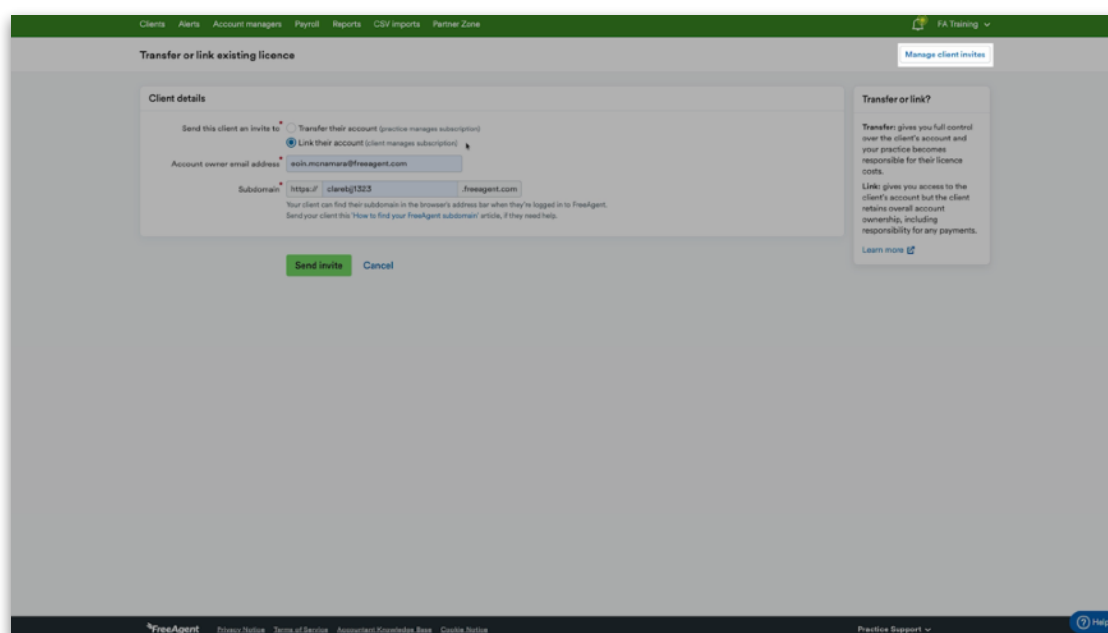


This will send a request via email stating you want to link them to your dashboard, and they must confirm.

Linking your client allows you to access your client's account from your dashboard without taking on the subscription cost of the licence; instead, the client still manages the subscription cost.

If a client is linked to your dashboard, it also means you can't modify their user access; they have the same level of access to the software that you have as the Account Manager.

To view the status of all linked client requests, select 'Manage client invites'.



This will list all active linking requests. You have the option to resend and cancel the linking request. Once the client confirms the changes, they will appear on your dashboard.

## Adding a new client to FreeAgent

If your client is new to FreeAgent, you'll need to follow a different process for adding them to your Practice Dashboard.

Select 'Add client' and then 'Create new licence'.

The screenshot shows the 'Clients' page in the FreeAgent system. The page has a navigation bar at the top with links for 'Clients', 'Alerts', 'Account managers', 'Payroll', 'Reports', 'CSV imports', and 'Partner Zone'. Below the navigation bar, there are tabs for 'My clients (20)', 'My group clients (1)', and 'All clients (65)'. A dropdown menu is open, showing options: 'Manage groups', 'Add client', 'Create new licence', and 'Transfer or link existing licence'. The main content area is a table of clients with columns for Name, Account owner, Client relationship, Free RWG licence, Status, Bank balance, Alerts, and Owner access. The table lists various clients such as 'A & K Bakery TB Cl Ltd', 'Bob The Builder Ltd', 'Builder', 'Clare Brazilian JuuItus Limited', 'Deat Integration', 'Eoin Demo Sole Trader', 'Eoin Prop', 'Handy Manny LTD', 'Landford Demo', 'McNamara & Associates', 'McNamara Steel LTD', 'Monopoly Residential', and 'Payroll Demo Eoin'.

Enter the client's business name and the subdomain you'd like them to use as the URL (web address) for their FreeAgent account. It needs to be unique, so you may need to add additional numbers or letters to the name of your client's business. Feel free to get creative and remember to choose something memorable for your client.

The screenshot shows the 'Create new licence' form in the FreeAgent system. The form is titled 'Create new licence' and has a 'Client details' section. The 'Business name' field is filled with 'Tams Butchers LTD'. The 'Subdomain' field is filled with 'https://tamsbutcher.freeagent.com'. The 'Client type' is set to 'UK Limited Company'. The 'Client status' is set to 'Inactive Licence'. There are also sections for 'Get a free licence', 'Additional features', and 'Account owner'. The 'Get a free licence' section asks 'Does your client have an eligible account?' with 'No' selected. The 'Additional features' section has 'Exclude from bulk payroll' set to 'No'. The 'Account owner' section has fields for 'First name', 'Last name', and 'Email'.

Next, choose the relevant client type. Please note that once the client type is set, it can't be changed later. For example, if a client incorporates their business, they will need a new FreeAgent account.

The screenshot shows the 'Create new licence' form in the FreeAgent interface. The 'Client type' dropdown menu is open, displaying the following options:

- For Everyone
- Universal
- For US Businesses
- US Sole Proprietor
- US Partnership
- US Limited Liability Company
- US C Corp
- US S Corp
- For UK Businesses
- UK Limited Company
- UK Limited Liability Partnership
- UK Partnership
- UK Sole Trader
- UK Unincorporated Landlord

The 'UK Limited Company' option is currently selected. The form also includes sections for 'Get a free licence', 'Additional features', and 'Account owner'.

Next, select the client's status. An active client will have access to their FreeAgent account and will be able to upload bank transactions, etc. Clients who are inactive won't have any access to FreeAgent. Please note that a client can only be active once. If you change their status from 'Active' to 'Inactive', it cannot be changed back to 'Active' again.

The screenshot shows the 'Create new licence' form in the FreeAgent interface. The 'Client status' dropdown menu is open, displaying the following options:

- Active Licence
- Inactive Licence

The 'Active Licence' option is currently selected. The form also includes sections for 'Get a free licence', 'Additional features', and 'Account owner'. The 'Client type' is set to 'UK Limited Company'.

## Free accounts for your clients

If your clients have NatWest, Royal Bank of Scotland or Ulster Bank business current accounts, or Mettle accounts, they're eligible to use FreeAgent for free.

To add them to your dashboard, tick the 'Yes' checkbox to the question 'Does your client have an eligible account?' in the 'Get a Free Licence' section.

The screenshot shows the 'Create new licence' form. The 'Client details' section is filled out with 'Toms Butchers LTD' as the business name, a subdomain, and 'UK Limited Company' as the client type. The 'Client status' is set to 'Active Licence'. In the 'Get a free licence' section, the question 'Does your client have an eligible account?' has the 'Yes' radio button selected. Below this, the 'Bank' section has radio buttons for 'NatWest', 'Royal Bank of Scotland', 'Mettle', and 'Ulster Bank', with 'NatWest' selected. The 'Account number' and 'Sort code' fields are empty. The 'Additional features' section has 'Exclude from bulk payroll' set to 'No'. The 'Account owner' section is partially visible at the bottom.

Select the relevant bank and enter the account number and sort code for your client's business bank account.

This screenshot is similar to the previous one but highlights the 'Get a free licence' section. The 'Bank' radio buttons are more prominent, with 'NatWest' selected. The 'Account number' and 'Sort code' fields are also highlighted, indicating where the user should enter the client's bank account details. The rest of the form remains the same as in the previous screenshot.

If you file payroll for your clients in bulk and don't wish to include the new client in your payroll run, select 'Yes' to 'Exclude from Bulk Payroll' in the 'Additional Features' section. Otherwise, select 'No' to include the client in your next payroll run.

The screenshot shows the 'Additional Features' section of the FreeAgent client setup form. The 'Exclude from bulk payroll' dropdown is set to 'Yes'. Below it, a note states: 'Bulk payroll filing allows account managers to prepare and file RTI payroll on behalf of multiple clients in a single payroll run.' The 'Account owner' section below contains empty input fields for 'First name', 'Last name', and 'Email'. The 'Owner access' section at the bottom has a blue bar with the text: 'You will be able to send your client an invitation to set their password once you have set up their FreeAgent account.'

Enter your client's details in the 'Account Owner' section, including their name, address and the email address that your client will use to log in to FreeAgent.

The screenshot shows the 'Account owner' and 'Owner permissions' sections. The 'Account owner' section has the following details filled in: First name: Eoin, Last name: McNamara, Email: eoin.mcnamara@freeagent.com. The 'Owner access' section has a checkbox 'Send this account owner an invitation to set their password' which is unchecked. The 'Owner permissions' section features a progress bar with 8 steps: 1. No Access, 2. Time, 3. My Money, 4. Contacts & Projects, 5. Invoices, Estimates and Files, 6. Bills, 7. Banking, 8. Tax, Accounting and Users. The progress bar is currently at step 7. Below the progress bar, there are two columns of permissions. The first column, 'Users can', lists: View VAT returns, Corporation Tax (Limited Companies only) and Tax Timelines; View Payroll (accrual basis only); View and edit Income Tax; View accounting reports; View Radar; Create timeslip reports for all users; Create and edit users; Create and edit stock items; Edit account settings; and all permissions from previous levels. The second column, 'Users can't', lists: File Income Tax returns; File VAT returns; and Post journals.

FreeAgent allows you to set permissions for what your client can and can't see within the software. The default user access level for a new client is level 7,

which means the client can see and do everything in FreeAgent except submit VAT returns and Self Assessment tax returns or post journal entries.

If you set the client's user access level to 7 or below in the 'Owner Permissions' section, you'll need to complete the setup stages of their account before you can send them an invitation to set their password.

If you set the client's user access level to 8 (full access), you can tick the check box in the 'Owner Access' to send the client an email invitation to choose their password. You can add a personalised message to the email if you like.

The screenshot shows the 'Owner Access' and 'Owner Permissions' sections of the FreeAgent interface. The 'Account owner' section at the top contains input fields for 'First name' (Eoin), 'Last name' (McNamara), and 'Email' (eoin.mcnamara@freeagent.com). Below this, the 'Owner access' section has a checked checkbox for 'Send this account owner an invitation to set their password'. A preview of the invitation email is shown, including a personalized message field. The 'Owner permissions' section features a horizontal slider with 8 levels: 1. No Access, 2. Time, 3. My Money, 4. Contacts & Projects, 5. Invoices, Estimates and Files, 6. Bills, 7. Banking, 8. Tax, Accounting and Users, and 9. Full Access. The slider is currently set to level 8. Below the slider, a list of permissions for each level is shown, with level 8 having all permissions from previous levels.

Make sure that you ask your client to follow the instructions in this invitation email to set their password, as they will need it to access FreeAgent. You don't need access to your client's password as you will be able to access their data and account from your Practice Dashboard.

You can amend the access level here, and we suggest starting new clients out at level 6, which means they can do everything they will need to do but they can't see accounting reports. However, feel free to pick the level that feels appropriate for you and your client; you can always adjust it in the future.

The permissions given with each level can be seen by adjusting the slider displayed in the 'Owner Permissions' section.

The text below the slider will change to show the permissions at that level.

Last name: McNamara  
 Email: esin.mcnamara@freeagent.com

**Owner access**

ⓘ You will be able to send your client an invitation to set their password once you have set up their FreeAgent account.

Send this account owner an invitation to set their password

**Owner permissions**

0 No Access   1 Time   2 My Money   3 Contacts & Projects   4 Invoices, Estimates and Files   5 Bills   6 Banking   7 Tax, Accounting and Users   8 Full Access

Users can:
 

- ✓ Create and edit bank accounts
- ✓ Import and explain bank statements
- ✓ Set up bank feeds (if available)
- all permissions from previous levels

Users can't:
 

- X See accounting reports

**Practice access**

Account manager: Esin McNamara  
This will be the main contact which the client has with your practice.

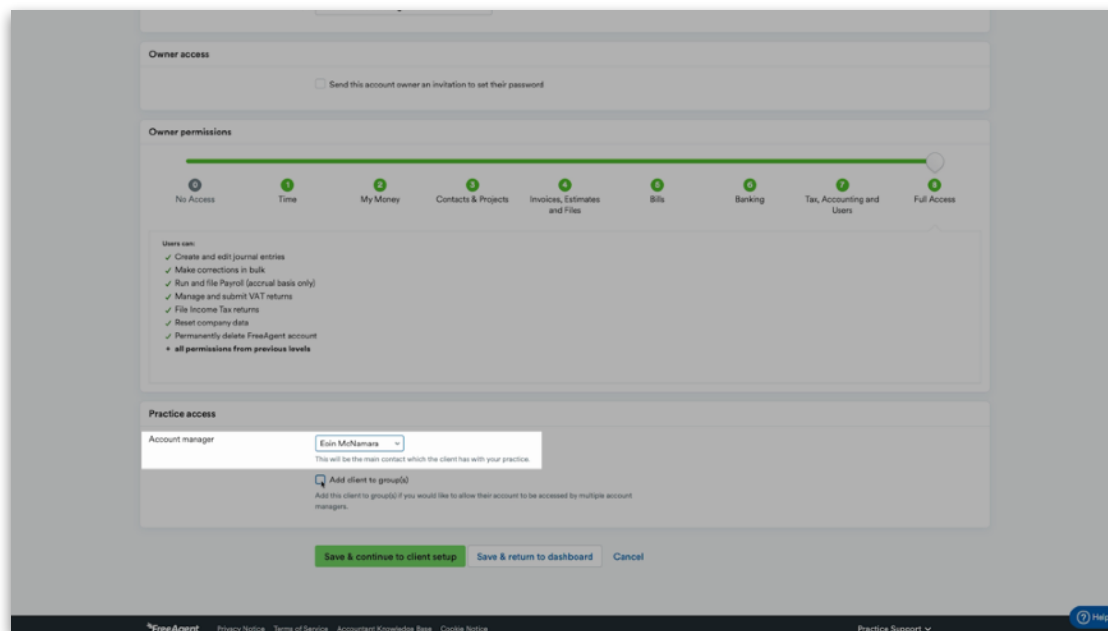
Add client to group(s)  
Add this client to group(s) if you would like to allow their account to be accessed by multiple account managers.

[Help](#)

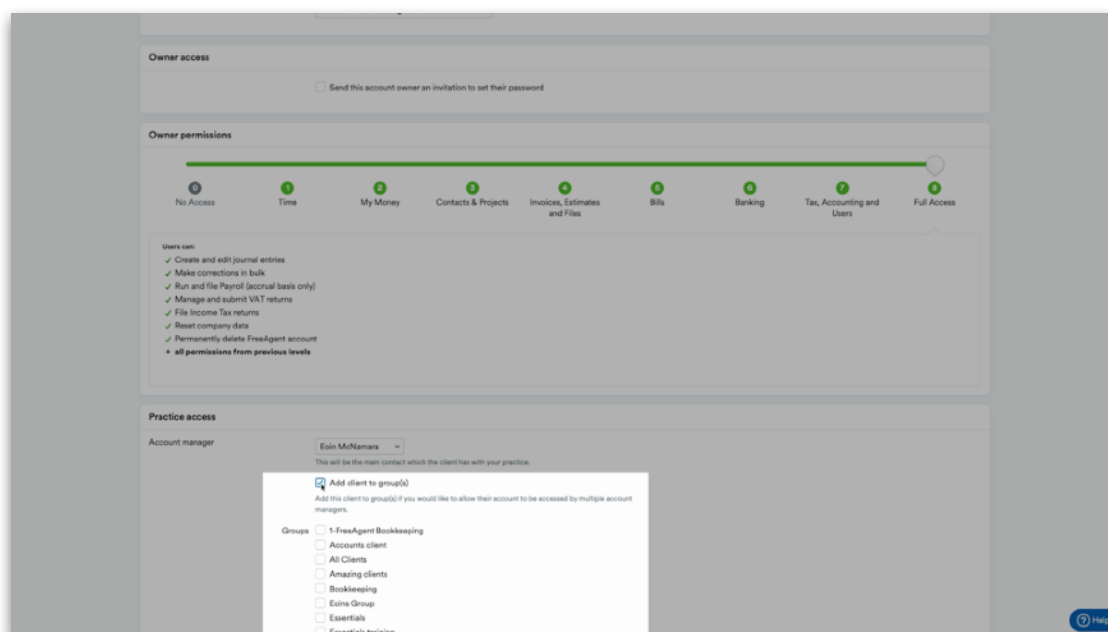
Please note that if your client has full (level 8) access, they will be able to submit their own Self Assessment and VAT returns, but they will not be able to make Final Accounts (FRS 105) and Corporation Tax (CT600) submissions themselves.

If a client has an access level of 0, they will not be able to log in to FreeAgent.

Next, if you want one of your colleagues to be this client's account manager, use the drop-down menu in the 'Account Manager' section at the bottom of the page. You need to be a senior account manager to assign an account manager to a client.

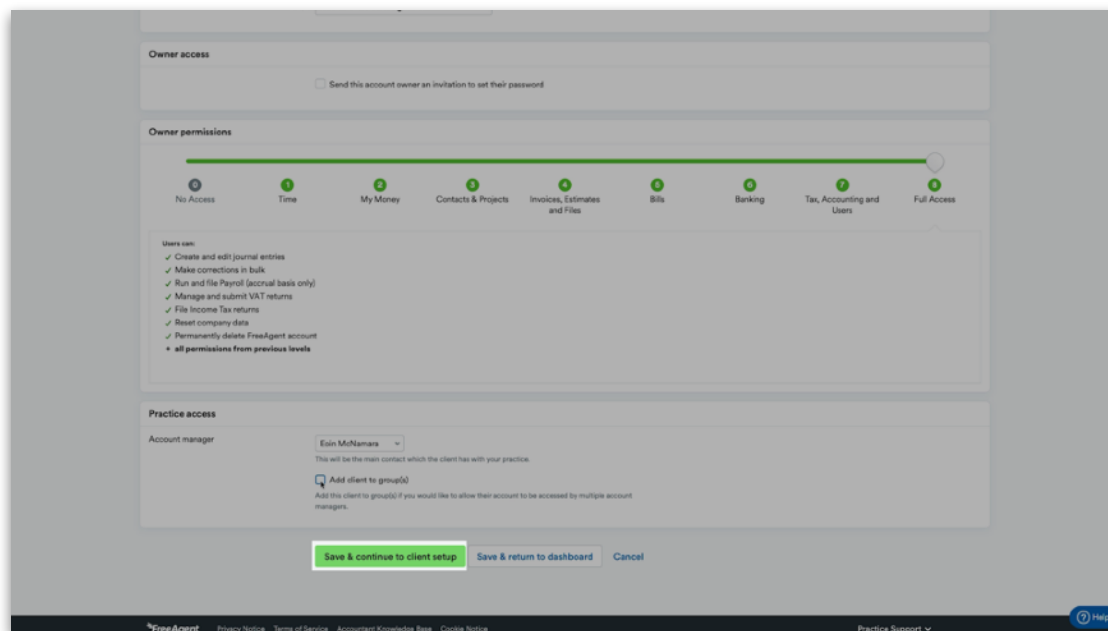


You can also assign the client to a previously created group. Click 'Add client to group(s)' and select the group you wish to assign the new client to.



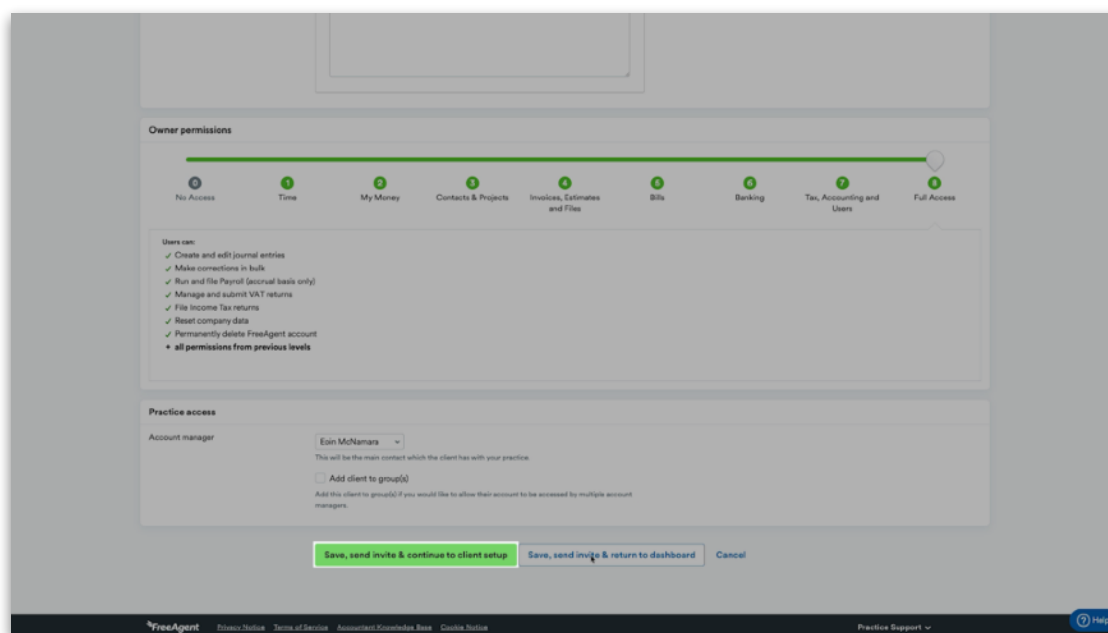
The next step you take will depend on whether you're completing the setup stages of the client's account or sending the client an invitation to set their password.

If you're completing the setup on behalf of your client, click 'Save & continue to client setup'. This switches you to the client account view of FreeAgent and takes you to the setup process.



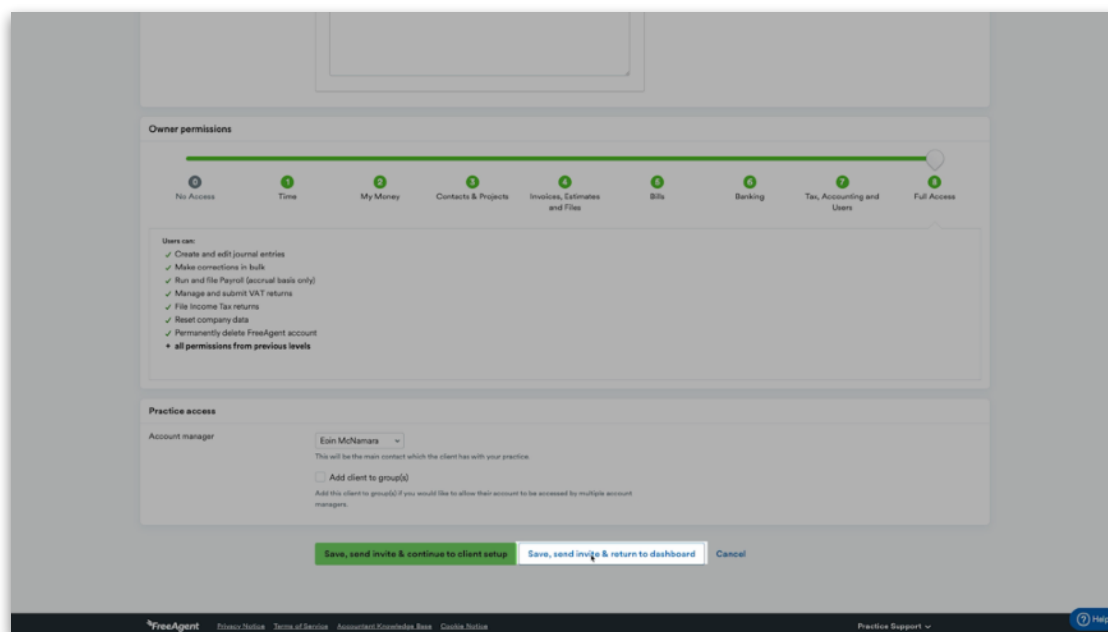
Follow the instructions provided, adding the relevant information for your client. After the final step, select 'Save and Finish' to complete the process.

If you set the client's user access level to 8 (full access) and send the client an invite to set their password, select 'Save, send invite & continue to client setup'.



This will set up the new client and send them the email to set their password. Then follow the instructions provided to complete the client setup process as above.

You also have a third option. If you'd like to send the client an email to set their password without continuing with the client setup process, for example, if you're going to complete the setup stages later or the client is going to set up their own account, select 'Save, send invite & return to dashboard' instead.



Then, when you're ready, switch to their account via your Practice Dashboard and complete the client setup process.

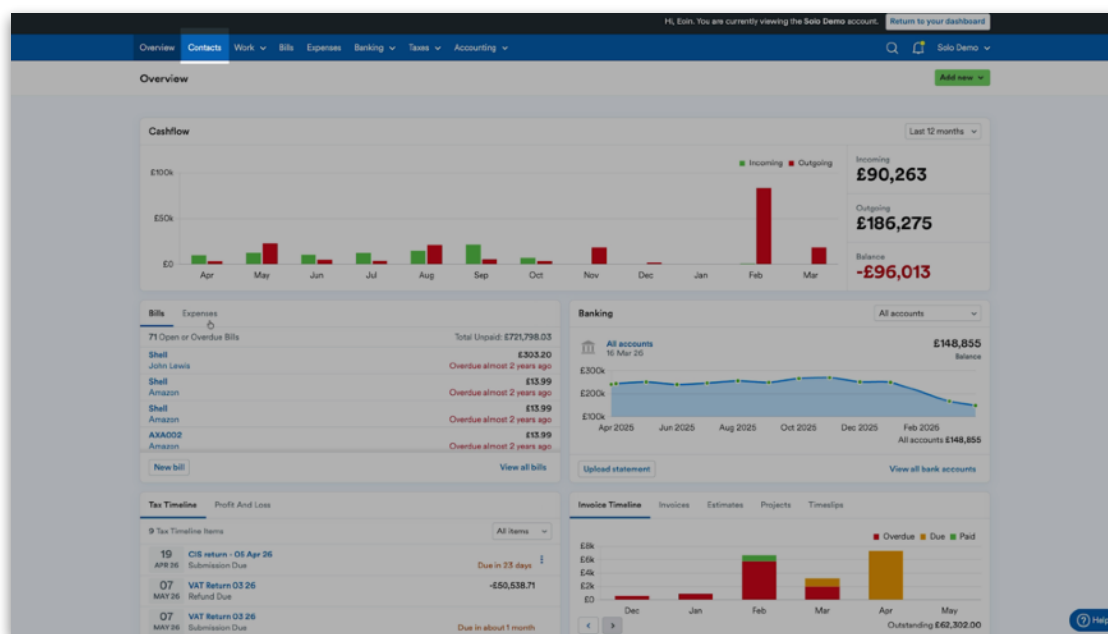
# Contacts, invoicing and credit notes

## Contacts

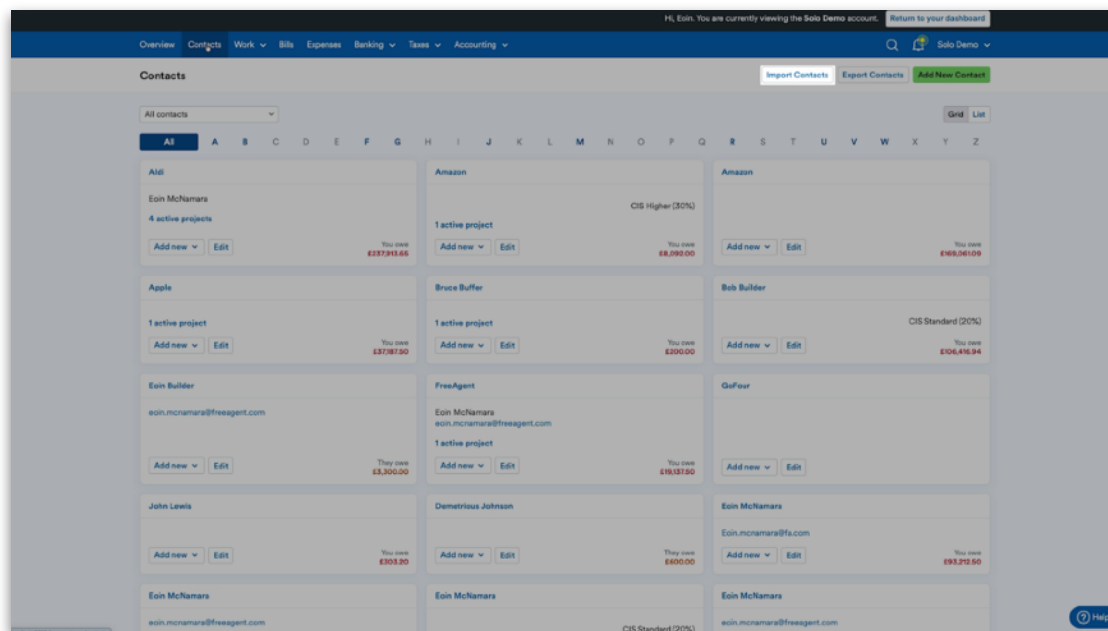
Contacts are your client's customers and suppliers in FreeAgent. To access this area, navigate to the relevant client on your Practice Dashboard and 'Switch to' their account.

Name	Account owner	Client relationship	Free NWG licence	Status	Bank balance	Alerts	Owner access
A & K Bakery TB Co Ltd	Regina Pereira regina.pereira@freeagent.com	Practice client	No	Active	£2,300.00	0	Level 7 Invite client
Bob The Builder Ltd	Bob The Builder eoin.mcnamara@freeagent.com	Practice client	No	Active	£34,949.36	0	Level 8 Invite client
Builder	Eoin McNamara Eoin.mcnamara@FA.com	Practice client	No	Active	£225,259.00	0	Level 8 Invite client
Clare Brazilian JuuItsu Limited	Eoin McNamara eoin.mcnamara@fa.com	Practice client	Could be	Active	£73,041.77	1	No Access Invite client
Dest Integration	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£196,270.20	0	Level 8 Invite client
Eoin Demo Sole Trader	Frankie Goodman eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	£46,012.34	1	Level 8 Invite client
Eoin Prop	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 7 Invite client
Handy Manny LTD	Manny Esteves Garcia Eoin.mcnamara@freeagent.com	Practice client	No	Active	-£13,700.00	0	Level 8 Invite client
Landlord Demo	Shanique Schneider eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	-£302,177.00	0	Level 8 Invite client
McNamara & Associates	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£100,000.00	1	Level 8 Invite client
McNamara Steel LTD	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8 Invite client
Monopoly Residential	Miliburn Pennybags eoin.mcnamara@freeagent.com	Practice client	No	Active	£101,197.44	1	Level 8 Invite client
Payroll Demo Eoin	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£0.00	0	Level 8 Invite client

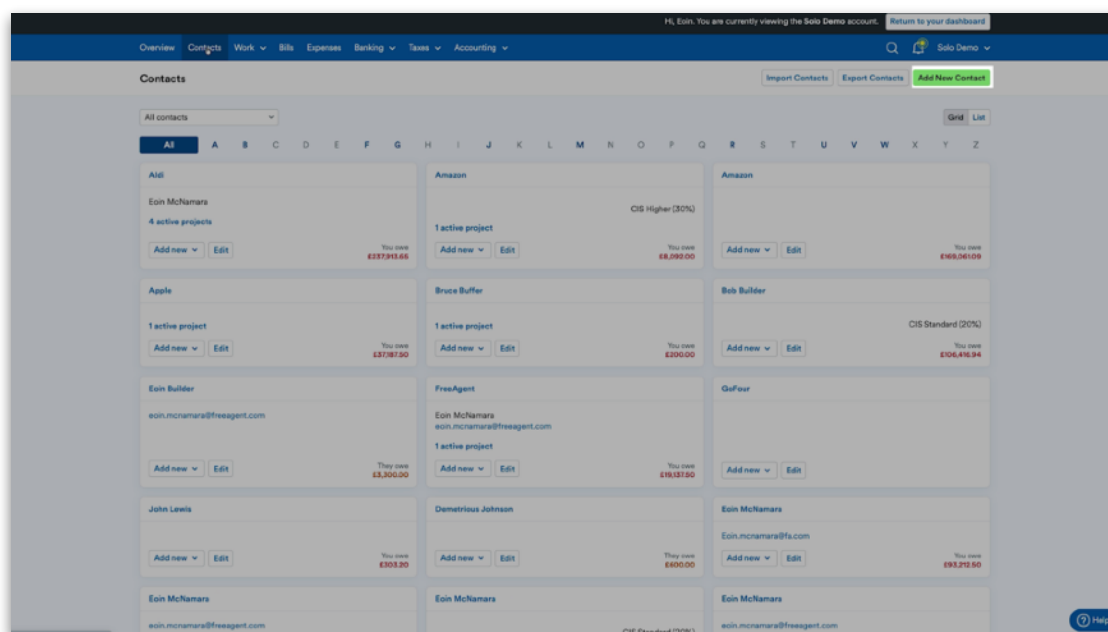
Click on the 'Contacts' tab at the top of the screen to access your client's Contacts area.



You have two options for adding contacts in FreeAgent. The first is to import multiple contacts at once. To do this, click on the 'Import Contacts' button and follow the steps provided to export contacts from an email client and import them into FreeAgent.



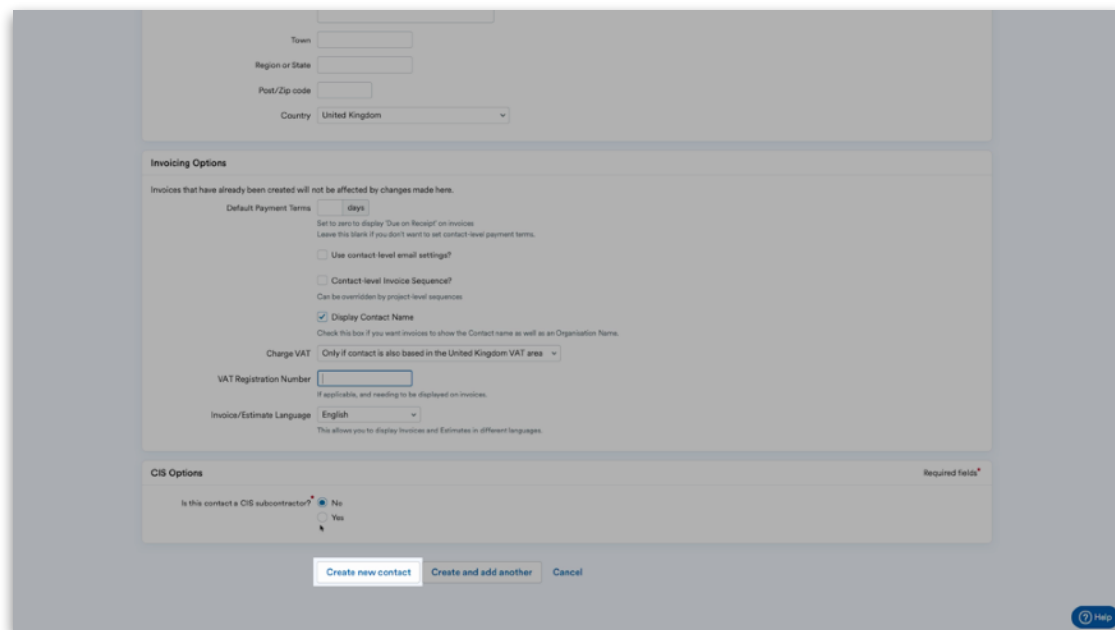
Alternatively, you can enter an individual contact by clicking on the green 'Add New Contact' button.



The more information you include for a contact, the more will get pulled through to other areas of FreeAgent, such as invoicing.

Please note that when you're adding a contact, you can enter the person's first name and last name and/or the name of the organisation they work for, but you don't need to enter both.

You can also add additional details for the contact including payment details, invoice sequencing, selecting whether to charge VAT and entering the contact's VAT registration number. The more information you enter here, the more will get pulled through to other areas of FreeAgent like sales invoicing. Select 'Create new contact' to save the new contact.

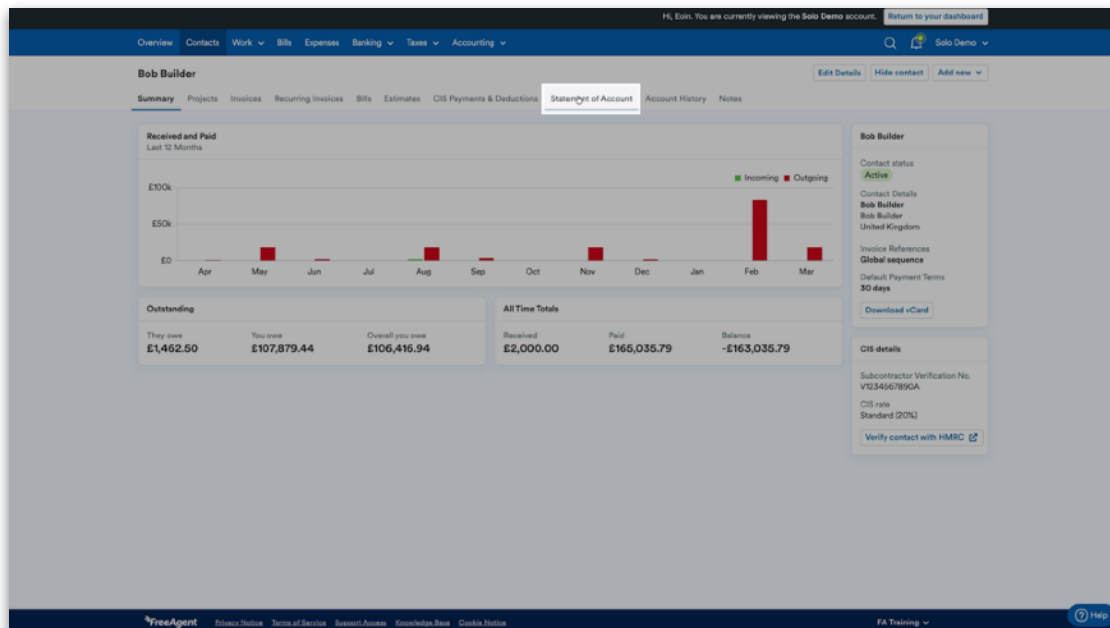


The screenshot displays a web form for creating a new contact. At the top, there are input fields for 'Town', 'Region or State', 'Post/Zip code', and a dropdown for 'Country' (set to 'United Kingdom'). Below this is the 'Invoicing Options' section, which includes a note: 'Invoices that have already been created will not be affected by changes made here.' It features a 'Default Payment Terms' field (set to 'days'), a 'Use contact level email settings?' checkbox, a 'Contact level Invoice Sequence?' checkbox, and a 'Display Contact Name' checkbox (checked). There is also a 'Charge VAT' dropdown (set to 'Only if contact is also based in the United Kingdom VAT area') and a 'VAT Registration Number' input field. The 'Invoice/Estimate Language' is set to 'English'. At the bottom is the 'CIS Options' section with a 'Required fields\*' label and a radio button selection for 'Is this contact a CIS subcontractor?' (set to 'No'). Three buttons are at the bottom: 'Create new contact', 'Create and add another', and 'Cancel'. A 'Help' icon is in the bottom right corner.

Once you've created a contact, you can click on their name in the 'Contacts' area and you'll be able to view all of the relevant transactions and data associated with them in FreeAgent.

This is also where you can view and download a Statement of Account for any contact.

To do this, navigate to the 'Statement of Account' tab.



Add the relevant date range. You can either include all transactions or just the outstanding ones by selecting the relevant option from the drop-down menu.

From: 01 Oct 24 To: 28 Oct 25 **Open or Overdue** Show Statement

STATEMENT OF ACCOUNT

FreeAgent  
Bob Demo  
12 Hatherley Road  
Strop  
DA14 4BG

Bob Builder  
Dates: 01 Oct 24 - 28 Oct 25  
Opening Balance GBP: £100.00  
Balance GBP: -£147,304.14

Date	Details	Balance GBP
01 Oct 24	Opening Balance	100.00
28 Apr 25	Bill payment against Invo23 (Bob Builder)	1,100.00
28 Apr 25	Bob Builder - Bill Invo23	1,100.00
06 May 25	Bill payment against Shell (Bob Builder)	20,000.00
26 May 25	Bob Builder - Bill Shell	2,000.00
27 May 25	Bob Builder - Bill Shell	2,000.00
27 May 25	Bob Builder - Bill shell	20,000.00
28 May 25	Bob Builder - Bill bill	100.00
01 Jun 25	Bob Builder - Bill Shell	2,000.00
01 Jun 25	Bob Builder - Bill Shell	2,000.00
11 Jun 25	Bill payment against Shell (Bob Builder)	2,000.00

Select 'Show Statement' to generate the statement.

Hi, Eoin. You are currently viewing the Solo Demo account. [Return to your dashboard](#)

Overview Contacts Work Bills Expenses Banking Taxes Accounting

Bob Builder [Edit Details](#) [Hide contact](#) [Add new](#)

Summary Projects Invoices Recurring Invoices Bills Estimates CIS Payments & Deductions **Statement of Account** Account History Notes

From: 01 Oct 24 To: 28 Oct 25 [Open or Overdue](#) **Show Statement** [Save as PDF](#) [Send by Email](#)

**STATEMENT OF ACCOUNT**

**FreeAgent**

Bob Dome  
12 Hatherley Road  
Stouup  
DA14 4BG

Bob Builder

Dates: 01 Oct 24 - 28 Oct 25  
Opening Balance GBP: £100.00  
**Balance GBP: -£147,304.14**

Date	Details	Balance GBP
01 Oct 24	Opening Balance	100.00
28 Apr 25	Bill payment against Invo23 (Bob Builder)	1,100.00
28 Apr 25	Bob Builder - Bill Invo23	1,100.00
06 May 25	Bill payment against Shell (Bob Builder)	20,000.00
26 May 25	Bob Builder - Bill Shell	2,000.00
27 May 25	Bob Builder - Bill Shell	2,000.00
27 May 25	Bob Builder - Bill shell	20,000.00
28 May 25	Bob Builder - Bill bill	100.00
01 Jun 25	Bob Builder - Bill Shell	2,000.00
01 Jun 25	Bob Builder - Bill Shell	2,000.00
11 Jun 25	Bill payment against Shell (Bob Builder)	2,000.00

Bob Builder

Contact status: Active

Contact Details: Bob Builder, Bob Builder, United Kingdom

Invoice References: Global sequence

Default Payment Terms: 30 days

[Download v-Card](#)

CIS details

Subcontractor Verification No. VZ34367990A

CIS rate: Standard (20%)

[Verify contact with HMRC](#)

[Help](#)

You can then save it as a PDF to print by clicking 'Save as PDF', or email it directly to the contact by clicking 'Send by Email'.

Hi, Eoin. You are currently viewing the Solo Demo account. [Return to your dashboard](#)

Overview Contacts Work Bills Expenses Banking Taxes Accounting

Bob Builder [Edit Details](#) [Hide contact](#) [Add new](#)

Summary Projects Invoices Recurring Invoices Bills Estimates CIS Payments & Deductions **Statement of Account** Account History Notes

From: 01 Oct 24 To: 28 Oct 25 [Open or Overdue](#) [Show Statement](#) **Save as PDF** [Send by Email](#)

**STATEMENT OF ACCOUNT**

**FreeAgent**

Bob Dome  
12 Hatherley Road  
Stouup  
DA14 4BG

Bob Builder

Dates: 01 Oct 24 - 28 Oct 25  
Opening Balance GBP: £0.00  
**Balance GBP: -£64,570.81**

Date	Details	Balance GBP
01 Oct 24	Opening Balance	0.00
26 May 25	Bob Builder - Bill Shell	2,000.00
27 May 25	Bob Builder - Bill shell	20,000.00
13 Aug 25	Invoice Solodemo088	600.00
18 Aug 25	Invoice Solodemo090	262.50
19 Aug 25	Invoice Solodemo091	600.00
03 Sep 25	Bob Builder - Bill Shell	2,000.00
04 Sep 25	Bob Builder - Bill Shell	2,400.00
17 Sep 25	Bob Builder - Bill XXX002	11,000.00
17 Sep 25	Bob Builder - Bill Shell	20,000.00
17 Sep 25	Bob Builder - Bill Shell	10,000.00
17 Sep 25	Bob Builder - Bill Shell	1,000.00
01 Oct 25	Bob Builder - Bill Shell	2,000.00

**CIS Deductions Pending £4,366.89**

Bob Builder

Contact status: Active

Contact Details: Bob Builder, Bob Builder, United Kingdom

Invoice References: Global sequence

Default Payment Terms: 30 days

[Download v-Card](#)

CIS details

Subcontractor Verification No. VZ34367990A

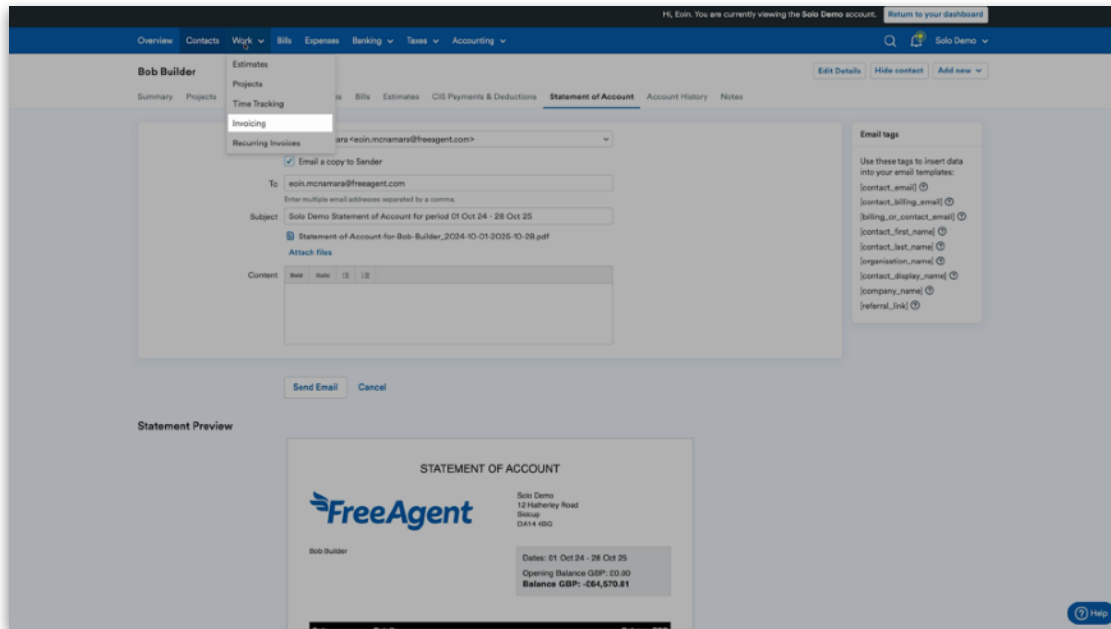
CIS rate: Standard (20%)

[Verify contact with HMRC](#)

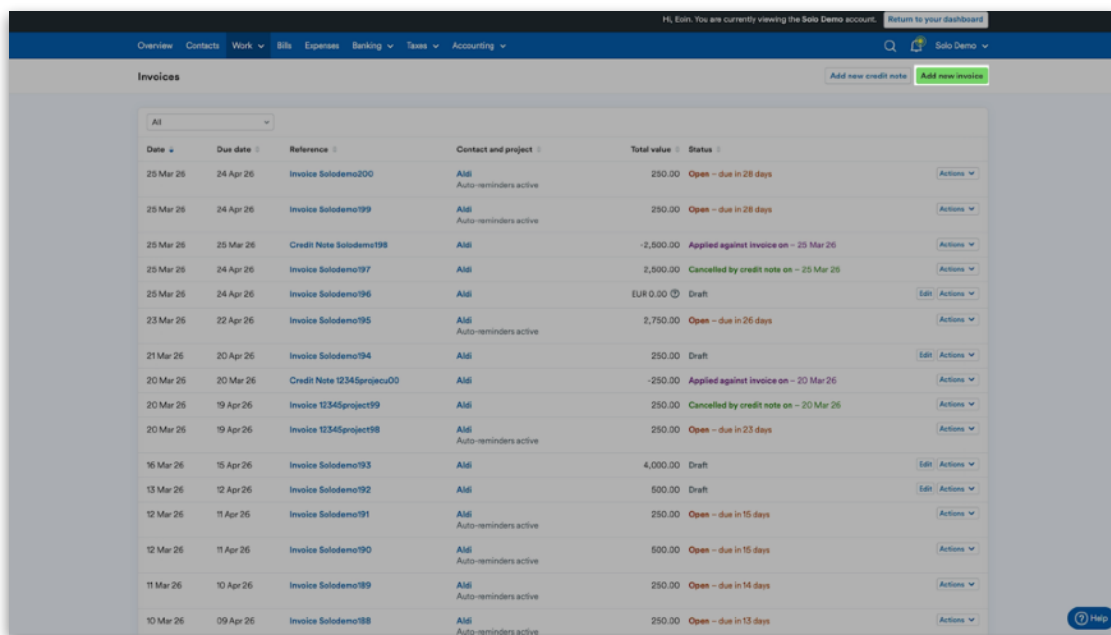
[Help](#)

## Invoicing

To navigate to the invoicing area in FreeAgent from within your client's account, select the 'Work' tab and then choose 'Invoicing' from the drop-down menu.



You'll see a list of sales invoices that have been entered in FreeAgent. FreeAgent uses a traffic light system to show the status of the invoices: green for 'Paid', amber for 'Open' (not due) and red for 'Overdue'. To add a new sales invoice, click on the green 'Add New Invoice' button in the top-right corner.



This is where you'll enter all the relevant information for the invoice. Begin by selecting the person or company that the invoice is going to be sent to from the 'Contact' drop-down list. If they haven't been added yet, select 'Or, add a new contact'. You can also select a project, if applicable.

The screenshot shows the 'New Invoice' form in a software application. The form is divided into sections: 'Contact and project', 'Details', 'Payments', and 'Emails'. The 'Contact and project' section has a dropdown menu for 'Contact' with a search bar and an 'Add a new contact' button. The 'Details' section includes fields for 'Invoice reference' (Solodemo201), 'Invoice date' (27 Mar 26), 'Payment terms' (30 days), 'Currency' (Pounds Sterling), and 'CIS category' (N/A). There is also an 'Additional text' field. The 'Payments' section has two options: 'Set up online payments' and 'GoCardless Direct Debit'. The 'Emails' section is partially visible at the bottom. The top navigation bar includes 'Overview', 'Contacts', 'Work', 'Bills', 'Expenses', 'Banking', 'Taxes', and 'Accounting'. A user profile 'Hi, Eoin. You are currently viewing the Solo Demo account.' and a 'Return to your dashboard' button are also visible.

Next, complete the 'Invoice Details' section. If you're using global invoice sequencing for the invoices, FreeAgent will automatically increase the invoice reference number by one each time you create an invoice. Alternatively, you can enter your own reference if you'd prefer.

In this section, you can also add payment terms, select a currency, include additional details and select which invoice emails should be sent to the client.

There are various other options available to include.

Select the arrow next to 'More Options':

The screenshot shows the 'More Options' dropdown menu expanded. The menu items are:

- Set up online payments: Let customers pay securely by card with Stripe, PayPal and more.
- GoCardless Direct Debit: Take single or recurring payments directly from your contact with GoCardless.
- Emails:
  - Email this invoice automatically
  - Email payment reminders if the invoice goes unpaid (with an 'Edit reminder rules' link)
  - Email a Thank You once this invoice has been paid (with a note: 'You need to create a Thank You email template first!')

At the bottom of the menu are the buttons 'Create new invoice' and 'Cancel'.

Then enter the relevant details if required and once you're happy with the information, select 'Create new invoice'.

The screenshot shows the 'More Options' dropdown menu expanded, displaying various settings:

- Invoice discount: [ ] % (The discount applied across the whole invoice.)
- Custom contact name: [ ] (This name will override the default contact name on this invoice.)
- Custom payment terms: [ ] (This will override the normal payment terms and invoice due date.)
- PO reference: [ ] (This PO reference will override any PO set for the project.)
- Bank account: Eain McNamara Mettle (This will be used to display remittance advice on this invoice.)
- Are you using Letterheaded Paper?  (Your logo and company address will be omitted.)
- Display the project name in the Other information section.
- Always display the BIC and IBAN numbers, if defined, on this invoice.
- VAT options:
  - UK VAT Rates
  - Reverse Charge
  - EC VAT MOSS

At the bottom of the menu are the buttons 'Create new invoice' and 'Cancel'.

Next, you'll need to add invoice items.

To do this, click on the green 'Add invoice item' button and enter the relevant details for the item in the pop-up window.

Invoice Solodemo201 (Draft)

**Add an invoice item**  
This invoice has been configured to send automated emails. You must add at least one invoice item to ensure these emails are sent.

Invoice Status: Draft | Sent | Paid

**FreeAgent**  
Soho Office  
12 Market Street  
D1 1PL  
UK27 1244878

**Bob Builder**

**INVOICE: SOLODEMO201**  
27 March 2020  
Payment due by 26 April 2020

QUANTITY	DETAILS	UNIT PRICE (£)	VAT	TOT SUBTOTAL (£)
				Tot Total 0.00
				UK27 0.00
				<b>GDP Total £0.00</b>

**Add invoice item**

Payment Details  
Eco Trainers  
Bank/Sort Code: 022140  
Account Number: 12345678  
Payment Reference: Solodemo201

Total value: **£0.00**  
Created: 27 Mar 20  
Due: Not yet sent  
Contact: Bob Builder

Online payments  
Let your customers pay quickly and securely online.  
[Set up online payments](#)

If your client sells the same items or services regularly, tick the 'Add this to your price list' checkbox and give the item a title.

**New invoice item**

Autofill from your price list

Select a price list item to automatically fill in the form below.

Quantity \* 1.00 Units Hours

Unit price \* £ 250.00  
Enter discounts and credits as negative.

VAT Standard (0.0%)

Add this to your price list

Price List Item Name/Code  
Essentials 2020

Details \*  
1 hour of essential training

**Create and finish** **Create and add another** **Cancel**

This will mean in the future you can select the item from the 'Autofill from your price list' drop-down menu at the top pop-up window and the fields will automatically be filled.

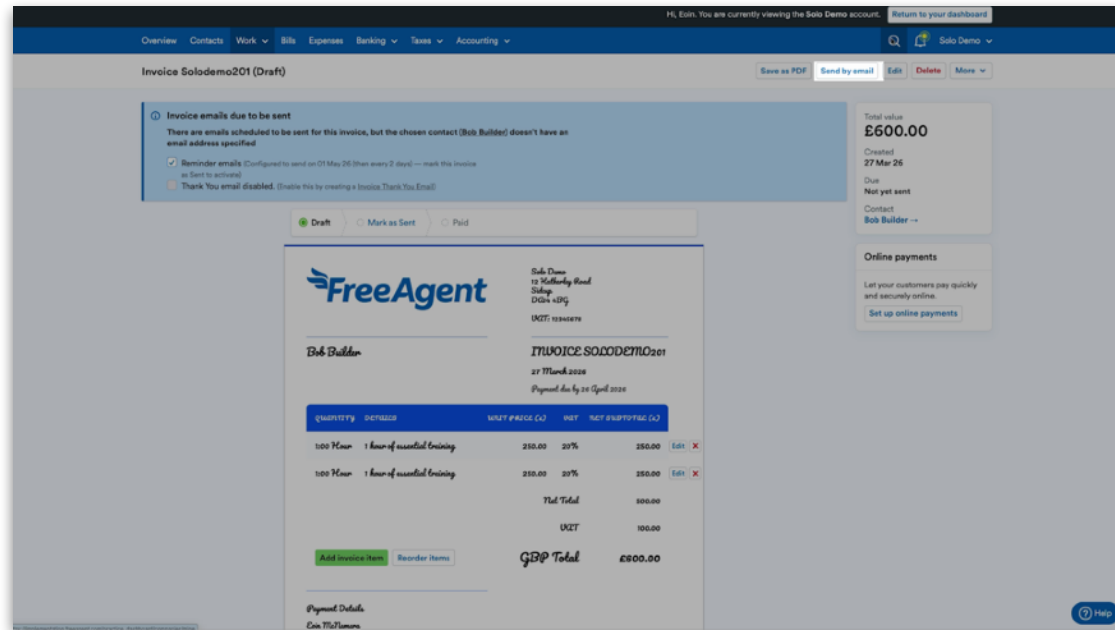
The screenshot shows the 'New invoice item' pop-up window in the FreeAgent interface. The window is titled 'New invoice item' and has a dropdown menu set to 'Autofill from your price list'. Below this, there is a text box for 'Details' which is currently empty. The 'Unit price' is set to £ 0.00. The 'VAT' is set to 'Standard (20.0%)'. There are three buttons at the bottom: 'Create and finish', 'Create and add another', and 'Cancel'.

Once you're happy with the details for the invoice item, you have two options: you can either create it and another item or click 'Create and finish' to complete the process.

The screenshot shows the 'New invoice item' pop-up window in the FreeAgent interface. The window is titled 'New invoice item' and has a dropdown menu set to 'Autofill from your price list'. Below this, the 'Details' text box is filled with '1 hour of essential training'. The 'Unit price' is set to £ 250.00. The 'VAT' is set to 'Standard (20.0%)'. The 'Add this to your price list' checkbox is checked. The 'Price List Item Name/Code' field is filled with 'Essentials 2020'. There are three buttons at the bottom: 'Create and finish', 'Create and add another', and 'Cancel'.

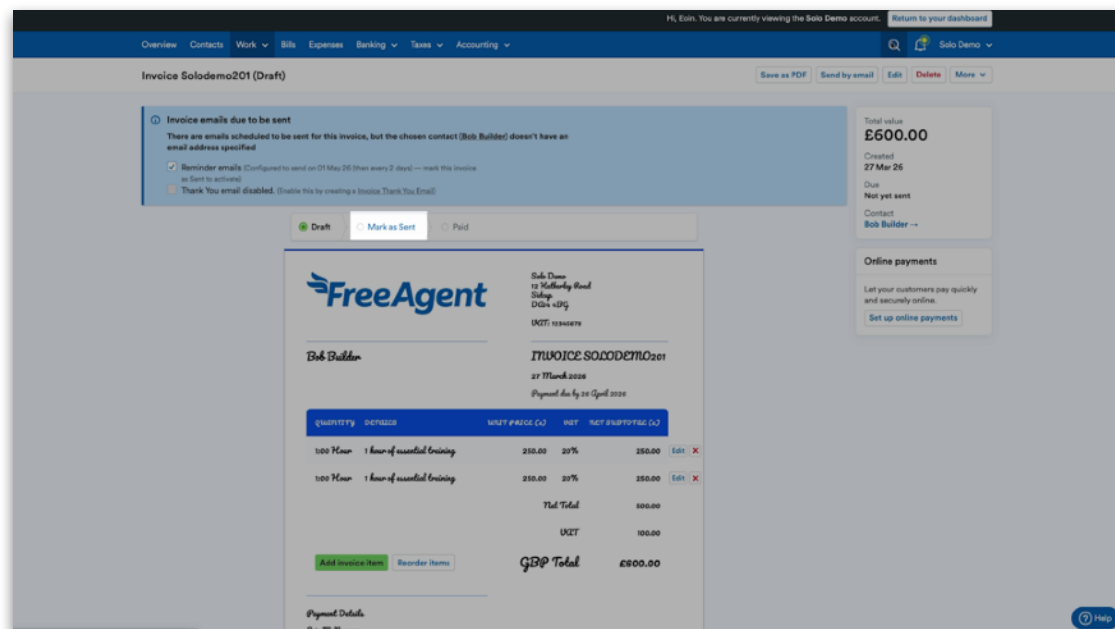
At this stage, the invoice is still marked as 'Draft', which means it will not be pulled through to the relevant accounting reports in FreeAgent.

To complete the process, you need to send the invoice or mark it as sent. If you selected the option to email the invoice automatically in the 'Invoice Emails' section, select 'Send by email' to activate the invoice and email it to your customer.



The screenshot shows the FreeAgent software interface for an invoice titled 'Invoice Solodemo201 (Draft)'. The interface includes a navigation menu at the top with options like Overview, Contacts, Work, Bills, Expenses, Banking, Taxes, and Accounting. A notification box at the top left states: 'Invoice emails due to be sent. There are emails scheduled to be sent for this invoice, but the chosen contact (Bob Builder) doesn't have an email address specified.' Below this, there are two options: 'Reminder emails (Configured to send on 01 May 26 (then every 2 days) - mark this invoice as Sent to activate)' which is checked, and 'Thank You email disabled (Disable this by creating a Invoice Thank You Email)'. On the right side, there is a summary box showing 'Total value £600.00', 'Created 27 Mar 26', 'Due Not yet sent', and 'Contact Bob Builder'. Below the summary, there are 'Online payments' options. The main invoice preview shows the FreeAgent logo, the customer name 'Bob Builder', and the invoice details: 'INVOICE SOL00DEMO201', '27 March 2026', and 'Payment due by 26 April 2026'. A table lists two items: '100 Hour 1 hour of essential training' with a unit price of 250.00 and a net amount of 250.00. The table also shows a 'Total Total' of 500.00 and a 'UKT' of 100.00, resulting in a 'GBP Total' of 600.00. At the bottom, there are 'Add invoice item' and 'Reorder items' buttons, and a 'Payment Details' section with 'Can MTL James'.

Alternatively, if you didn't select the option to email the invoice automatically, select 'Mark as Sent' to activate the invoice and your client can then send the invoice to their customer manually.



This screenshot is identical to the one above, showing the FreeAgent software interface for the same invoice. However, in this version, the 'Mark as Sent' button in the status bar is highlighted, indicating that the invoice is being manually marked as sent instead of being sent automatically via email.

Once the invoice is activated, it will be pulled through to the relevant accounting reports and VAT returns, if applicable. It will also be available to have bank transactions explained against it.

If you need to make changes to the invoice for any reason, select 'Make Draft' and amend the invoice. Then, repeat the process to email the invoice or mark it as sent.

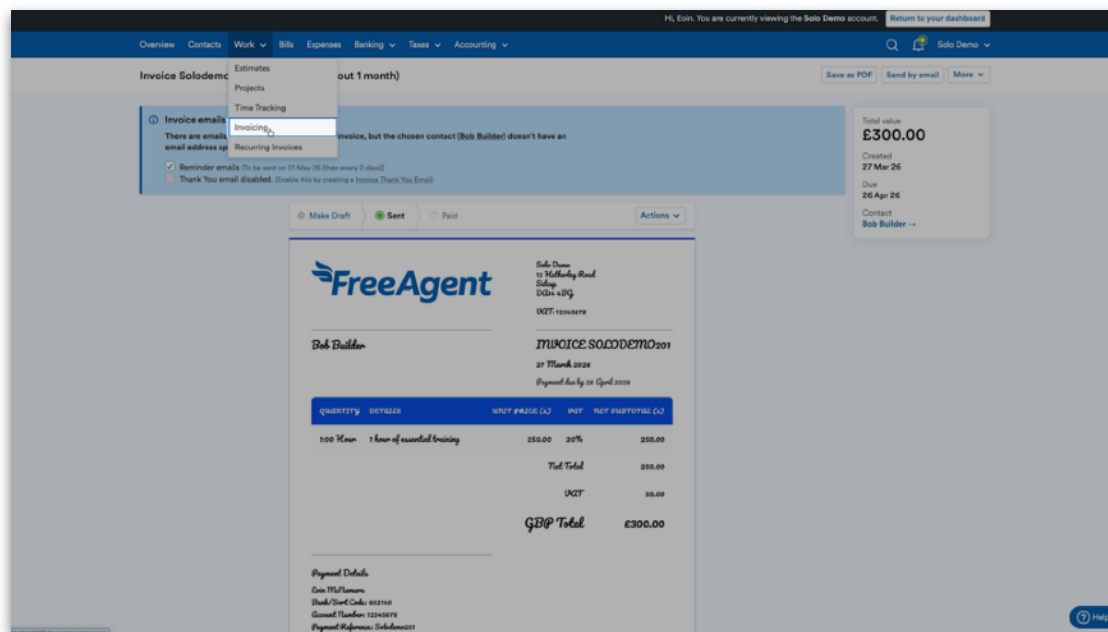
The screenshot shows the FreeAgent software interface for an invoice titled 'Invoice Solodemo201 (Open - due in about 1 month)'. The interface includes a navigation menu at the top with options like Overview, Contacts, Work, Bills, Expenses, Banking, Taxes, and Accounting. A status bar indicates the user is viewing a demo account. The main content area shows a notification about email scheduling, a 'Total value' of £600.00, and a table of invoice items. The invoice is addressed to 'Bob Builder' and is dated 27 March 2020. The table lists two items, each for 100 hours of essential training at £55.00 per hour, with a 20% discount, resulting in a net total of £890.00 and a VAT of £100.00, for a grand total of £600.00.

QUANTITY	DETAILS	UNIT PRICE (£)	DISC	NET SUBTOTAL (£)
100 Hours	1 hour of essential training	55.00	20%	250.00
100 Hours	1 hour of essential training	55.00	20%	250.00
				<b>Net Total</b>
				890.00
				<b>VAT</b>
				100.00
				<b>GBP Total</b>
				600.00

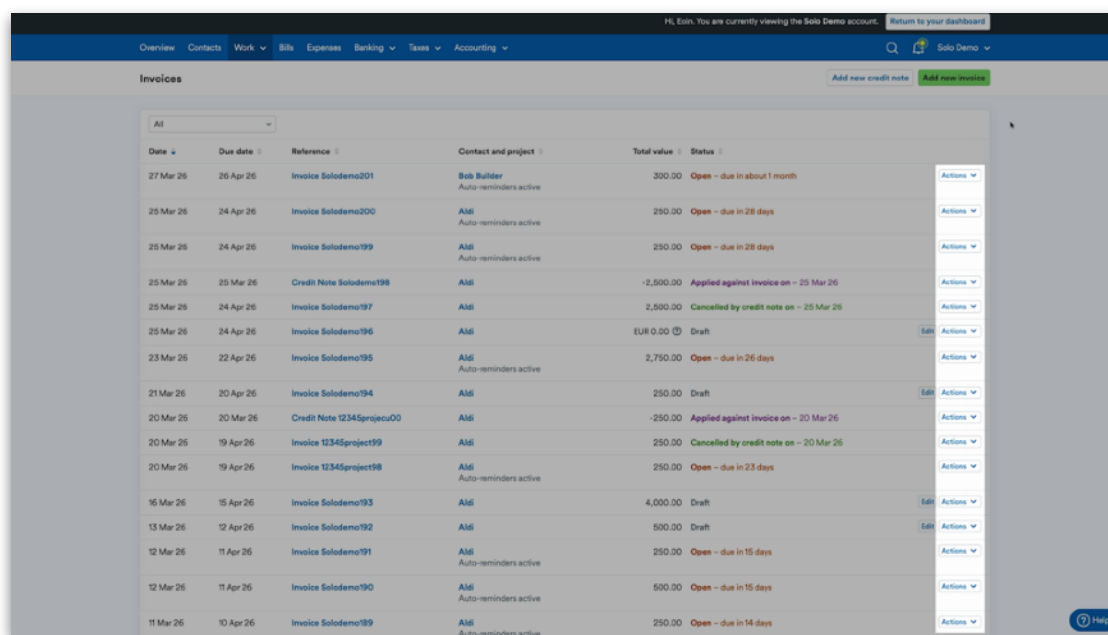
Please note that you can only do this if no payment has been marked against it. If one has, you can't make any changes until the payment has been removed. Your clients can also create and send invoices using the FreeAgent mobile app. To find out more about this, visit the Mobile module in the 'Learning and accreditation' area in the Practice Portal.

## Invoice Quick Actions

Navigate to the 'Work' tab and select 'Invoicing' from the drop-down menu.



Select the 'Actions' drop-down menu next to the relevant invoice.



The status of the invoice will affect what options are given in the drop-down menu.

For invoices with a 'Draft' status, you'll be able to 'View' the invoice, 'Send by email', 'Mark as sent', 'Duplicate invoice', 'Create recurring profile' from the invoice, 'Download PDF', or 'Delete' the draft invoice.

The screenshot shows the 'Invoices' page in a software application. The top navigation bar includes 'Overview', 'Contacts', 'Work', 'Bills', 'My Money', 'Banking', 'Taxes', and 'Accounting'. The main content area displays a table of invoices with columns for 'Date', 'Due date', 'Reference', 'Contact and project', 'Total value', and 'Status'. A dropdown menu is open over the 'Draft' status of the first invoice, showing options: 'View', 'Send by email', 'Mark as sent', 'Duplicate invoice', 'Create recurring profile', 'Download PDF', and 'Delete'.

Date	Due date	Reference	Contact and project	Total value	Status
28 Mar 26	27 Apr 26	Invoice FezC81	Fez Consulting Ltd	536.40	Draft
03 Mar 26	03 Mar 26	Credit Note FezC80	Dan Ashcroft	-1,800.00	Applied against invoice on - 03 Mar 26
03 Mar 26	03 Mar 26	Credit Note FezC79	Fez Consulting Ltd	-1,500.00	Draft
03 Mar 26	02 Apr 26	Invoice FezC78	Dan Ashcroft	1,800.00	Open - due today
03 Mar 26	02 Apr 26	Invoice FezC77	Dan Ashcroft	1,800.00	Cancelled by credit note on - 03 Mar 26
28 Feb 26	30 Mar 26	Invoice FezC76	Fez Consulting Ltd	536.40	Draft
17 Feb 26	19 Mar 26	Invoice FezC75	Fez Consulting Ltd	48.00	Overdue - due 14 days ago
28 Jan 26	27 Feb 26	Invoice FezC74	Fez Consulting Ltd	250.00	Draft
23 Jan 26	23 Jan 26	Credit Note FezC73	Fez Consulting Ltd	-300.00	Overdue - due 2 months ago
28 Dec 25	27 Jan 26	Invoice FezC72	Fez Consulting Ltd	536.40	Draft

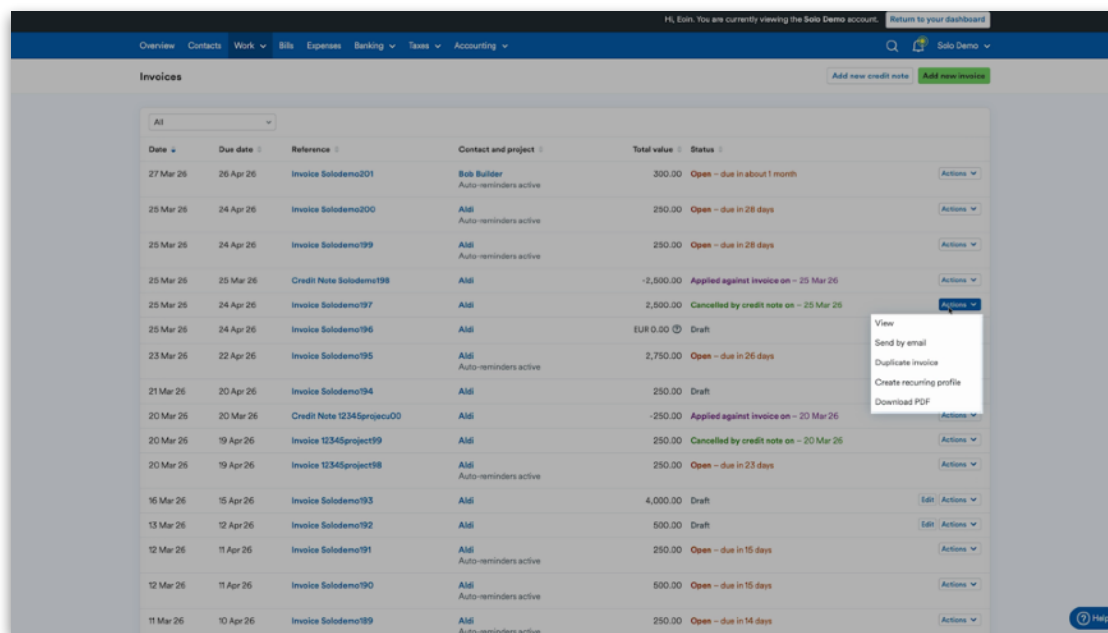
For invoices that are 'Open' or 'Overdue', you can 'View' the invoice, 'Send by email' or 'Resend by email', 'Mark as draft', 'Duplicate invoice', 'Create recurring profile' from the invoice, or 'Download PDF'.

The screenshot shows the 'Invoices' page in a software application. The top navigation bar includes 'Overview', 'Contacts', 'Work', 'Bills', 'Expenses', 'Banking', 'Taxes', and 'Accounting'. The main content area displays a table of invoices with columns for 'Date', 'Due date', 'Reference', 'Contact and project', 'Total value', and 'Status'. A dropdown menu is open over the 'Open' status of the first invoice, showing options: 'View', 'Send by email', 'Mark as draft', 'Duplicate invoice', 'Create recurring profile', and 'Download PDF'.

Date	Due date	Reference	Contact and project	Total value	Status
27 Mar 26	26 Apr 26	Invoice Solodemo201	Bob Bulder Auto-reminders active	300.00	Open - due in about 1 month
25 Mar 26	24 Apr 26	Invoice Solodemo200	Atsi Auto-reminders active	250.00	Open - due in 28 days
25 Mar 26	24 Apr 26	Invoice Solodemo199	Atsi Auto-reminders active	250.00	Open - due in 28 days
25 Mar 26	25 Mar 26	Credit Note Solodemo198	Atsi	-2,500.00	Applied against invoice on - 25 Mar 26
25 Mar 26	24 Apr 26	Invoice Solodemo197	Atsi	2,500.00	Cancelled by credit note on - 25 Mar 26
25 Mar 26	24 Apr 26	Invoice Solodemo196	Atsi	EUR 0.00	Draft
23 Mar 26	22 Apr 26	Invoice Solodemo195	Atsi Auto-reminders active	2,750.00	Open - due in 26 days
21 Mar 26	20 Apr 26	Invoice Solodemo194	Atsi	250.00	Draft
20 Mar 26	20 Mar 26	Credit Note 12345project00	Atsi	-250.00	Applied against invoice on - 20 Mar 26
20 Mar 26	19 Apr 26	Invoice 12345project199	Atsi	250.00	Cancelled by credit note on - 20 Mar 26
20 Mar 26	19 Apr 26	Invoice 12345project198	Atsi Auto-reminders active	250.00	Open - due in 23 days
16 Mar 26	15 Apr 26	Invoice Solodemo193	Atsi	4,000.00	Draft
13 Mar 26	12 Apr 26	Invoice Solodemo192	Atsi	500.00	Draft
12 Mar 26	11 Apr 26	Invoice Solodemo191	Atsi Auto-reminders active	250.00	Open - due in 15 days
12 Mar 26	11 Apr 26	Invoice Solodemo190	Atsi Auto-reminders active	500.00	Open - due in 15 days
11 Mar 26	10 Apr 26	Invoice Solodemo189	Atsi Auto-reminders active	250.00	Open - due in 14 days

You also have the option to 'Send reminder' emails for overdue invoices.

If the invoice is marked as paid, you can 'View', 'Send by email', 'Duplicate invoice', 'Create recurring profile' from the invoice, or 'Download PDF'.

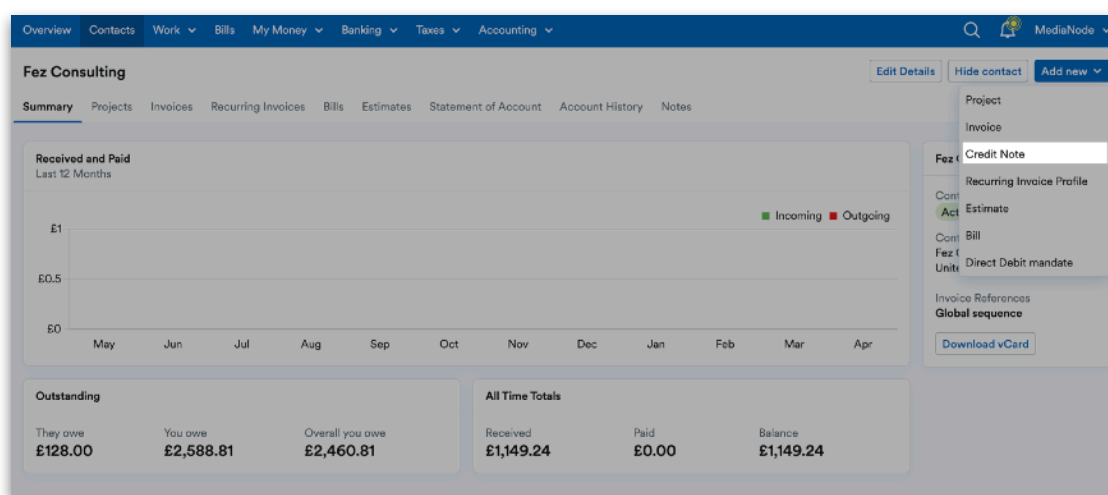


The screenshot shows the 'Invoices' section of the FreeAgent interface. A table lists various invoices with columns for Date, Due date, Reference, Contact and project, Total value, and Status. A context menu is open over the invoice 'Invoice Solodemo196', showing options: View, Send by email, Duplicate invoice, Create recurring profile, and Download PDF.

Date	Due date	Reference	Contact and project	Total value	Status
27 Mar 26	26 Apr 26	Invoice Solodemo201	Bob Builder Auto-reminders active	300.00	Open - due in about 1 month
25 Mar 26	24 Apr 26	Invoice Solodemo200	Aisi Auto-reminders active	250.00	Open - due in 28 days
25 Mar 26	24 Apr 26	Invoice Solodemo199	Aisi Auto-reminders active	250.00	Open - due in 28 days
25 Mar 26	25 Mar 26	Credit Note Solodemo198	Aisi	-2,500.00	Applied against invoice on - 25 Mar 26
25 Mar 26	24 Apr 26	Invoice Solodemo197	Aisi	2,500.00	Cancelled by credit note on - 25 Mar 26
25 Mar 26	24 Apr 26	Invoice Solodemo196	Aisi	EUR 0.00	Draft
23 Mar 26	22 Apr 26	Invoice Solodemo195	Aisi Auto-reminders active	2,750.00	Open - due in 26 days
21 Mar 26	20 Apr 26	Invoice Solodemo194	Aisi	250.00	Draft
20 Mar 26	20 Mar 26	Credit Note 12345project00	Aisi	-250.00	Applied against invoice on - 20 Mar 26
20 Mar 26	19 Apr 26	Invoice 12345project99	Aisi	250.00	Cancelled by credit note on - 20 Mar 26
20 Mar 26	19 Apr 26	Invoice 12345project98	Aisi Auto-reminders active	250.00	Open - due in 23 days
16 Mar 26	15 Apr 26	Invoice Solodemo193	Aisi	4,000.00	Draft
13 Mar 26	12 Apr 26	Invoice Solodemo192	Aisi	500.00	Draft
12 Mar 26	11 Apr 26	Invoice Solodemo191	Aisi Auto-reminders active	250.00	Open - due in 15 days
12 Mar 26	11 Apr 26	Invoice Solodemo190	Aisi Auto-reminders active	500.00	Open - due in 15 days
11 Mar 26	10 Apr 26	Invoice Solodemo189	Aisi Auto-reminders active	250.00	Open - due in 14 days

## Credit notes

There are a few ways to enter credit notes from within your client's account in FreeAgent. The first is to create one from scratch. You can do this directly from the 'Contacts' or 'Projects' areas. Just select 'Add new' and choose 'Credit Note' from the drop-down.

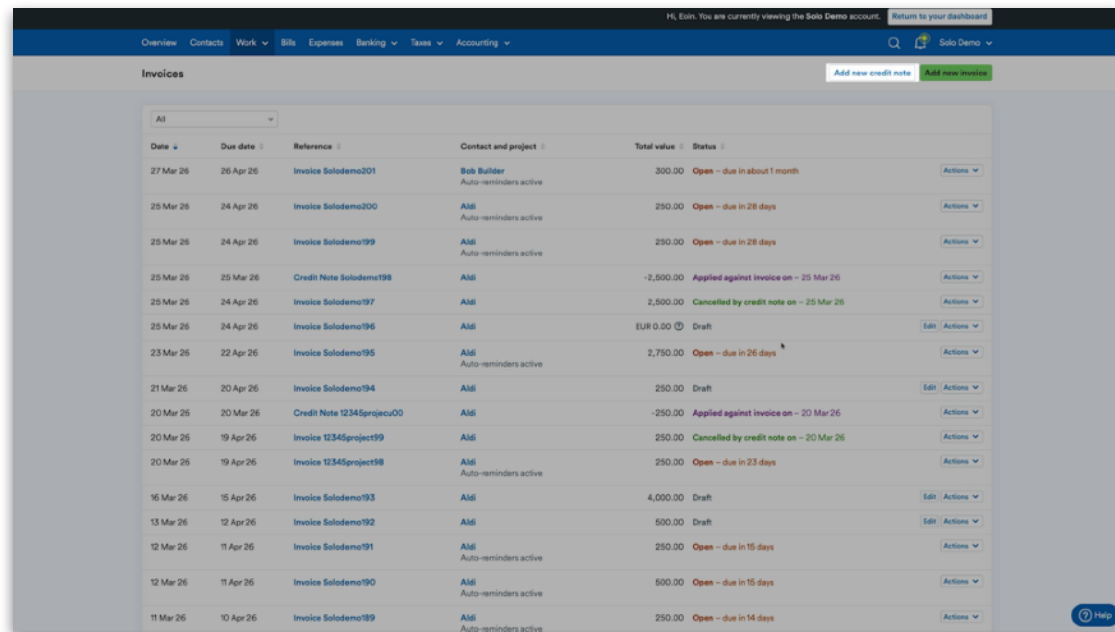


The screenshot shows the 'Fez Consulting' account page in FreeAgent. The 'Add new' dropdown menu is open, showing options: Project, Invoice, Credit Note (highlighted), Recurring Invoice Profile, Estimate, Bill, and Direct Debit mandate. Below the menu, there is a 'Received and Paid' chart and an 'Outstanding' summary table.

Outstanding			All Time Totals		
They owe	You owe	Overall you owe	Received	Paid	Balance
£128.00	£2,588.81	£2,460.81	£1,149.24	£0.00	£1,149.24

Alternatively, you can create a credit note from scratch via the 'Invoicing' section.

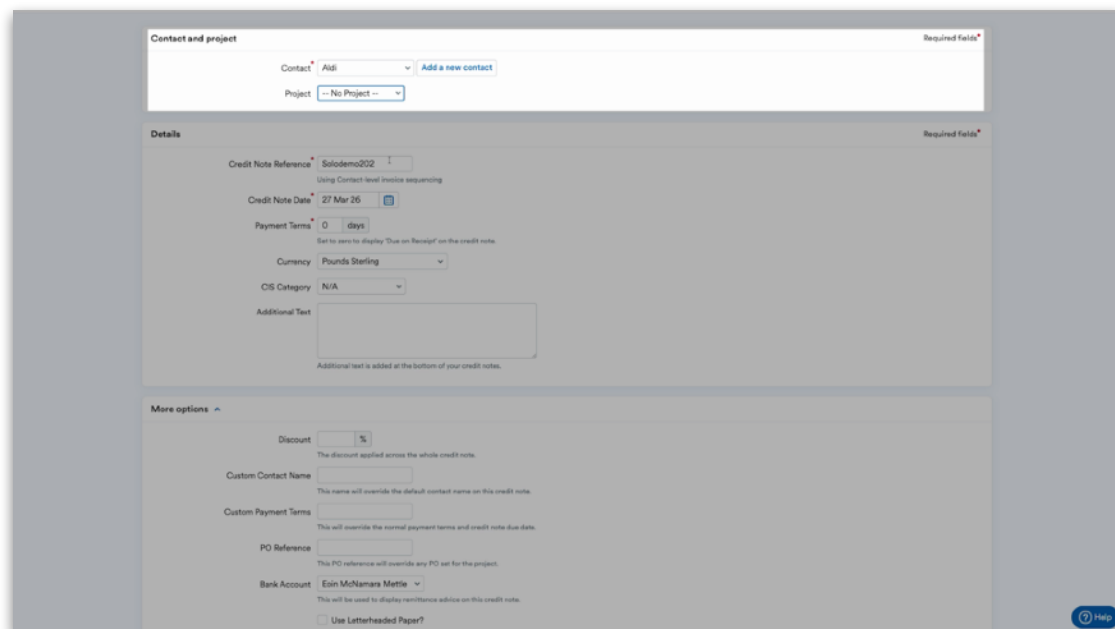
To do this, click on the 'Work' tab, choose 'Invoicing' and then select the 'Add new credit note' button at the top right of the page.



The screenshot shows the 'Invoices' page with a navigation bar at the top containing 'Overview', 'Contacts', 'Work', 'Bills', 'Expenses', 'Banking', 'Taxes', and 'Accounting'. The main content area displays a table of invoices with the following columns: Date, Due date, Reference, Contact and project, Total value, and Status. The table contains 18 rows of invoice data. At the top right of the page, there are two buttons: 'Add new credit note' and 'Add new invoice'.

Date	Due date	Reference	Contact and project	Total value	Status
27 Mar 26	26 Apr 26	Invoice Solodemo201	Bob Builder Auto-reminders active	300.00	Open - due in about 1 month
25 Mar 26	24 Apr 26	Invoice Solodemo200	Aisi Auto-reminders active	250.00	Open - due in 28 days
25 Mar 26	24 Apr 26	Invoice Solodemo199	Aisi Auto-reminders active	250.00	Open - due in 28 days
25 Mar 26	25 Mar 26	Credit Note Solodemo198	Aisi	-2,500.00	Applied against invoice on - 25 Mar 26
25 Mar 26	24 Apr 26	Invoice Solodemo197	Aisi	2,500.00	Cancelled by credit note on - 25 Mar 25
25 Mar 26	24 Apr 26	Invoice Solodemo196	Aisi	EUR 0.00	Draft
23 Mar 26	22 Apr 26	Invoice Solodemo195	Aisi Auto-reminders active	2,750.00	Open - due in 26 days
21 Mar 26	20 Apr 26	Invoice Solodemo194	Aisi	250.00	Draft
20 Mar 26	20 Mar 26	Credit Note 12345project00	Aisi	-250.00	Applied against invoice on - 20 Mar 26
20 Mar 26	19 Apr 26	Invoice 12345project99	Aisi	250.00	Cancelled by credit note on - 20 Mar 26
20 Mar 26	19 Apr 26	Invoice 12345project98	Aisi Auto-reminders active	250.00	Open - due in 23 days
16 Mar 26	15 Apr 26	Invoice Solodemo193	Aisi	4,000.00	Draft
13 Mar 26	12 Apr 26	Invoice Solodemo192	Aisi	500.00	Draft
12 Mar 26	11 Apr 26	Invoice Solodemo191	Aisi Auto-reminders active	250.00	Open - due in 15 days
12 Mar 26	11 Apr 26	Invoice Solodemo190	Aisi Auto-reminders active	500.00	Open - due in 15 days
11 Mar 26	10 Apr 26	Invoice Solodemo189	Aisi Auto-reminders active	250.00	Open - due in 14 days

Whichever way you choose, you'll be taken to the new credit note screen. You'll notice that this page is very similar to the one shown earlier in the invoicing section, starting with adding a contact and project, if applicable.



The screenshot shows the 'Contact and project' and 'Details' sections of the new credit note screen. The 'Contact and project' section has a 'Contact' dropdown set to 'Aisi' and a 'Project' dropdown set to '-- No Project --'. The 'Details' section includes the following fields: 'Credit Note Reference' (Solodemo202), 'Credit Note Date' (27 Mar 26), 'Payment Terms' (0 days), 'Currency' (Pounds Sterling), 'CIS Category' (N/A), and 'Additional Text'. The 'More options' section includes 'Discount' (0%), 'Custom Contact Name', 'Custom Payment Terms', 'PO Reference', 'Bank Account' (Eoin McNamara Mettles), and a checkbox for 'Use Letterheaded Paper?'.

Next, add the credit note details, including a reference number, and any relevant extra information in the 'More Options' section. Once you're happy with it, select 'Save Changes'.

Using Contact level invoice sequencing

Credit Note Date: 27 Mar 26

Payment Terms: 0 days  
Set to zero to display 'Due on Receipt' on the credit note.

Currency: Pounds Sterling

CIS Category: N/A

Additional Text: [Text area]  
Additional text is added at the bottom of your credit notes.

**More options**

Discount: [Input field] %  
The discount applied across the whole credit note.

Custom Contact Name: [Input field]  
This name will override the default contact name on this credit note.

Custom Payment Terms: [Input field]  
This will override the normal payment terms and credit note due date.

PO Reference: [Input field]  
This PO reference will override any PO set for the project.

Bank Account: Eoin McNamara Mettle  
This will be used to display remittance advice on this credit note.

Use Letterheaded Paper?  
Your logo and company address will be omitted.

Display the project name in the Other information section.

VAT options:

- UK VAT Rates
- Reverse Charge
- EC VAT MOSS

[Save Changes](#) [Cancel](#)

[Help](#)

From here, follow the same process of adding line items as for invoicing. However, make sure the figures are negative.

FreeAgent

Overview Contacts Work Bills Expenses Banking Taxes Accounting

Hi Eoin, You are currently viewing the Solo Demo account. [Return to your dashboard](#)

Credit Note Solodemo202 (Draft) [Save as PDF](#) [Edit](#) [Delete](#) [More](#)

[Time to add some credit note items...](#)  
Click the 'Add Credit Note Item' button below to create your first credit note item. Once you're done, you can email the credit note to your client, or simply save it as a PDF for emailing or printing.

Total value: £0.00  
Created: 27 Mar 26  
Due: Not yet sent  
Contact: Add

**New credit note item**

[Autofill from your price list](#)  
Select a price list item to automatically fill in the form below.

Quantity: 1.00 Units: Hours

Details: training

Unit price: £ 260.00  
Enter discounts and credits as negative.

[Create and finish](#) [Create and add another](#) [Cancel](#)

**FreeA**  
Eoin McNamara  
Gill  
Mymk

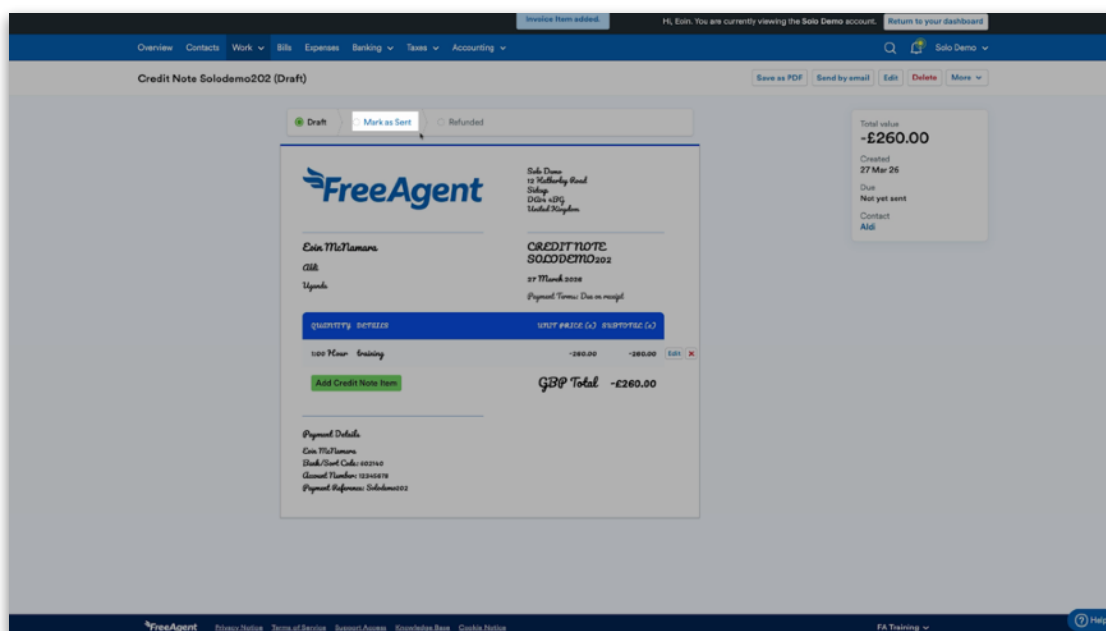
Payment Details:  
Eoin McNamara  
Bank/Sort Code: 022160  
Account Number: 12345678  
Payment Reference: Solodemo202

[Add Credit Note Item](#)

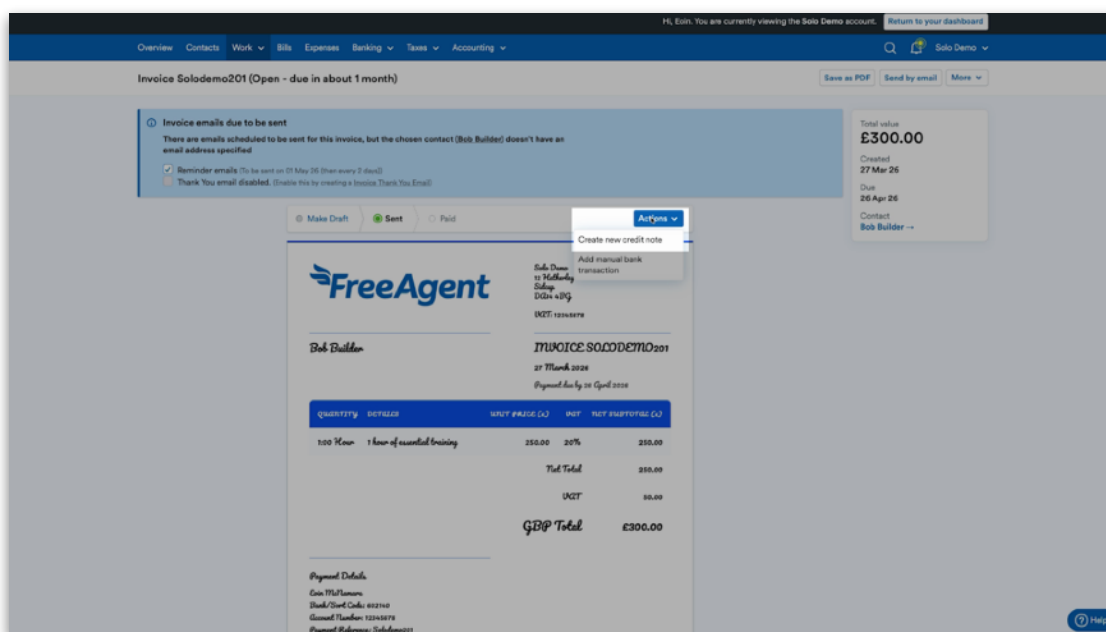
FreeAgent [Privacy Notice](#) [Terms of Service](#) [Support Access](#) [Knowledge Base](#) [Credit Note](#)

FA Training [Help](#)

Once you're happy with the credit note, click 'Mark as sent'.



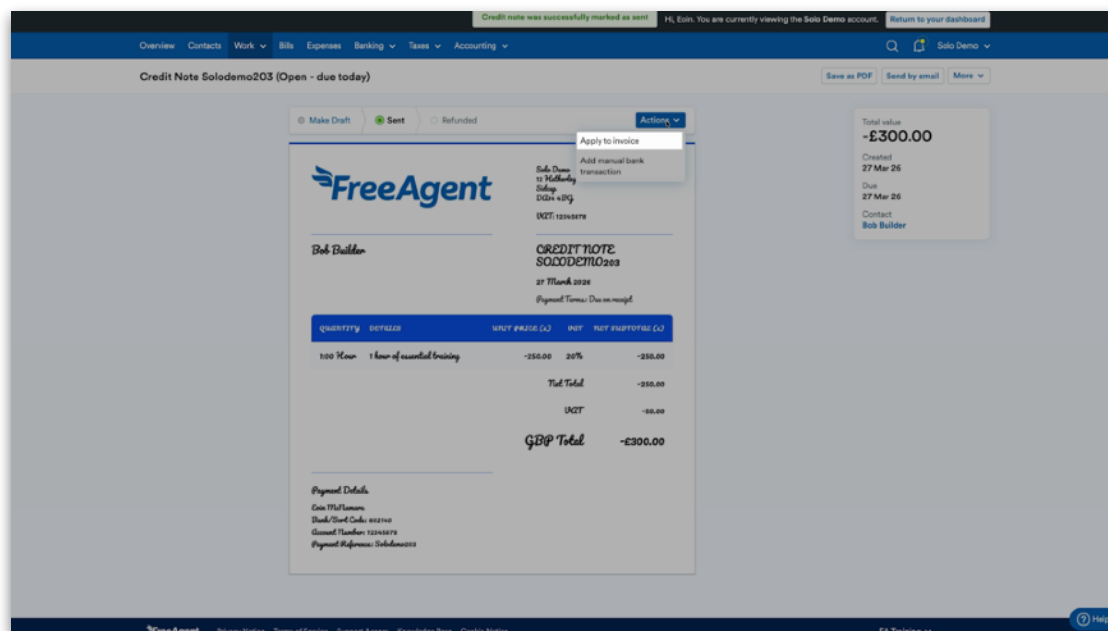
Alternatively, you can create a credit note from an existing invoice in FreeAgent. To do this, navigate to the 'Invoicing' area and select the invoice that you want to credit. Click on the 'Actions' drop-down menu and select 'Create new credit note'.



This will create a credit note based on the information on the invoice. From this screen, you can add more line items to the credit note, delete line items and then mark the credit note as sent. Once you've marked a credit note as sent, an 'Actions' button will appear.

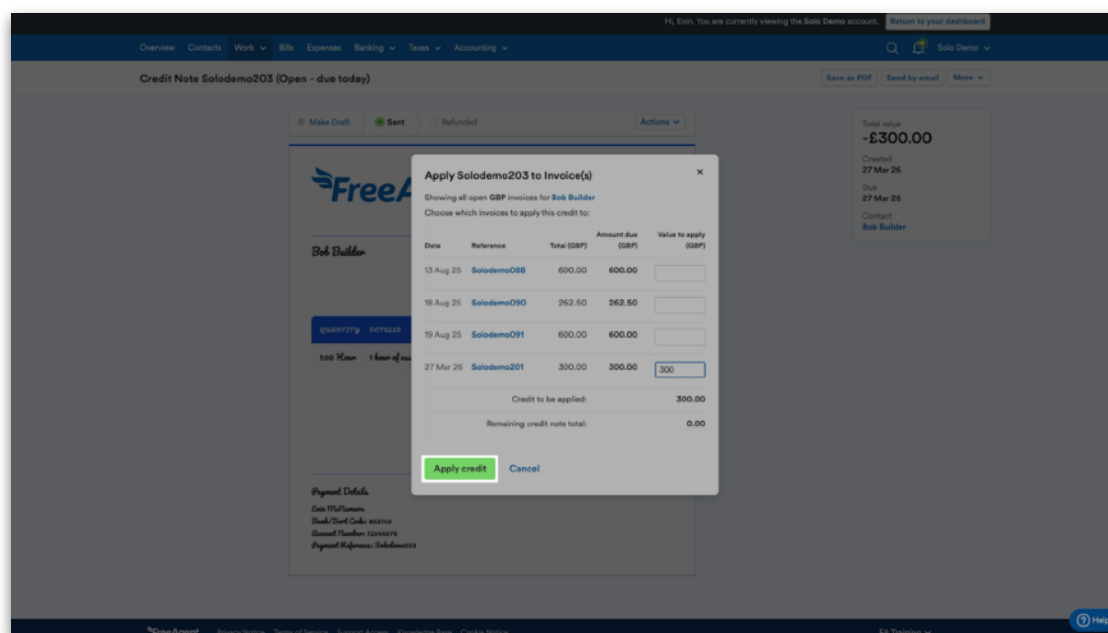
In the drop-down menu you'll have two options to mark the credit note as paid.

You can either leave the credit note to be allocated against a bank transaction via the Banking area, or you can select 'Apply to invoice'.



In the pop-up window, enter the value you'd like to apply.

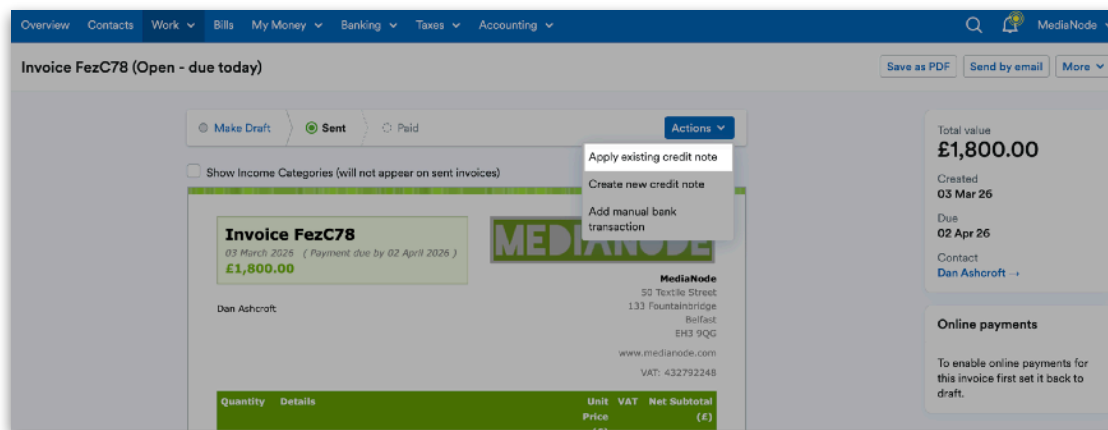
If you're looking to use the entire credit note then enter its full value, or you can split it out against various sales invoices for the contact. Select 'Apply Credit' to complete the process.



The invoice and credit note are now netted off against each other and will show as settled in your client's account.

As well as opening a credit note to match it to an invoice, you can also open an invoice and match it to a credit note.

To do this, navigate to the relevant invoice, click on the 'Actions' drop-down and then select 'Apply existing credit note'.



Overview Contacts Work Bills My Money Banking Taxes Accounting

Invoice FezC78 (Open - due today) Save as PDF Send by email More

Make Draft Sent Paid Actions

Show Income Categories (will not appear on sent invoices)

**Invoice FezC78**  
03 March 2025 ( Payment due by 02 April 2026 )  
**£1,800.00**

Dan Ashcroft

**MEDIA NODE**  
MediaNode  
50 Textile Street  
133 Fountainbridge  
Belfast  
EH3 9QG  
www.medianode.com  
VAT: 432792248

Quantity Details Unit VAT Net Subtotal Price (£)

Total value  
**£1,800.00**  
Created  
03 Mar 26  
Due  
02 Apr 26  
Contact  
Dan Ashcroft

Online payments  
To enable online payments for this invoice first set it back to draft.

# Support for your clients

FreeAgent offers you and your clients a wide range of support, including:

- bespoke practice training for you and your colleagues
- ‘Getting Started’ webinars for you, your staff and your clients to help them understand the FreeAgent basics
- a searchable online Knowledge Base
- telephone and online support for you and your staff from our dedicated Practice Support team
- telephone and online support for your clients from FreeAgent’s customer support team
- a co-branded onboarding email journey to help clients get started and understand the basics of the software

Security measures at FreeAgent mean our Practice Support team will only communicate with account managers who are listed on your Practice’s dashboard. Make sure that you add your staff members so they can receive support when they need it.

For more information on how to use FreeAgent, visit our Knowledge Base online. You’ll find step-by-step instructions on how to complete a wide range of actions in FreeAgent, from basic functions right through to more complex accounting procedures.

[Knowledge Base](#)

[Accountants’ Knowledge Base](#)

## Practice Support team

You can also contact our dedicated Practice Support team via email or telephone, 9am - 5pm on Monday to Thursday and 9am - 4pm on Friday.

**Email:** [practicesupport@freeagent.com](mailto:practicesupport@freeagent.com)

**Telephone:** 0800 025 3800

Please have your [account manager ID](#) ready when contacting the Practice Support team.