Accreditation

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

2025

freeagent.com

Welcome!

Welcome to the manual for the Accreditation module for 2025. This module will update you on new FreeAgent features and help improve your knowledge of FreeAgent's core functionality.

Completing the Accreditation module will ensure that you keep your knowledge up to date and retain your accredited partner status.

The Accreditation exam includes questions on new features and also includes questions on the functionality covered in the FreeAgent Essentials module.

Contents

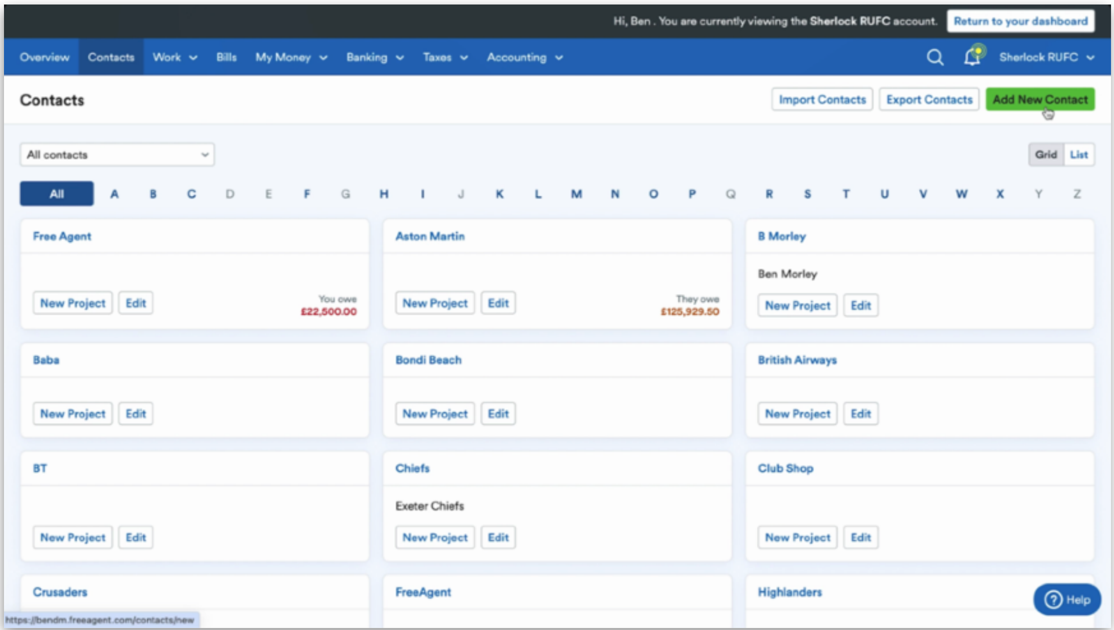
1. Contacts, invoicing, credit notes and projects

In this section, we'll show you how to enter contacts, sales invoices and credit notes, as well as how to manage projects within FreeAgent.

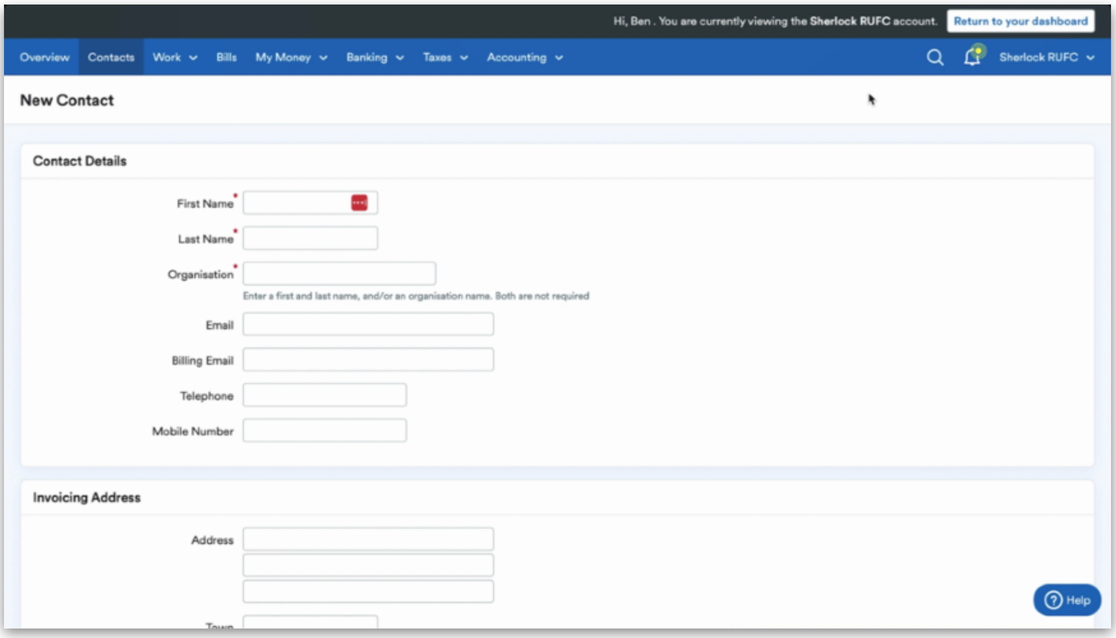
Contacts

In FreeAgent, contacts refer to your client's customers and suppliers. Adding contacts is normally the first thing your client would do, but not always. For example, if clients are explaining everything from their bank account to P&L codes, they don't need to use contacts.

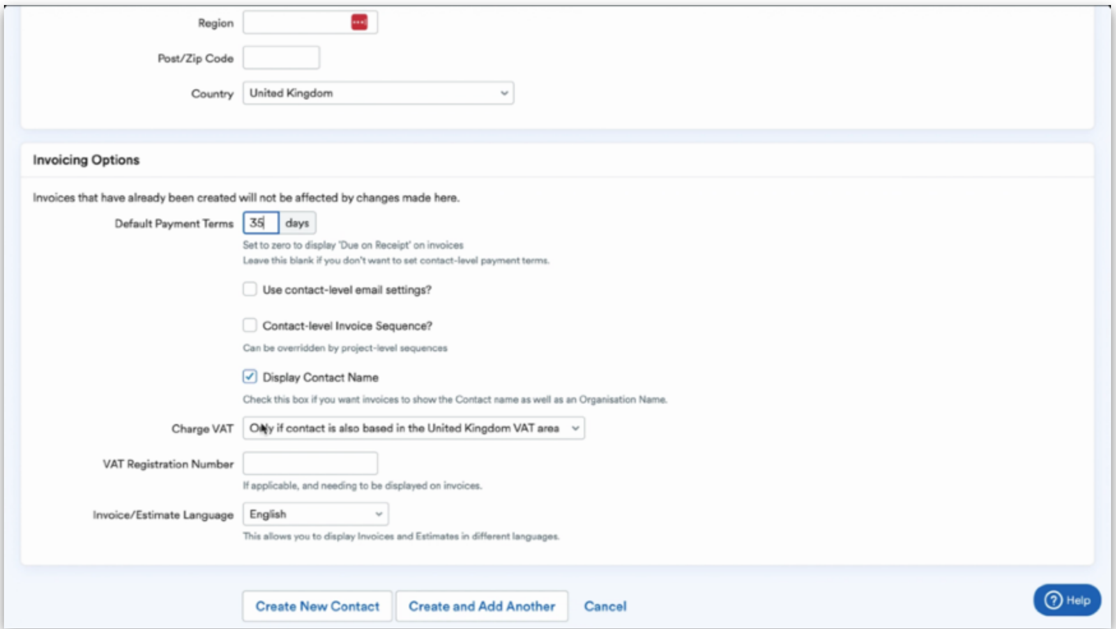
To enter a new contact, navigate to the '**Contacts**' tab and select '**Add new contact**'.



The information you enter here will get pulled through to other areas of FreeAgent, like sales invoicing. When entering the name of the contact, you can either enter the person's name or the name of the organisation they work for. You don't need to enter both, but you may want to if you are dealing with a specific person within an organisation.

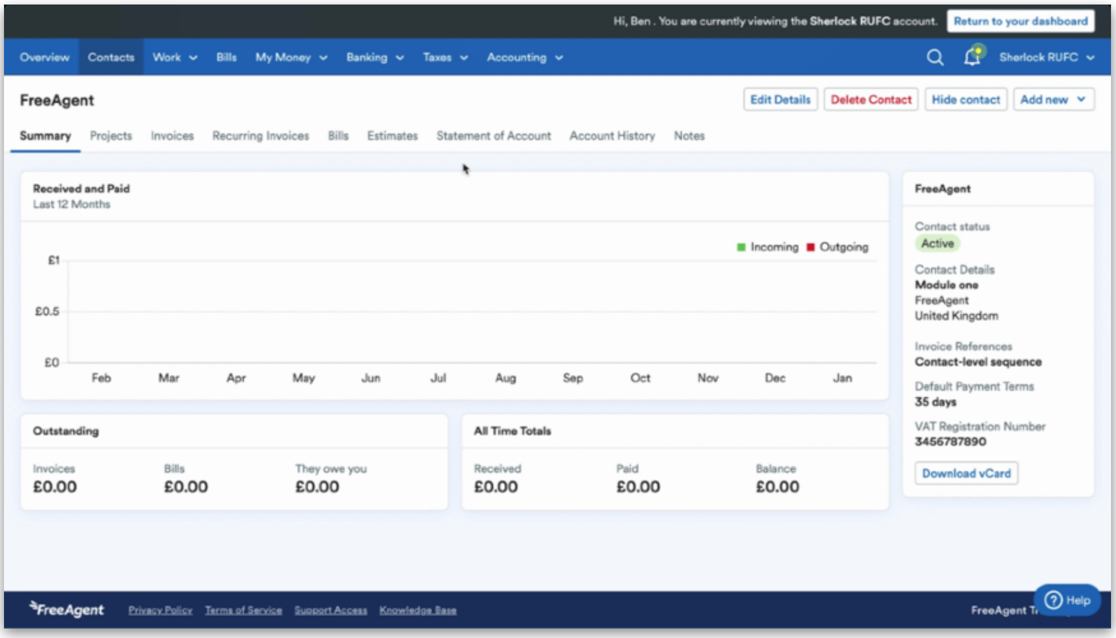


Under 'Invoicing Options', you can specify the payment terms for the contact. You can also set up contact-level email settings and use contact-level invoice sequencing instead of using global invoice sequencing. You can enter the contact's VAT registration number here too.

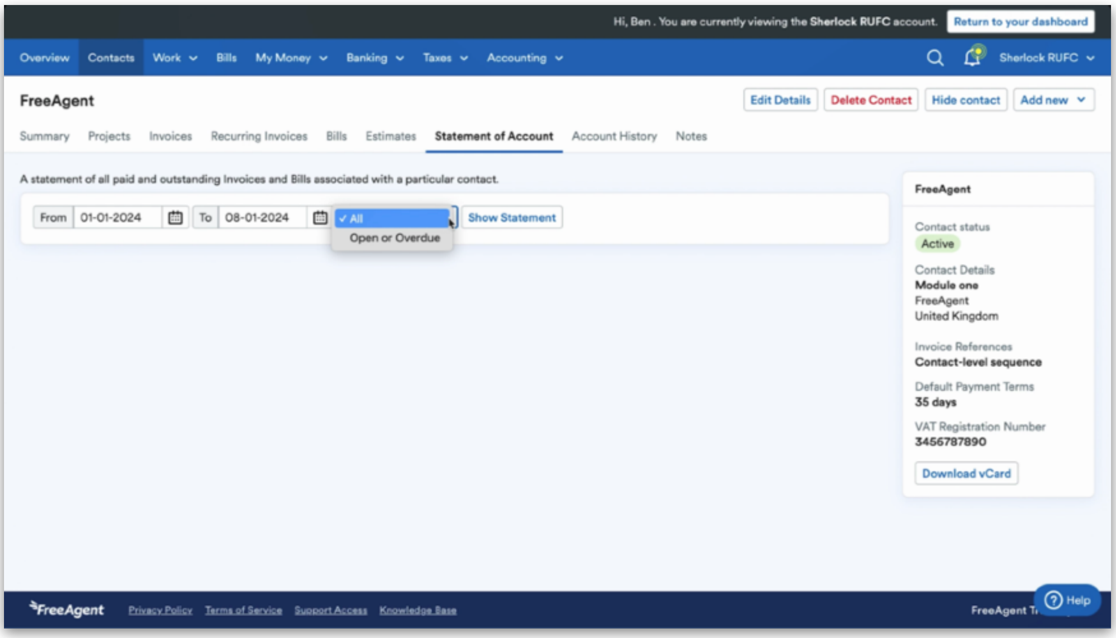


If the contact is based outside the UK, and is VAT-equivalent registered, set the 'Charge VAT' option to '**Never**'. If they are not VAT-registered in their own country, then you may wish to leave it on the default setting.

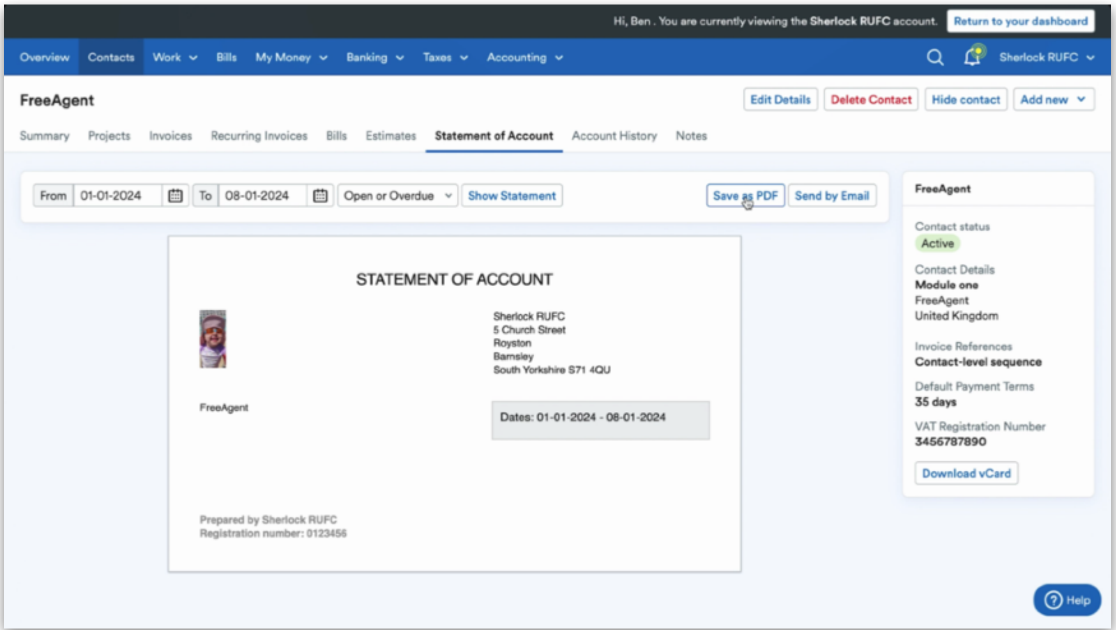
Once you've created a contact, you can start explaining transactions to them. Once you've done so, you can select the contact's name to see all of their transactions in FreeAgent.



You can also view the statement of account for that contact by selecting the '**Statement of Account**' tab, which can either be shown as all transactions or just the outstanding ones.

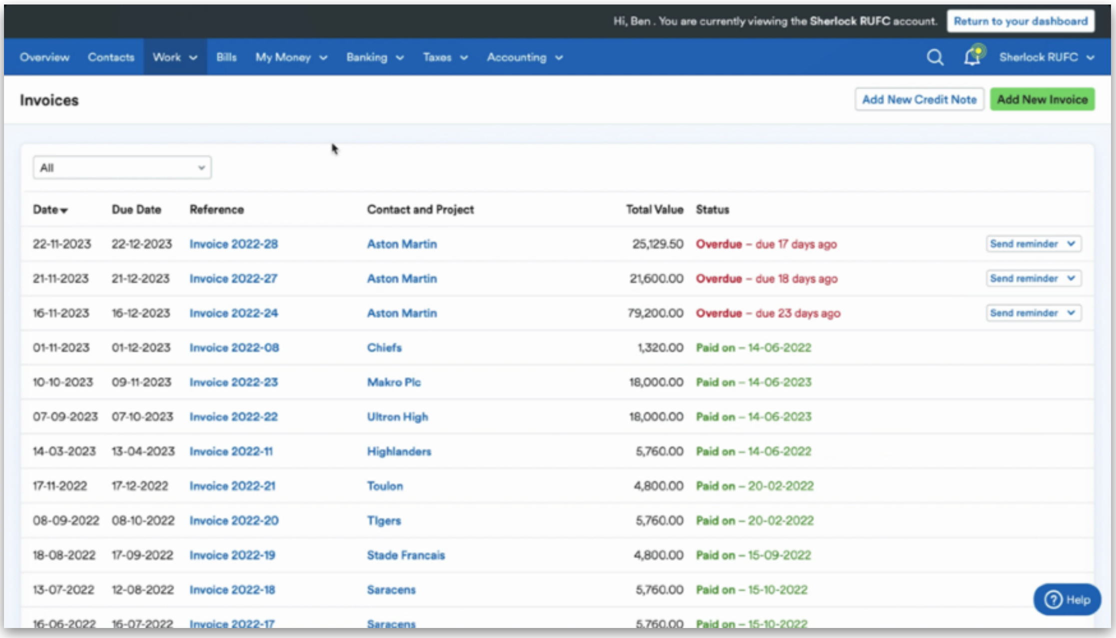


You can save this as a PDF and print it or email it to the contact by selecting the relevant option in the top-right.

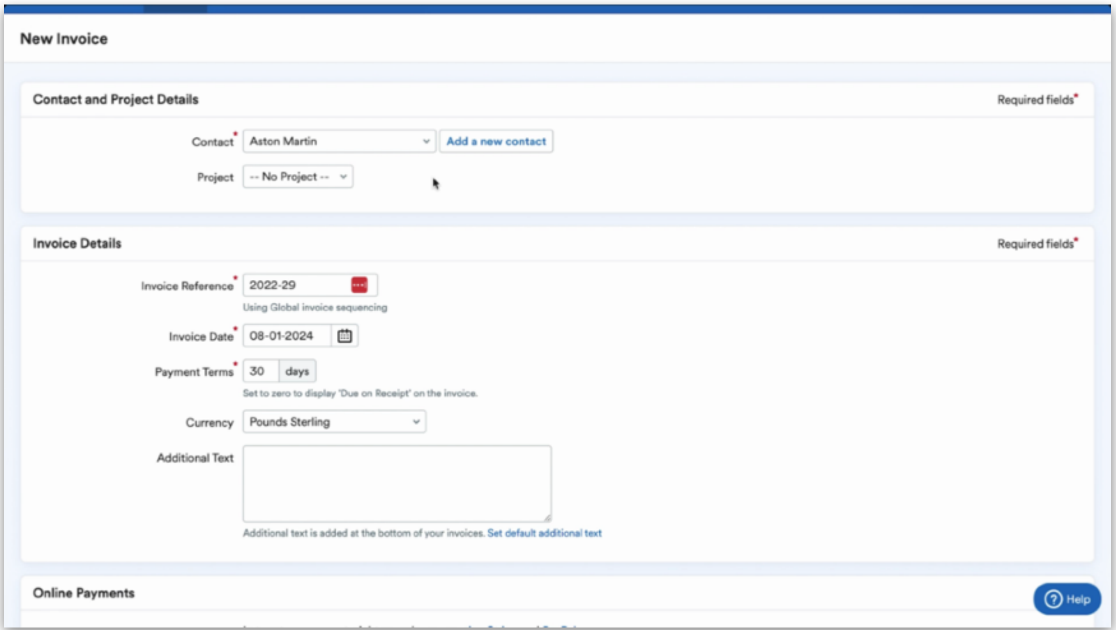


Invoicing

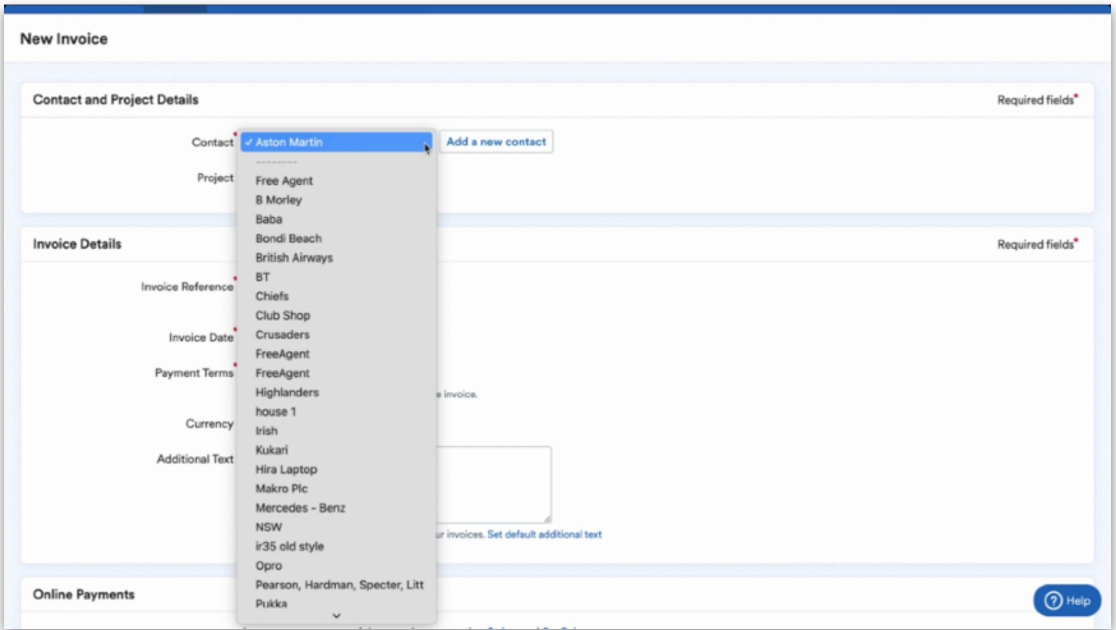
To navigate to the Invoices area, select the ‘**Work**’ tab and then ‘**Invoicing**’ from the drop-down menu. On this page, you’ll see a list of sales invoices that have been entered into FreeAgent.



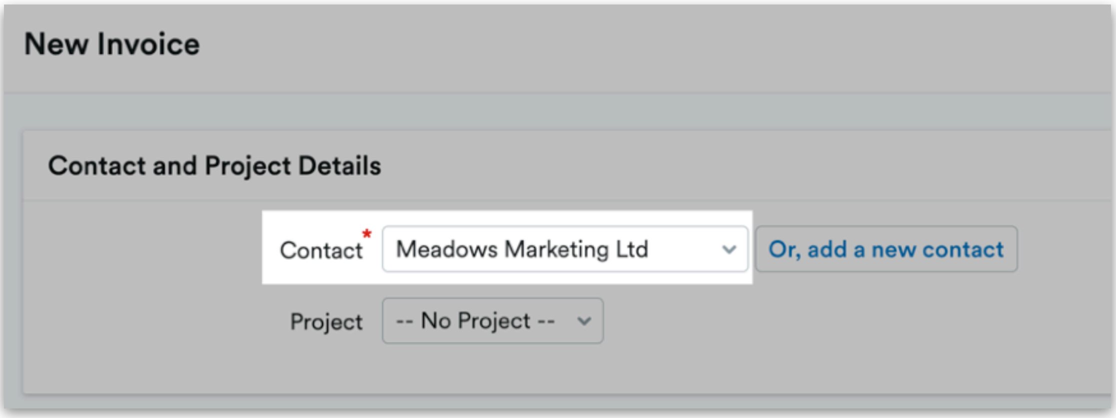
FreeAgent uses a traffic light system to show the state of the invoice: green means the invoice is paid; orange means the customer has not yet met payment terms, and red means they have not yet paid and the invoice is now overdue. To add a new sales invoice, select ‘**Add new invoice**’. This is where you will enter all of the standing data for the sales invoice.



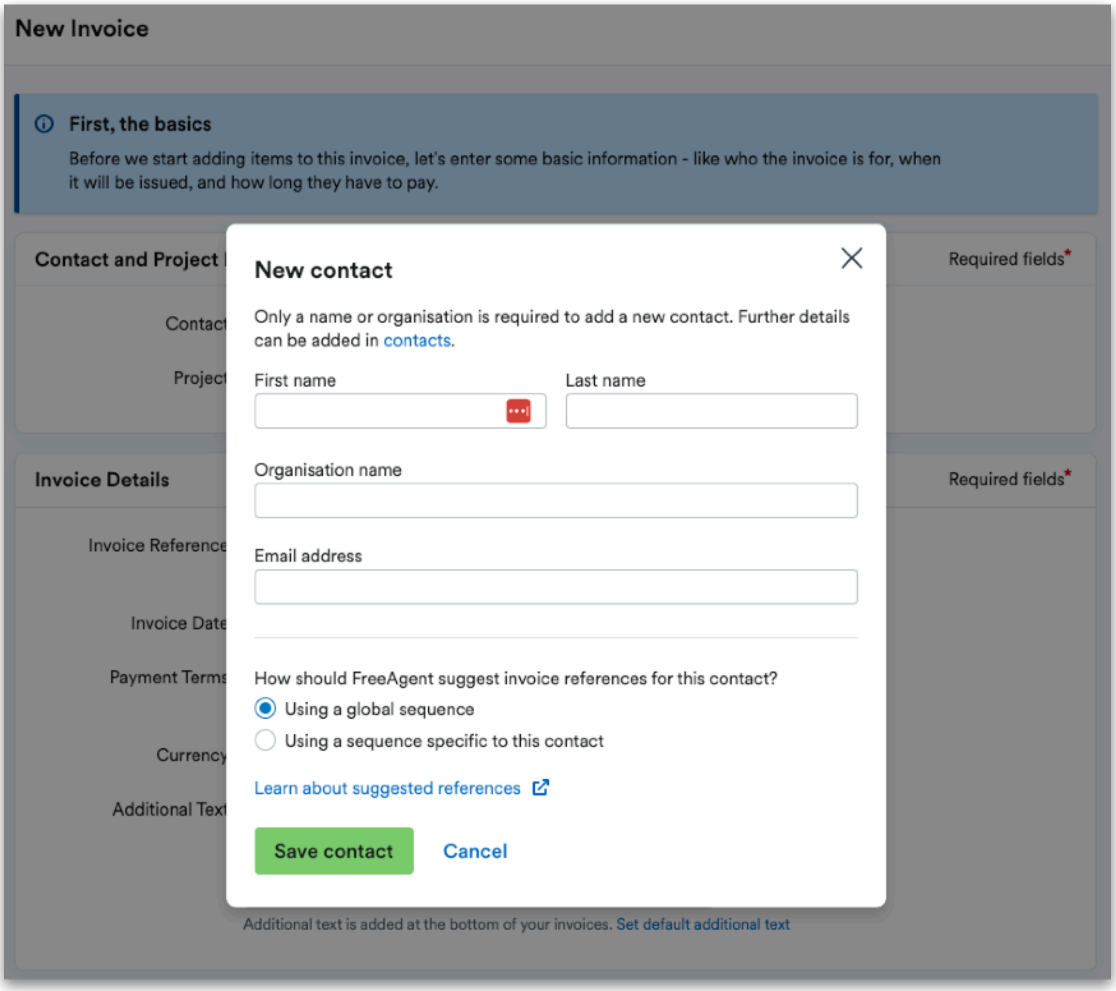
Next, select the contact who you’re going to send the invoice to. The drop-down list under ‘Contact’ will show all the customers and suppliers that have been added as contacts to FreeAgent.



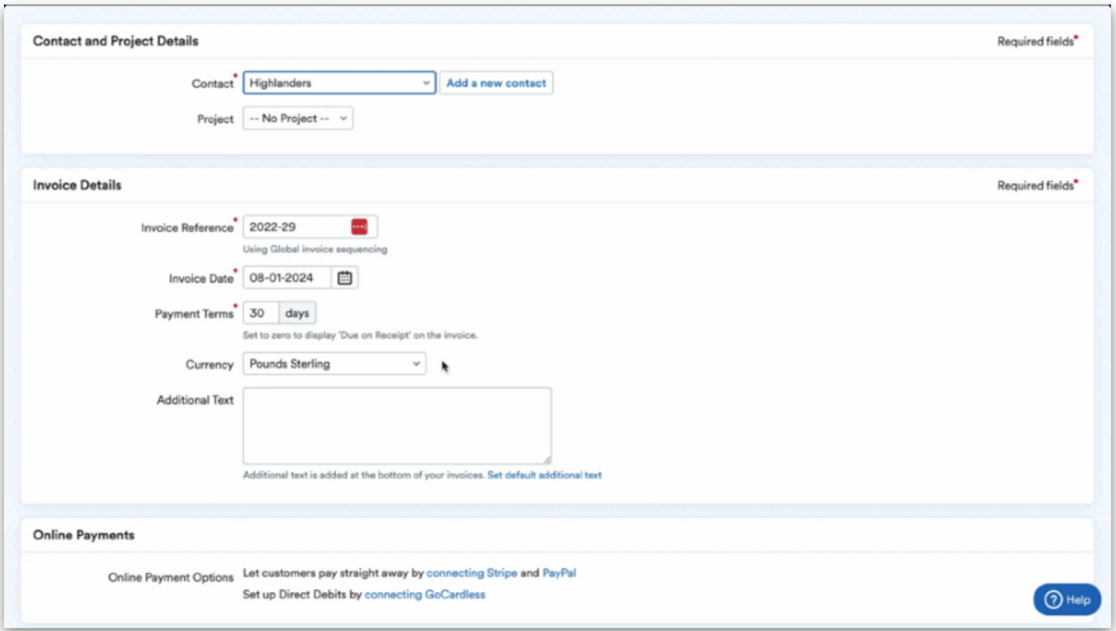
You can select a contact from the menu, or you can add a new contact by selecting '**Or, add a new contact**' next to the Contact field.



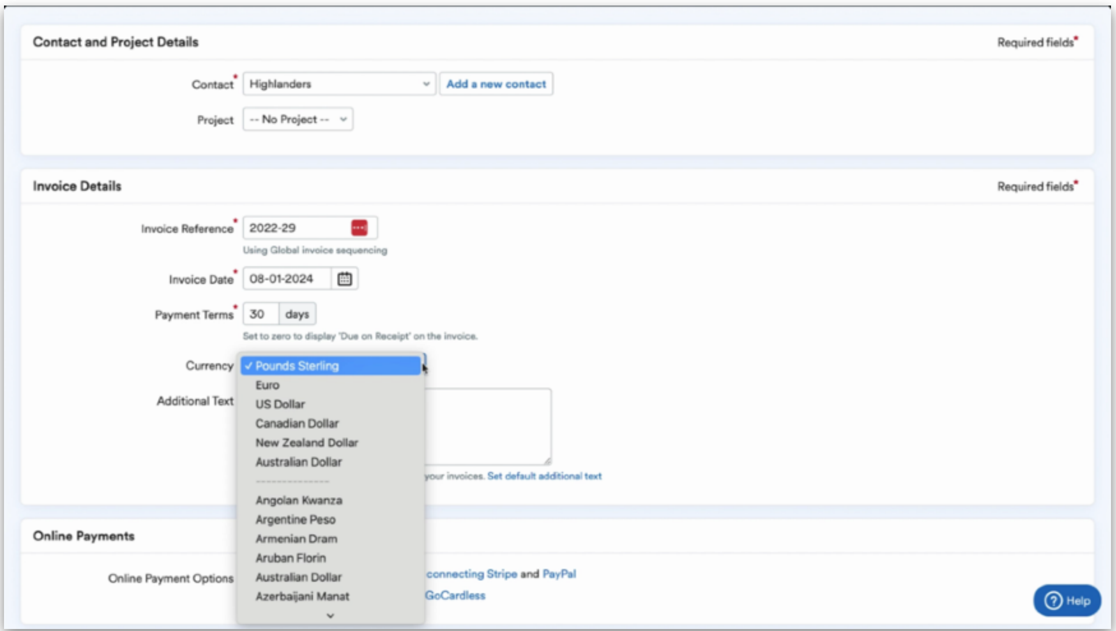
You can either enter a first name and last name (with or without an organisation name) or enter an organisation name on its own. You can also include the email address for the contact and specify whether you want to use FreeAgent's global invoice sequencing or contact-level invoice sequencing.



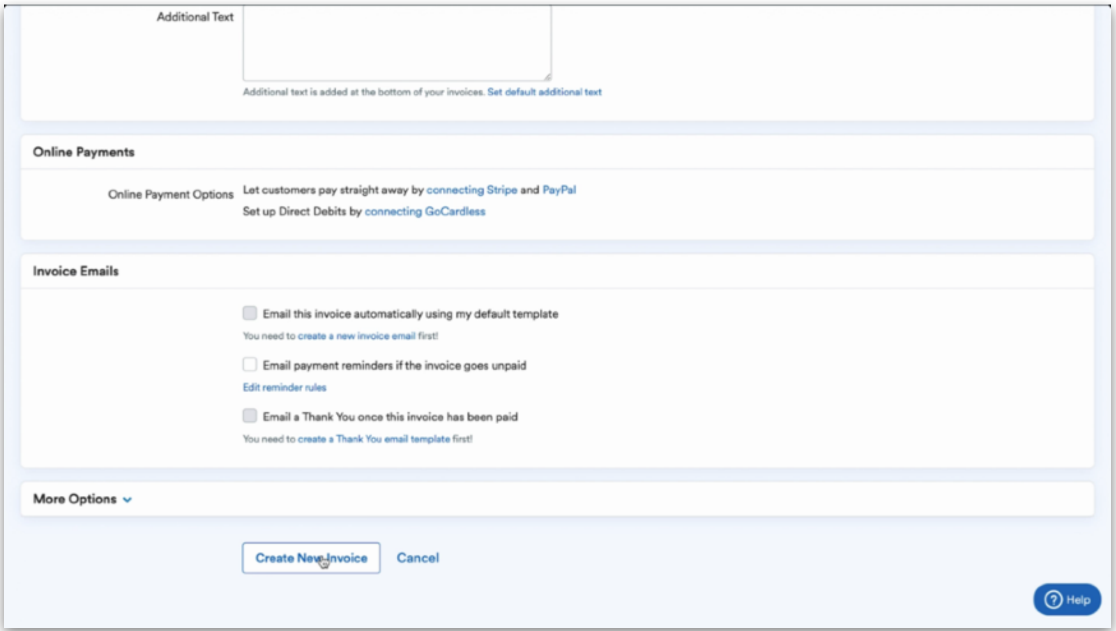
If you're using global invoice sequencing, FreeAgent will automatically increase the invoice reference number by one each time you create an invoice. You can select the payment terms for the invoice here, or from within the 'Contacts' area.



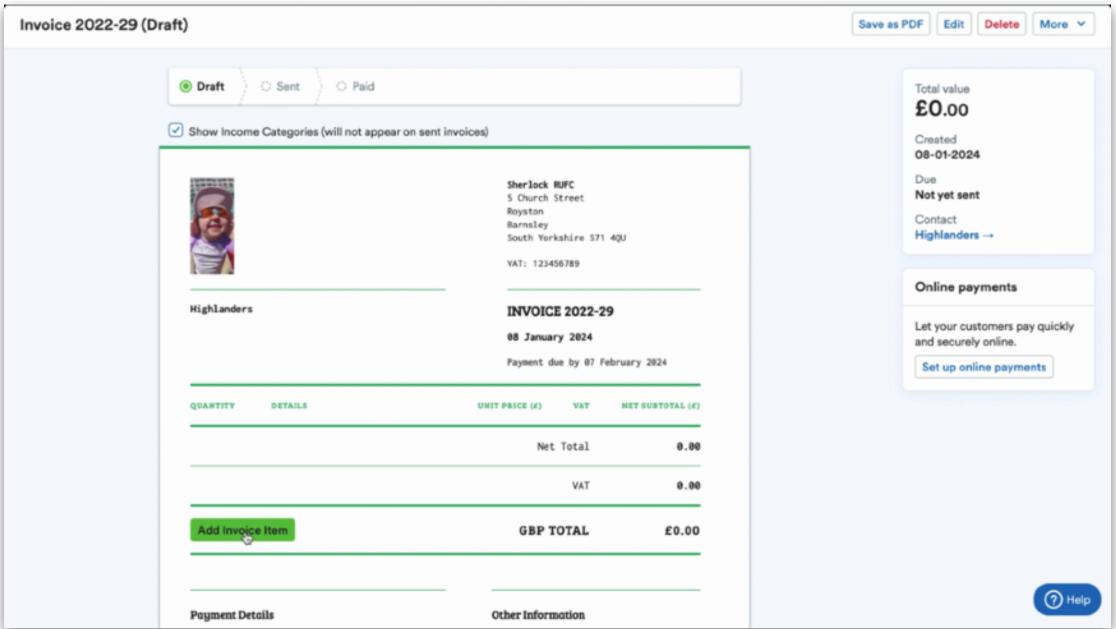
You can set up an invoice in an international currency by selecting the relevant currency from the drop-down menu. We use XE.com to update the exchange rate daily. FreeAgent will work out any realised and unrealised losses or gains and post them accordingly.



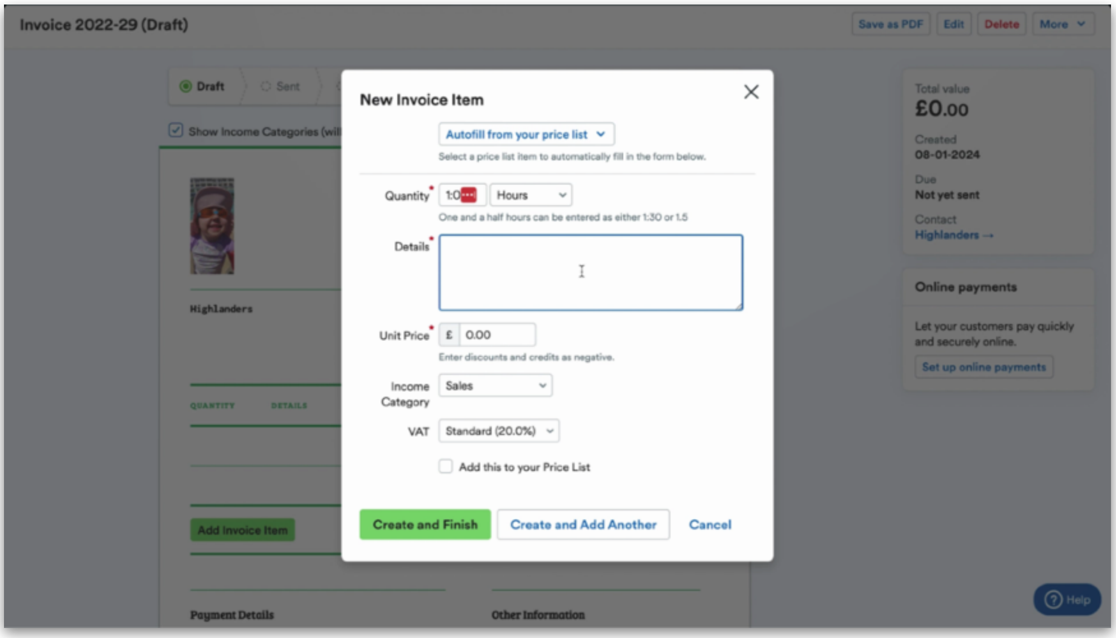
If you have a client who is a CIS subcontractor, you can set this up from within the 'Settings' menu. Your client can also use templates for their sales invoices. We will cover these in more detail in the Settings section. Once you're happy with the information, select '**Create new invoice**' at the bottom of the page.



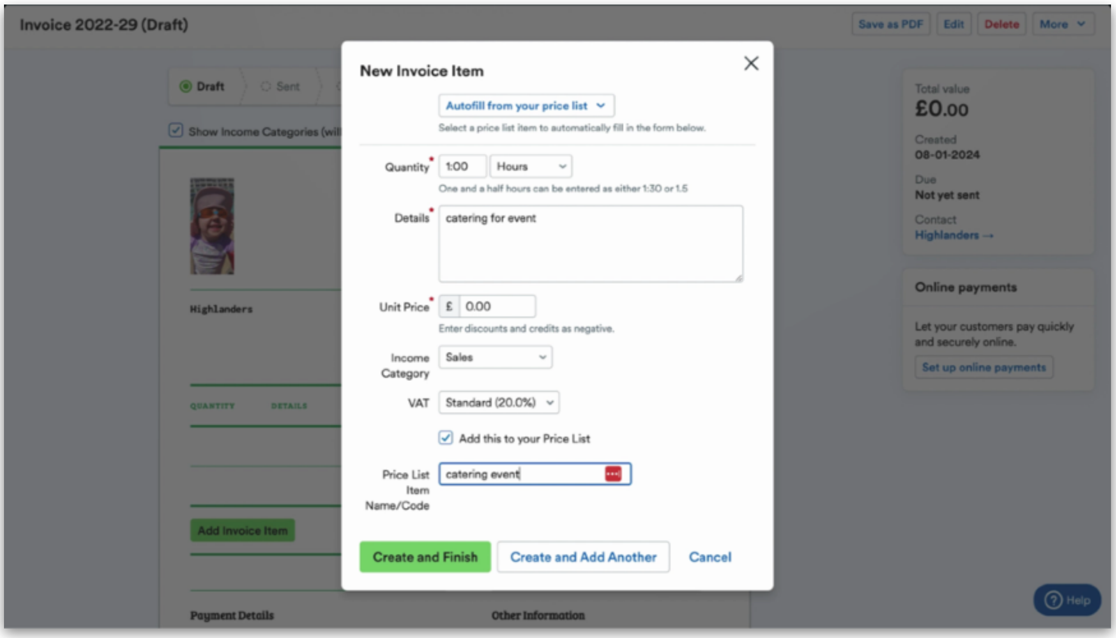
Next, you can enter the line items for the invoice. To do this, select '**Add invoice item**'.



The pop-up window lets you enter the details for each line item.



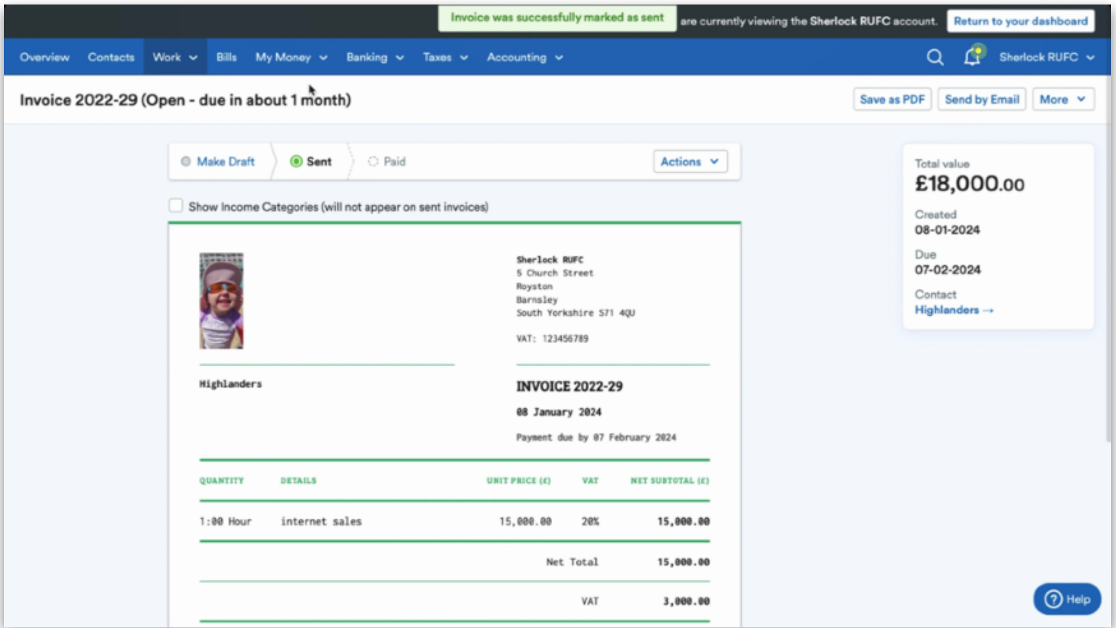
If your client sells the same items or services regularly, we recommend setting those items up as price list items. To do this, tick the checkbox next to '**Add this to your price list**' and give the item a title.



This will mean that in the future you'll be able to select the item from 'Autofill from your price list' drop-down, which will populate the field and save you time.

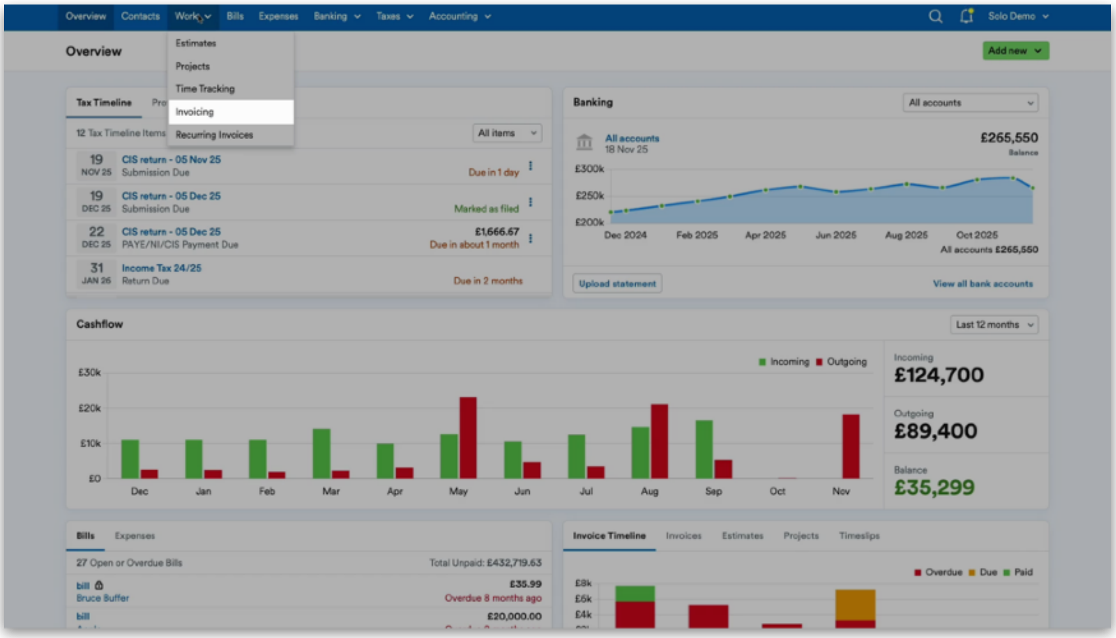
Once you're happy, you have two options: you can either create another line item or select '**Create and Finish**' to complete the process.

Please note that while the invoice is in 'draft' mode, it will not be pulled through to the accounting reports in FreeAgent. When 'Mark as Sent' is selected, the invoice will be pulled through to the accounting reports, to the VAT returns if applicable, and will be available to have bank transactions explained against it.



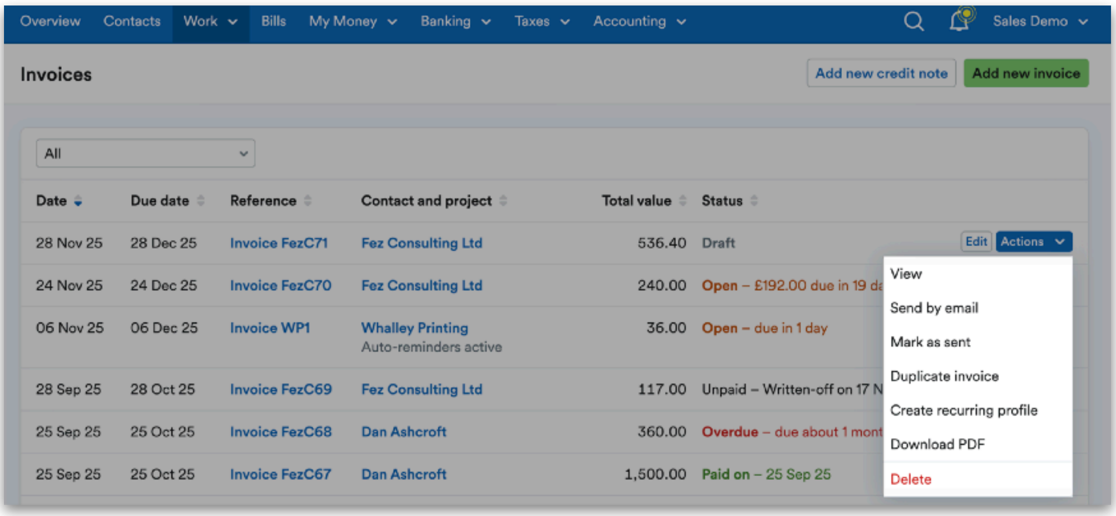
Invoice quick action updates

To view the new invoice quick action updates, navigate to the ‘**Work**’ tab and select ‘**Invoicing**’.

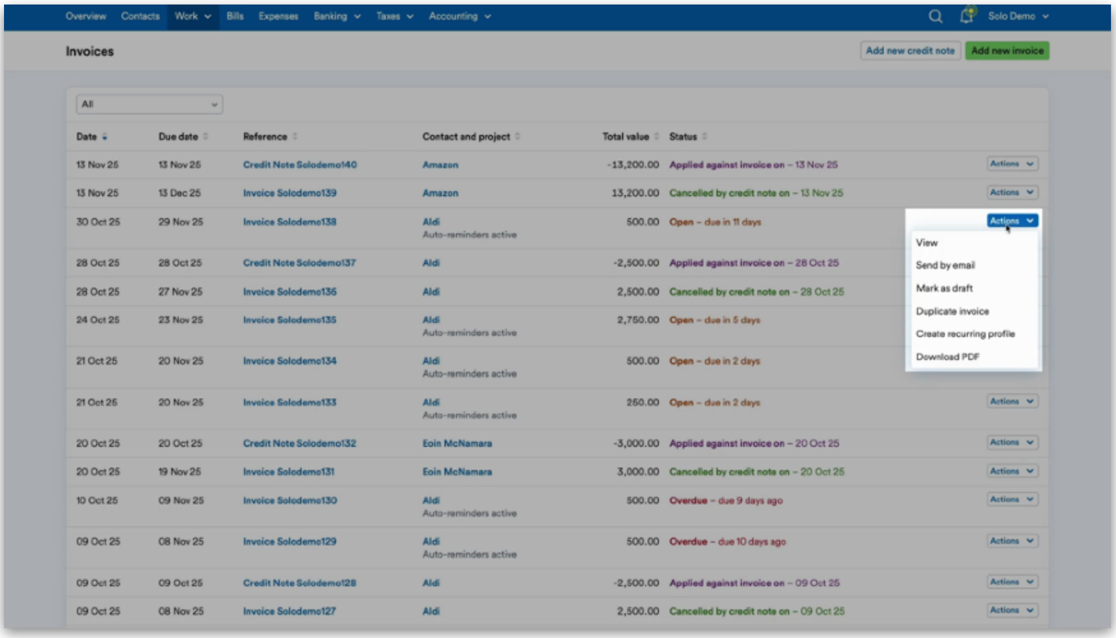


In the invoice table, select the ‘**Actions**’ drop-down menu next to an invoice. The status of the invoice will affect what options are given in the drop-down menu.

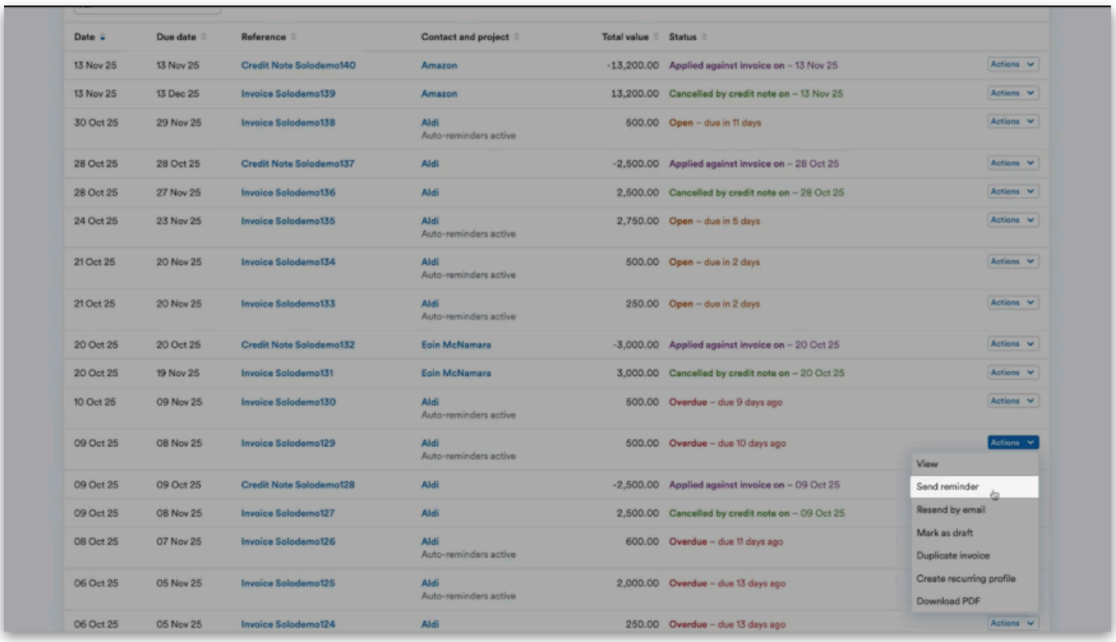
For invoices with a ‘Draft’ status, you’ll be able to view the invoice, send by email, mark as sent, duplicate the invoice, create a recurring profile from the invoice, download a PDF or delete the draft invoice.



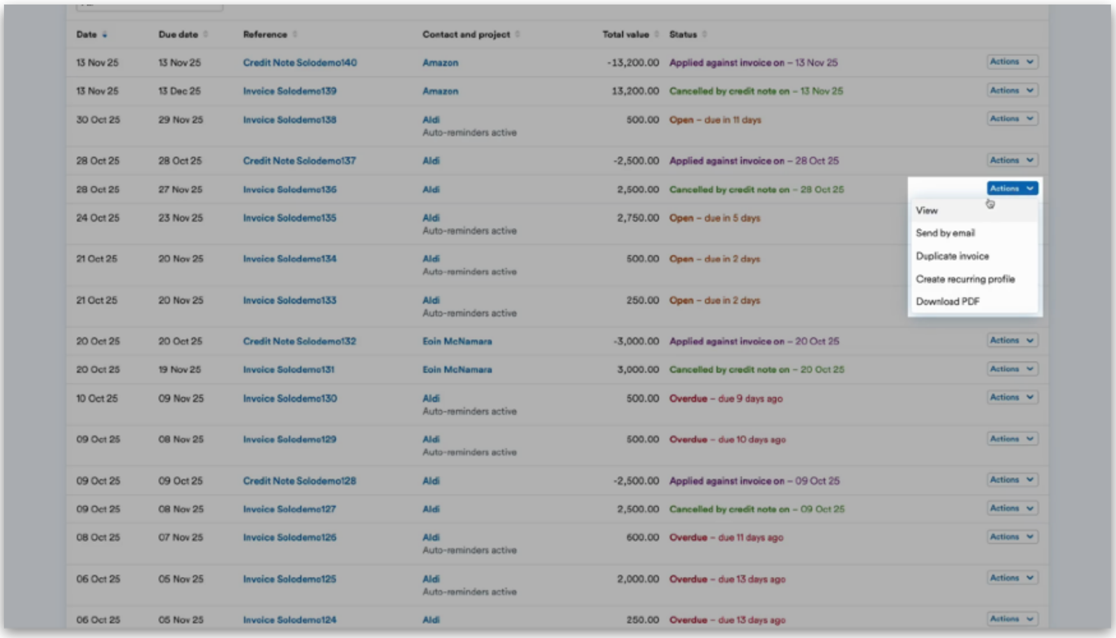
For invoices that are 'Open' and 'Overdue', it allows you to view the invoice, send or resend by email, mark as draft, duplicate the invoice, create a recurring profile from the invoice or download a PDF.



You also have the option to send a reminder email for overdue invoices.

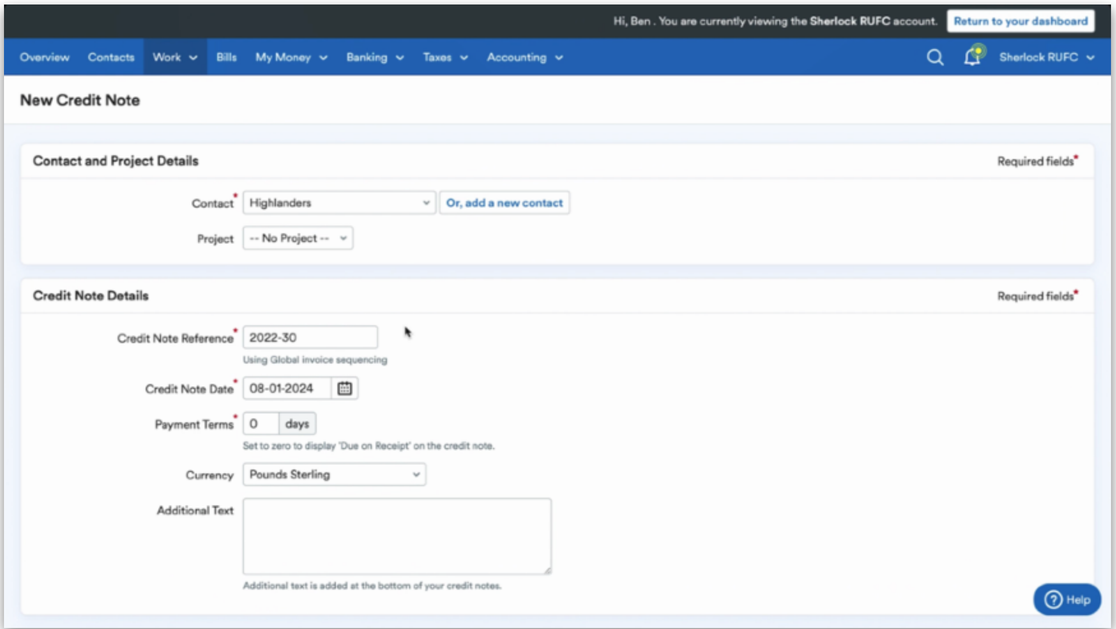


If the invoice is marked as paid, it will allow you to view, send by email, duplicate the invoice, create a recurring profile from the invoice or download a PDF.

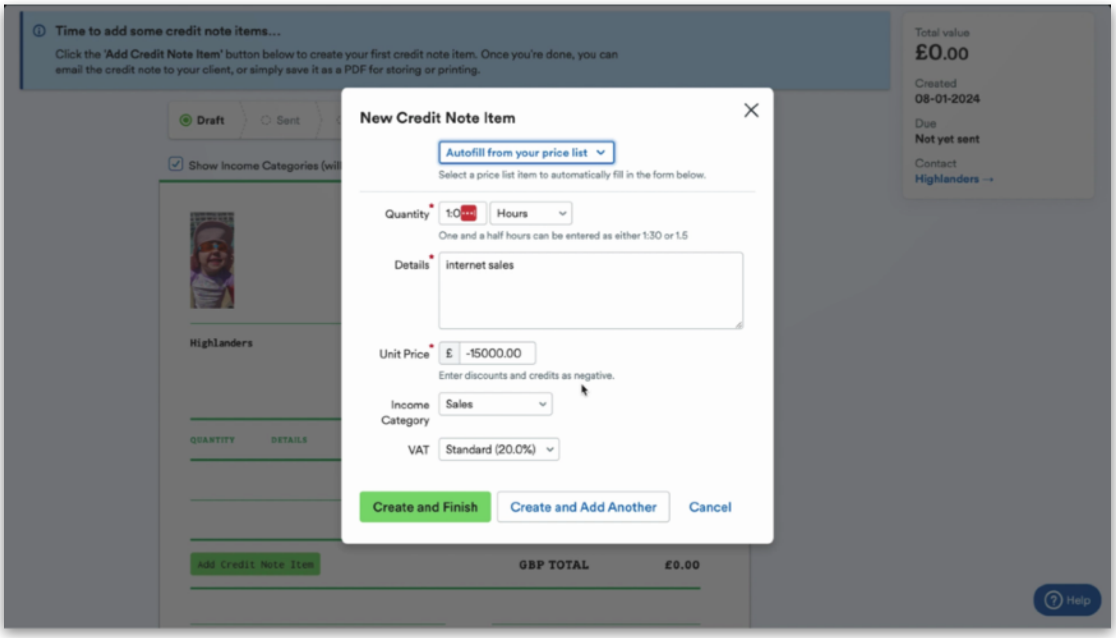


Credit notes

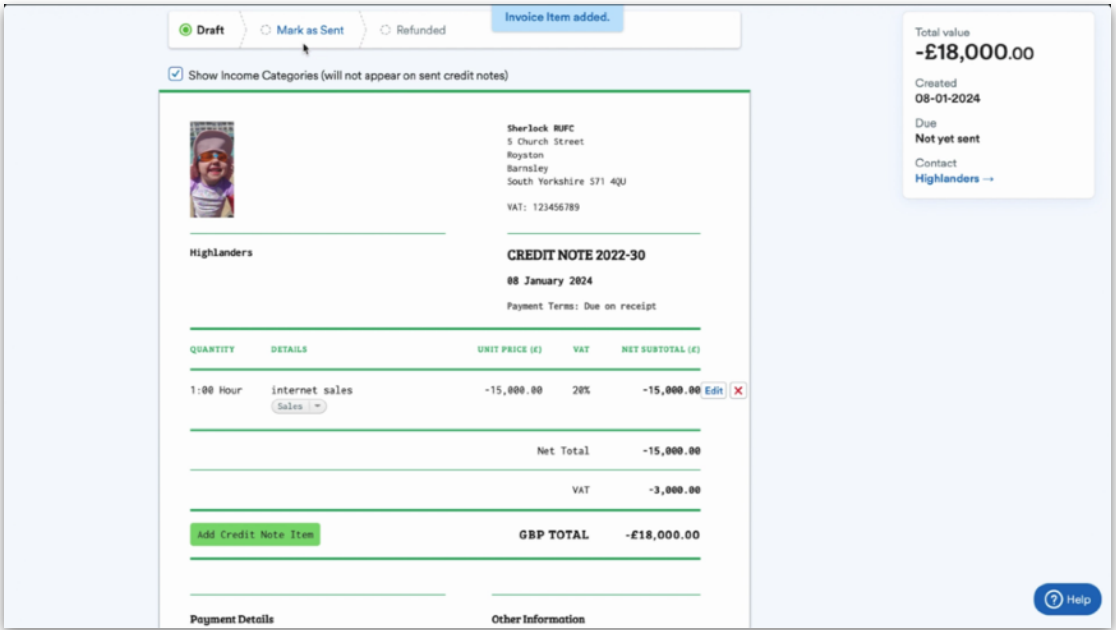
Within FreeAgent there are two ways to enter credit notes. The first is to create a standalone credit note. To do this, begin by selecting '**Work**' and then '**Invoicing**' from the drop-down menu. Next, select '**Add new credit note**'.



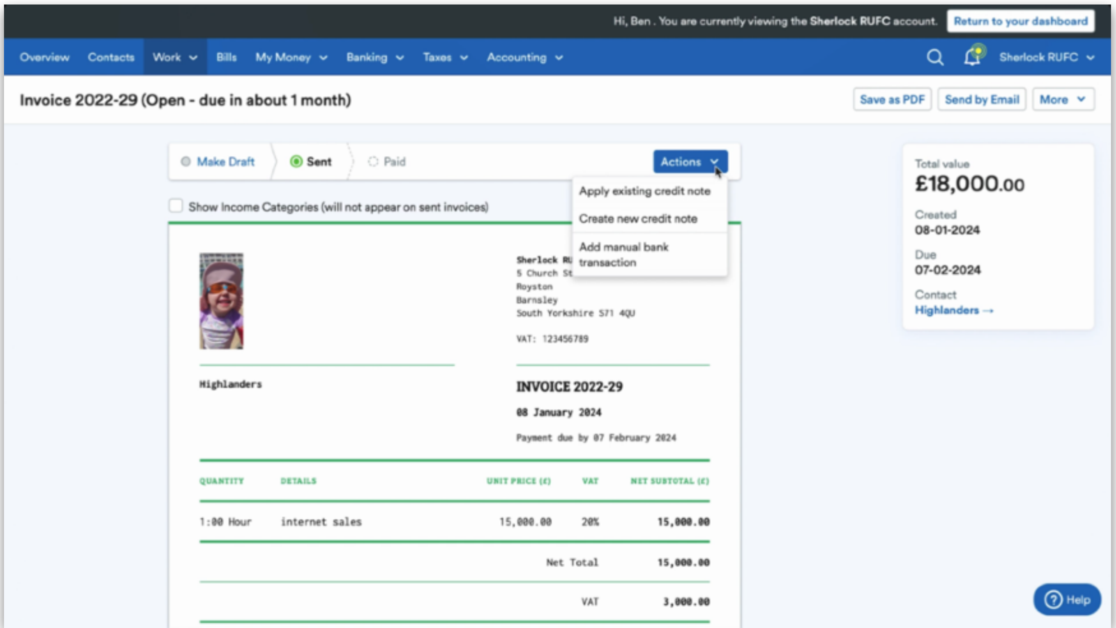
This page is very similar to the one shown in the Invoicing section above. The main difference is that you enter a credit note reference. Once you are happy with the credit note, select '**Save changes**'. From here, follow the same process for adding line items as you would for a sales invoice. However, this time you'll need to make sure the figures are negative.



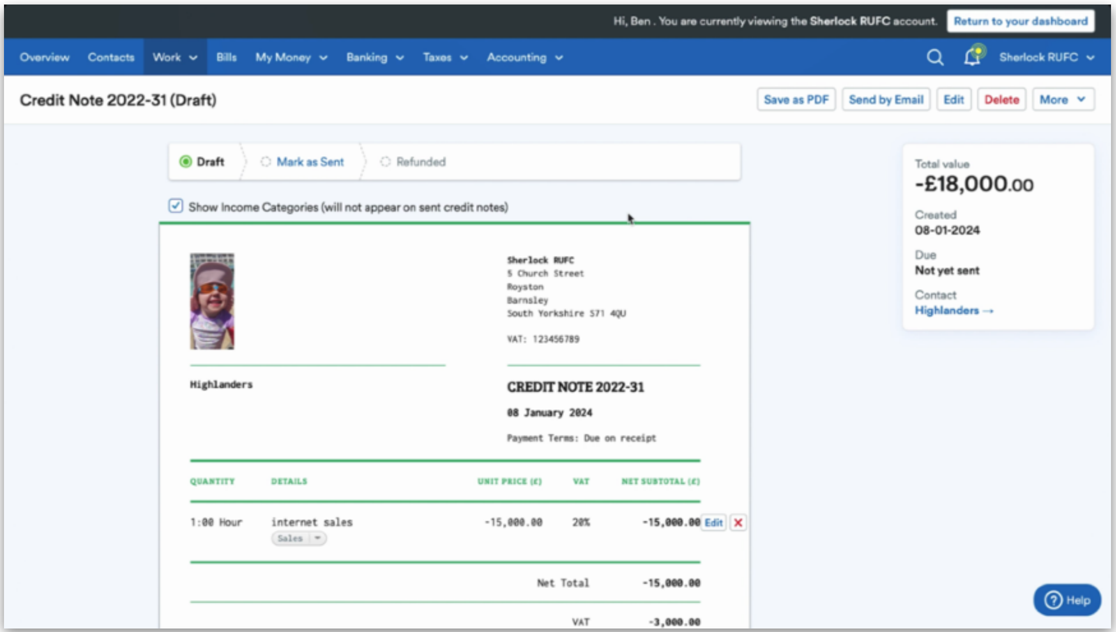
Once you're happy with the credit note, select '**Mark as sent**'.



The other way to create a credit note is against a sales invoice. To do this, select the sales invoice that you want to credit, then select the '**Actions**' drop-down. Next, select '**Create new credit note**'.

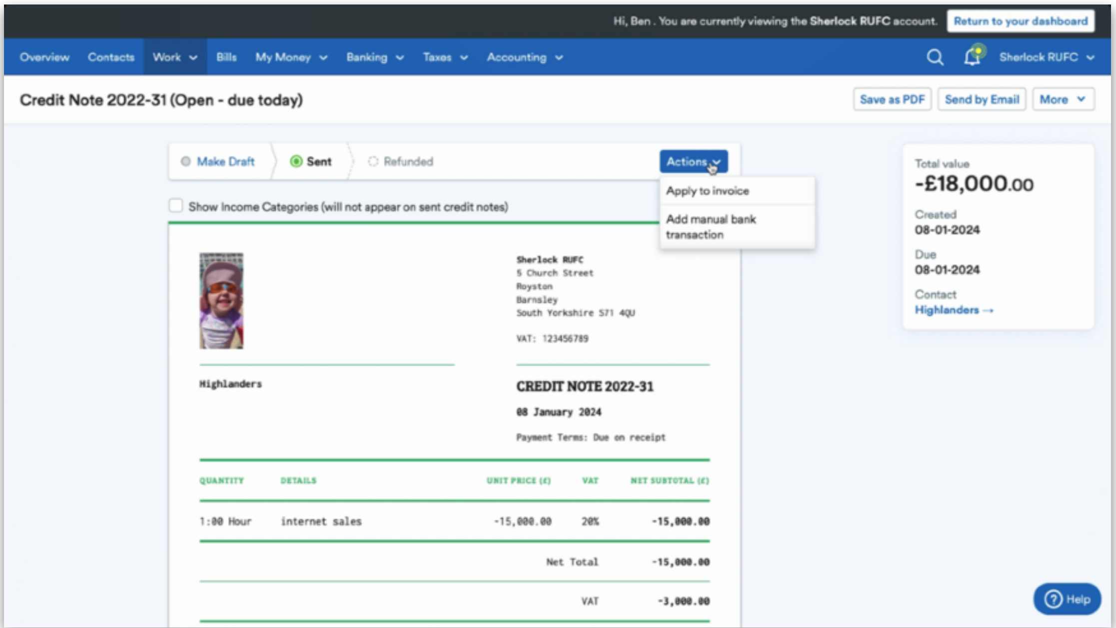


Once it has been created you have two options: you can add more line items to the credit note if needed, or mark the credit note as sent.

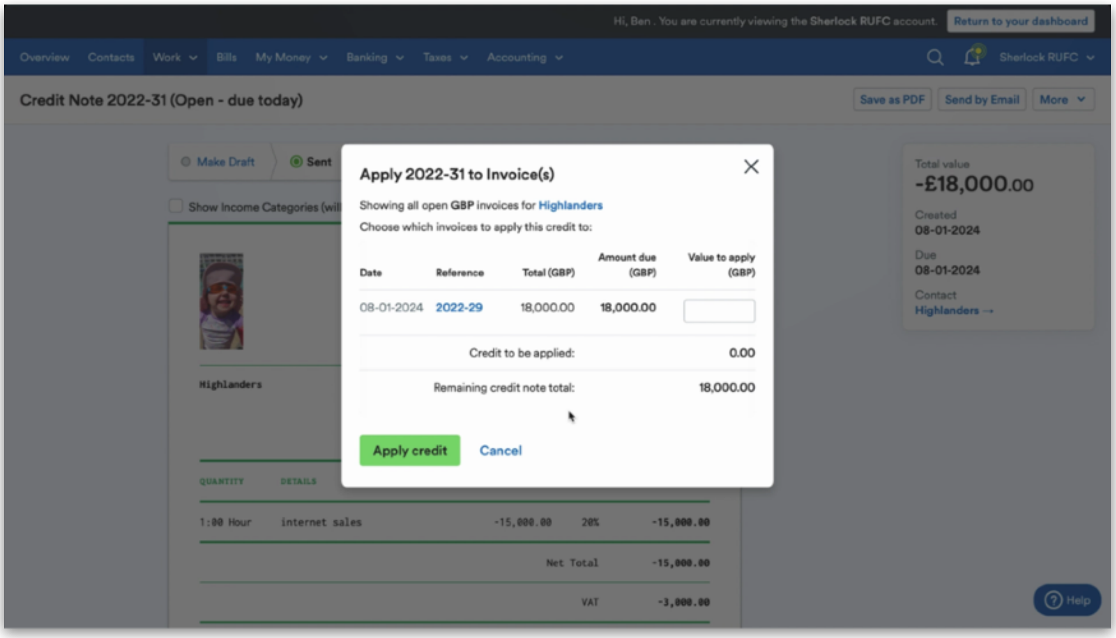


Once you have marked the credit note as sent, you'll see the '**Actions**' button appear.

You have two options to mark the credit note as paid: you can allocate the credit note against a bank transaction; or you can select '**Apply to invoice**'

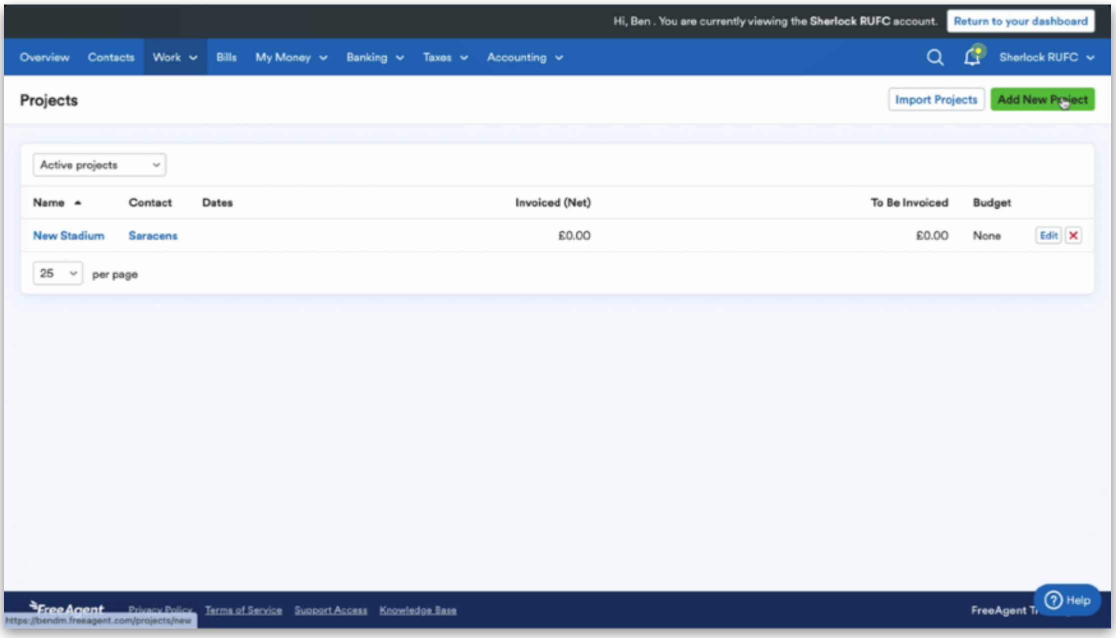


A pop-up will appear with all the sales invoices associated with that contact in FreeAgent. You can then either allocate the full amount of the credit note against one invoice or split it against numerous sales invoices for that contact.

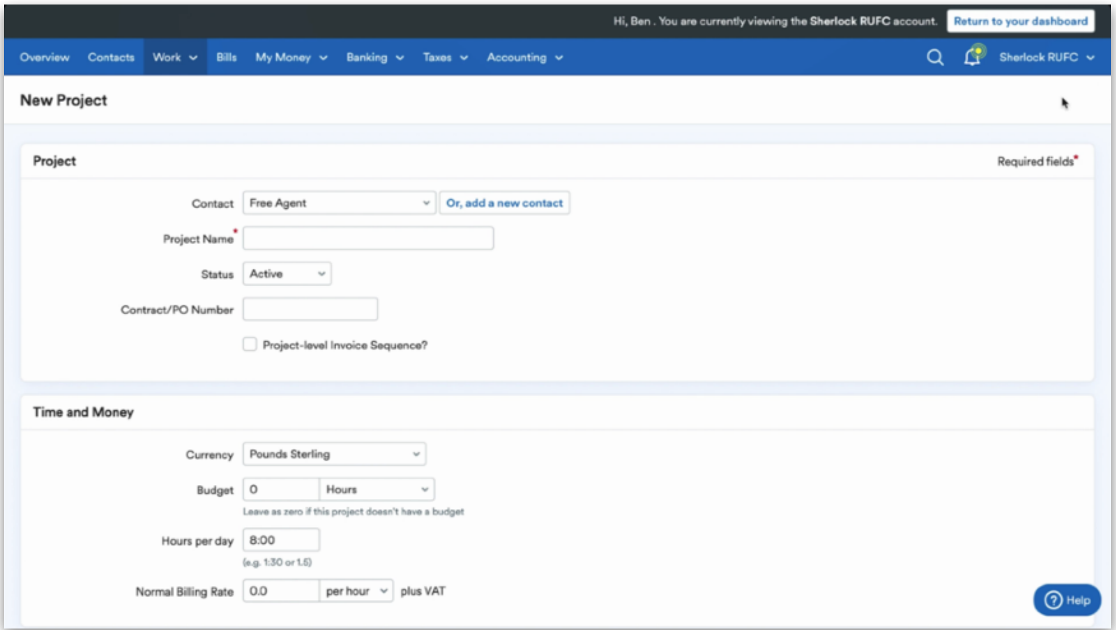


Projects

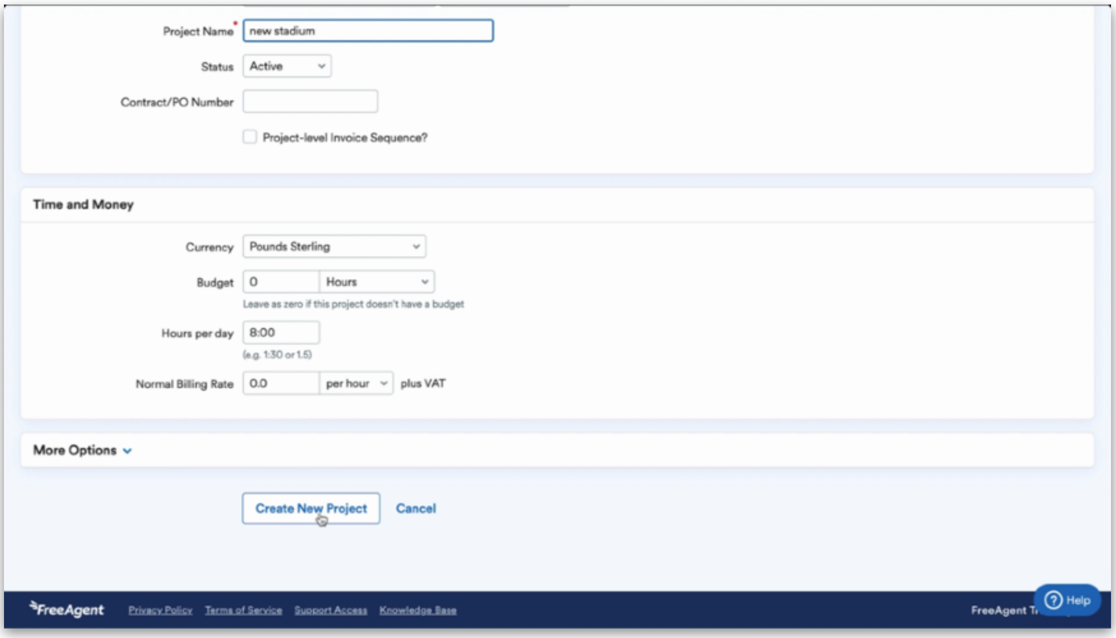
To navigate to the Projects area, select the '**Work**' tab and then '**Projects**' from the drop-down menu. From here, you can manage any projects that have already been set up in FreeAgent or add new ones by selecting '**Add new project**'.



Next, you'll be taken to the 'New Project' setup area. Select a contact from the drop-down list and enter the additional relevant options for the project.

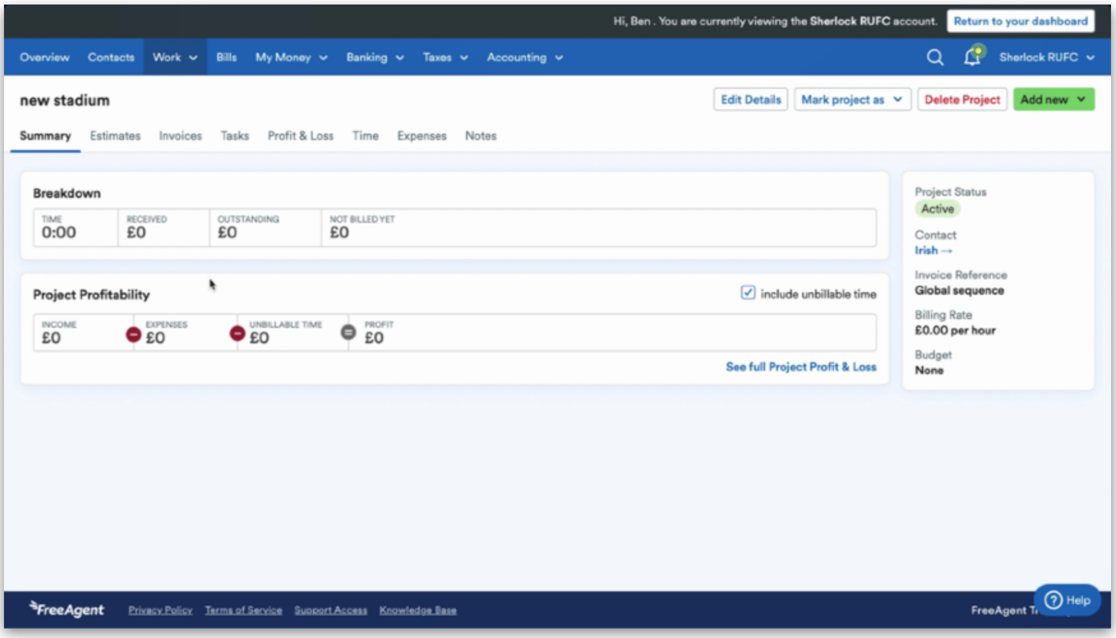


Once you're happy with the setup of the project, select '**Create New Project**'.



Once you've created the project, you can start allocating transactions to it. Please note that the following types of transactions cannot currently be allocated to a project: journals, wages, and sales income that has gone directly into the bank account.

Once you've started allocating transactions to a project, you can see a breakdown of all the transactions that have been allocated to it, as well as a detailed P&L specifically for that project.



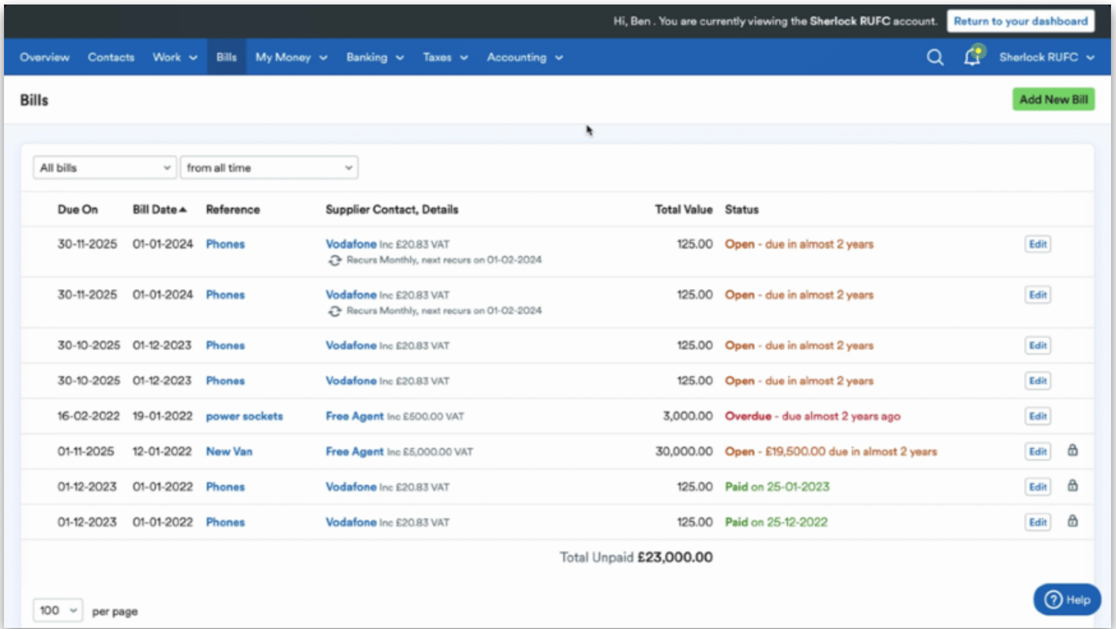
2. Bills and out-of-pocket expenses

In this section, we'll explain how to work with bills and out-of-pocket expenses within FreeAgent.

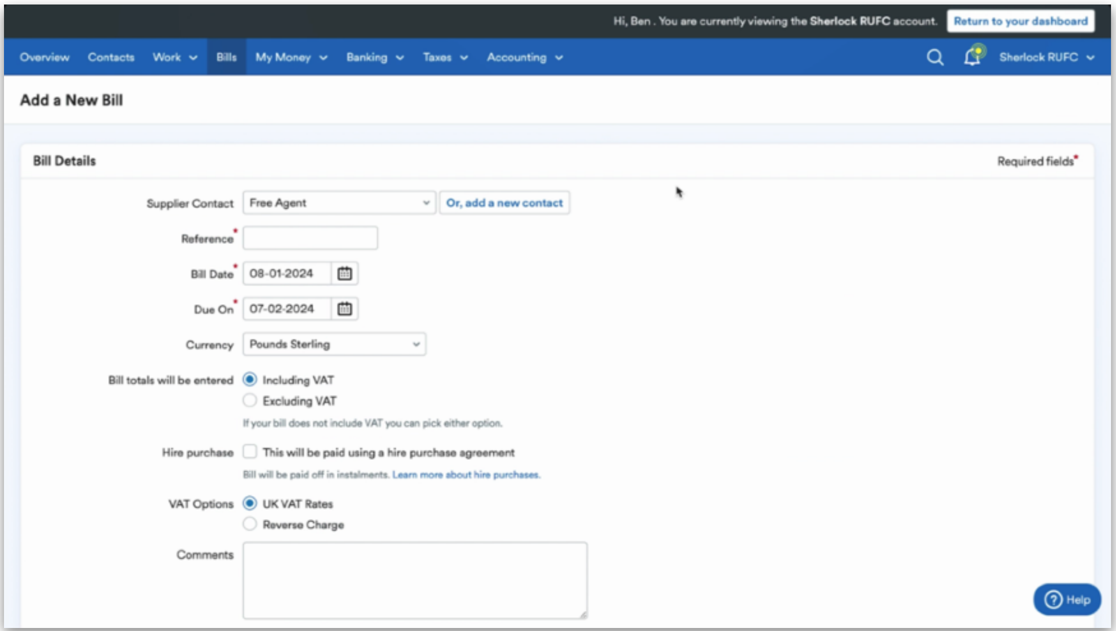
Bills

Bills are purchase ledger invoices and they run on the same traffic light system as sales invoices in FreeAgent.

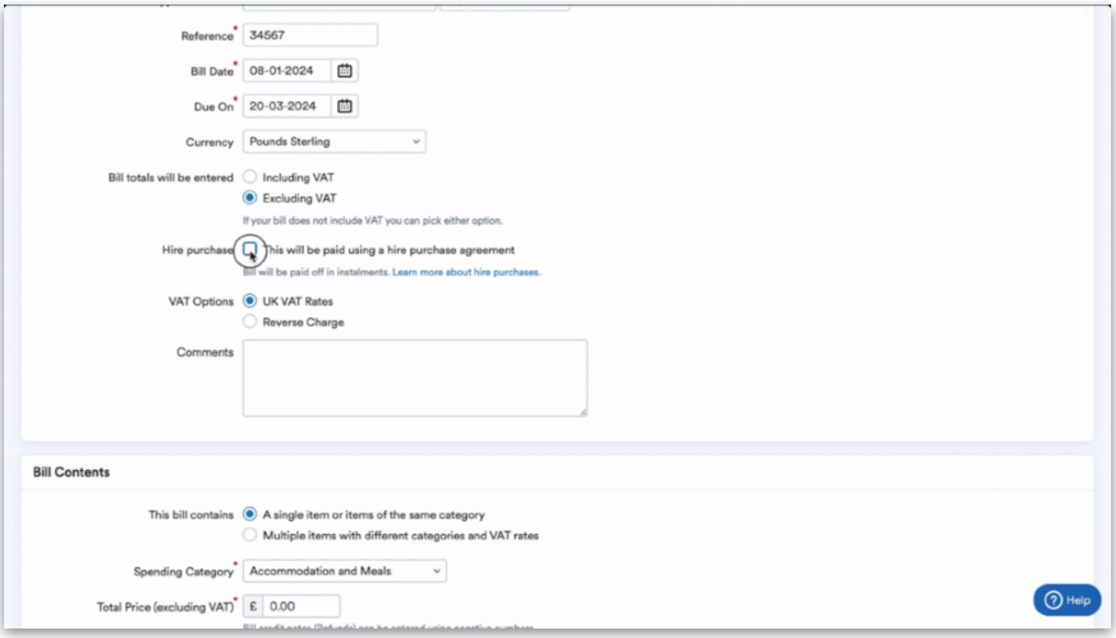
To add a new bill, select the '**Bills**' tab and then select '**Add New Bill**' at the top-right.



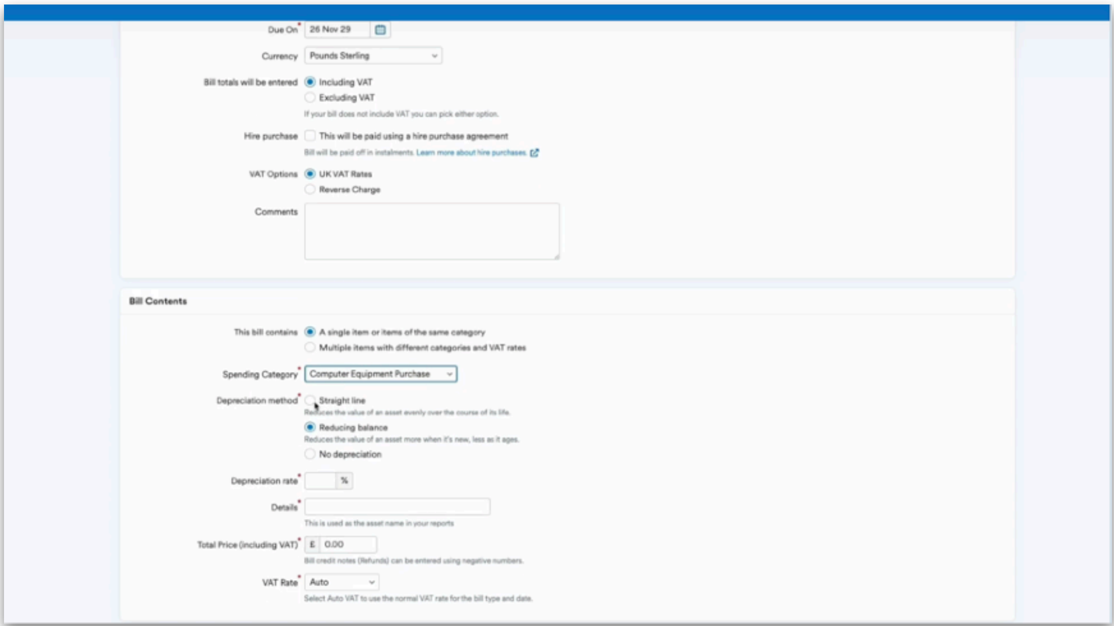
Next, select the contact that the bill relates to. Then, enter the reference, bill date and due date from the purchase invoice. You can select an international currency if needed, and choose whether to enter the items as either including VAT or excluding VAT.



If the bill is for an item bought using a hire purchase agreement, tick the '**Hire purchase**' checkbox, which will enable the bill to be paid off in instalments. Enter the date that the hire purchase agreement ends in the 'Due On' field.



If you only have a single line item to enter for the bill, enter it at this step. If you need to enter multiple line items, select '**Multiple items with different categories and VAT rates**' in the 'Bill contents' section.



If a Capital asset category is selected, you can choose the method of depreciation that best suits your needs. FreeAgent now supports multiple depreciation methods, including:

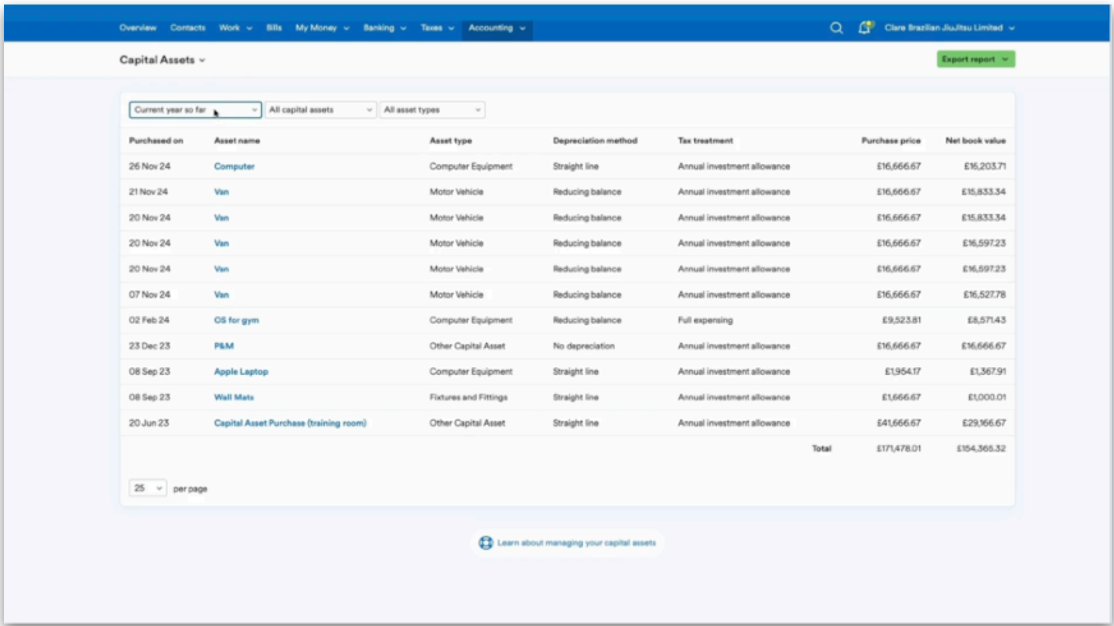
- **Straight-Line method**
- **Reducing Balance method**

Additionally, you can specify the annual depreciation rate in the system. You also have the flexibility to choose whether to post the depreciation annually or monthly. For certain assets, such as land and investments you may choose to apply no depreciation.

You can depreciate assets over 2-25 years using the Straight-Line method in FreeAgent. FreeAgent automatically generates the necessary acquisition, depreciation and disposal journals based on your asset details. This saves you time and ensures accuracy in your financial records.

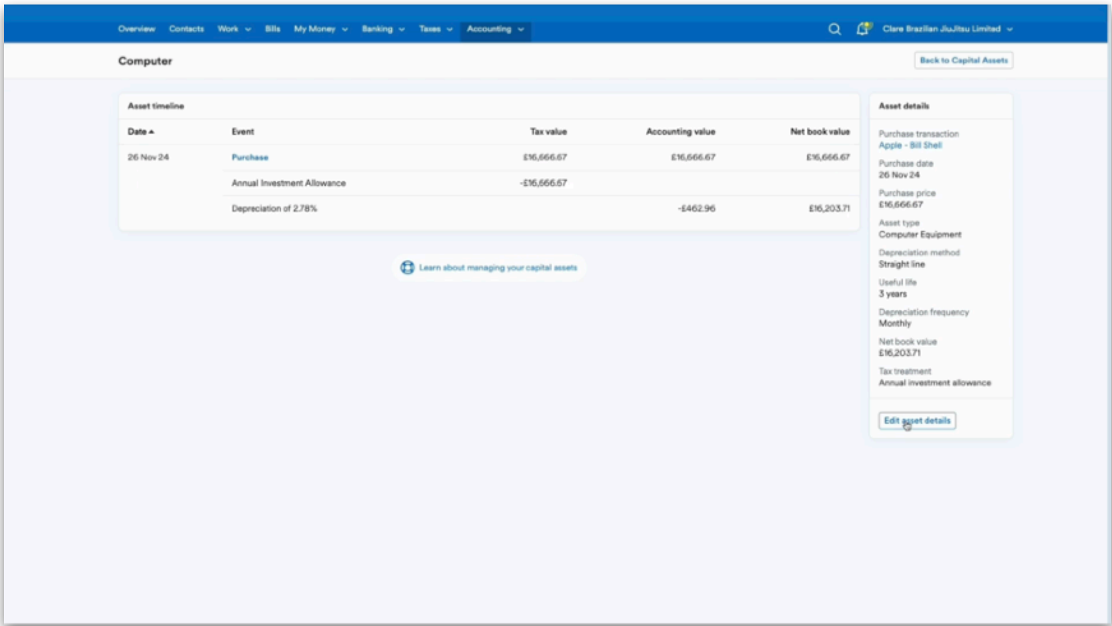
You can use the Capital Asset report to:

- Filter assets by tax year, current status, disposed assets, and asset type.
- Export reports to CSV or PDF via the drop-down menu at the top right corner of the screen.
- View asset details by clicking on the asset name.



When you click on an asset name, the system will display the following key details: Acquisition date, Tax treatment, Depreciation method, and Disposal details.

On the right-hand side of the screen, you will see a grid showing the asset details. If you need to update any of the information, click '**Edit asset details**'.



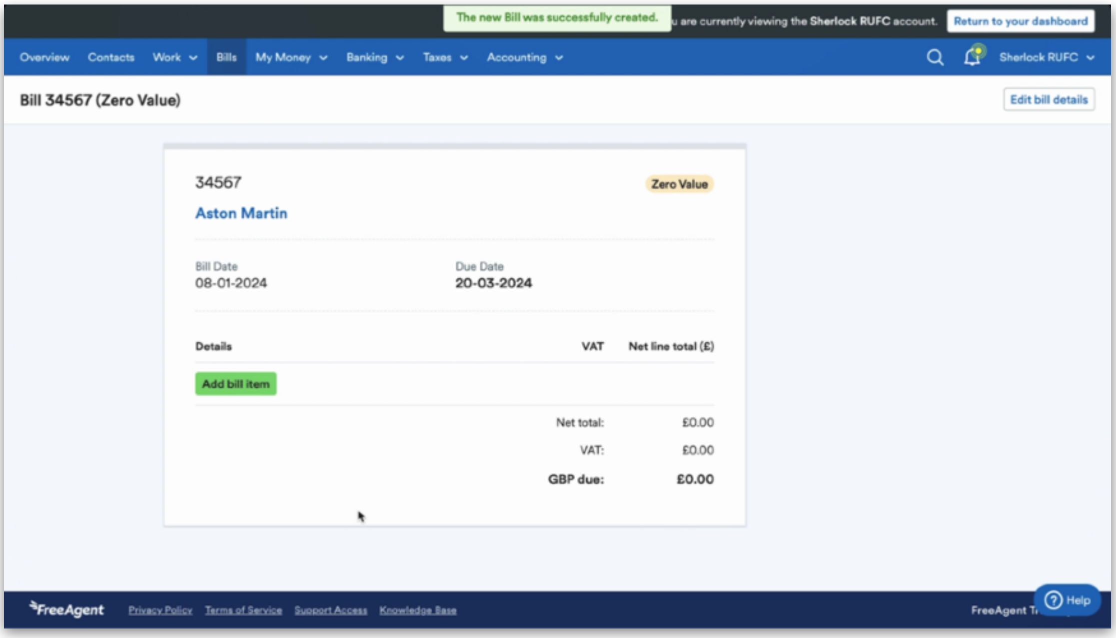
In the edit screen, you can

- Adjust the Tax Treatment (e.g. main pool or special pool).
- Choose whether to post depreciation monthly or yearly
  - **Monthly depreciation**: the annual depreciation rate is divided by 12 and posted each month.
  - **Yearly depreciation**: the full depreciation amount is posted at the start of the year.

When an asset is disposed of, FreeAgent automatically adjusts the net book value against the sales proceeds. Any difference is posted to the Loss/Gain on Disposal of Capital Asset accounting category.

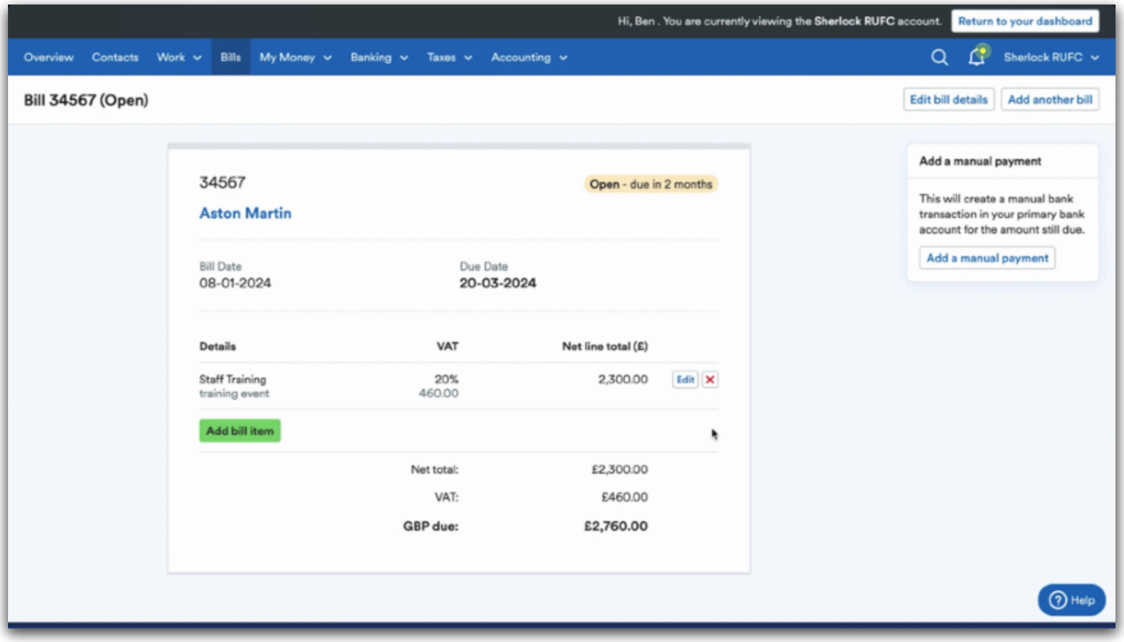
Please note, once the accounting period is locked, no changes can be made to the asset records for that period. It is not possible to add assets with an acquisition date prior to when you first start using FreeAgent.

If you then select '**Save and continue**', you'll be able to enter multiple line items by selecting '**Add bill item**'.



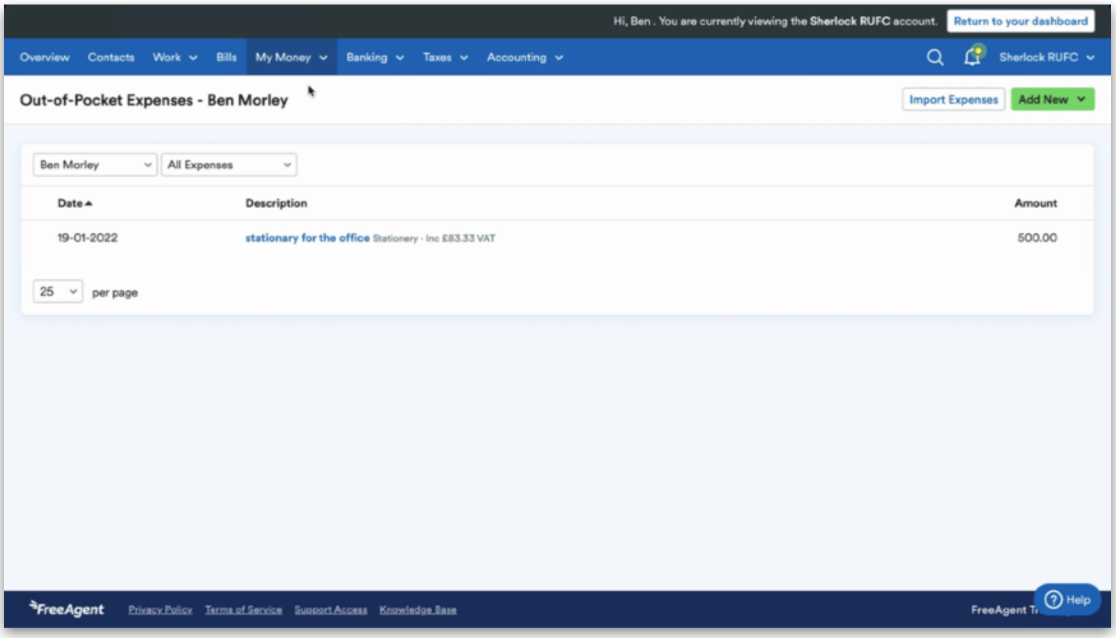
Choose a P&L code under 'Spending Category'. Then, add the relevant details, quantity if necessary, and the price. This will be inclusive or exclusive of VAT, depending what option you selected in the previous step.

Once you're happy with the information, you can add another line item to the bill by selecting '**Save and add another**', or select '**Save**' to finish the process. Once you've saved the bill, you can click on '**Add another bill**' if you have more bills to add.



Out-of-pocket expenses

To navigate to the out-of-pocket expenses area in FreeAgent, select the '**My Money**' tab and then '**Expenses**' from the drop-down menu. This will show you the out-of-pocket expenses for all directors and employees.



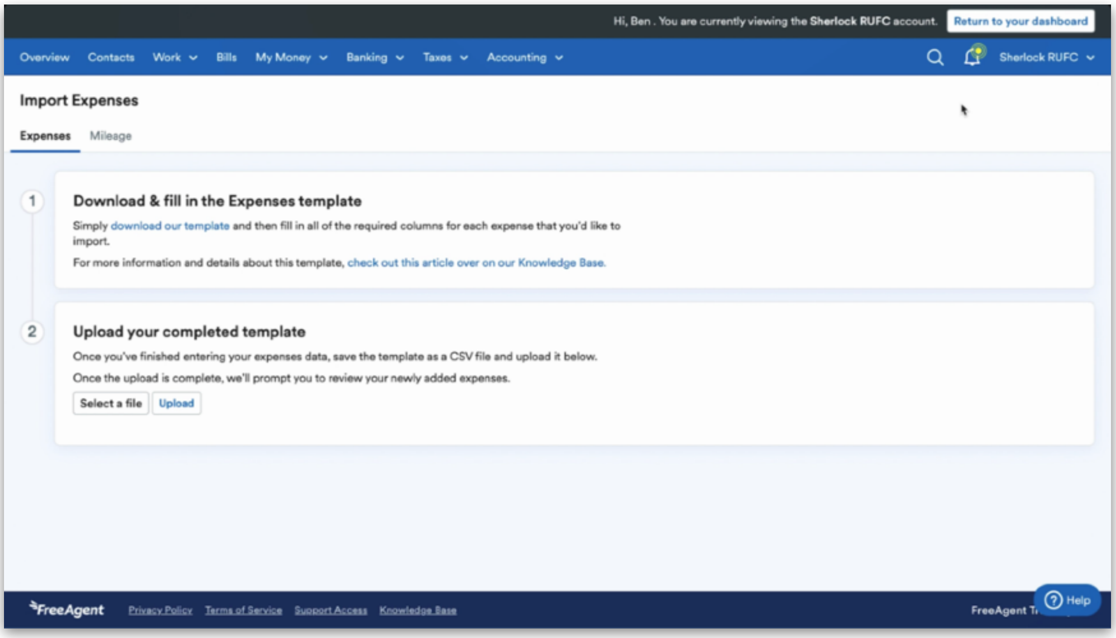
You can switch between directors and employees by selecting from the drop-down menu in the top-left corner. You can also change which expenses are being shown using the drop-down menu to the right of this.

Out-of-pocket expenses are split between expenses and mileage claims. There are a few different ways to add these into FreeAgent.

The first option is to take a photo of an expense using the FreeAgent mobile app. The Smart Capture feature will save a photo of the receipt in the 'Files' area of the mobile app.

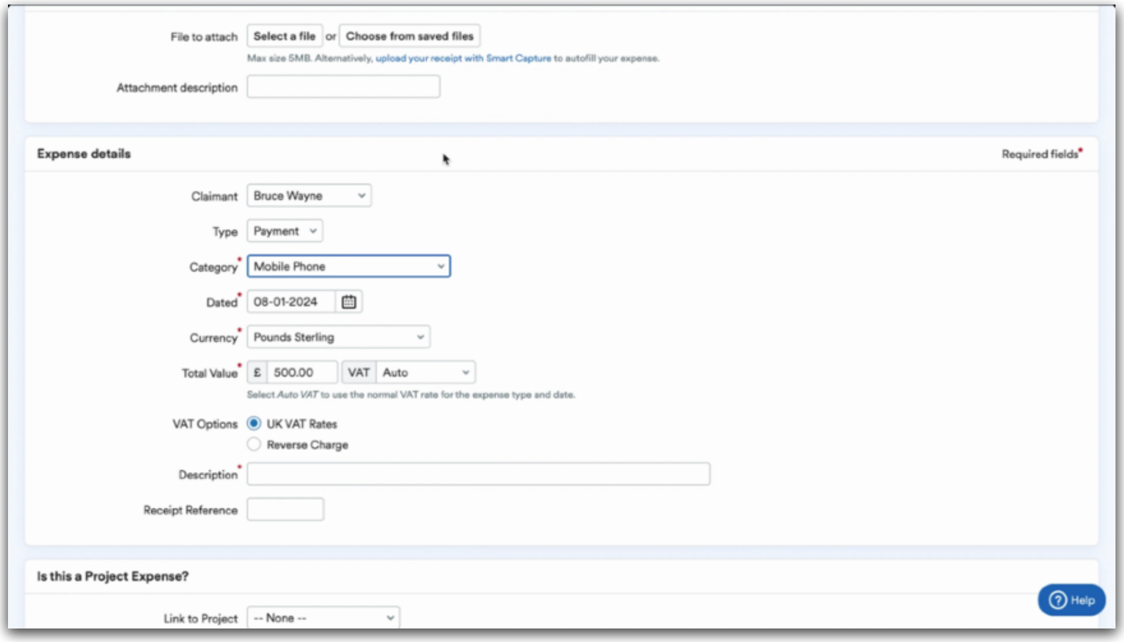
Smart Capture will then automatically extract the date and amount from the file. The file can then be allocated against a transaction at a later time. This process is covered in more detail in the separate mobile learning module.

You can also bulk import expenses into FreeAgent through a CSV upload. To do this, select 'Import expenses' in the top-right corner and follow the link to download our template for either expenses or mileage, which you can then fill in and upload back into FreeAgent.

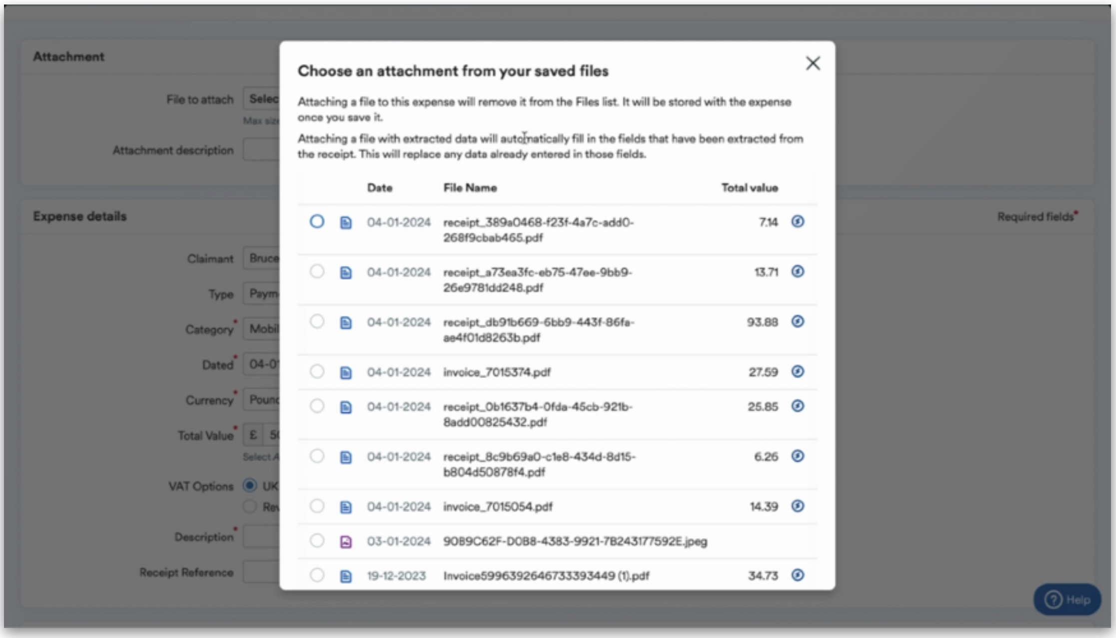


To enter an individual expense or mileage claim, select '**Add new**' and choose the appropriate option.

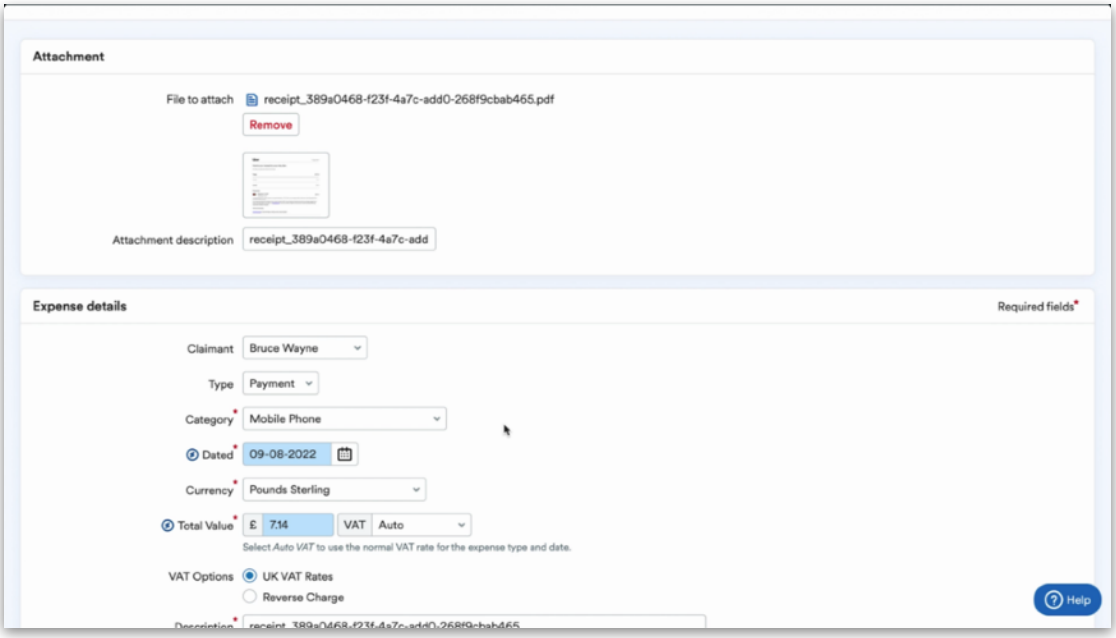
When entering an expense, you'll need to select the claimant first. This is the employee or director that the expense relates to. Under 'Type', select either payment or refund, and under 'Category' select the P&L code you would like to allocate it to. Next, select the date that the expense occurred on and the amount of the transaction.



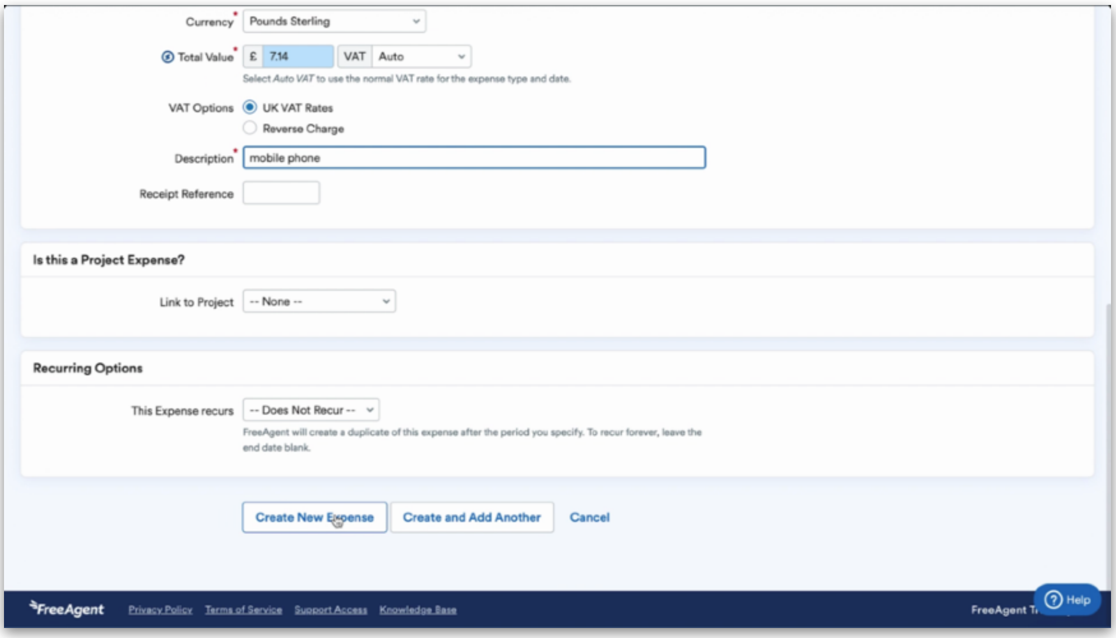
If you want to use a saved photo of a receipt, select '**Choose from saved files**' at the top of the screen.



If you select a file that Smart Capture has been applied to, it will pull the date of the purchase invoice and the gross amount through to the expense page, and it will highlight those fields in blue.



In the 'Description' field, enter a brief description of the expense. When you're happy with the information entered, select '**Create new expense**' or '**Create and add another**' if you'd like to enter additional expenses.

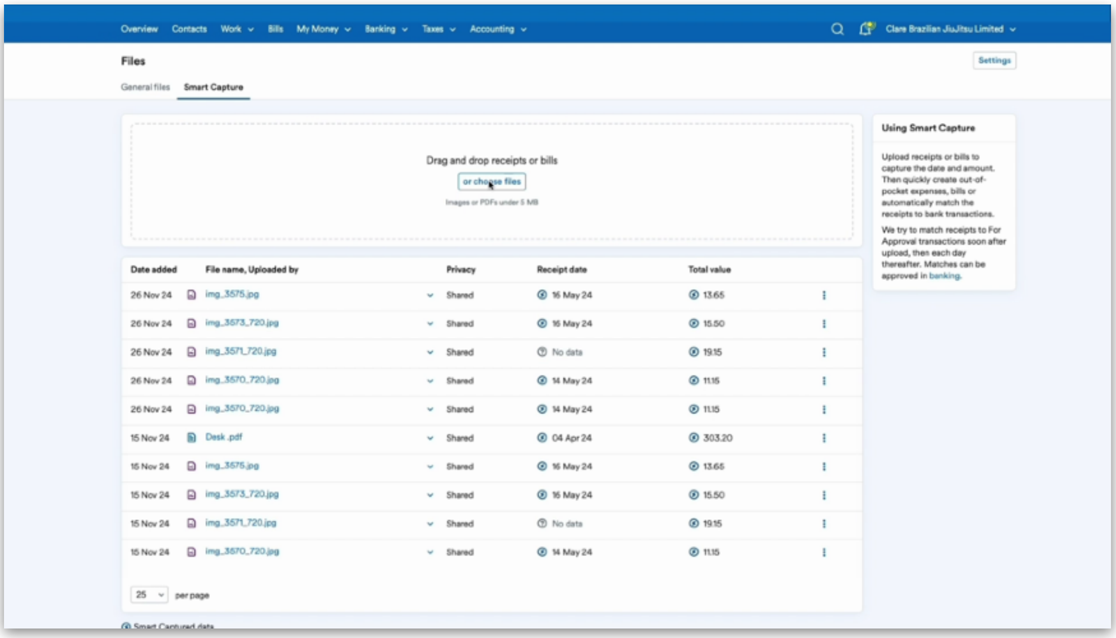


Smart Capture

Smart Capture is a FreeAgent add-on that automatically extracts the date and amount from images of receipts and bills. This tool simplifies the process of uploading and managing expenses in FreeAgent.

You can use Smart Capture to upload receipts and bills in bulk using the following steps:

1. Click on the name of your client in the top-right corner of the screen.
2. Select '**Files and Smart Capture**' from the drop-down menu and then the Smart Capture icon at the top left of the screen.
3. Drag and drop files into the upload area and click '**Choose files**' to select images or PDFs of receipts and bills from your desktop.



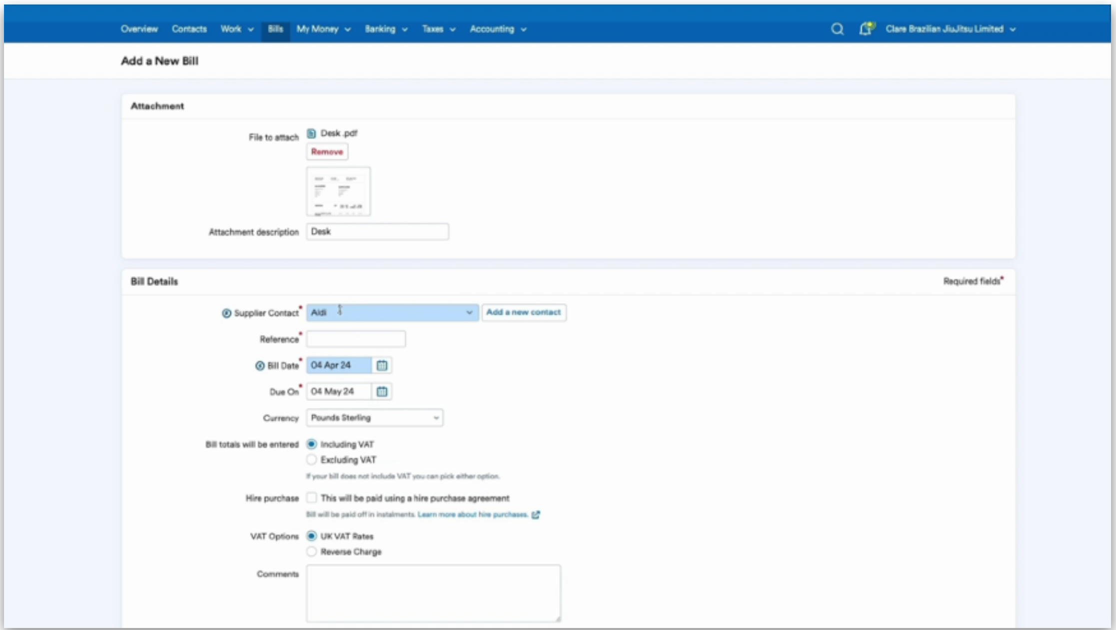
Once uploaded, the system will display the date the file was added, along with the name of the file.

You can convert a Smart Capture file in two ways: during the creation of the expense or directly from the Files area. To convert from the Files area:

1. Navigate to the '**Files**' area in FreeAgent.
2. In the Smart Capture Files area, click the three dots next to the uploaded file.
3. From the menu, you can:
    - Preview the file

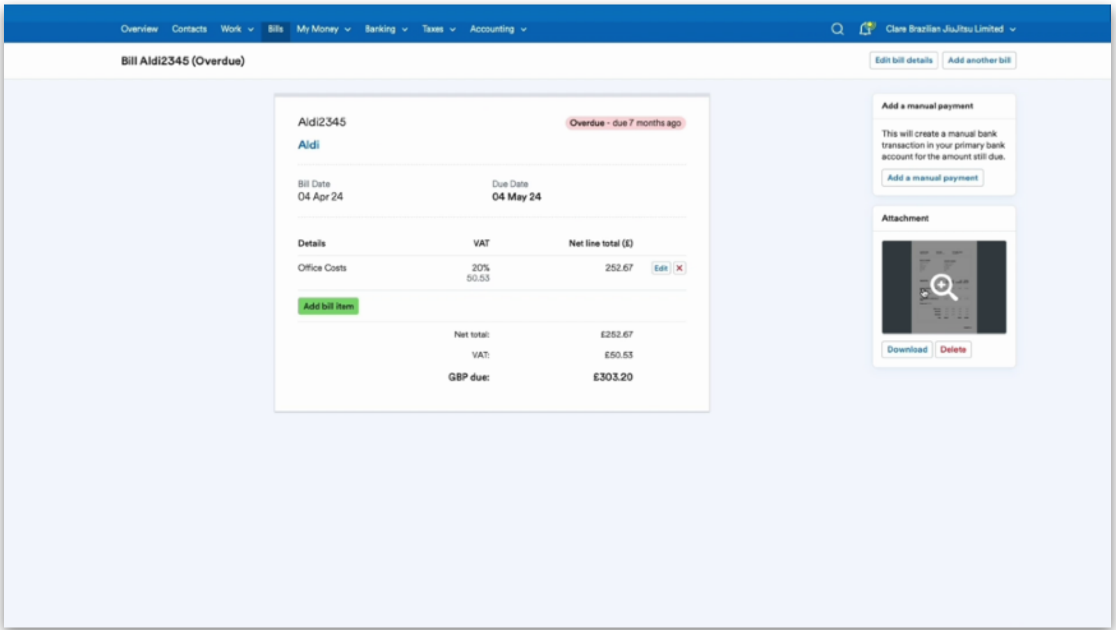
- Create an expense or bill
- Edit the file name
- Download the original file
- Delete the file

4. To create a bill, click ‘**Create Bill**’, which will open the Add new bill screen. The date, amount, due date, supplier name and category will be auto-populated.



When creating a bill, you will need to manually complete the Reference, Hire Purchase (if applicable), VAT rate, Link to Project (if required) and re-bill (if applicable) fields.

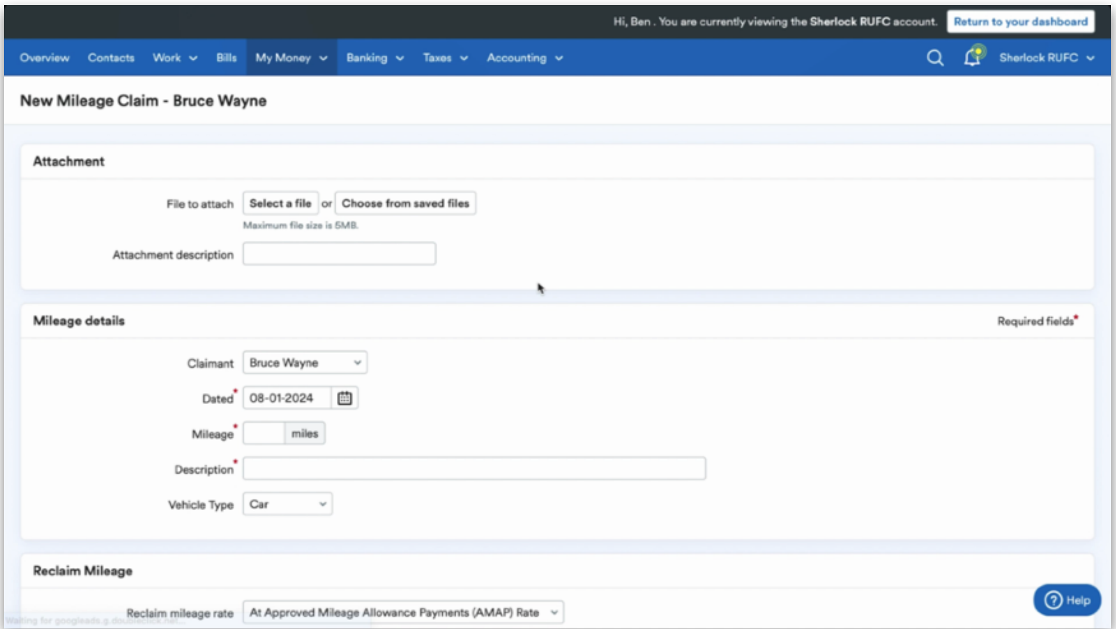
Once you’ve entered all the information required, click ‘**Save and Review**’. The file will then be attached to the transaction and removed from the Smart Capture area.



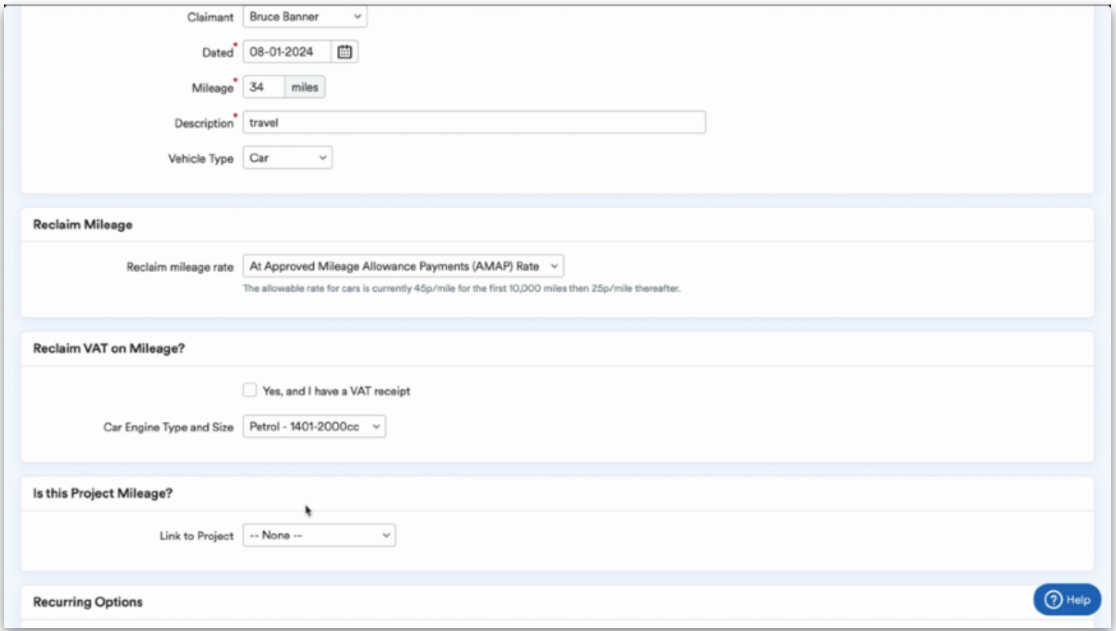
In the Bills screen, a paperclip icon indicates that a file is attached to the transaction. If you delete a bill, you will be asked whether you want to delete the file permanently or move the file back to the files area.

Mileage

Mileage follows a similar process to expenses. Select the relevant employee or director from the 'Claimant' drop-down menu in the 'Mileage details' section, then enter the date and a description of the journey. Next, select which vehicle was used: a car, motorcycle or bicycle.



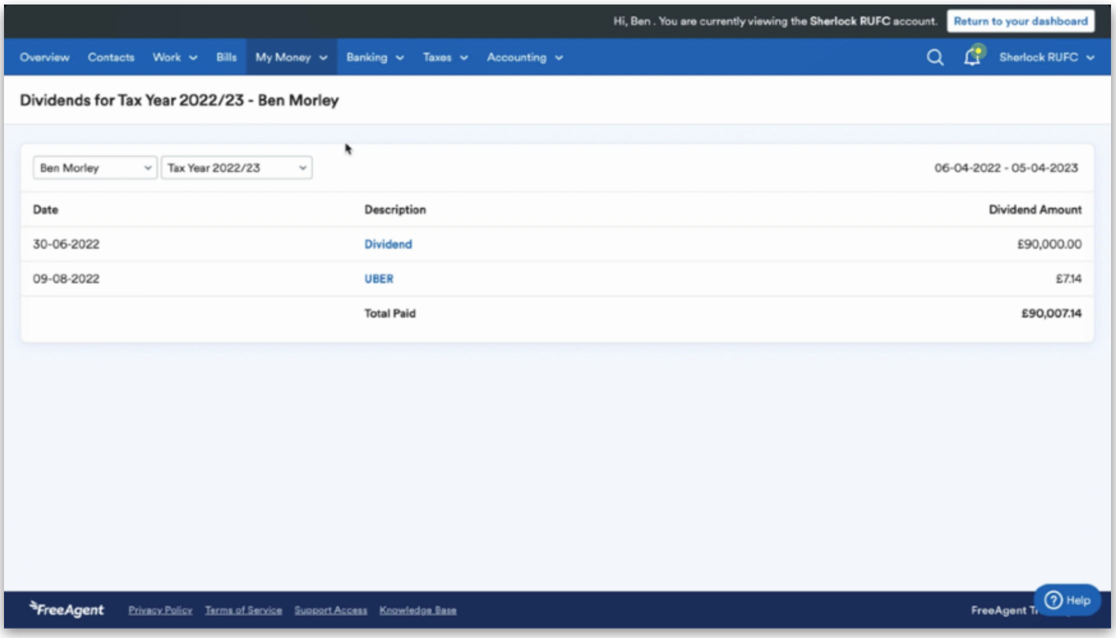
To use the mileage claims in FreeAgent, your client needs to reimburse at the government's recommended rates of 45p and 25p per mile. FreeAgent will automatically change to 25p per mile once 10,000 miles has been surpassed.



If your client is VAT registered, you can reclaim VAT on the mileage as FreeAgent has HMRC's fuel rates built in and they are updated in line with HMRC's updates.

Dividends

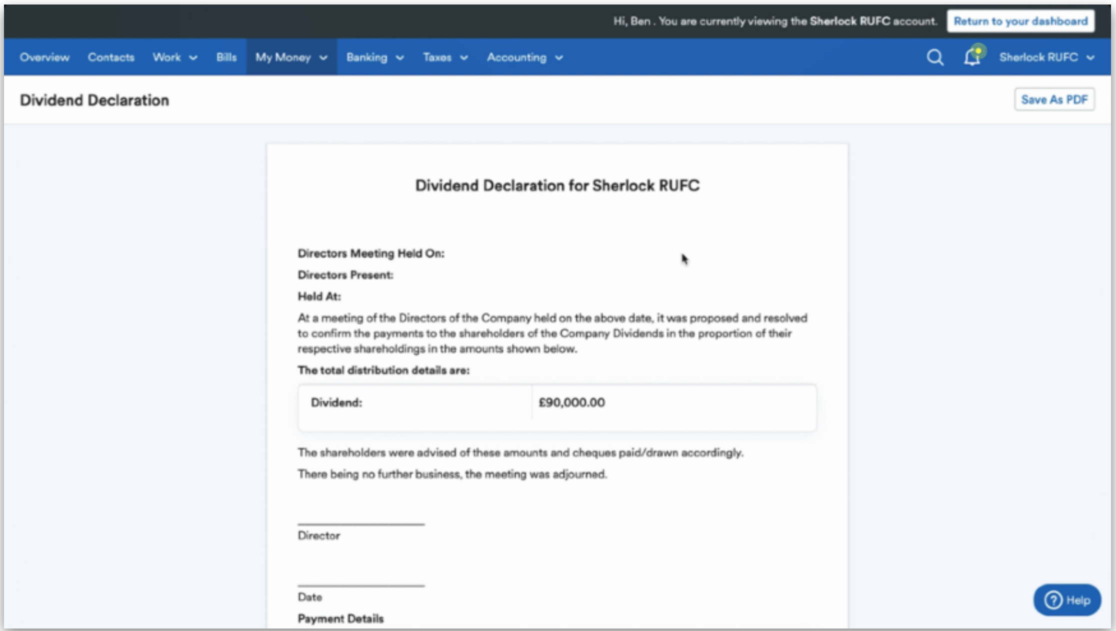
The '**My Money**' tab in FreeAgent is also where the '**Dividends**' area can be found within your client's licence. This is where dividend declaration vouchers are generated when either a bank transaction is explained as a dividend payment or when a director's dividend code is journaled to.



Please note that because the dividend voucher declarations are automatically generated from the bank transaction or journal, the only way to adjust these vouchers inside your client's licence would be to adjust the original dividend explanation or journal entry.

Completely removing the explanation posted to the bank transaction or deleting the journal entry will lead to the removal of the dividend voucher altogether.

Select the voucher from the list to view it, or download it as a PDF by selecting '**Save as PDF**' in the top-right corner. This will allow you to share it outside your client's licence.

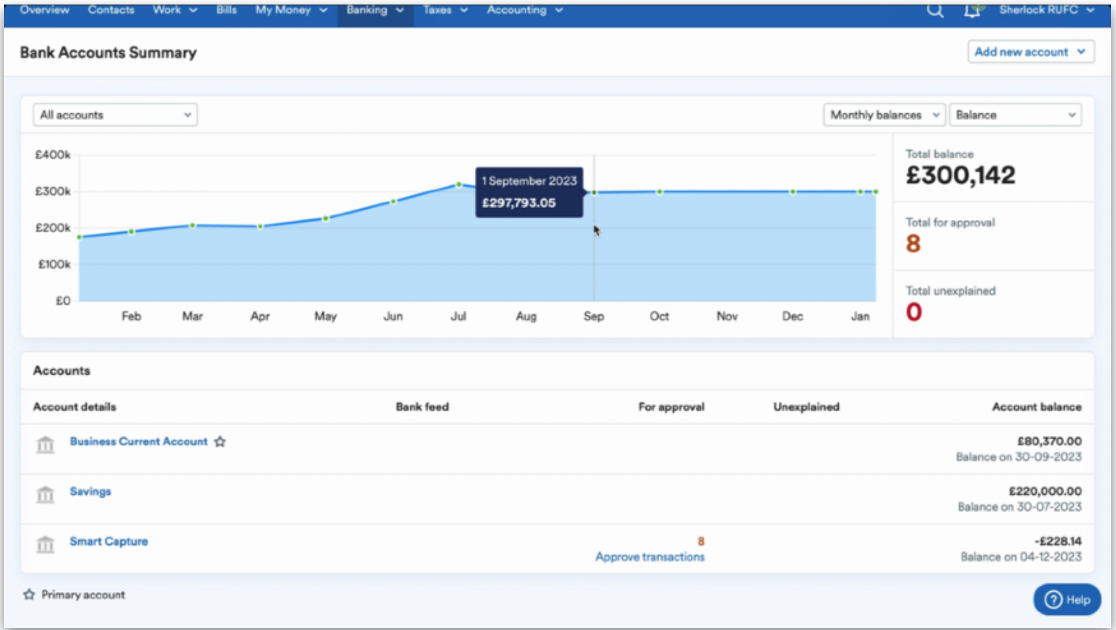


3. Banking and Cashflow

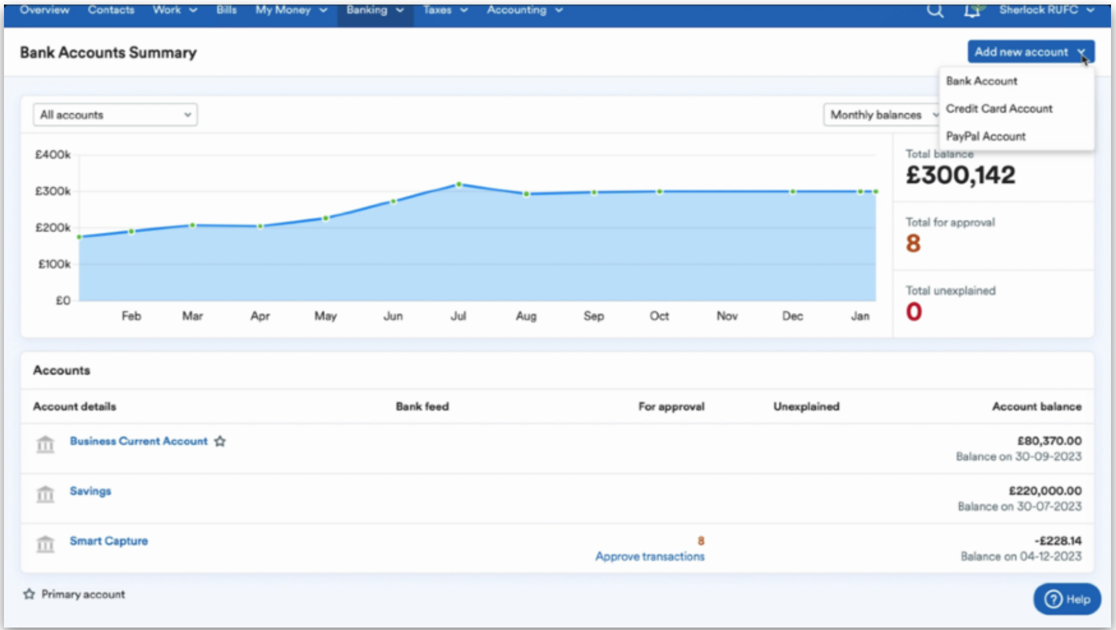
In this section, we'll show you an overview of the Banking area and Cashflow reports inside FreeAgent. We'll also explain how these features can help lessen the business admin burden for you and your clients.

The Banking area

If you navigate to the '**Banking**' tab at the top of the screen and select '**Bank accounts**' from the drop-down menu, you'll be able to see your client's individual bank account balances, an aggregated view of how much cash they have in the bank in total, along with any transactions that require your attention.



Within FreeAgent, you can create as many bank accounts as your client needs for their business. To do this, select ‘**Add new account**’ at the top-right.



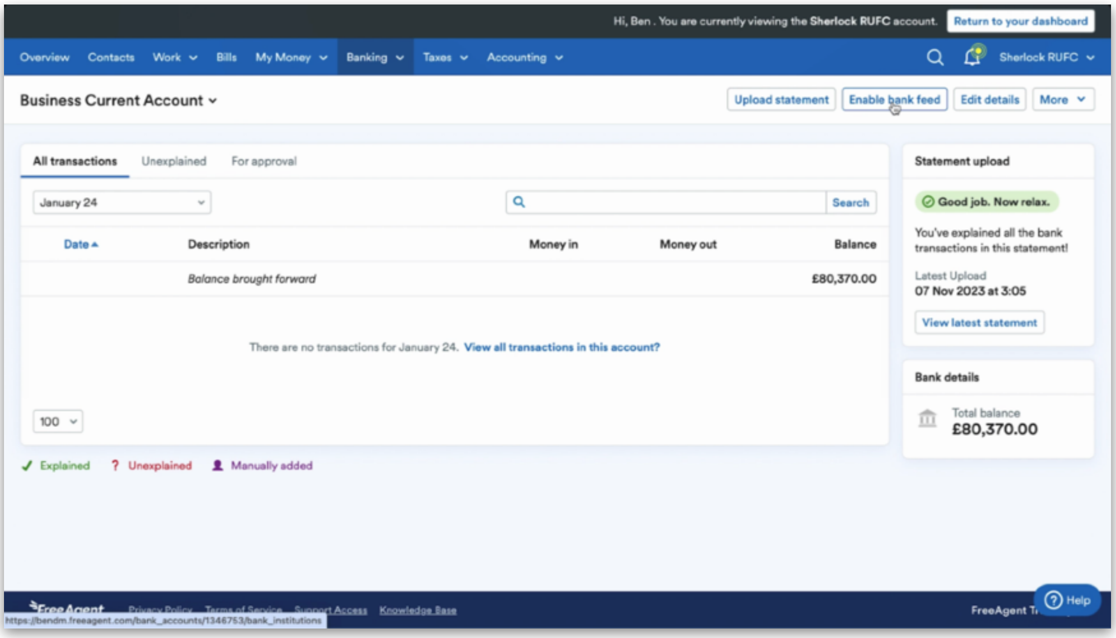
You can create additional bank, credit card and PayPal accounts. Bank accounts can have automated feeds, which will handle the transactions being imported into these accounts in FreeAgent.

Dummy bank accounts can also be used to manage the bookkeeping for petty cash movements, till takings, E-commerce and the liability for bank loans.

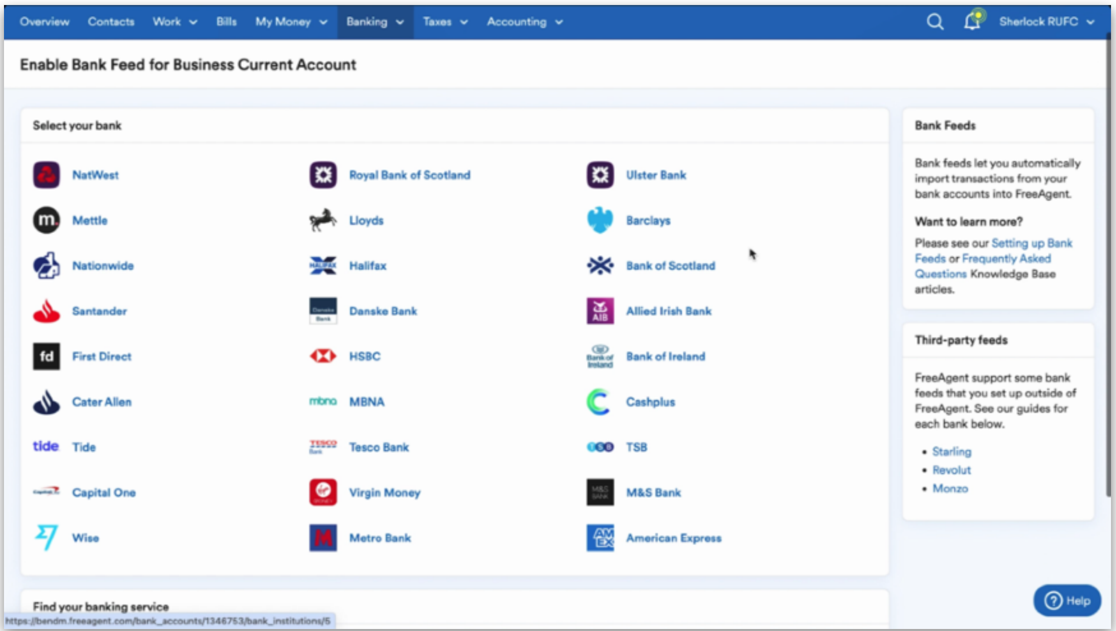
Bank feeds

There are two main methods of getting your client's banking transactions into their bank account inside FreeAgent.

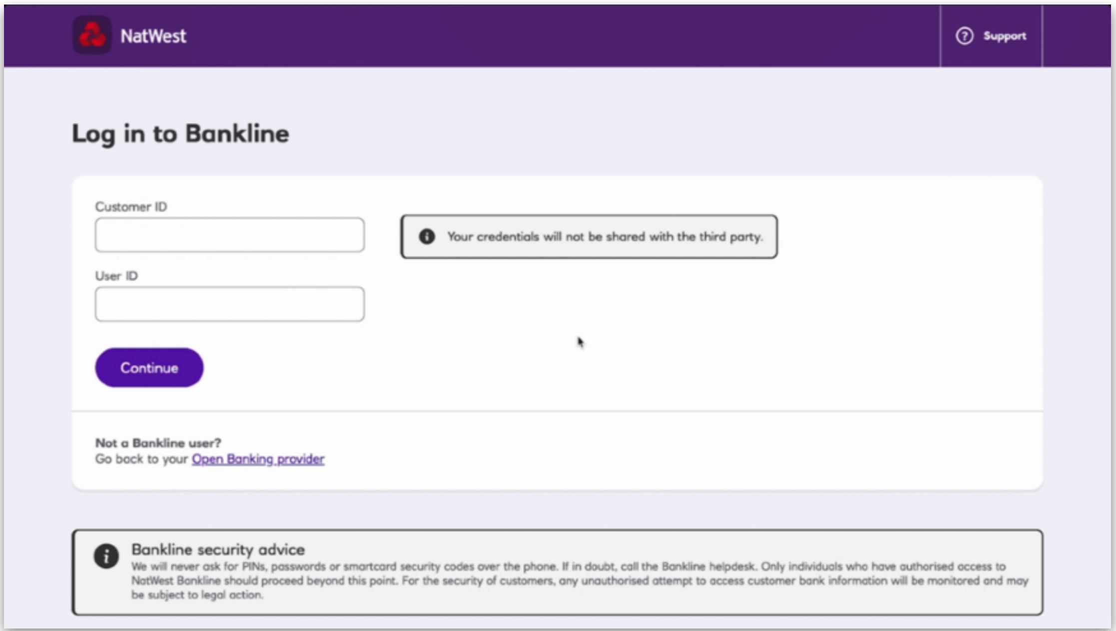
First, after selecting a bank account, choosing '**Enable Bank Feed**' will allow your client's bank transactions to be automatically imported into FreeAgent from their bank via an Open Banking bank feed.



Your client would set up this connection by simply selecting who they bank with, the type of bank account and finally choosing '**Connect to my bank**'.



Your client would then be switched over to their online banking login screen, where they can enter their login credentials for their online banking and select the relevant account to connect to FreeAgent.



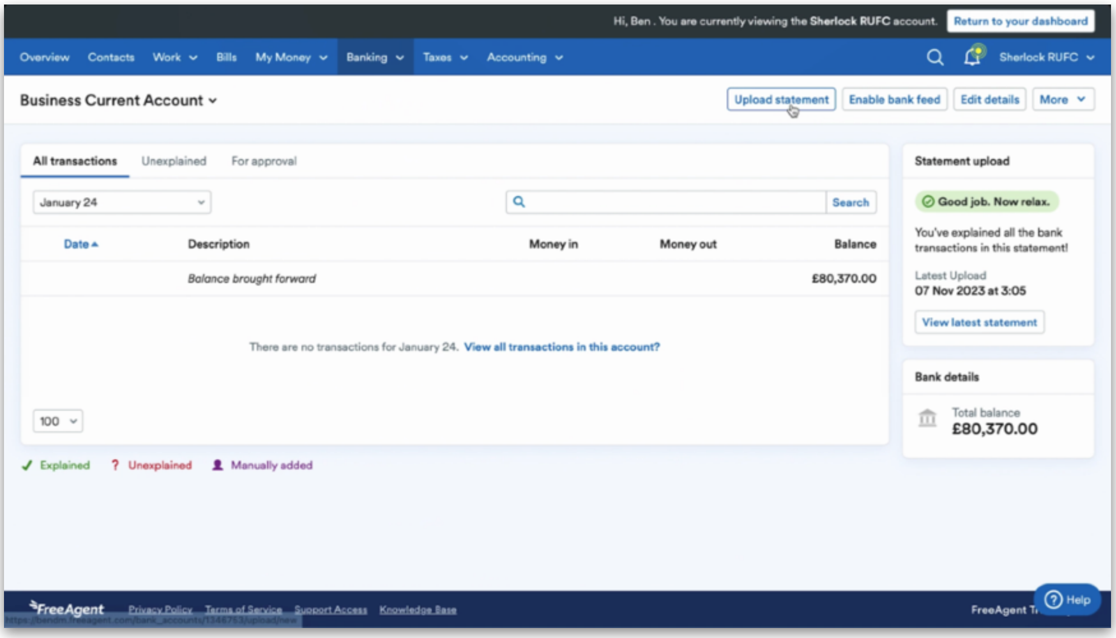
At this point, they would be taken back to FreeAgent and the banking transactions would be imported into their account from the FreeAgent start date.

Be sure you select the correct FreeAgent start date for your client to ensure the correct transactions are brought into their FreeAgent account. Having the right dates will help keep your client's account accurate. Please note that entering any transactions dated before your client's FreeAgent start date can cause errors in your client's account. FreeAgent can import transactions from either your client's FreeAgent start date or up to two years prior, whichever comes first.

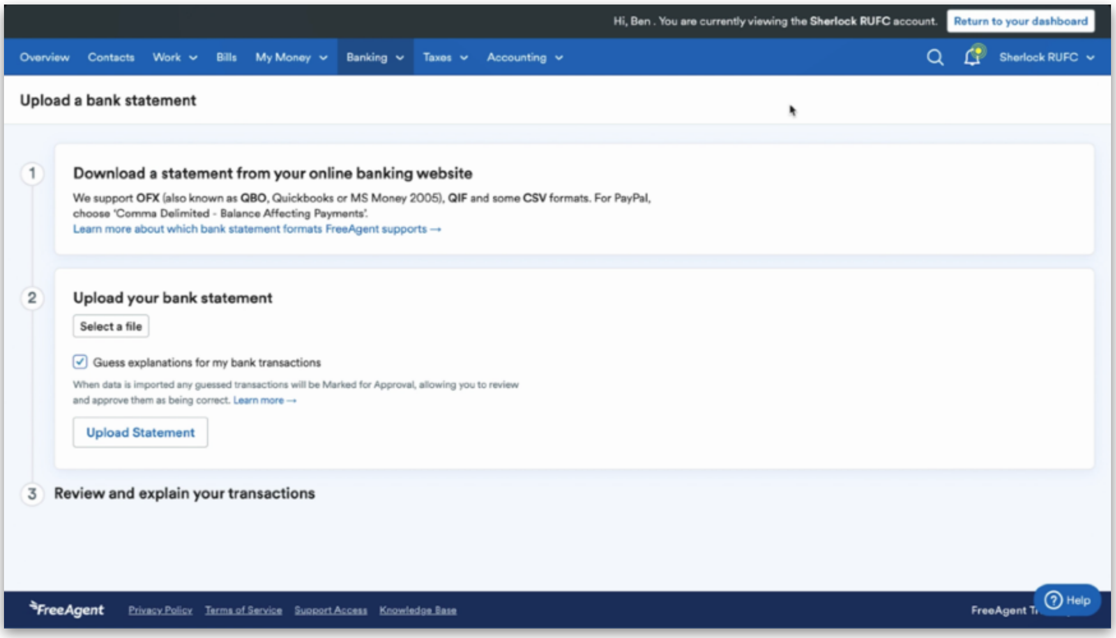
Your client's FreeAgent bank accounts should then be used to mirror their actual bank accounts in order to keep the data as accurate as possible.

CSV imports

Instead of setting up an automated bank feed, your client also has the option to upload electronic statements by selecting '**Upload Statement**'.



We support OFX and QIF file formats, as well as standard CSV files.



A CSV file should simply be an Excel document saved in the 'comma separated value' format with no headings and three columns. Each row inside the document relates to a single bank transaction, while each column reflects the following:

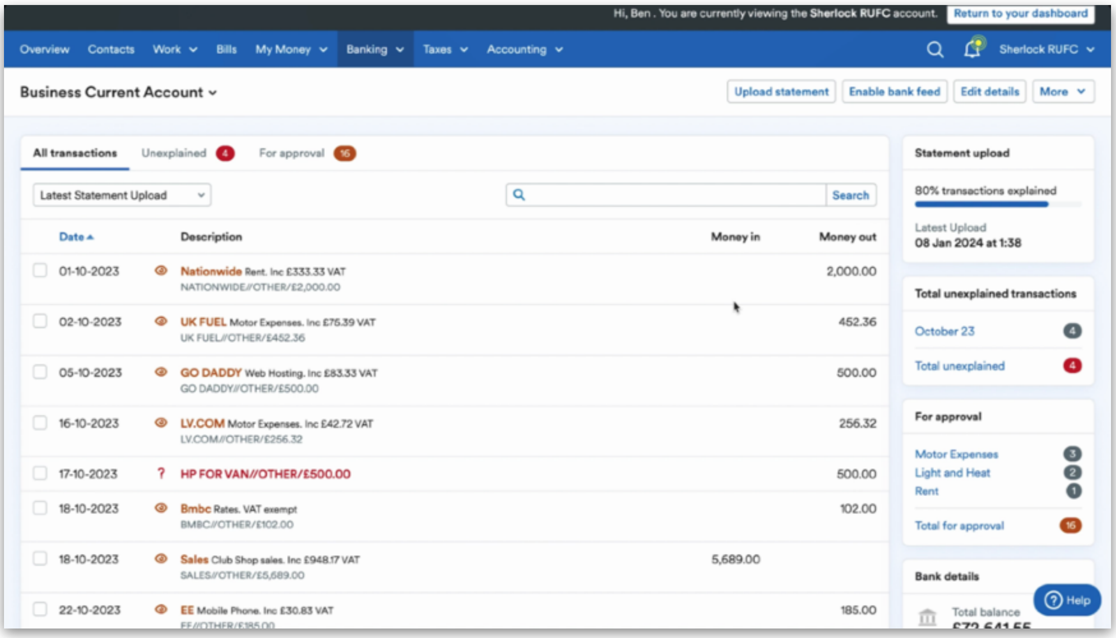
- The first column is the date of a transaction in the format DD/MM/YYYY.
- The second is the value of the transaction, where negative transactions are outgoing and incoming transactions are positive.
- The third and final column would be the description that's uploaded with the transaction.

Reconciling transactions

Now you know how to get transactions into your client's bank account, we're going to cover some of the functionality in FreeAgent that makes the reconciliation of your client's transactions as efficient as possible.

Guess

FreeAgent's Guess functionality makes suggestions for transaction allocations, which can be found in the 'For Approval' tab. This allows you to simply select '**Approve & Save Changes**' to approve and explain guessed transactions.



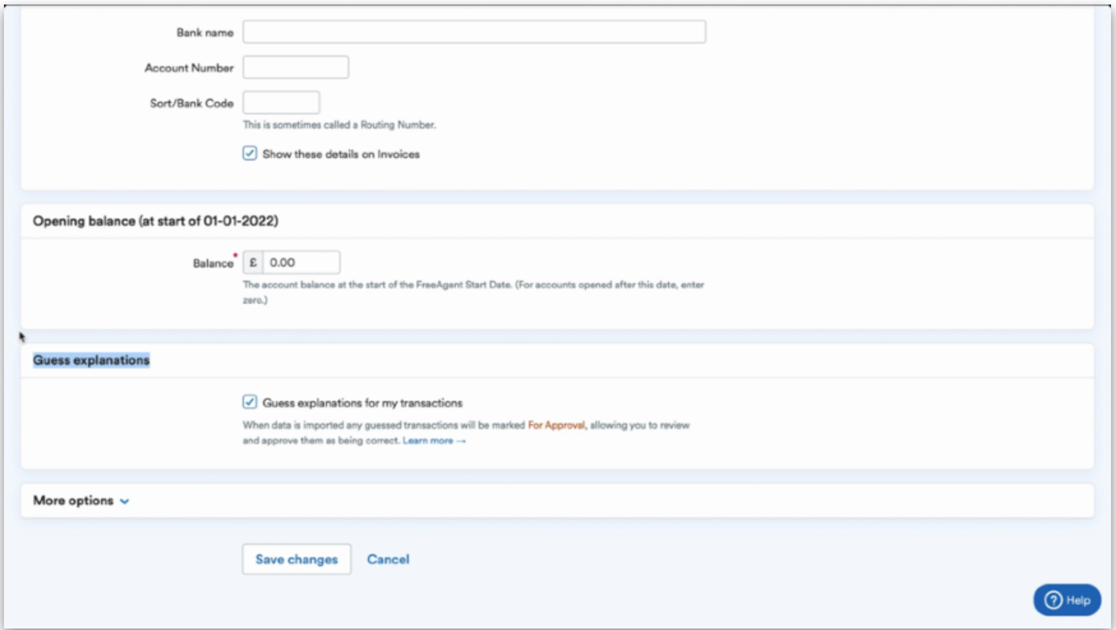
Guess has two separate features to help you and your client allocate explanations to bank transactions. These are Guess explanations and Guess rules.

Guess explanations

The ‘Guess explanations’ feature looks at the day-to-day transactions within your client’s accounts and offers an explanation suggestion based on the description that is either imported or uploaded.

Guess explanations work from day one within your client’s account as Guess uses data from other FreeAgent accounts to spot patterns and offer suggestions based on how other users have categorised similar transactions.

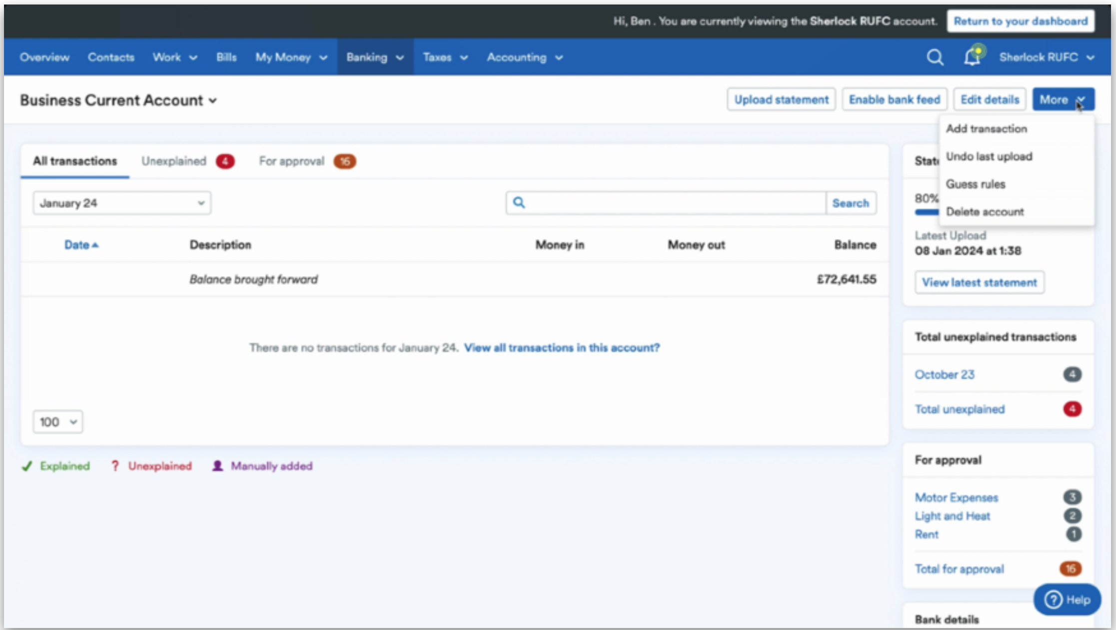
Guess explanations can be enabled or disabled for each of your client’s individual bank accounts in FreeAgent.



Guess rules

The second feature is 'Guess rules', which looks at the transactions that have bookkeeping associated with them and offers transaction explanations based on nine rules.

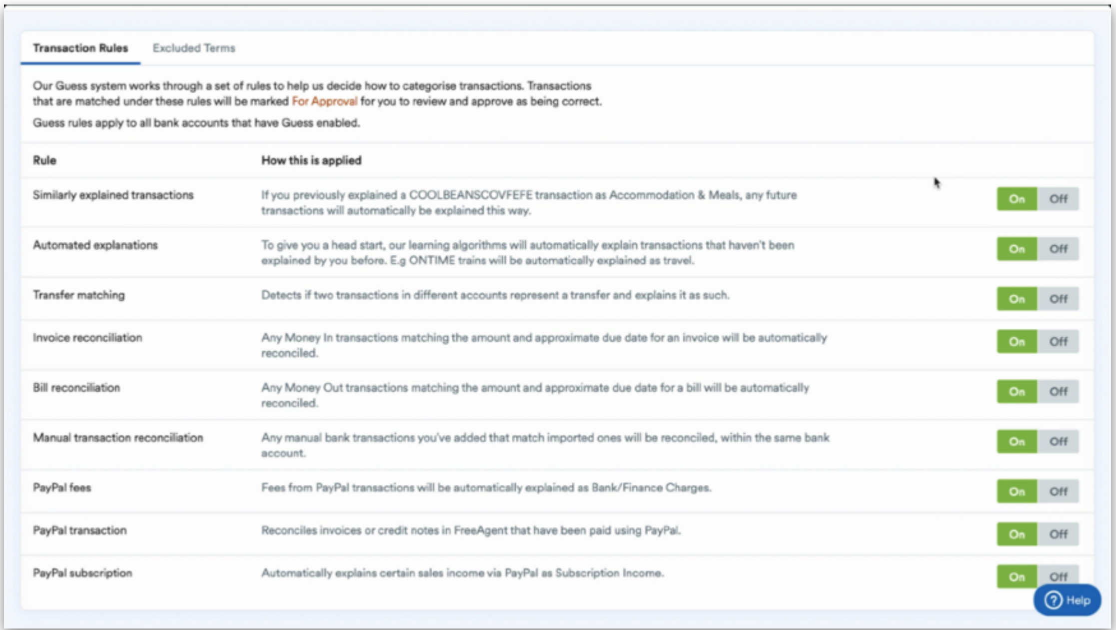
You can access the rules by choosing '**Guess rules**' from the '**More**' drop-down menu.



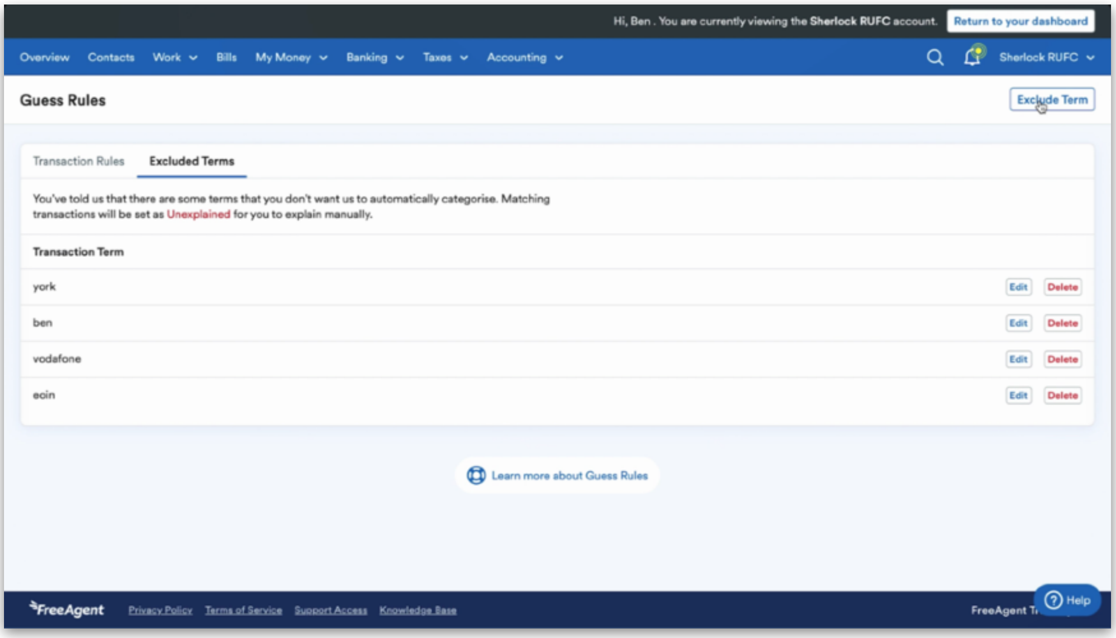
These nine rules will attempt to explain transactions against open or overdue invoices and bills, transfers between bank accounts, manual transactions being matched to imported or uploaded transactions along with handling subsequent PayPal transactions.

Guess rules will also learn both your and your client's behaviour to offer suggestions for new transactions that come in with similar descriptions.

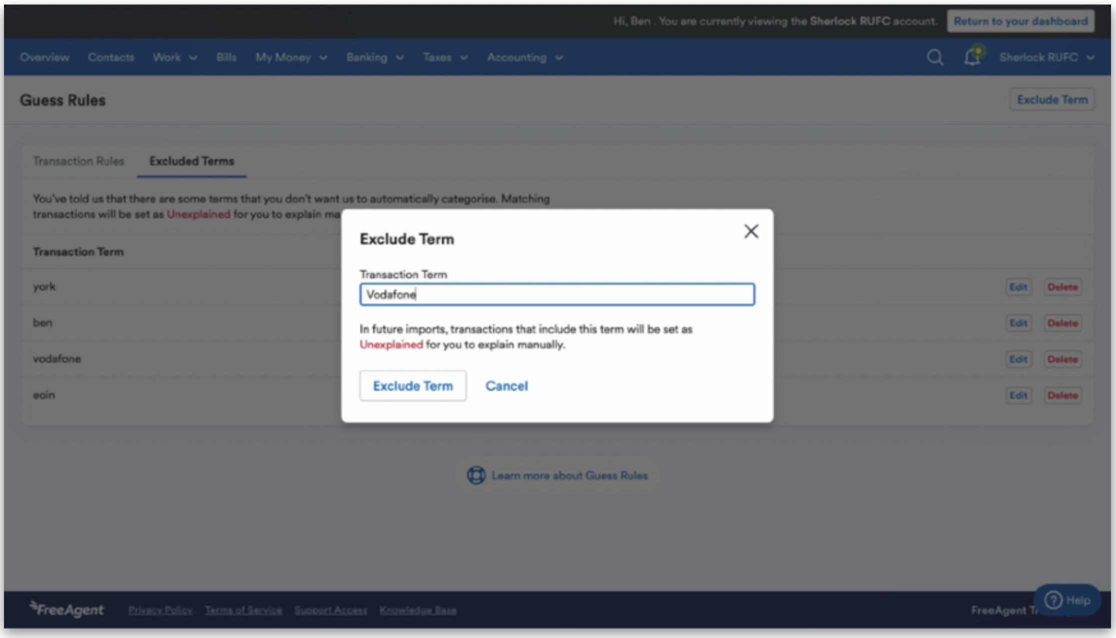
You can manage the individual rules by toggling them on and off.



Guess rules and Guess explanations should help you operate efficiently when it comes to the day-to-day bookkeeping inside your client's FreeAgent account. However, you may wish to navigate to the 'Excluded Terms' section to add any transactions that you don't want Guess to try to explain. To do this, navigate to the '**Excluded Terms**' tab and select '**Exclude Term**' at the top-right.



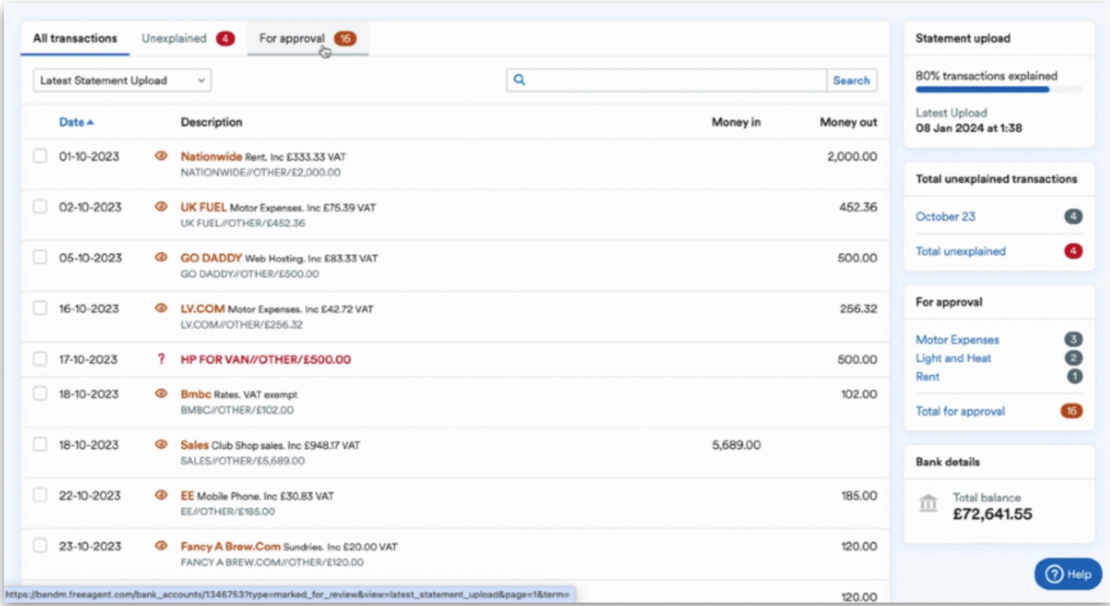
Next, enter the term you would like to exclude in the pop-up window. This will ensure that Guess ignores these terms. The term you enter is not case-sensitive or phrase sensitive, meaning that it should always be picked up and left as unexplained within your client's account.



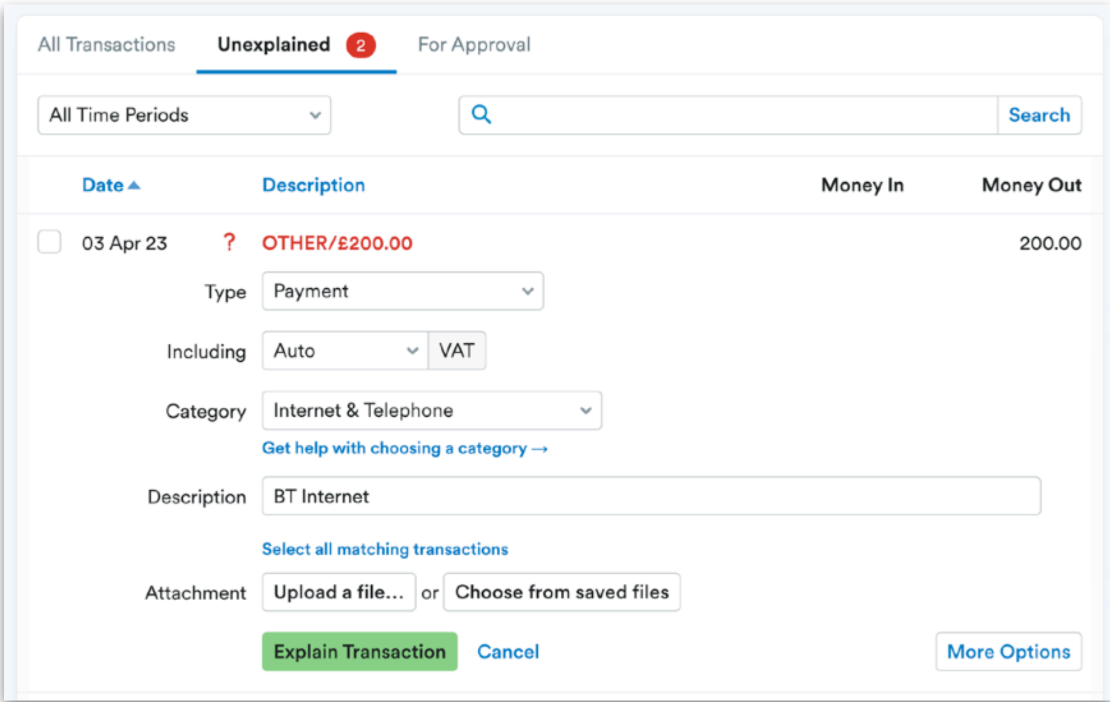
You can enter as many excluded terms as necessary and can update the list of terms at any time.

Explaining bank transactions

Regardless of how transactions are added to FreeAgent, explaining bank transactions is a simple process. Transactions can be filtered by state using the different tabs. For example, 'All transactions' or 'Unexplained'. Transactions can also be filtered by date, using the drop-down menu on the left.



Once you've selected a transaction to explain, FreeAgent will ask you to provide some information about it. You'll need to fill in the payment type, category, the appropriate rate of VAT and a description if necessary. Then select '**Explain Transaction**' to complete the process.

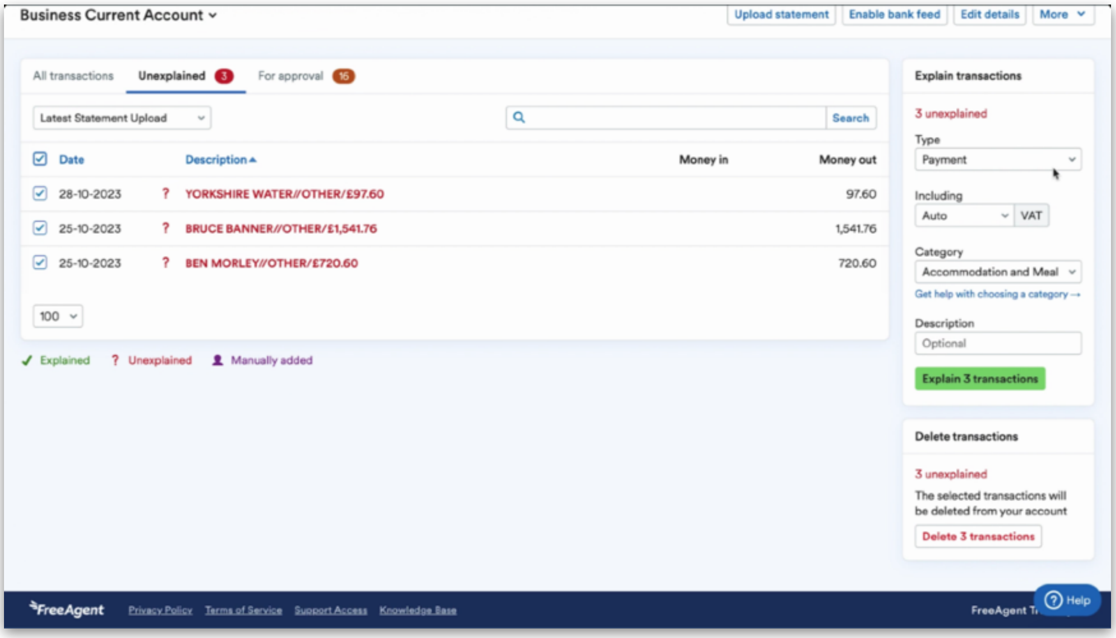


You'll notice that each transaction has a colour and icon. You can refer to the colour legend at the bottom-left of the screen to see the different transaction statuses and icons.

Explaining bank transactions is an important part of keeping your client's accounts up to date as it will post it inside their accounts and onto their VAT return, if applicable.

Explaining multiple bank transactions in bulk

To save time, you can also explain certain transactions in bulk in FreeAgent. To do this, tick the checkbox next to each of the transactions you would like to explain, select the relevant 'Type' and VAT rate for the transactions, and add a description in the 'Explain transactions' section to the right of the screen. Then, select '**Explain X transactions**' (where 'X' is the number of transactions you selected).

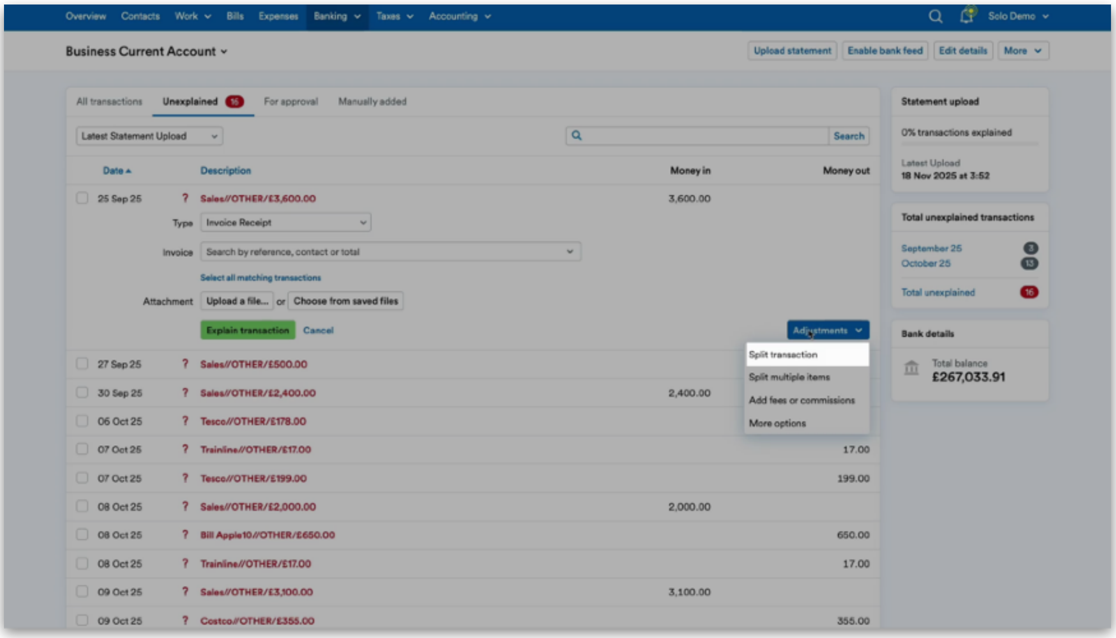


You can bulk explain to different P&L codes and VAT rates, as well as bulk explain transactions as transfers to different bank accounts or payments to and from the Director Loan Account. However, please note that you cannot bulk explain transactions as capital assets, as you need to individually enter a useful life for an asset.

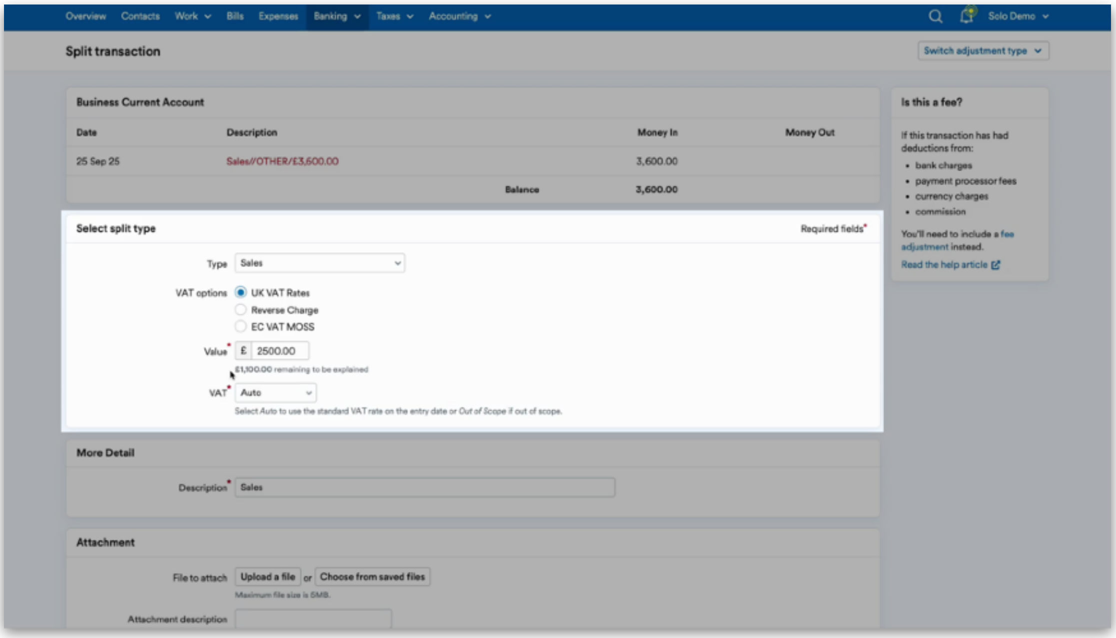
Splitting transactions

If a transaction has had charges deducted prior to receiving the money or if a transaction needs to be split between a few different nominal codes, then you can split the transaction in FreeAgent.

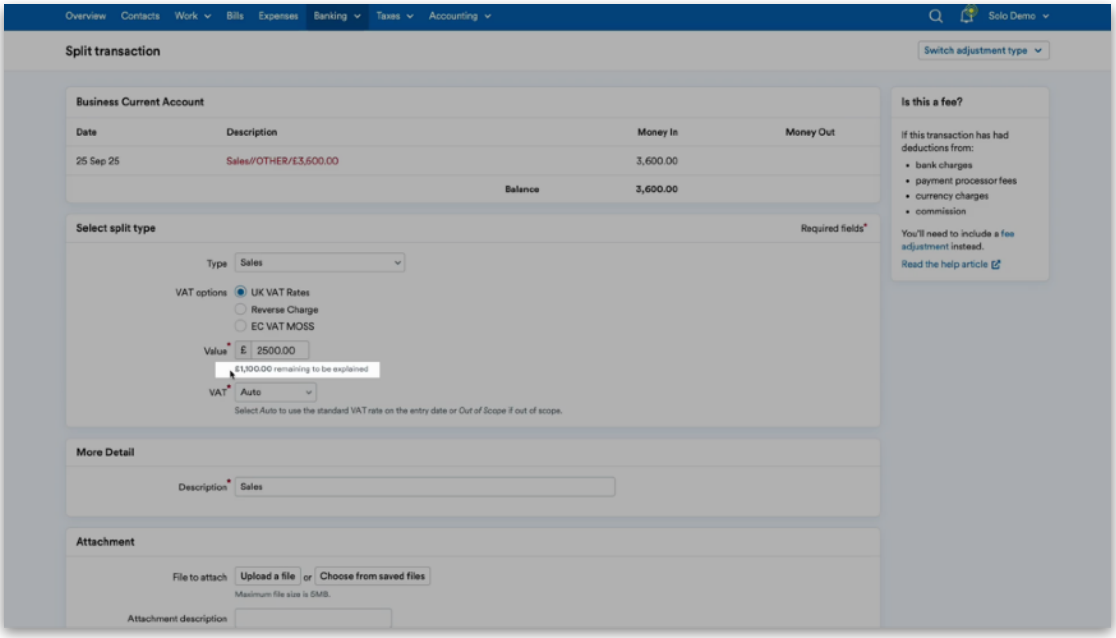
To do this, choose the transaction you would like to explain. Then, navigate to the '**Adjustments**' drop-down menu and select '**Split transaction**'.



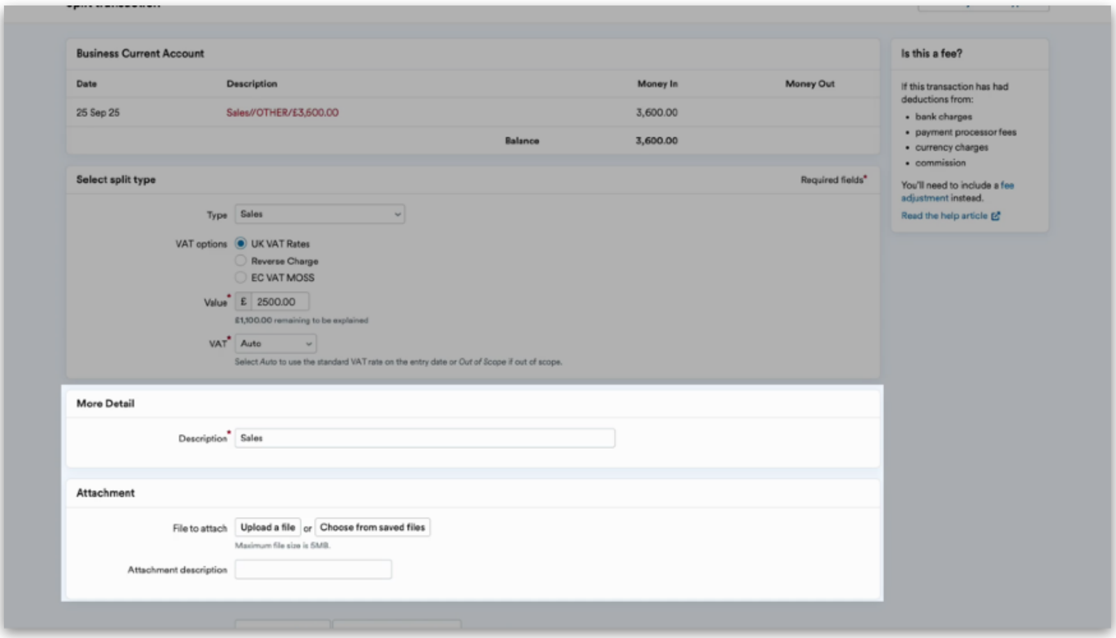
Under '**Select split type**', you can select the Type, VAT option and the split value you want to assign.



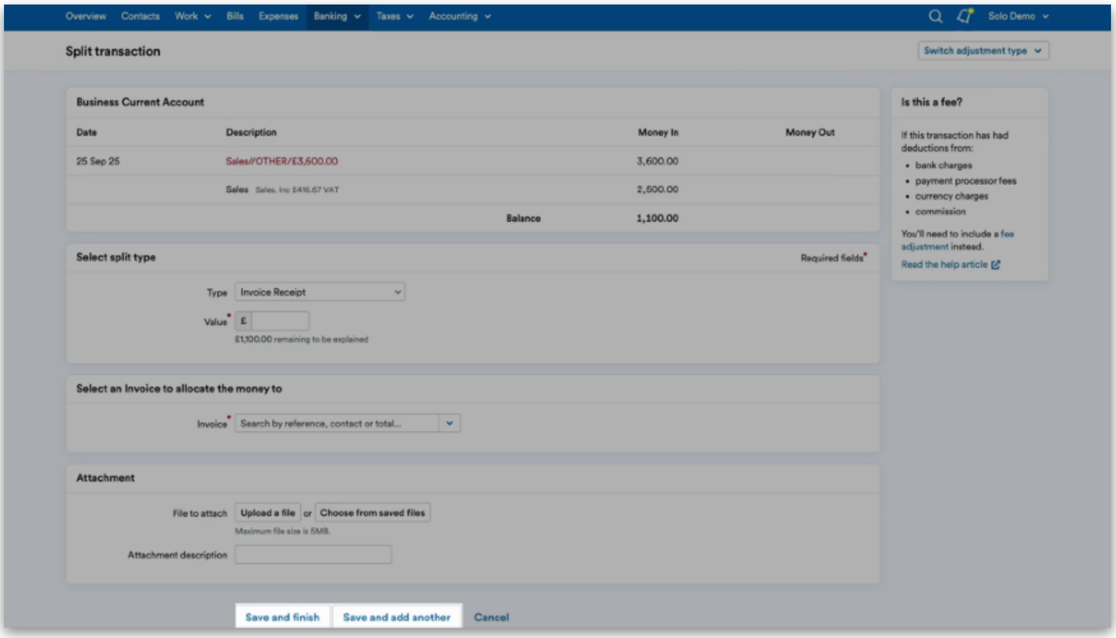
Under the value you have assigned, you'll see the amount that is remaining to be explained.



In the 'More Detail' section you can assign the category and the description. You can also link this to a project and attach an item to the split of the transaction.

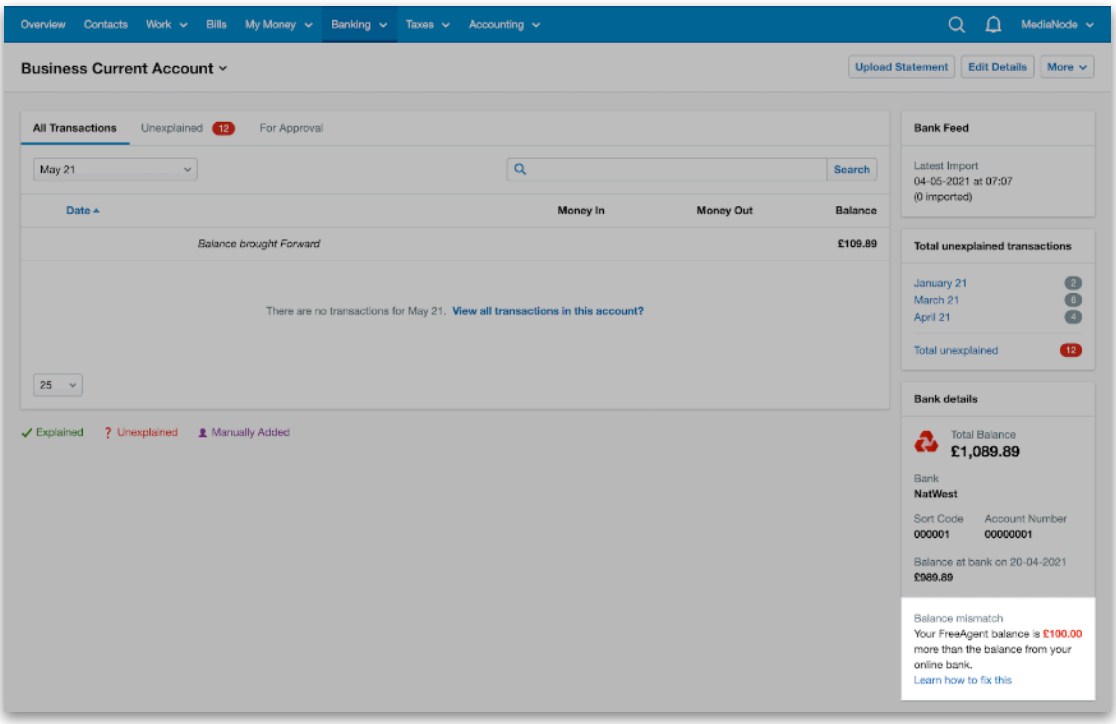


You can keep splitting the transaction into further additional splits by selecting ‘**Save and add another**’ until you have split it the required amount of times, and then select ‘**Save and finish**’.



Balance at bank

If your client decides to use an Open Banking bank feed to manage the input of transactions into their FreeAgent account, they will also receive a balance mismatch alert in the ‘Bank details’ section in the bottom-right of the banking area when the balance of the bank account in FreeAgent doesn’t match the balance of their actual bank account.

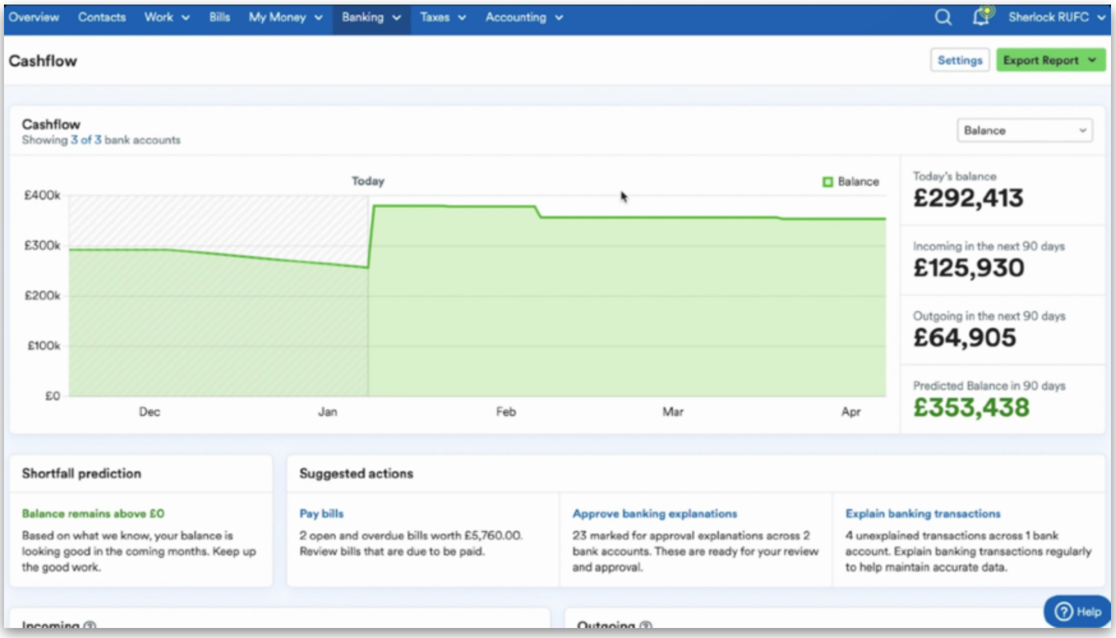


The balance mismatch alert will also highlight exactly which day the balances started to differ. Your client can then do a quick bank reconciliation exercise by navigating to the highlighted date and correcting any mistakes, such as accidentally deleted transactions or manual transactions added in error.

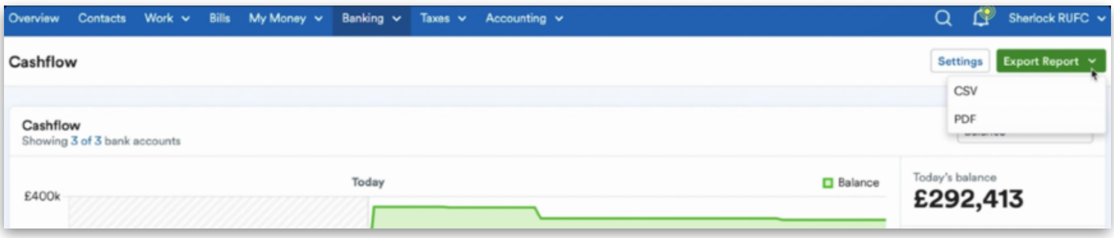
The Cashflow report

The Cashflow report is a 90-day forecasted projection. It's important to note that the 'Cashflow' panel on the Overview screen in FreeAgent is different to the Cashflow functionality and only shows historical cashflow.

To access the Cashflow report, select the '**Banking**' tab and then '**Cashflow**' from the drop-down menu.

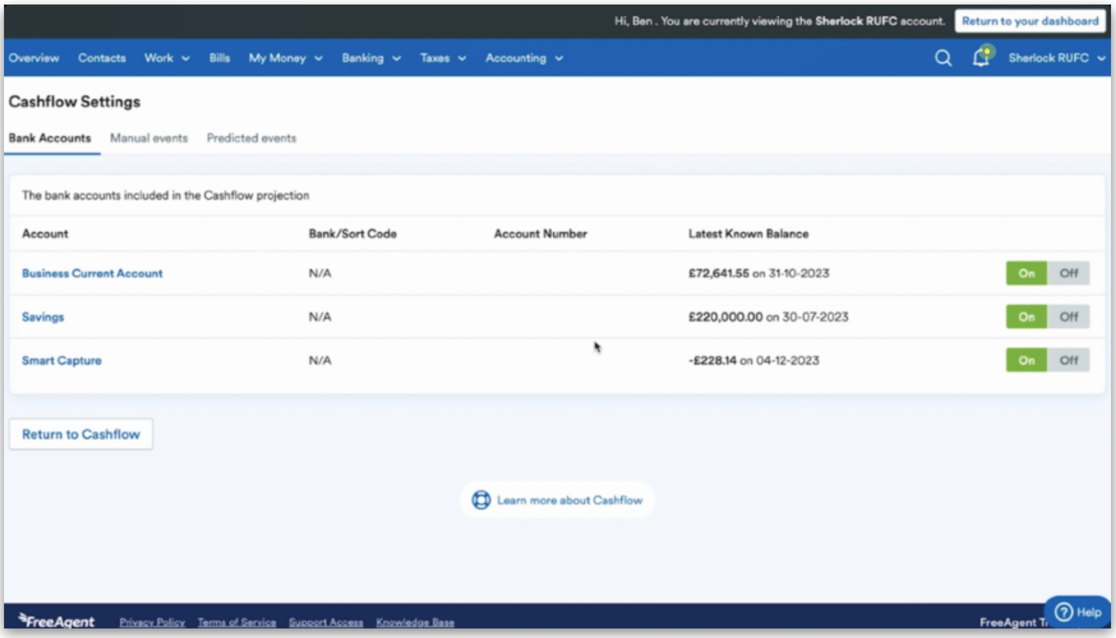


This report can be exported as a CSV or PDF and can be managed by selecting '**Export Report**' in the top-right corner of the Cashflow area and selecting the relevant file format from the '**Export Report**' drop-down menu.



FreeAgent calculates the money coming in and going out of your client's business across a 90-day window to provide a measure of business health and to show you and your client a projected future balance. To perform the calculation, FreeAgent uses data from other areas of your client's account, including your bank accounts, invoices, bills, VAT returns, and payroll.

You can customise the data that FreeAgent displays in the Cashflow report by selecting '**Settings**'.

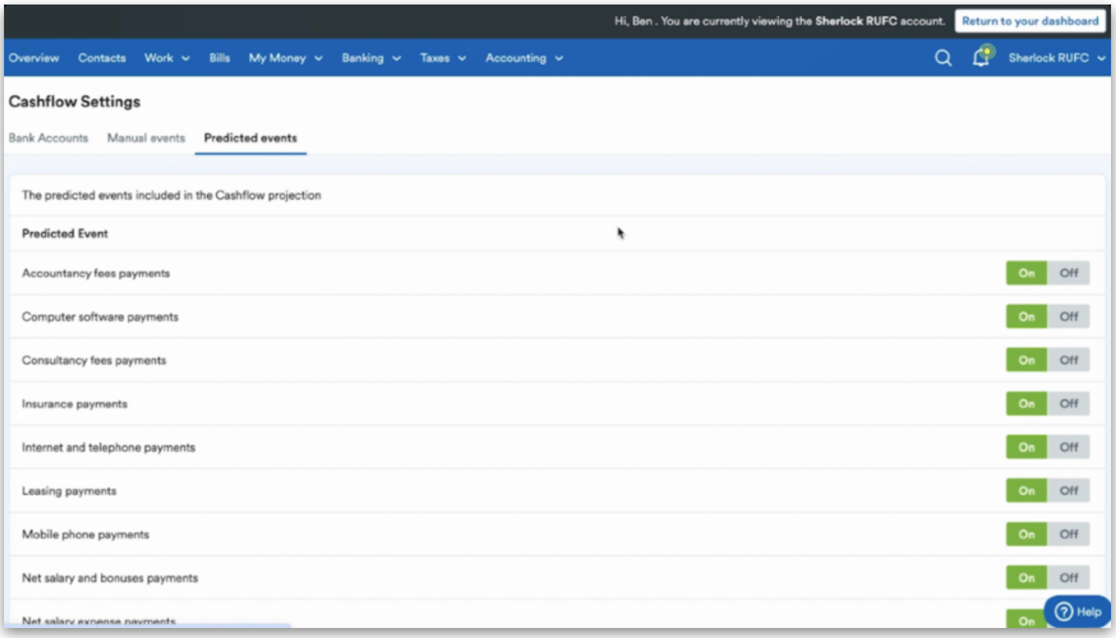


You can toggle on or off any personal accounts, credit card accounts or foreign currency accounts depending on whether you want them included in the Cashflow forecast.

This means, for instance, if you've got something like a loan account that doesn't have a bearing on your cash position because you pay it through your main bank account, you can turn it off, and it won't throw out your Cashflow projection.

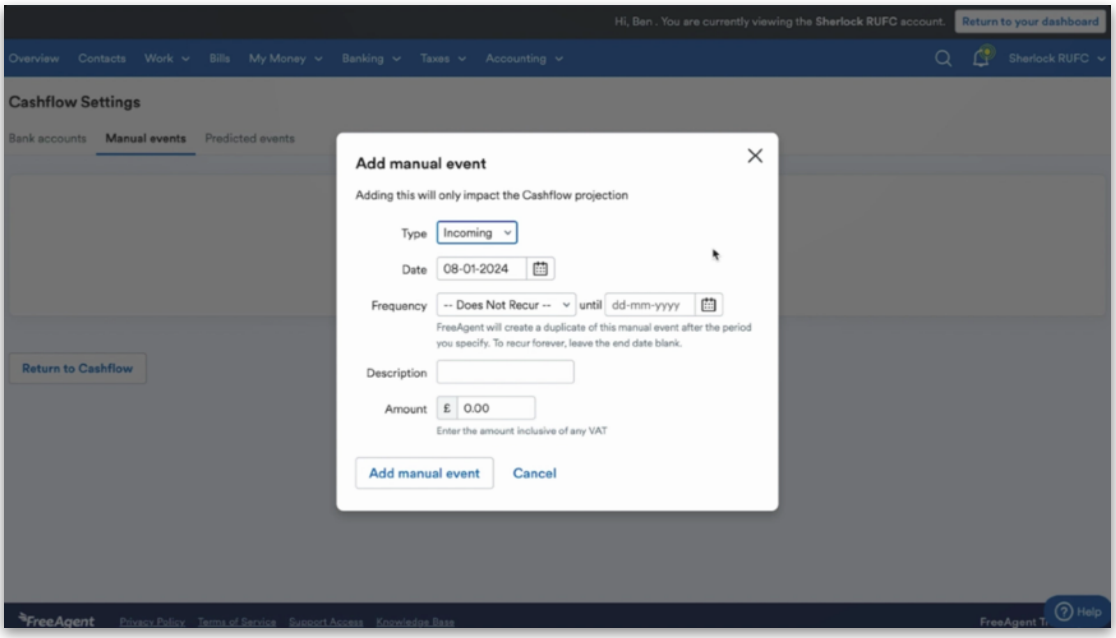
Once you've chosen these settings, select 'Return to Cashflow' and the projection will be updated accordingly.

Predicted events are transactions that come into the banking section with the same description and are consistently explained with the same explanations consecutively for 90 days. FreeAgent will recognise these transactions and include them in the cashflow calculations.



You can turn predicted events on and off per the different categories used to explain bank transactions. This gives you more control over what's included in the Cashflow report.

Anything that hasn't been captured by the 'Predicted events' can be added as a manual event in the 'Manuel events' tab. This can be for recurring transactions or one-off transactions.



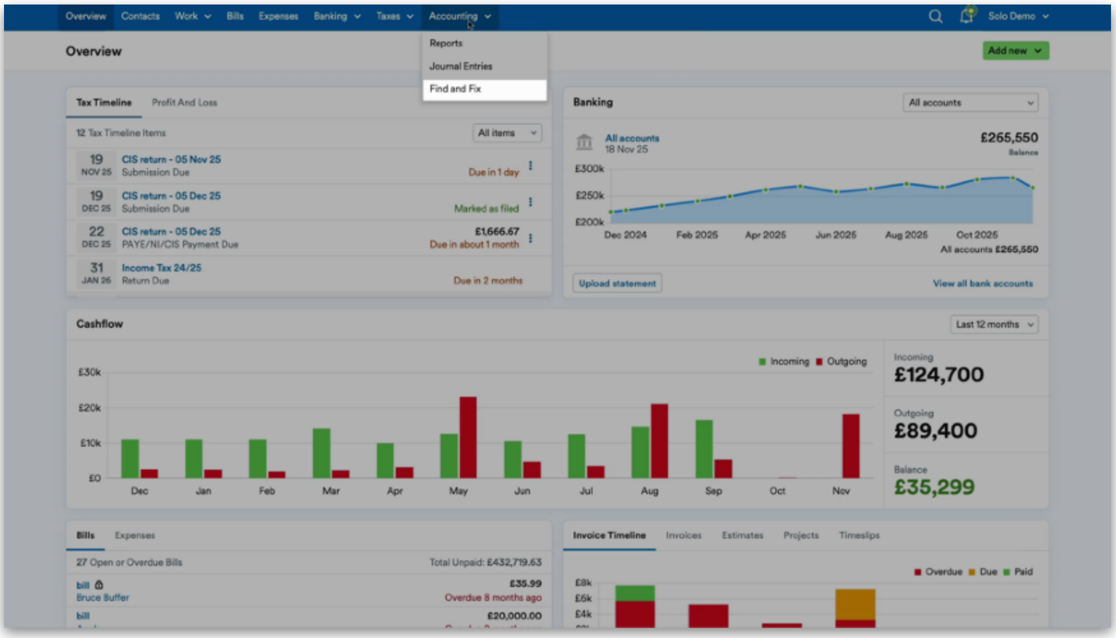
4. Find and Fix

FreeAgent now has a bulk categorising tool for bank transactions, out-of-pocket expenses and bills.

You can fix up to 100 transactions at a time and change the accounting category, VAT rate, and description of those items.

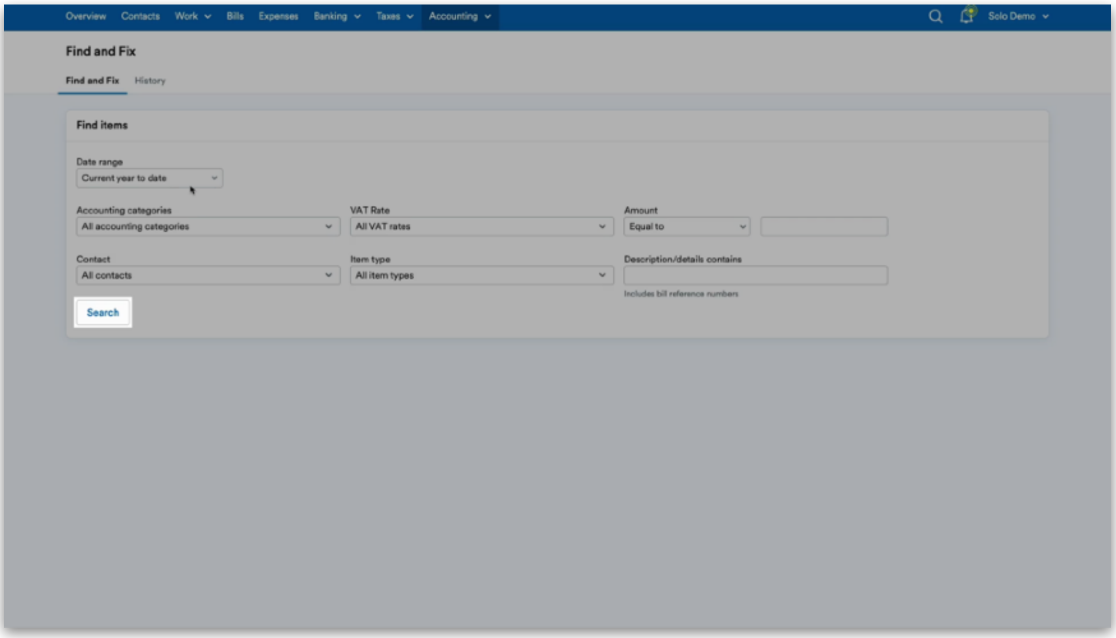
Your clients must have a minimum of level 8 access to their FreeAgent account to use this feature.

In your client's FreeAgent account, navigate to the '**Accounting**' tab and select '**Find and Fix**'.



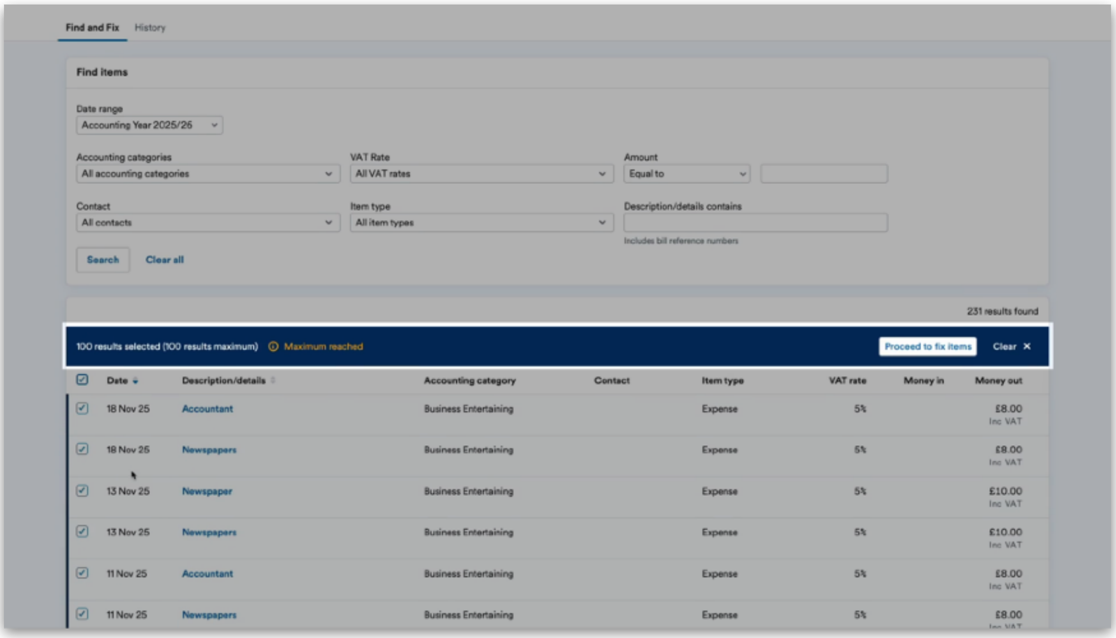
In the 'Find items' section, you can filter by date range, accounting category, VAT rate, amount, contact, description and item type.

Select ‘**Search**’ to search for items with your chosen filters.

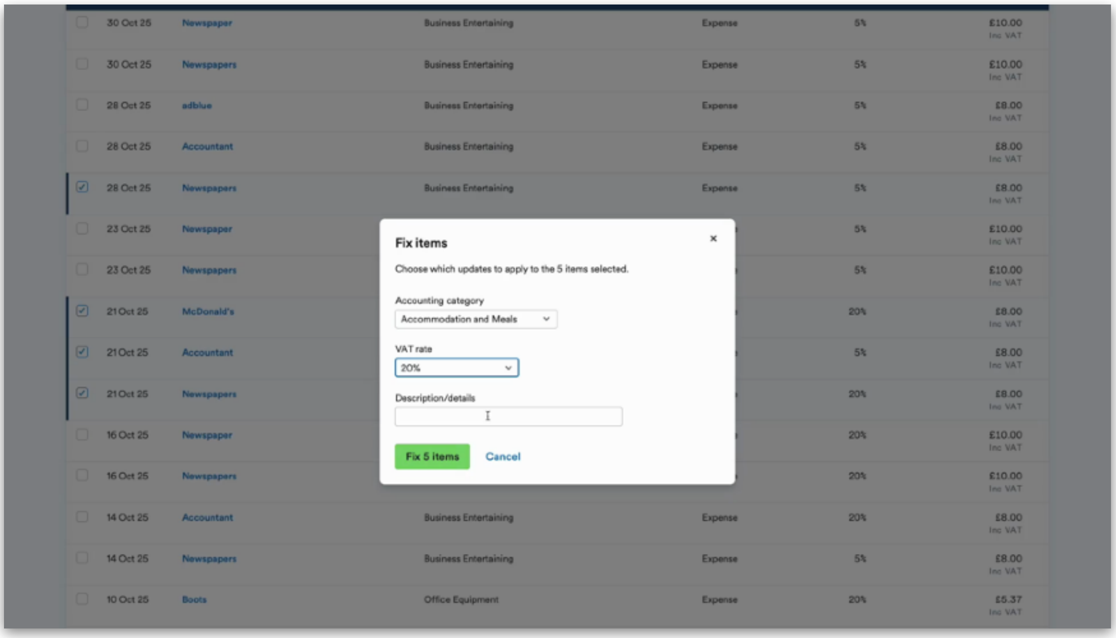


You can see up to 100 items per page. If a bill has multiple line items, each line item will appear as a separate line in the results. If you want to select all items on that page, select the box in the top-left corner. Alternatively, you can manually select the individual items you want to change by clicking on the box beside each line item.

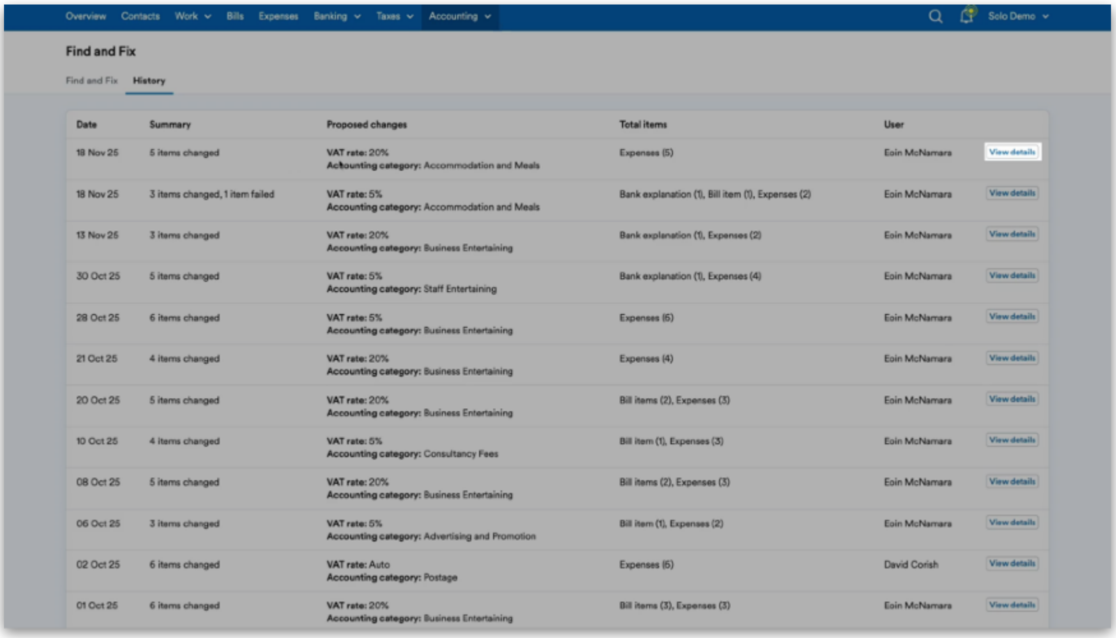
Select ‘**Proceed to fix items**’ above the table.



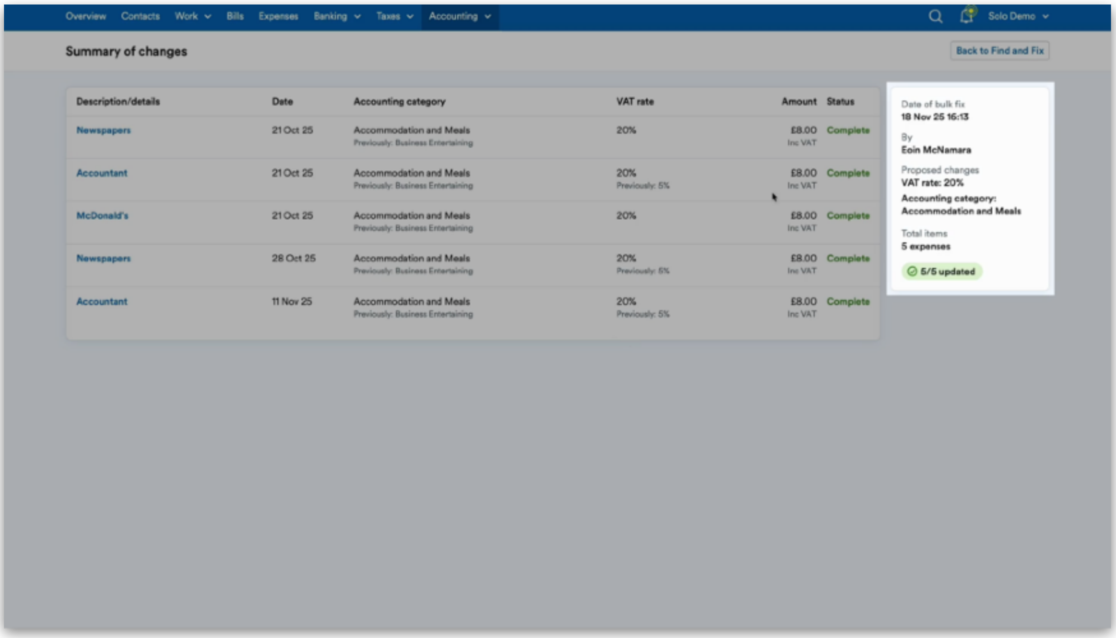
Find and Fix will allow you to select a change to accounting category, VAT rate and description to be applied across all of the selected transactions. If you don't wish to change one of these attributes, leave it blank or select '**No change**'. Then select '**Fix items**'.



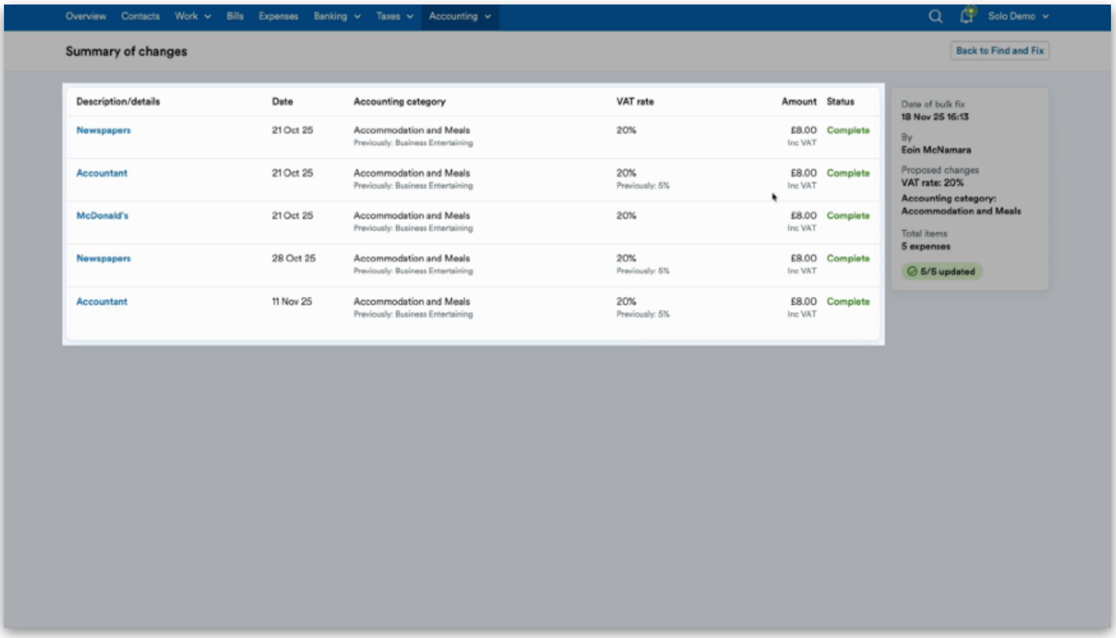
When the fix has been processed, it will appear in the 'History' tab. The most recent fix will be the first entry on this list. You can view the number of changes, proposed changes, total items and the user who completed the fix. To view the detailed report of changes, select '**View details**'.



The box on the right-hand side of the page shows you how many transactions were fixed.



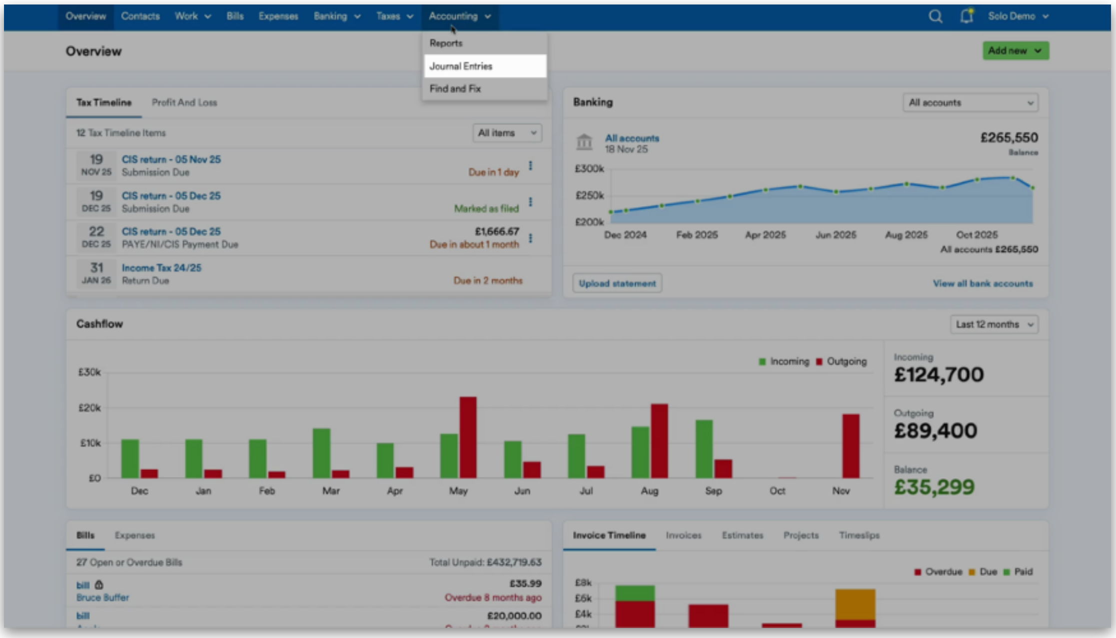
The table on the left shows the detailed changes to the transaction. If there was a change, it will not state what it was prior to the change. It lists the description, date, accounting category, VAT rate, amount and status. If the fix failed for any items, you can select '**Error details**' to see why the fix wasn't able to be made.



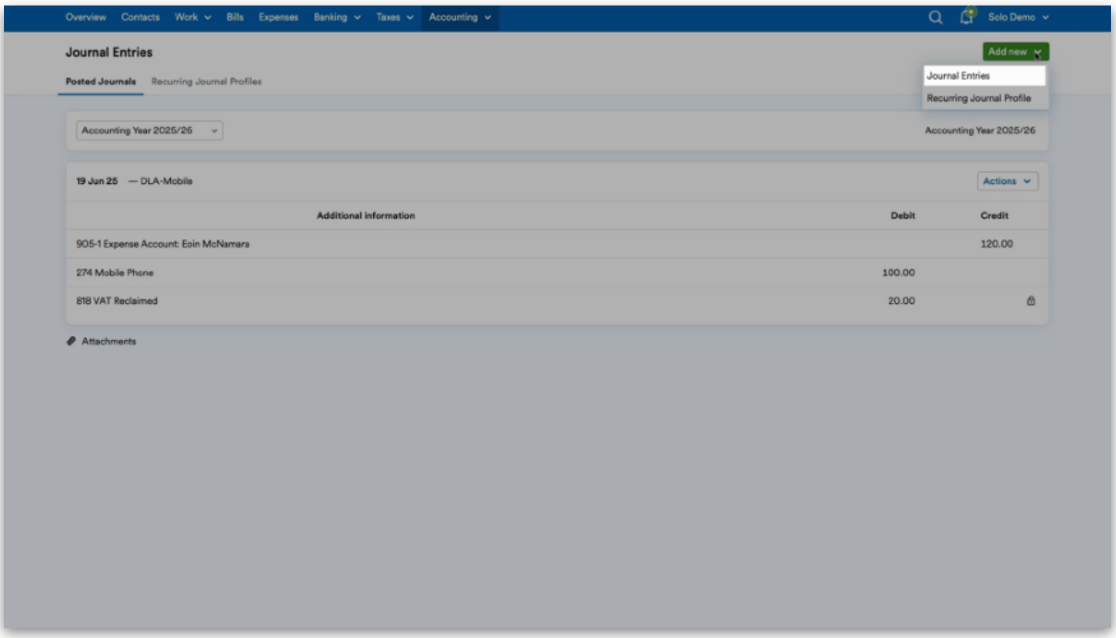
5. Recurring Journal Entries

Attachments

You can now attach files to opening balances and journal entries in FreeAgent. Navigate to the '**Accounting**' tab and select '**Journal Entries**'.



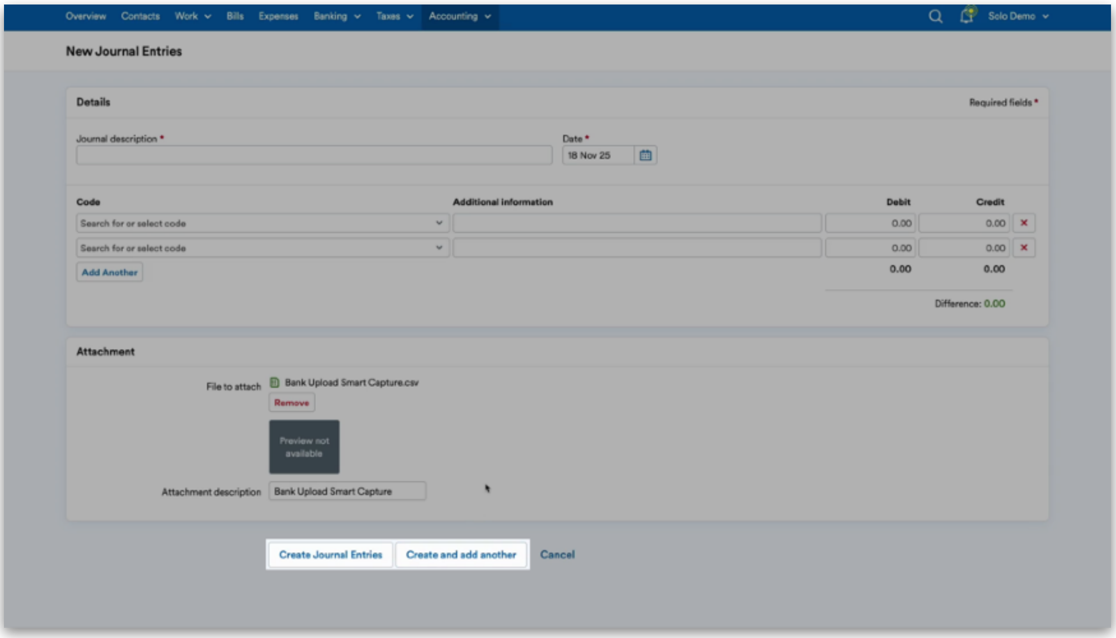
If you're creating new journal entries, select '**Add new**' then select '**Journal Entries**'.



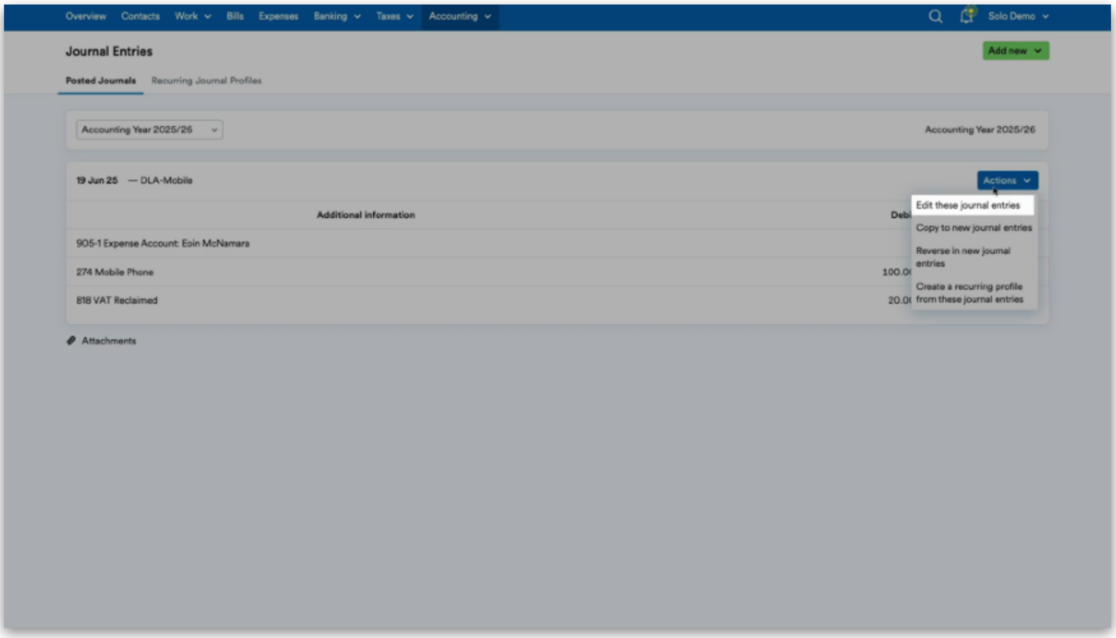
Fill in all of the information for the journals in the 'Details' section.

The 'Attachment' section allows you to attach documents from your computer by selecting '**Upload a file**' or you can attach a file from the client's Files area by selecting '**Choose from saved files**'.

Once the journal entries are complete, select '**Create Journal Entries**'. If you'd like to add another journal, select '**Create and add another**'.



If you want to add a file to an existing journal entry, select the '**Actions**' drop-down menu next to the relevant entry and select '**Edit these journal entries**'.

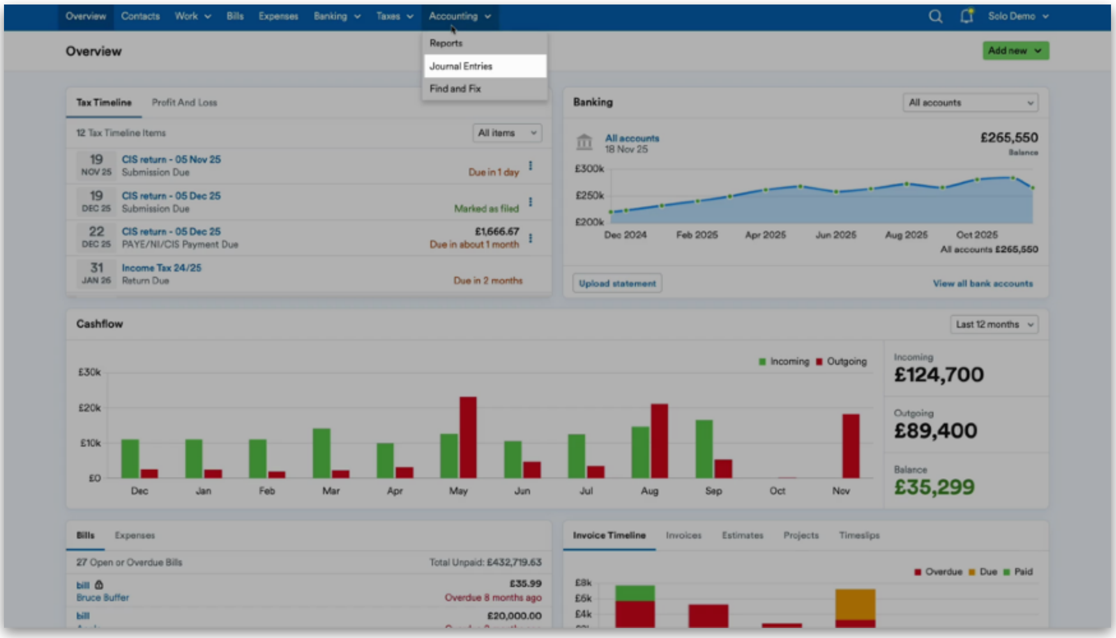


From here you can follow the same process within the Attachment section.

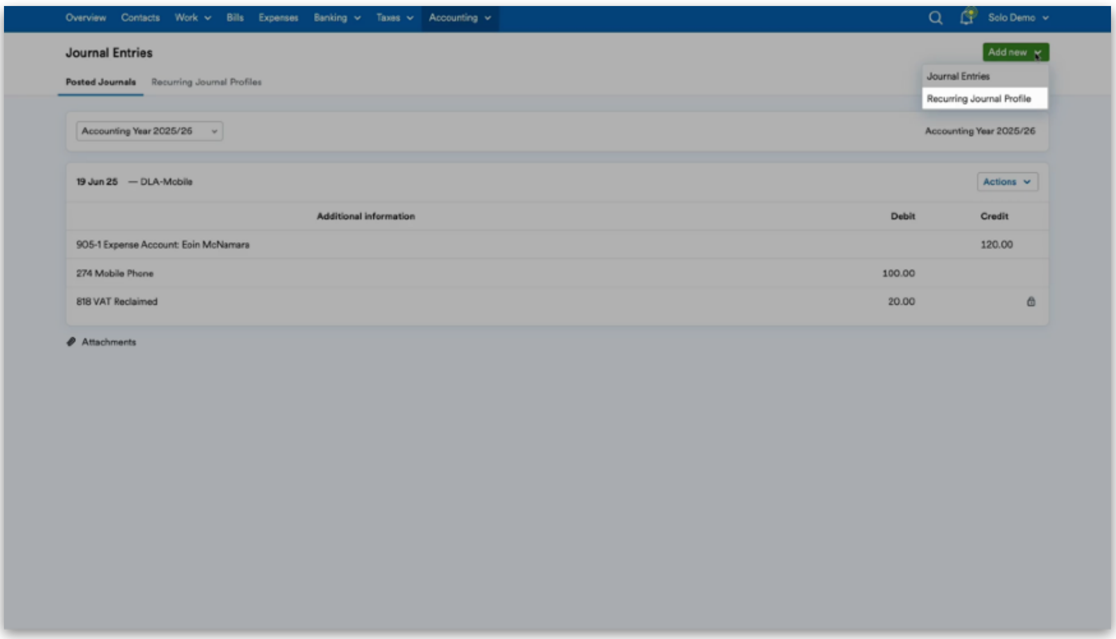
Recurring journal profile

You can now add recurring journal entries to your client's FreeAgent account.

Navigate to '**Accounting**' and select '**Journal Entries**' from the drop-down menu.

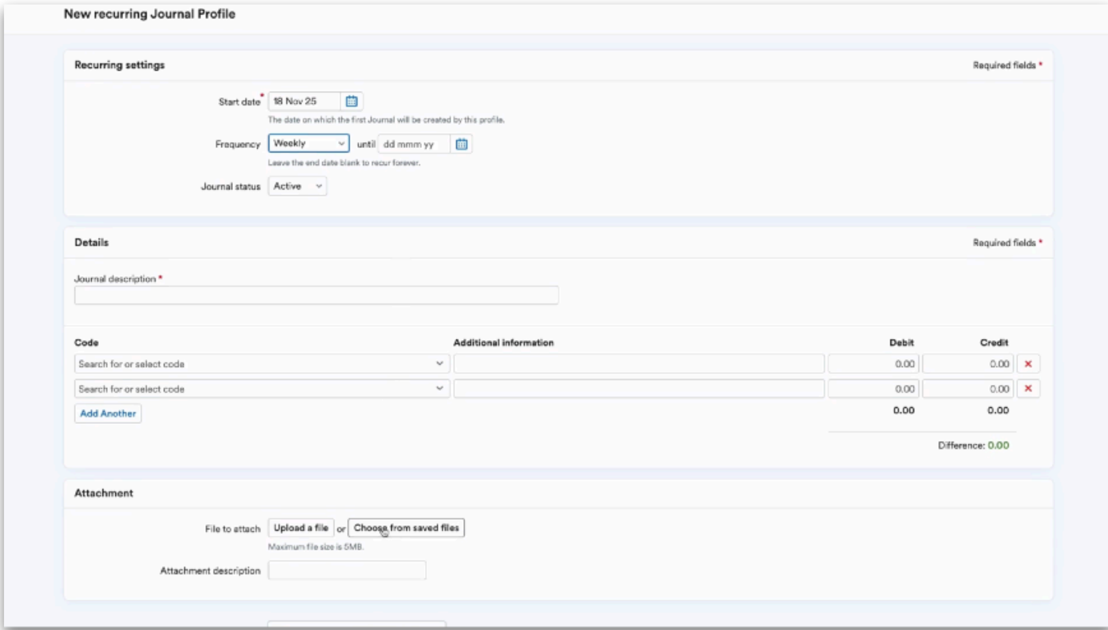


If you want to create a new recurring journal profile from scratch, select '**Add new**' and select '**Recurring Journal Profile**' from the drop-down menu.



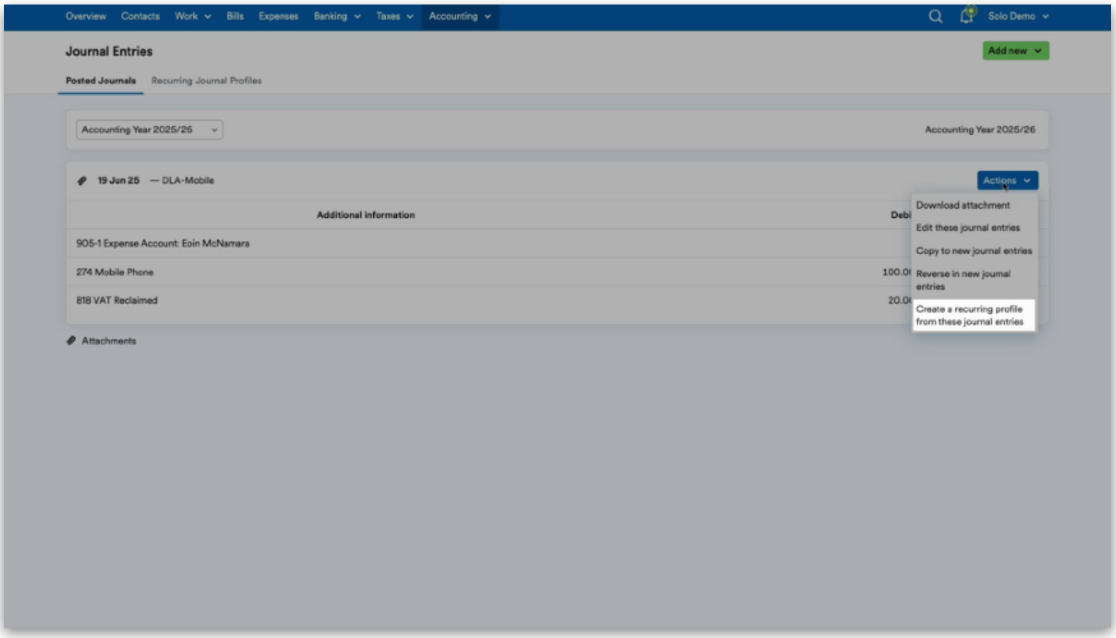
In the ‘Recurring settings’ section, enter the start date of when you want the first journal entry to be created. In the ‘Frequency’ box, select how often you want to post this journal. In the ‘until’ box, select a date when you want the journal entry to stop posting; if this is left blank, it will recur forever.

Fill in the ‘Details’ section to create the recurring journal entry, and you can also add an attachment at the bottom in the ‘Attachment’ tab. The attachment will be added to each set of journals created by the profile.



Then, select ‘**Create recurring Journal Profile**’ at the bottom of the screen to begin the recurring journal profile.

If you want to use existing journal entries to create a new recurring journal profile, navigate to the ‘**Actions**’ drop-down menu next to the relevant entry and select ‘**Create a recurring profile from these journal entries**’.



From here you can follow the same process.

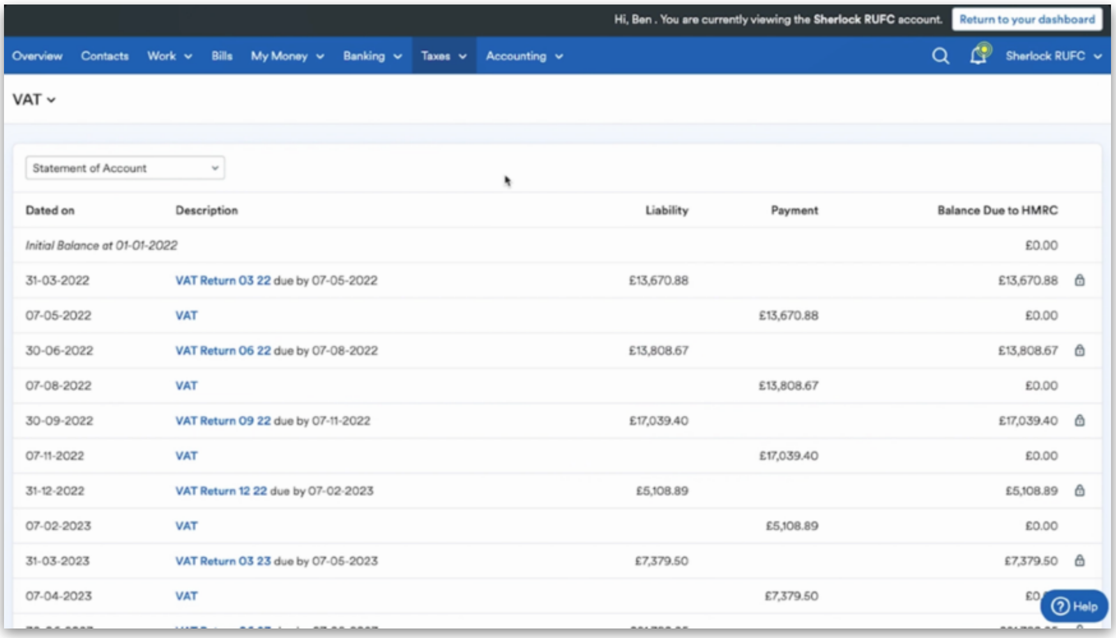
6. VAT

In this section, we'll discuss FreeAgent's VAT filing functionality. FreeAgent calculates tax liabilities in real time, based on the transactions in the account. With FreeAgent, you can easily file VAT, Payroll, Corporation Tax and, for sole traders and company directors, Self Assessment directly to HMRC. Payroll and the end-of-year process are covered in separate learning modules.

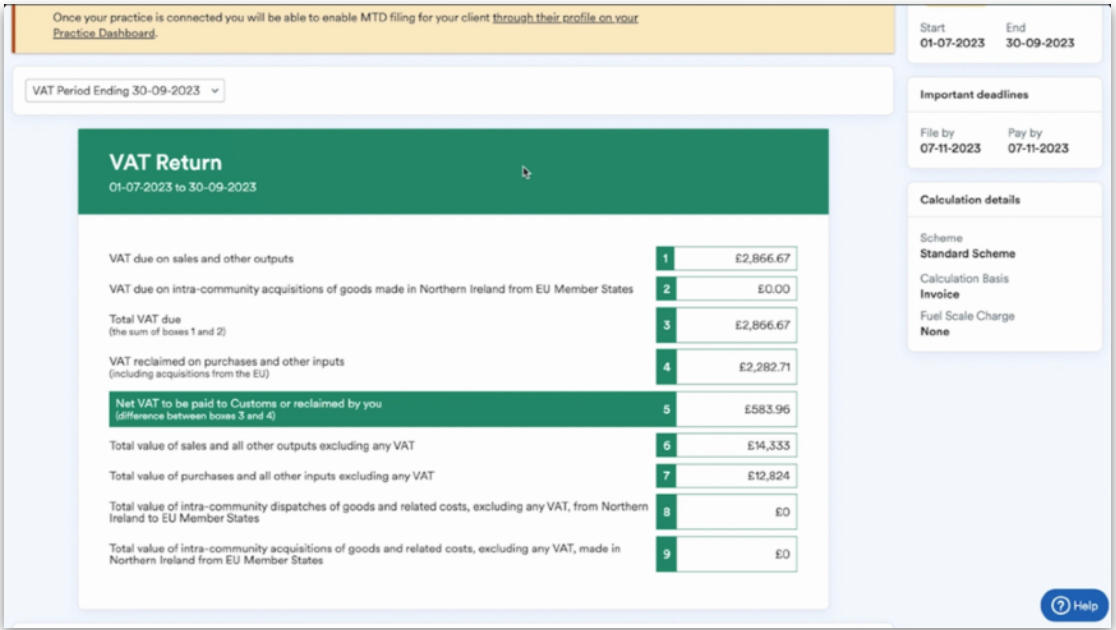
FreeAgent supports annual, monthly and quarterly VAT returns for both invoice and cash accounting, and the VAT Flat Rate Scheme.

Viewing a VAT return

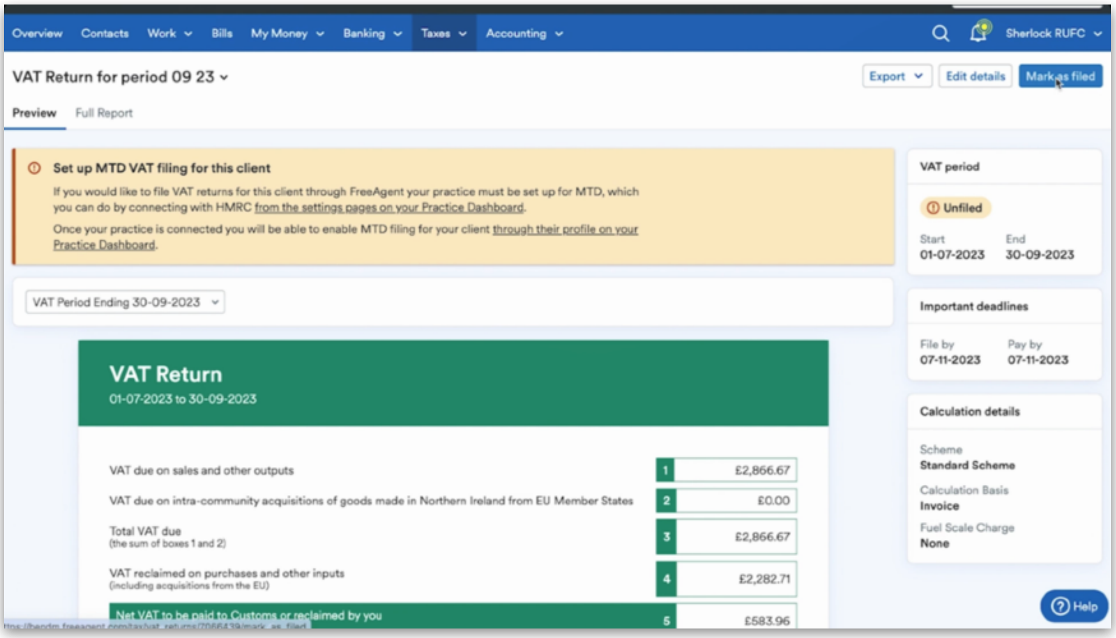
You can access the VAT area in FreeAgent by navigating to the '**Taxes**' tab at the top of the screen and then selecting '**VAT**' from the drop-down menu.



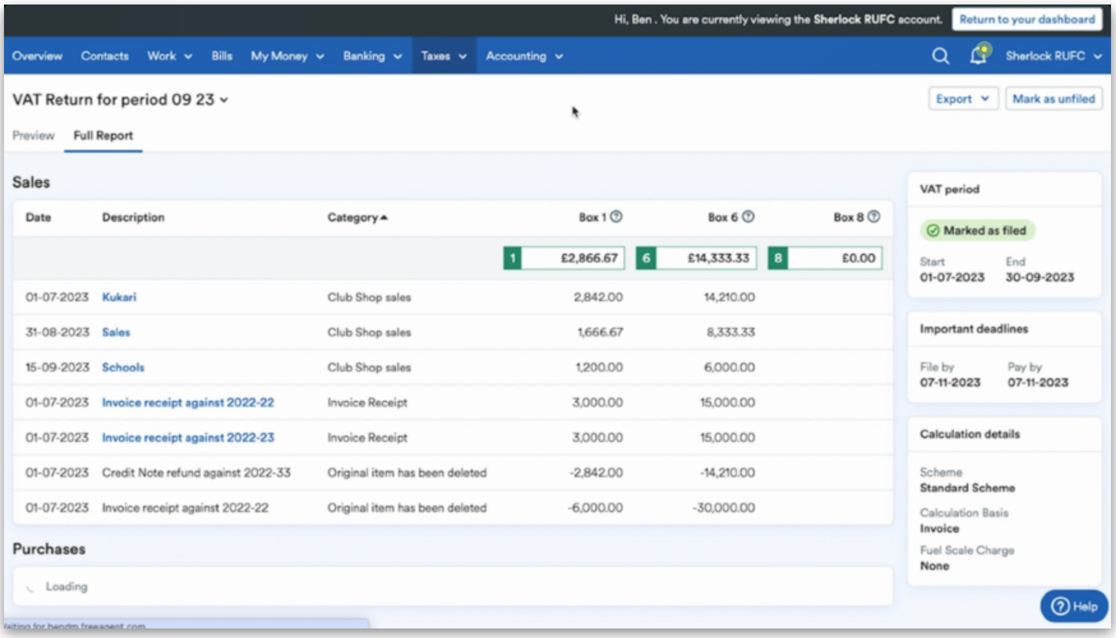
This view shows the standard return and what values are in each of the boxes. It also shows if the VAT return is filed or unfiled.



When a VAT return is filed, it will be locked and boxes 1-9 will no longer change if transactions are adjusted within that VAT period. You can mark a return as filed by selecting '**mark as filed**'.



The Full Report view shows you exactly how the boxes for this VAT return are made up.



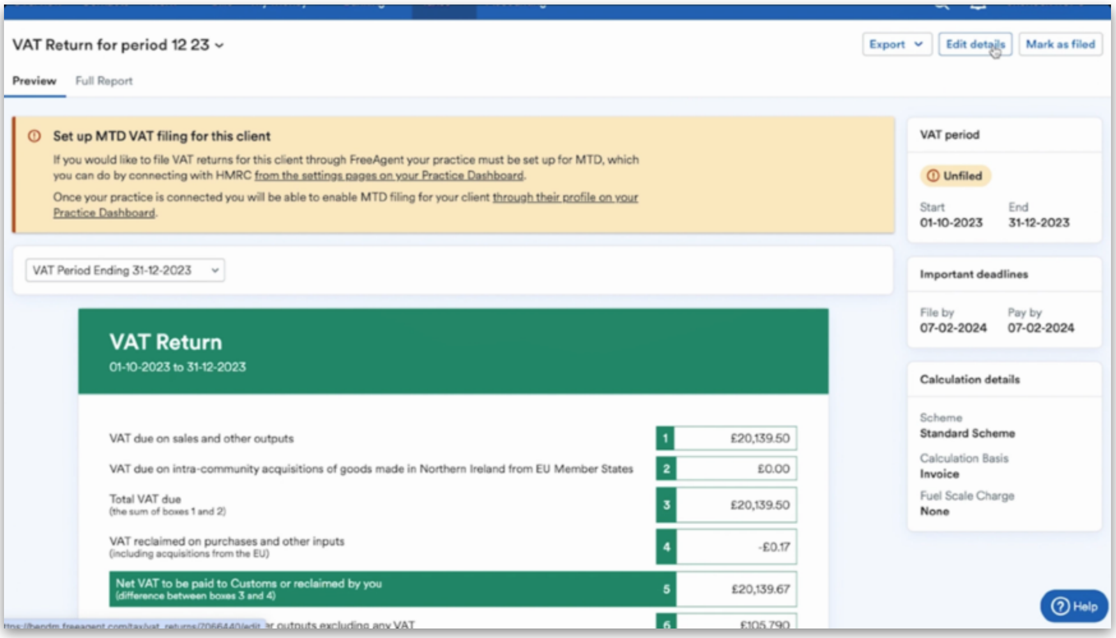
Each line item is a blue link that you can select to view the original transaction responsible for the posting on the return.

If a VAT return is filed and locked and you adjust the VAT on a transaction, for example from 20% to 0%, box 4 will not change to reflect the adjustment, as HMRC states that changes should be corrected and shown on the next open VAT return.

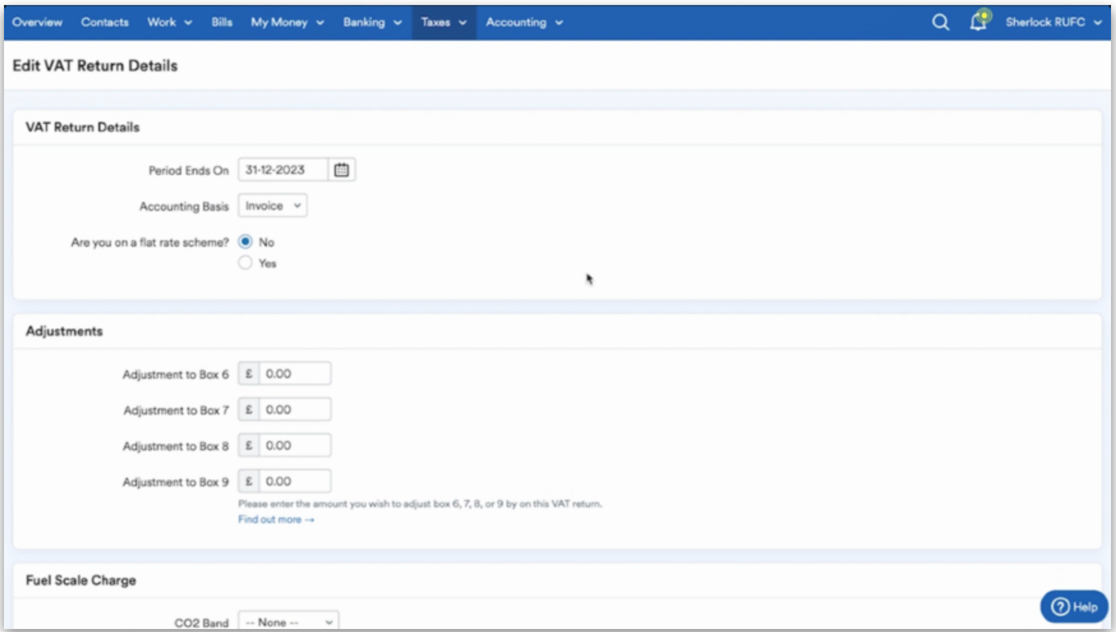
FreeAgent will also handle any missing transactions added late, or any duplicate transactions being deleted, by showing those corrections on the next open VAT return.

Making adjustments

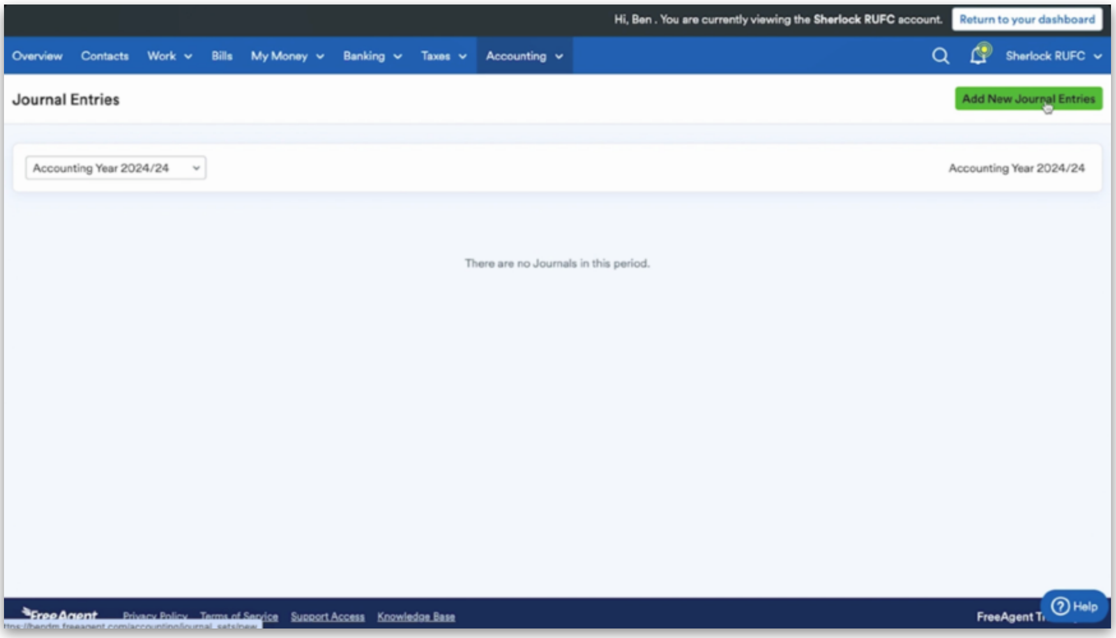
There may be manual adjustments that you need to make to a VAT return. To do this, navigate to the relevant open VAT Return that you'd like to adjust. In either the preview or the Full report view of the open VAT return, select '**Edit Details**' at the top-right of the screen.



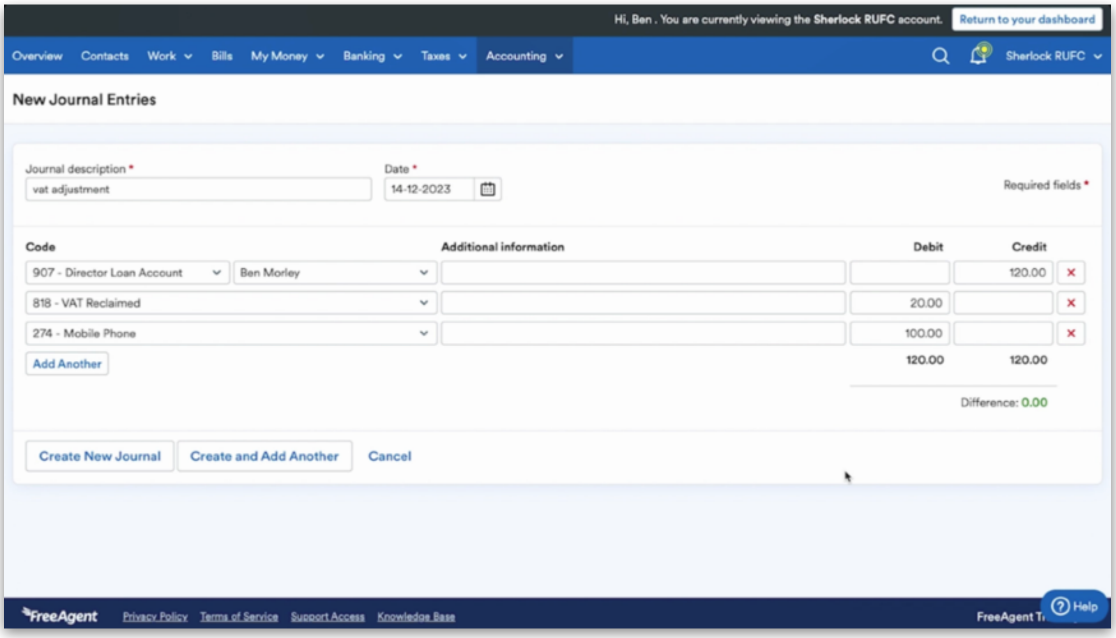
This is where boxes 6, 7, 8 and 9 can be adjusted using positive or negative transactions to increase or decrease the values.



Boxes 1 and 4 require a journal to show an adjustment. To do this, navigate to the 'Journals' area of your client's account via the '**Accounting**' tab and select '**Add New Journal Entries**'.



You'll need to date this journal to reflect the adjustment within the open VAT period. Dating the adjustment inside a VAT locked period will lead to an error message, as adjustments to boxes 1 and 4 cannot be posted in a VAT locked period.

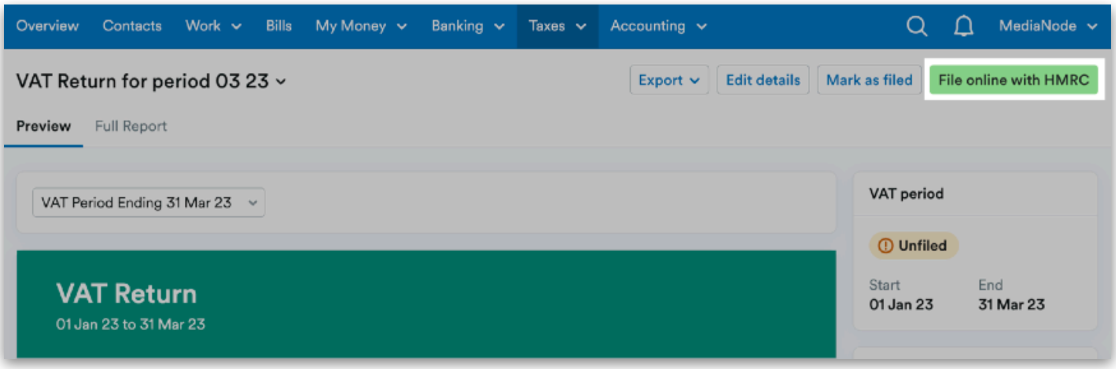


The nominal codes required to adjust boxes 1 and 4 are ‘819 - VAT Charged’ and ‘818 - VAT Reclaimed’. VAT requires its own line entry inside a journal. You can search for these codes by typing the code description or actual nominal code.

Filing a VAT return

Submitting a VAT return to HMRC on behalf of a client is a straightforward process once you’ve connected your agent services account to your Practice Dashboard.

Once you’re connected to HMRC for MTD and the VAT period has ended, ensure that your client’s transactions have been fully explained and check the full report view. Then, select ‘**File online with HMRC**’ to complete the submission process.

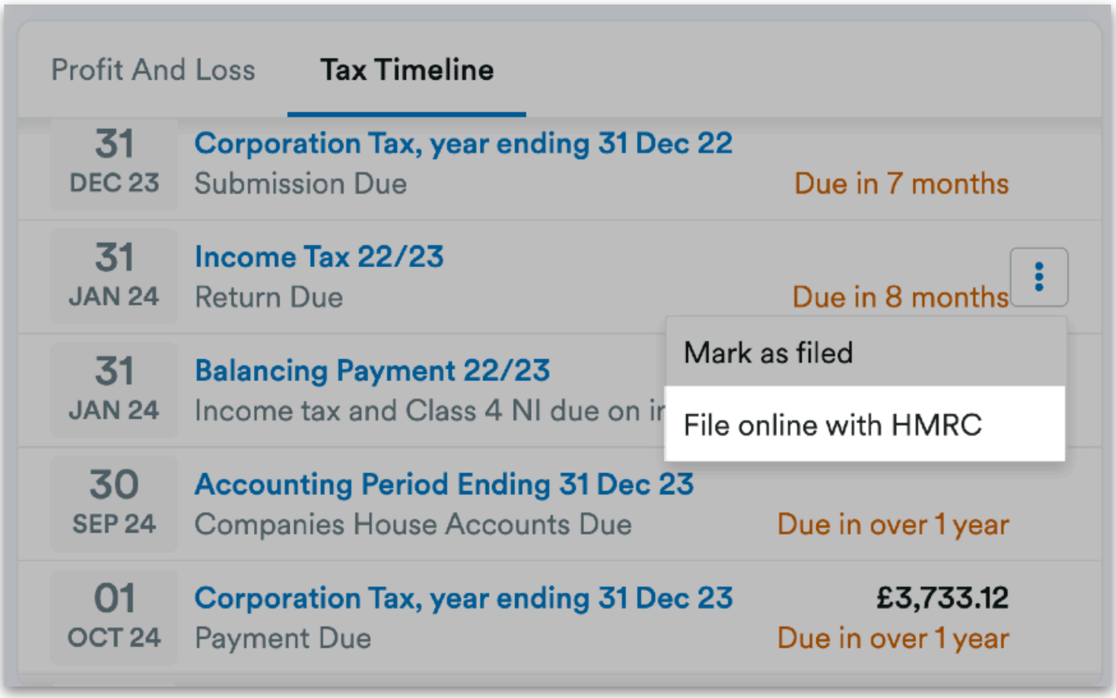


Tax Timeline updates

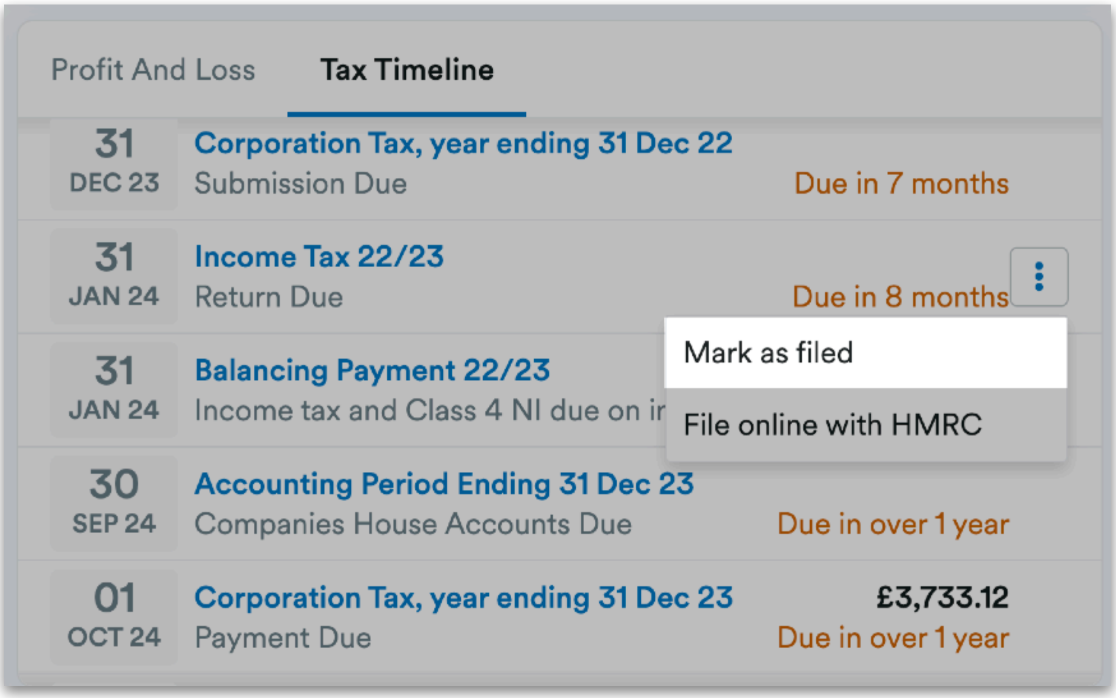
The Tax Timeline is visible to any users that have level 7 access or above. The Tax Timeline panel on the Overview screen is a calendar overview of the important tax dates and payments for businesses based on the accounting dates and VAT return dates in the VAT settings.

Items on the Tax Timeline will automatically update when something has been filed, marked as filed or paid off. You can also complete an item directly from the Tax Timeline.

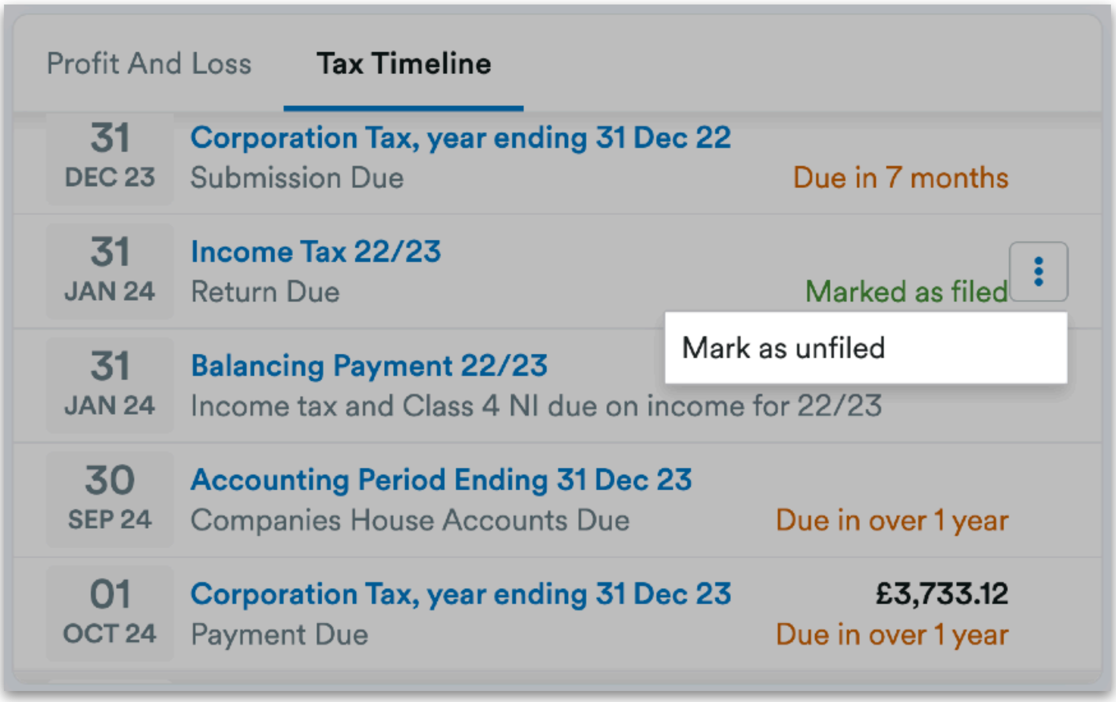
To file a tax return from the Tax Timeline, select the three dots to the right of the item and then select '**File Online with HMRC**' from the drop-down menu. This will take you straight to the submission page without having to navigate multiple pages.



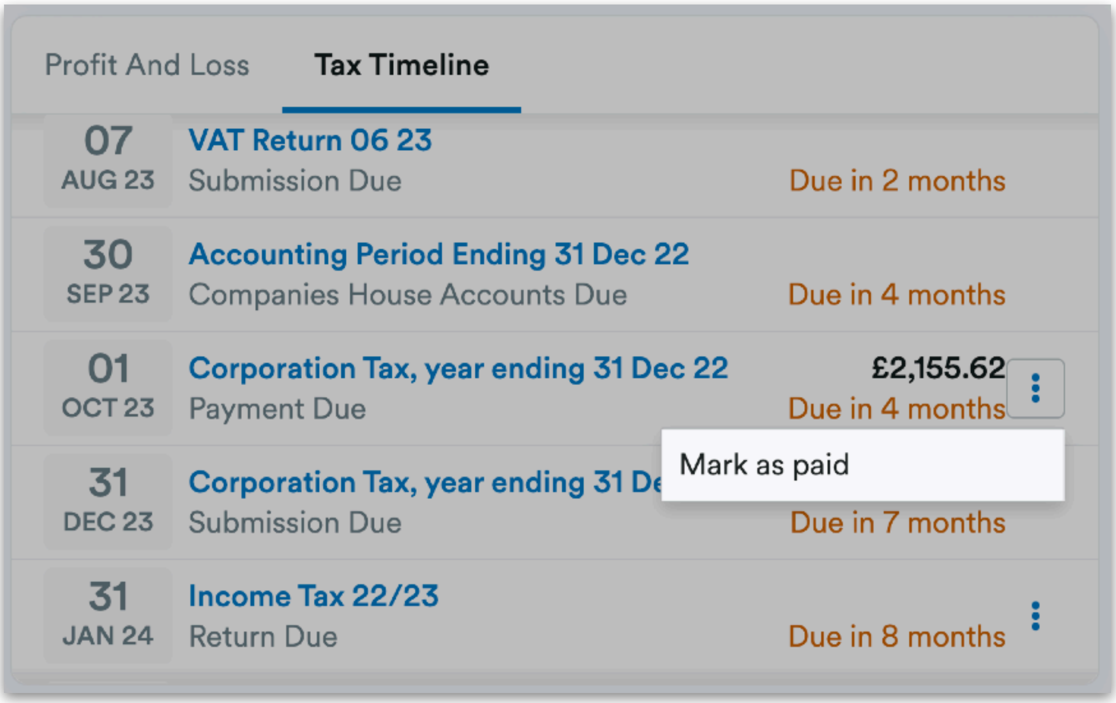
Alternatively, if you're filing the tax return outside of FreeAgent, you can mark it as filed on the Tax Timeline by selecting the three dots to the right of the item and selecting '**Mark as Filed**' from the drop-down menu.



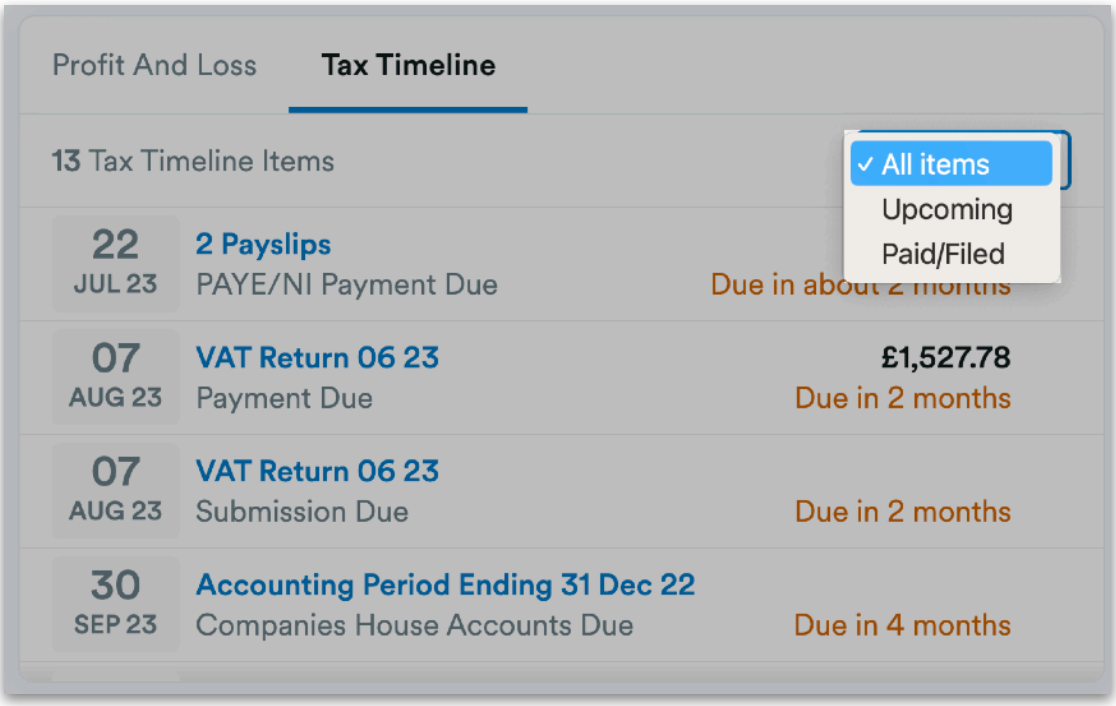
If you need to make any changes, you can mark it as unfiled by selecting the three dots to the right of the item and selecting '**Mark as Unfiled**' from the drop down menu.



To mark a tax liability as paid, select the three dots to the right of the item and select '**Mark as paid**' from the drop-down menu.



You can filter the Tax Timeline to view all items, upcoming items or paid/filed items using the drop-down menu at the top-right of the panel. This can help you get a more focused view of the tax obligations for you and the business and prioritise upcoming tasks.



You can also customise the item categories displayed on the Tax Timeline by following these steps:

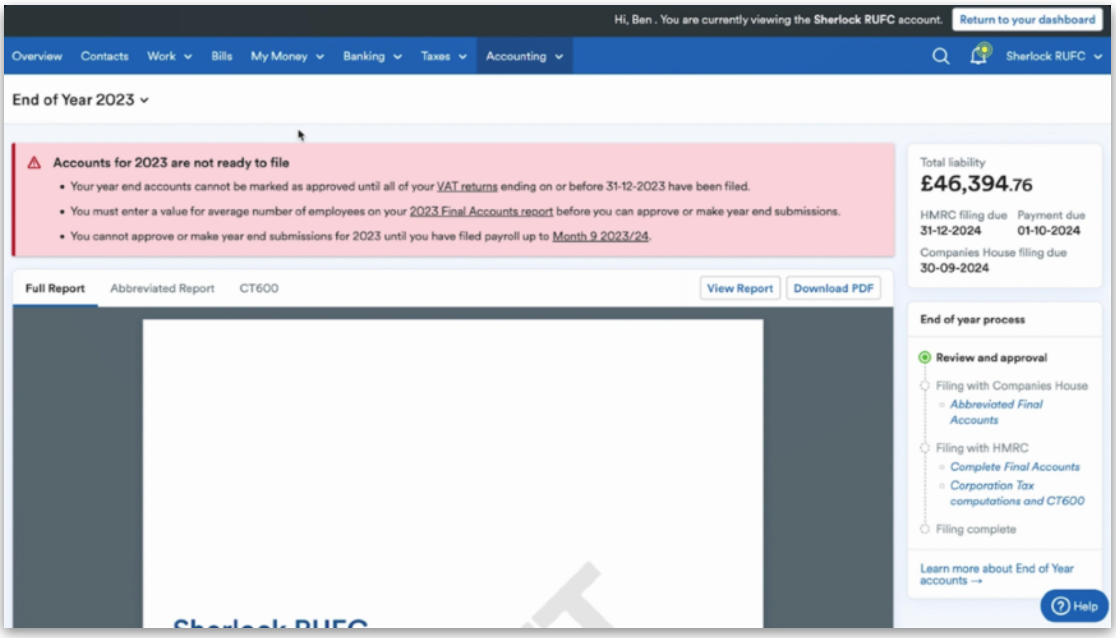
1. Click on your client's name from the drop-down menu in the top-right corner of the screen.
2. From the menu, select '**Settings**'.
3. In the settings menu, choose '**Tax Timeline Settings**'.
4. A list of tax items applicable to your client's licence type will appear. Next to each tax item, you will see a drop-down menu with the following options:
    - **Show with Tax Amounts**: Displays both the amount due and the due date for the return.
    - **Show without Tax Amounts**: Shows only the due date, without the amount due.
    - **Hide**: Removes the item from the Tax Timeline.

7. Reports and settings

In this section, we'll look at some of the reports available in FreeAgent and run through the settings you and your clients may wish to adjust.

End of Year

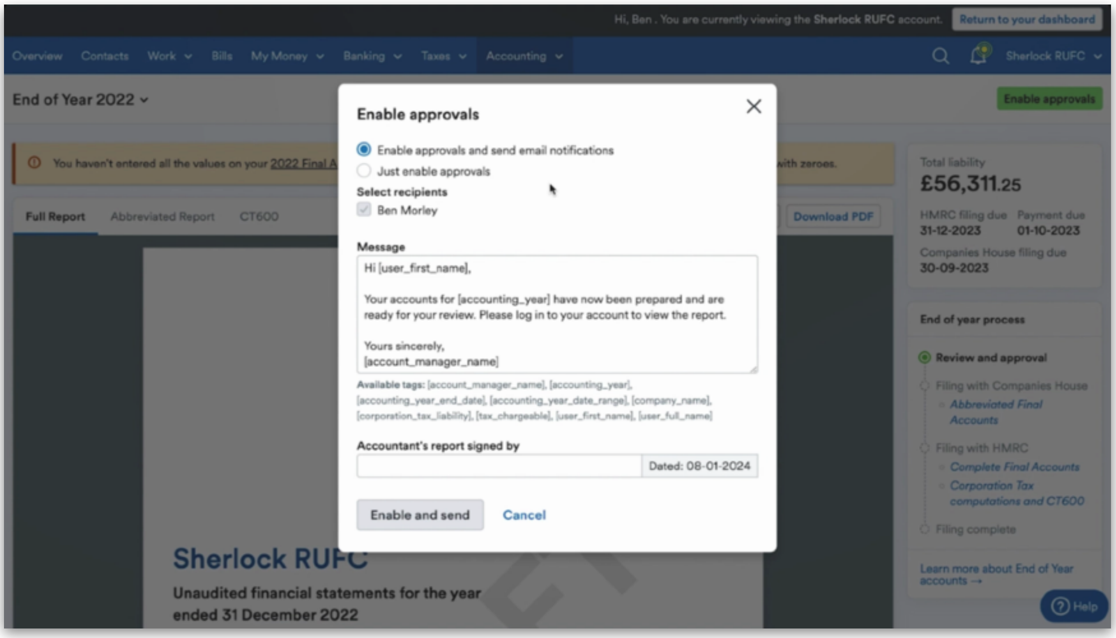
Under the '**Accounting**' tab, the '**End of Year**' area allows limited company directors to use FreeAgent to prepare a company's Final Accounts and CT600. You can then file them with Companies House and HMRC from this area.



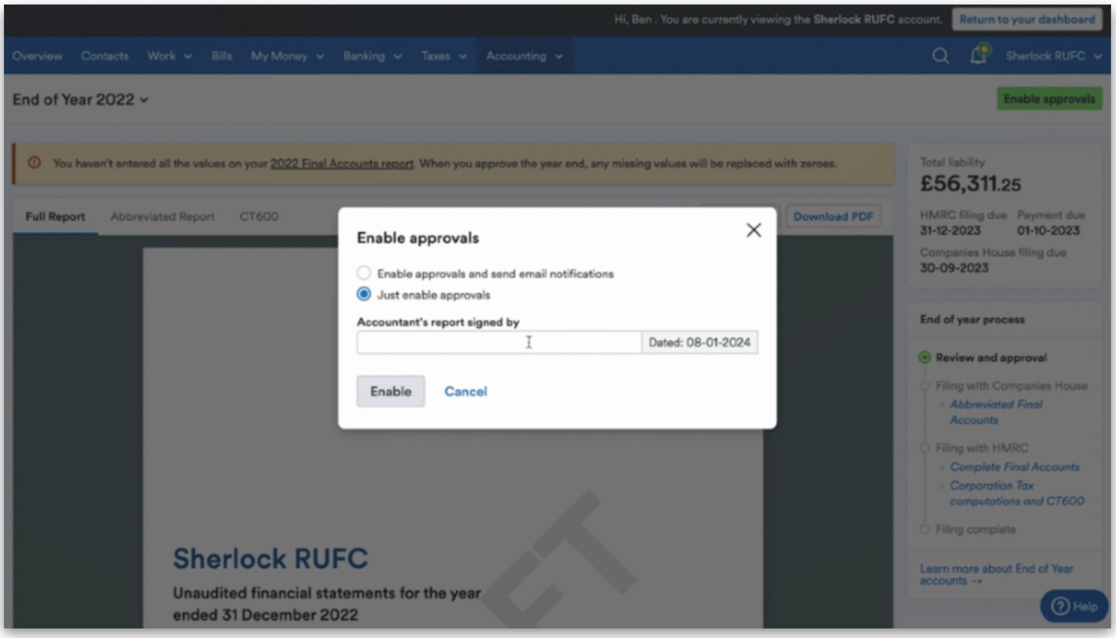
Please note: while small business owners who do not use FreeAgent with an accountant will have full access to this functionality, your clients will not have full access to it. If they hold the user role of 'Director' in FreeAgent and have either full (level 8) or level 7 access to their account, they will be able to approve and sign their End of Year report but they won't be able to file Final Accounts to Companies House or their Corporation Tax return to HMRC. As the accountant, you will complete the filing process.

You'll find more information on this process in the separate Tax learning module. However, you may want to know about the benefit of enabling the approvals process even if you're not going to use FreeAgent to file your client's end-of-year accounts.

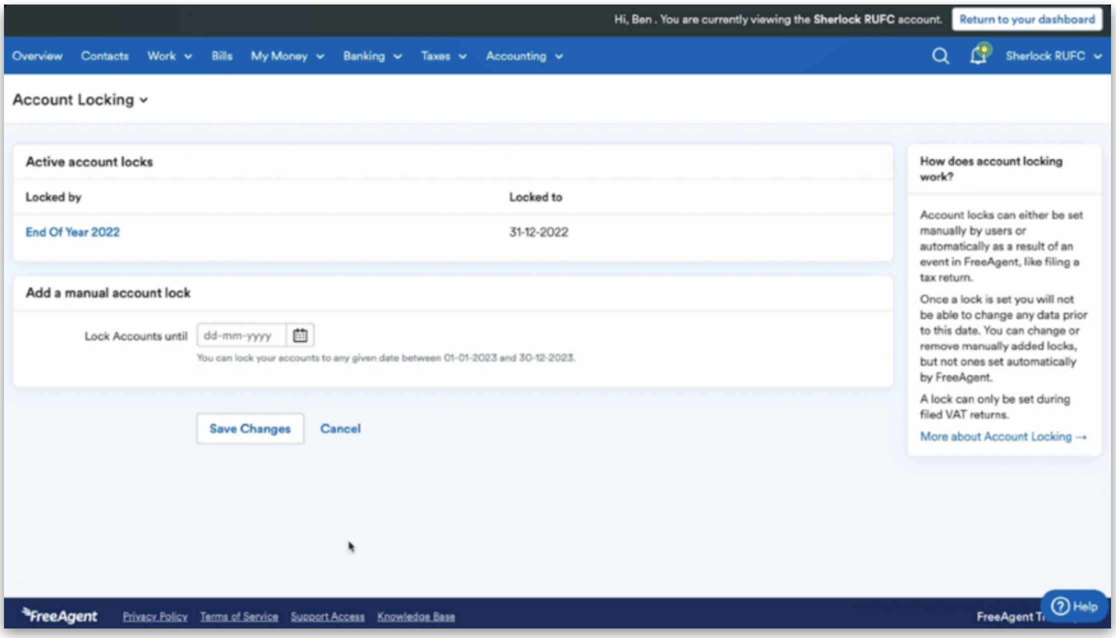
There are two options when enabling approvals. The first alerts your client of the end-of-year process beginning.



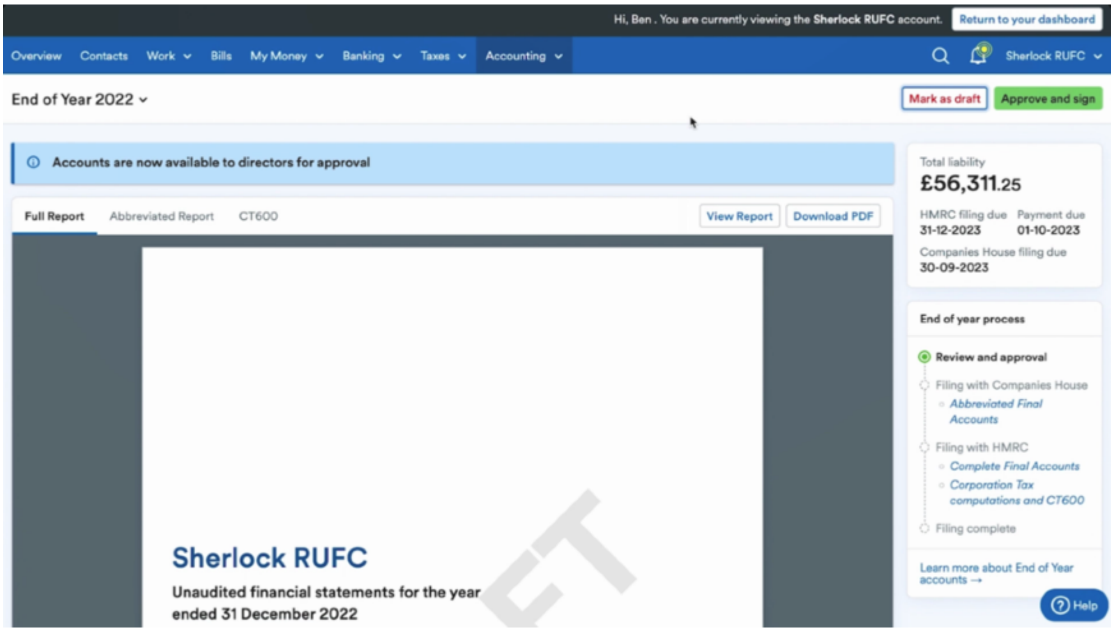
If you don't want to alert your client, select the second option, which is '**Just enable approvals**'. This will allow you to simply enter your name and select '**Enable Approvals**'.



Doing this will add an account lock within your client's FreeAgent licence and will not allow the accounting period in question to be adjusted or added to.

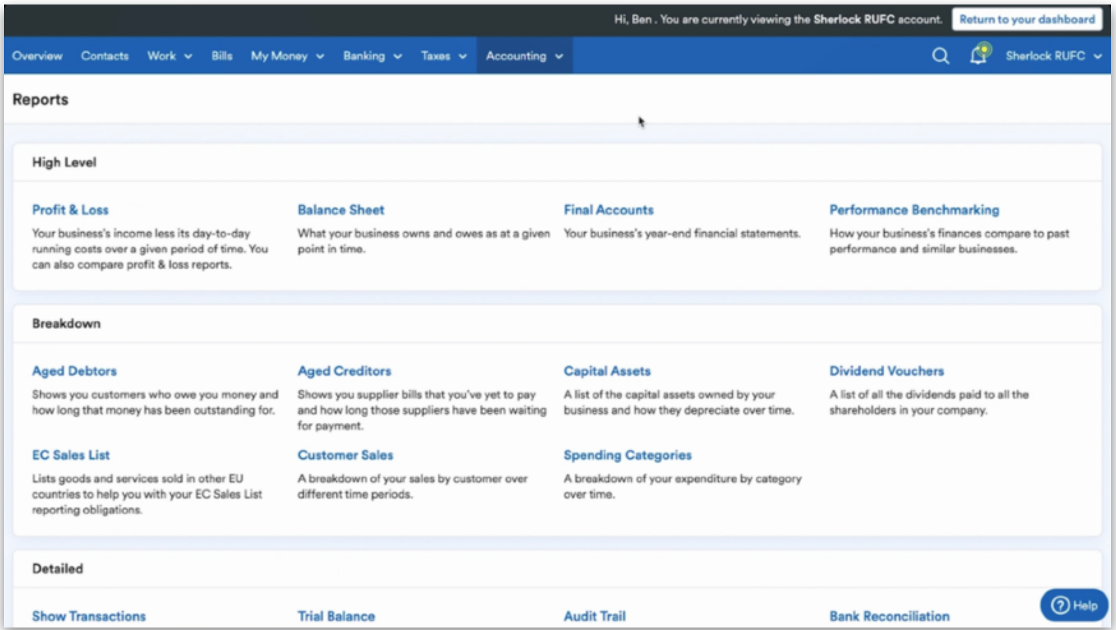


You can use the '**Mark as draft**' option to remove the lock, but this is only available to Account Managers on your Practice Dashboard.



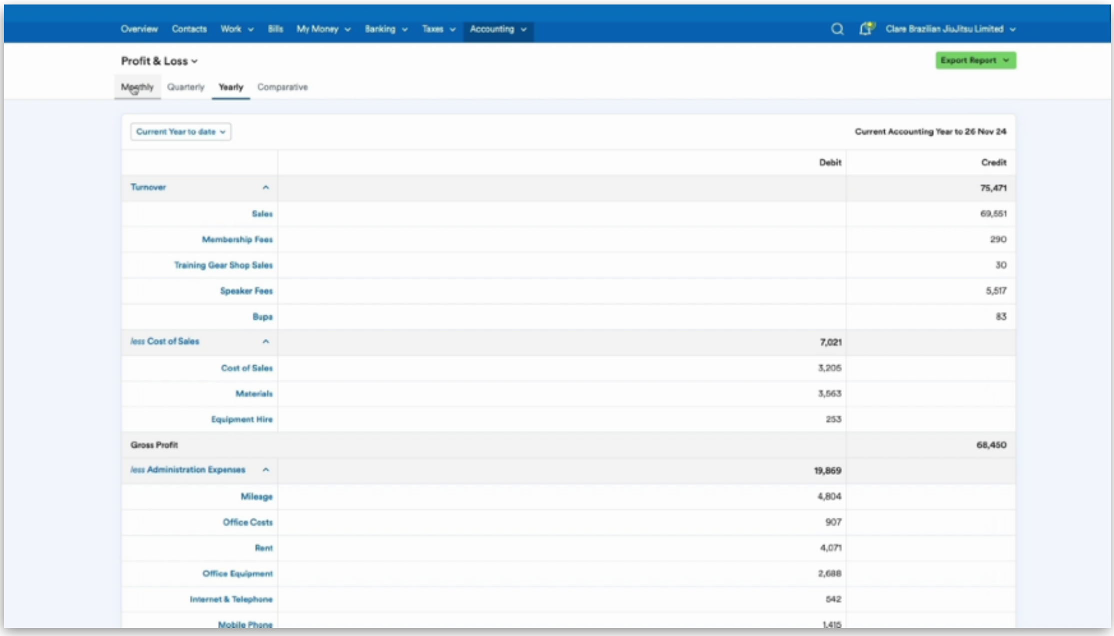
Reports

To access reports in FreeAgent, navigate to the ‘**Accounting**’ tab and select ‘**Reports**’. This area includes a collection of essential reports on your client’s business generated by the data in your client’s FreeAgent account.



These reports are very helpful for providing an understanding of specific details about your client’s business. Here are some of the most commonly used reports.

The **Profit & Loss** report can be viewed in different ways, including monthly, yearly or comparative. It's also possible to use a custom date range or a standard date range.



Overview Contacts Work Bills My Money Banking Taxes Accounting

Clare Brazilian JiuJitsu Limited

Profit & Loss

Export Report

Monthly Quarterly Yearly Comparative

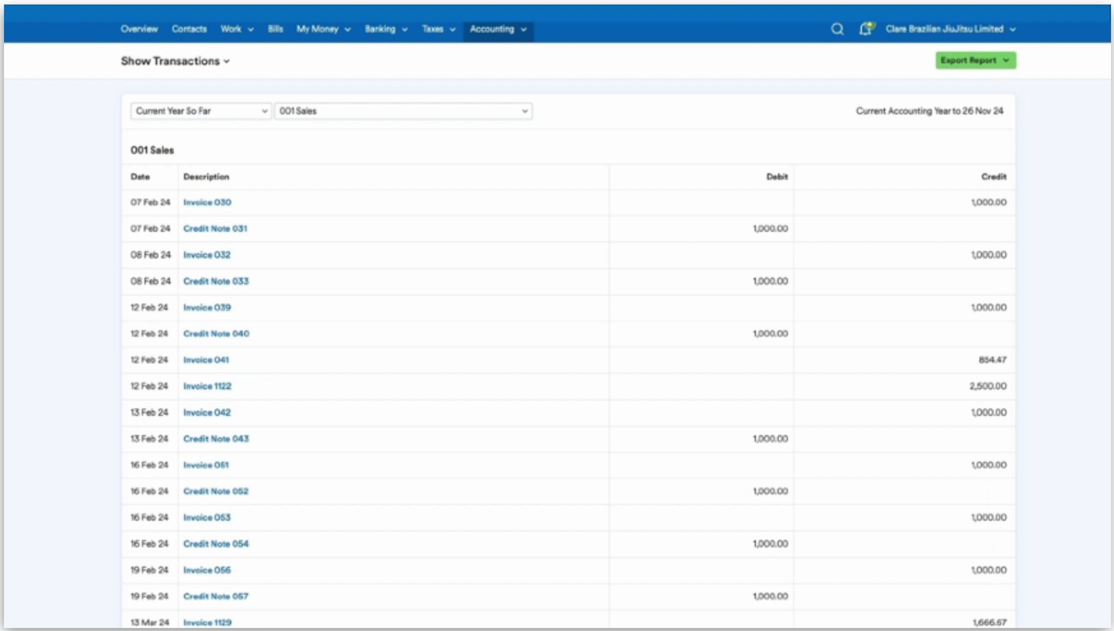
Current Year to date

Current Accounting Year to 26 Nov 24

	Debit	Credit
Turnover		75,471
Sales		69,551
Membership Fees		290
Training Gear Shop Sales		30
Speaker Fees		5,517
Bupa		83
less Cost of Sales	7,021	
Cost of Sales	3,205	
Materials	3,563	
Equipment Hire	253	
Gross Profit		68,450
less Administration Expenses	19,869	
Mileage	4,804	
Office Costs	907	
Rent	4,071	
Office Equipment	2,688	
Internet & Telephone	542	
Mobile Phone	1,415	

The report can also be viewed as a PDF or CSV. All the items on the report are clickable links. Selecting one will show the credits and debits that make up the line item on the report.

The **Show Transactions** report displays all the transactions in each of the different account categories in FreeAgent. This list is also known as the nominal ledger or general ledger.



Overview Contacts Work Bills My Money Banking Taxes Accounting

Clare Brazilian JiuJitsu Limited

Show Transactions

Export Report

Current Year So Far | 001 Sales

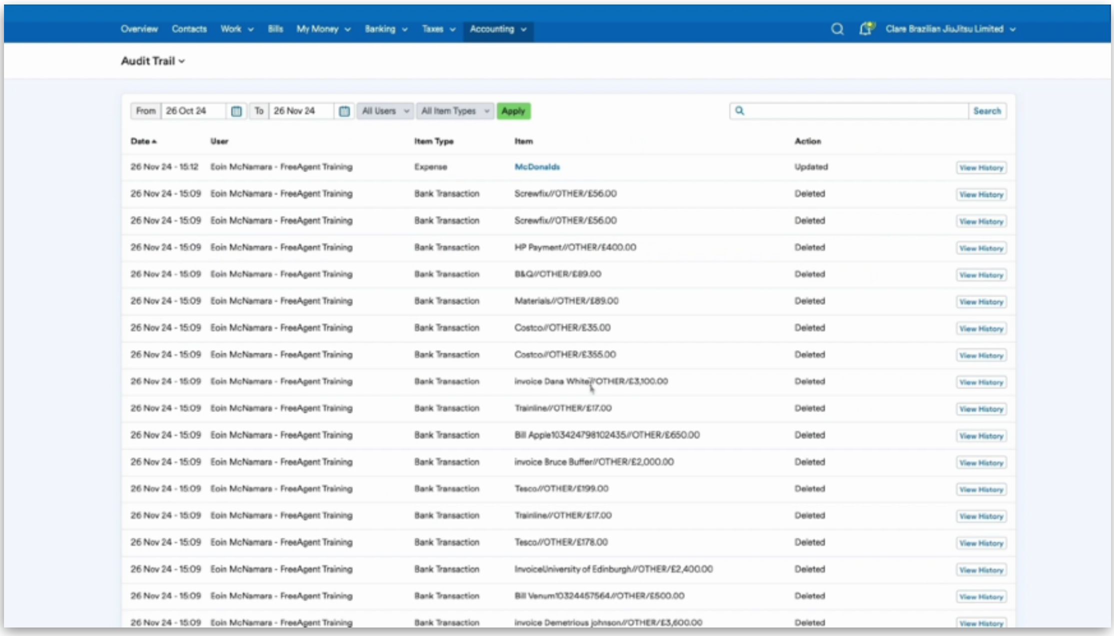
Current Accounting Year to 26 Nov 24

001 Sales

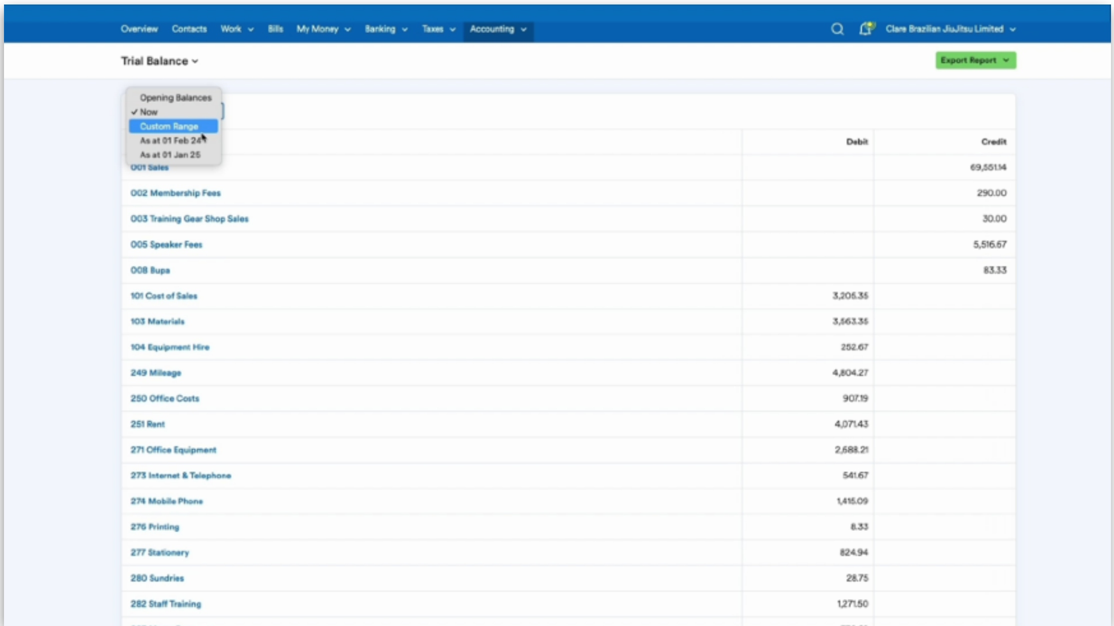
Date	Description	Debit	Credit
07 Feb 24	Invoice 030		1,000.00
07 Feb 24	Credit Note 031	1,000.00	
08 Feb 24	Invoice 032		1,000.00
08 Feb 24	Credit Note 033	1,000.00	
12 Feb 24	Invoice 039		1,000.00
12 Feb 24	Credit Note 040	1,000.00	
12 Feb 24	Invoice 041		854.47
12 Feb 24	Invoice 1122		2,500.00
13 Feb 24	Invoice 042		1,000.00
13 Feb 24	Credit Note 043	1,000.00	
16 Feb 24	Invoice 051		1,000.00
16 Feb 24	Credit Note 052	1,000.00	
16 Feb 24	Invoice 053		1,000.00
16 Feb 24	Credit Note 054	1,000.00	
19 Feb 24	Invoice 056		1,000.00
19 Feb 24	Credit Note 057	1,000.00	
13 Mar 24	Invoice 1129		1,666.67

Choose '**Select an Account**' from the drop-down menu, select any account, click 'Apply', and all transactions for that nominal code or group of nominal codes will be pulled through for the specified date range.

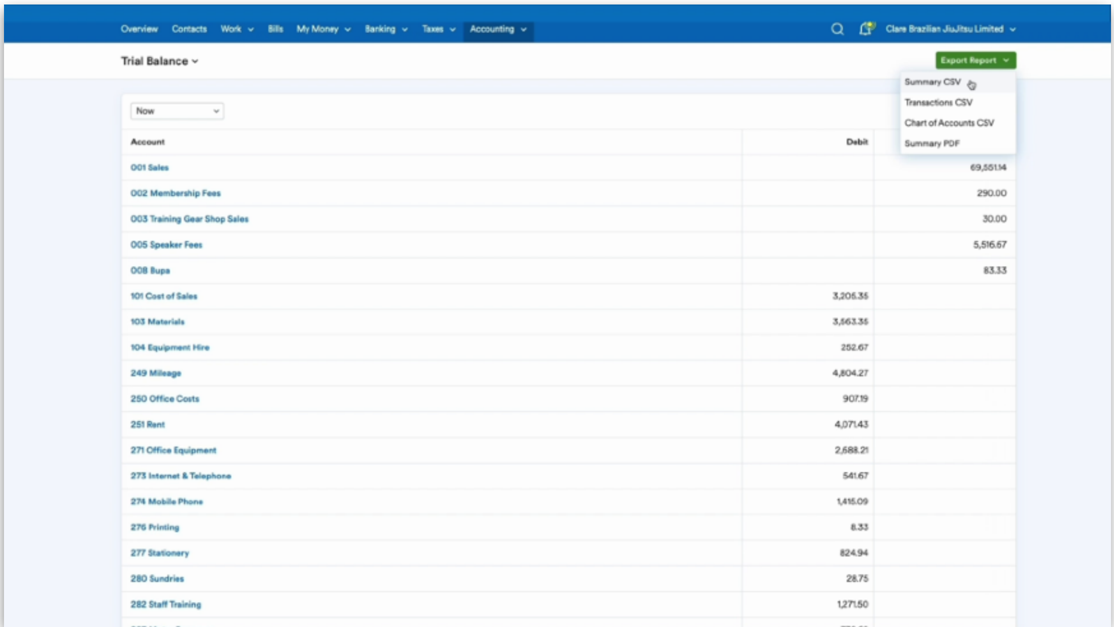
The **Audit Trail** shows you a list of many of the changes that have been made in the FreeAgent account.



The **Trial Balance** can use a custom date range, when it will be a transactional report, or a standard date range. All the items on the report are clickable links. Selecting one will show the credits and debits that make up the line items on the report.



To export a CSV file of a report summary, which is the format accepted by all tax production software if you're not using FreeAgent for the end-of-year production process, select the 'Export' button in the top right. You'll also find the Chart of Accounts report inside the Export option.



Recent reporting updates

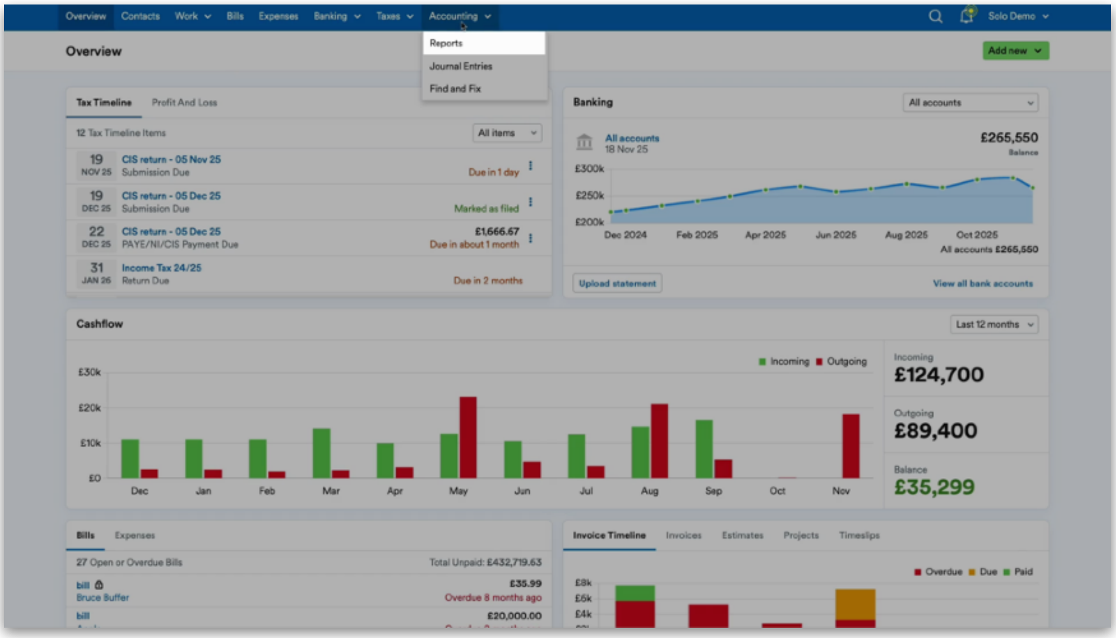
Over the past year, several updates have been made to FreeAgent's reporting features to improve the way you view and manage your financial data. Here are some of the key updates:

Management Reports

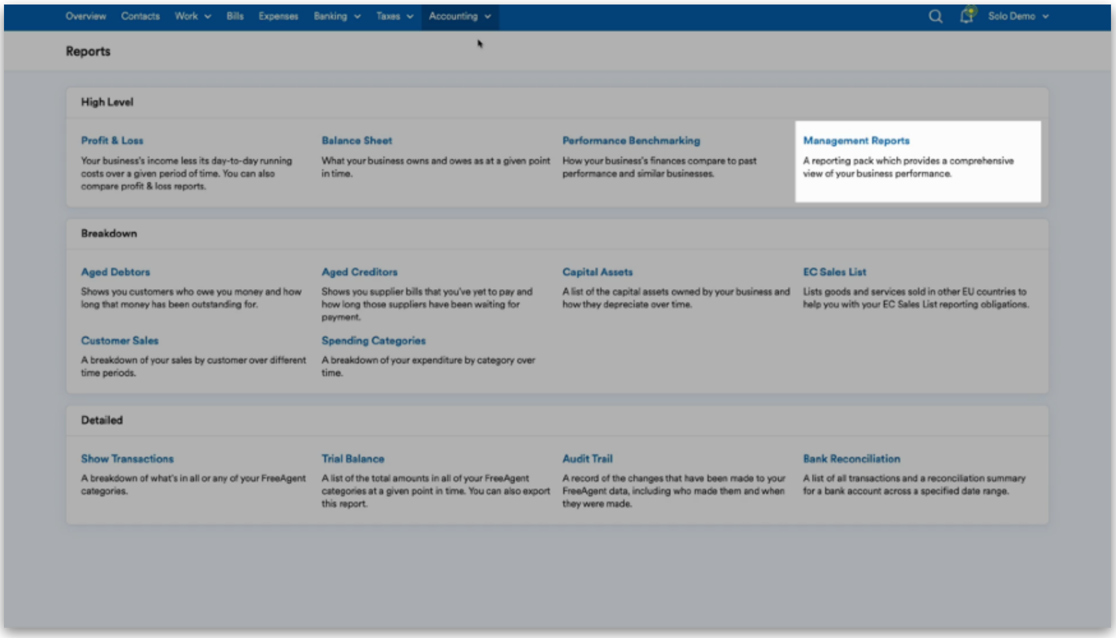
You can now create management reporting packs to prepare for your clients in FreeAgent.

Users with access level 7 or above can view the management reporting area of FreeAgent.

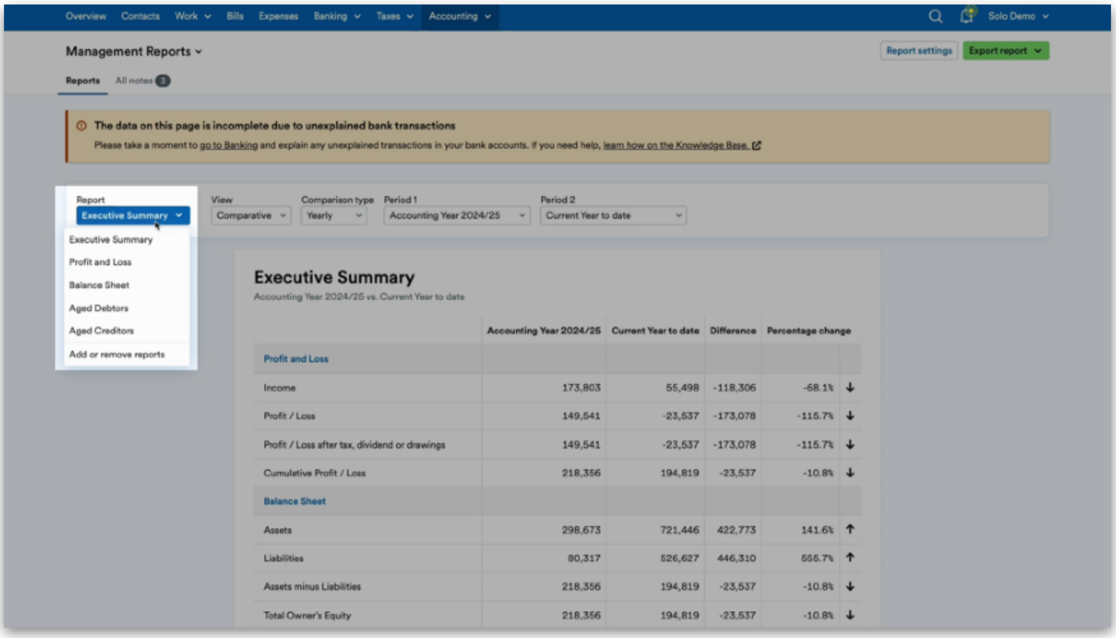
To view the management reports, navigate to the '**Accounting**' tab and select '**Reports**'.



In the ‘High Level’ section, select ‘**Management Reports**’.

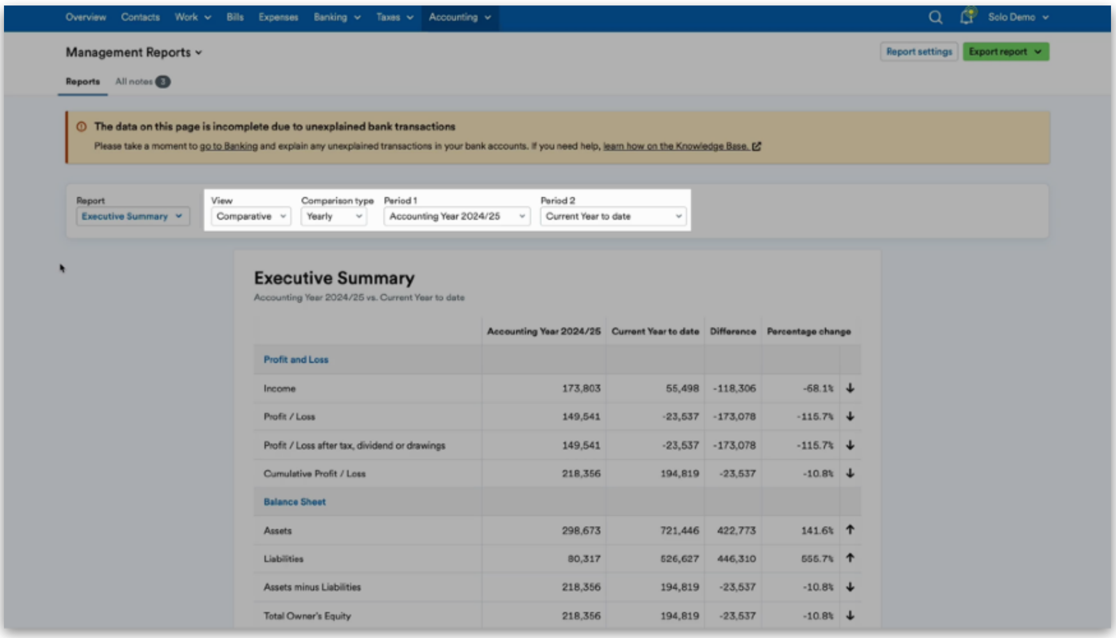


Select which report you would like to view from: ‘**Executive Summary**’, ‘**Profit and Loss**’, '**Balance Sheet**', ‘**Aged Debtors**’ and ‘**Aged Creditors**.’



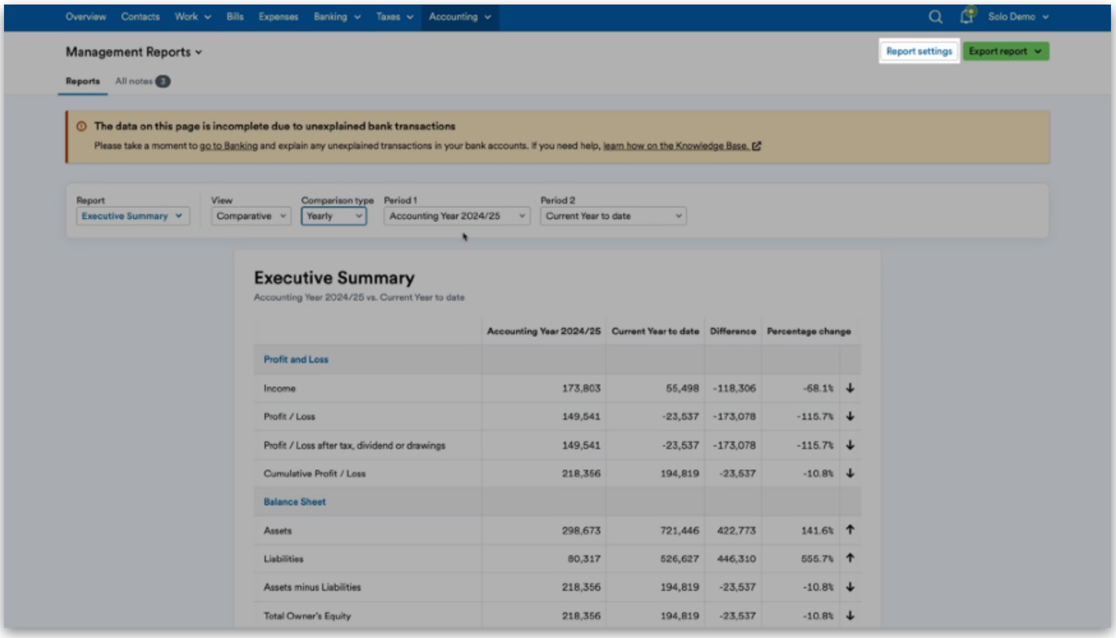
In the 'View' drop-down, you can select if you want to view this report '**Monthly**', '**Quarterly**', '**Yearly**', or '**Comparative**', which compares two different periods. The comparative report requires a 'Comparison Type'. You can compare yearly, quarterly, or custom periods.

Select the two periods you want to compare. The other three views just require a single reporting period.

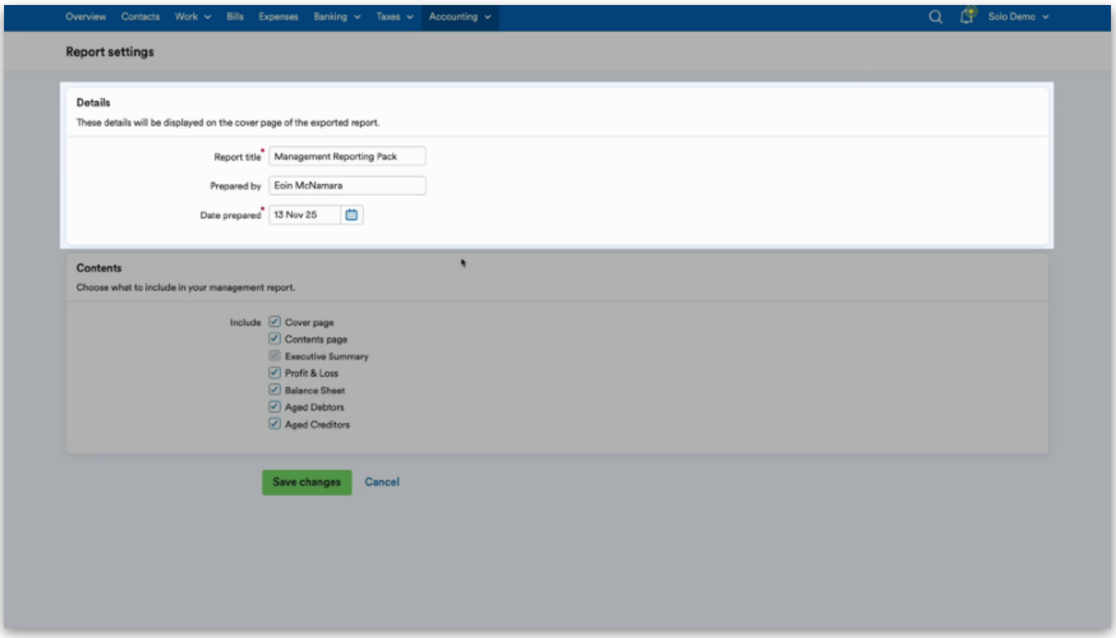


Customising the Management Reports

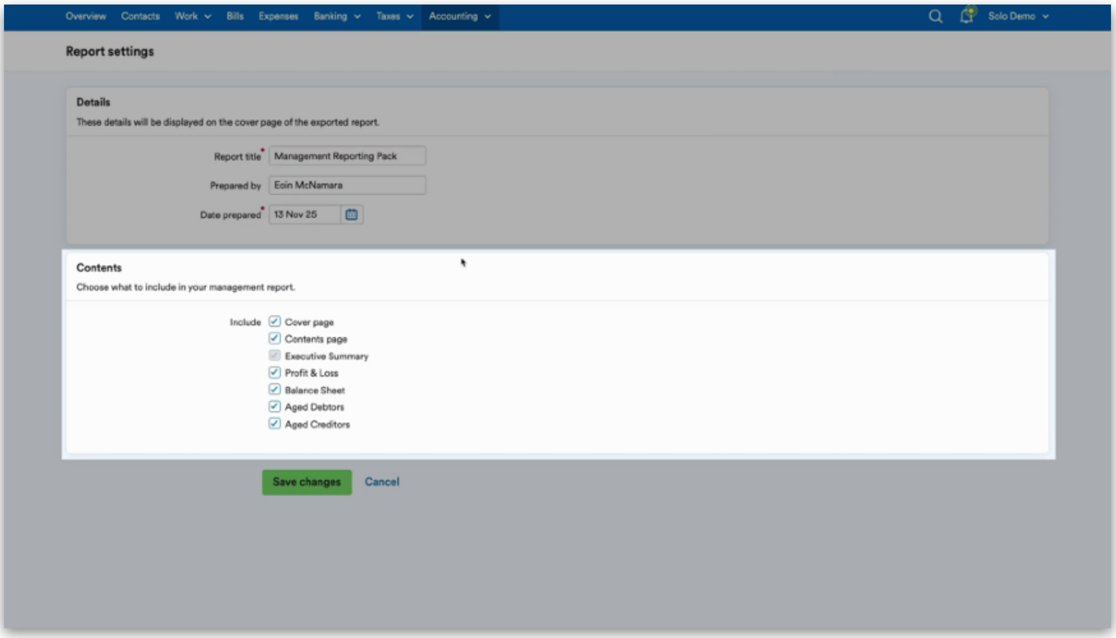
Select ‘**Report settings**’.



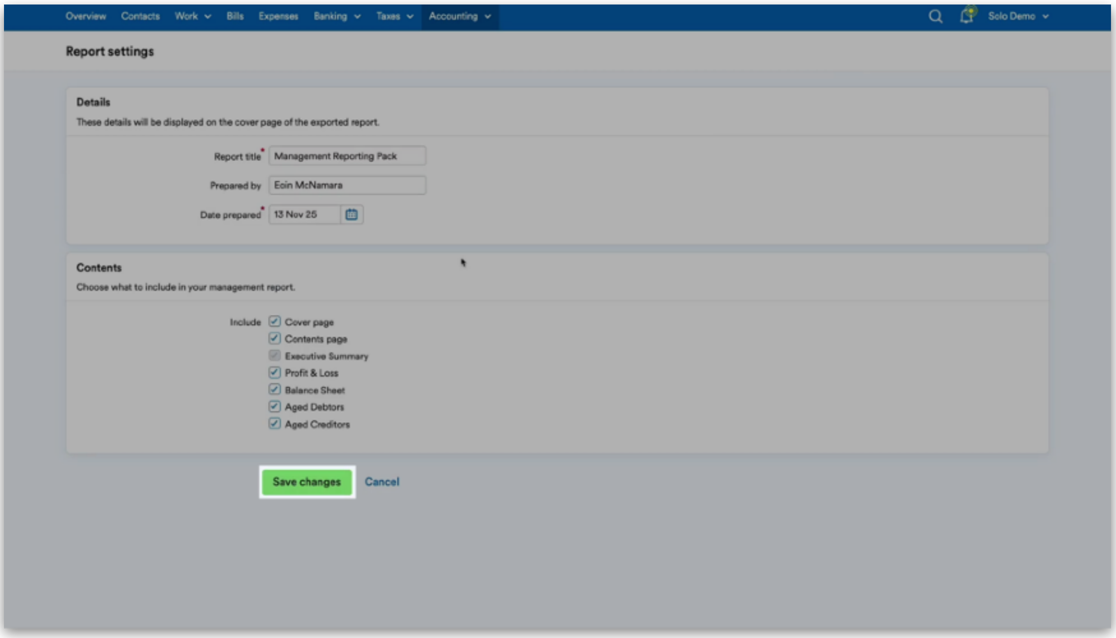
In the ‘Details’ section, enter the report title, who they were prepared by and the date they were prepared.



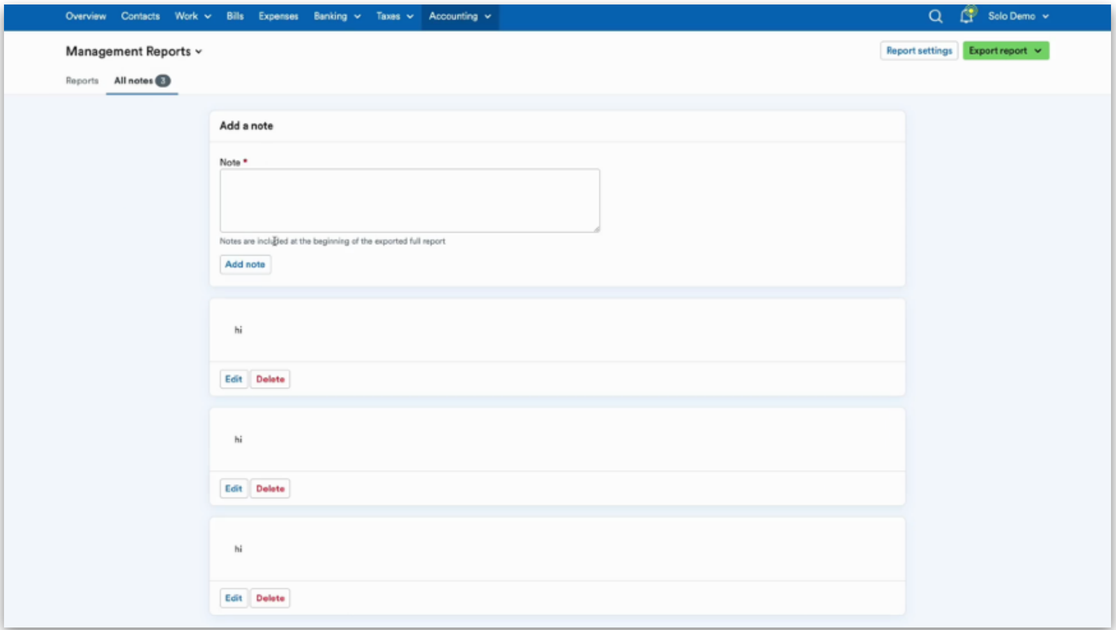
In the ‘Contents' tab, you choose which reports you’d like to include in the export of the reports.



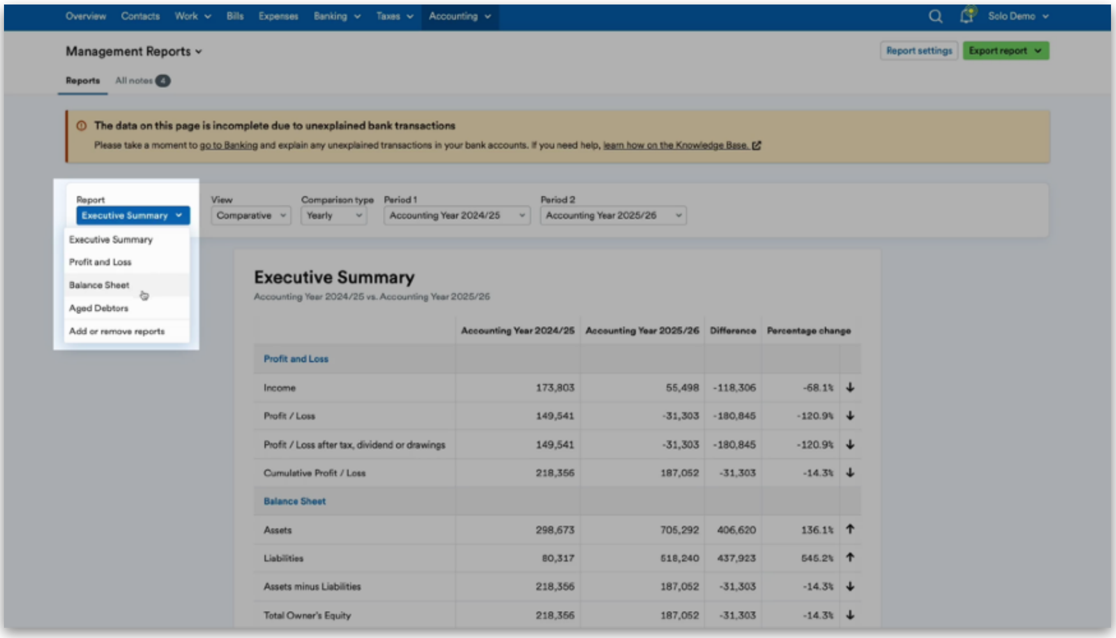
To finalise these changes, select ‘**Save changes**’ at the bottom.



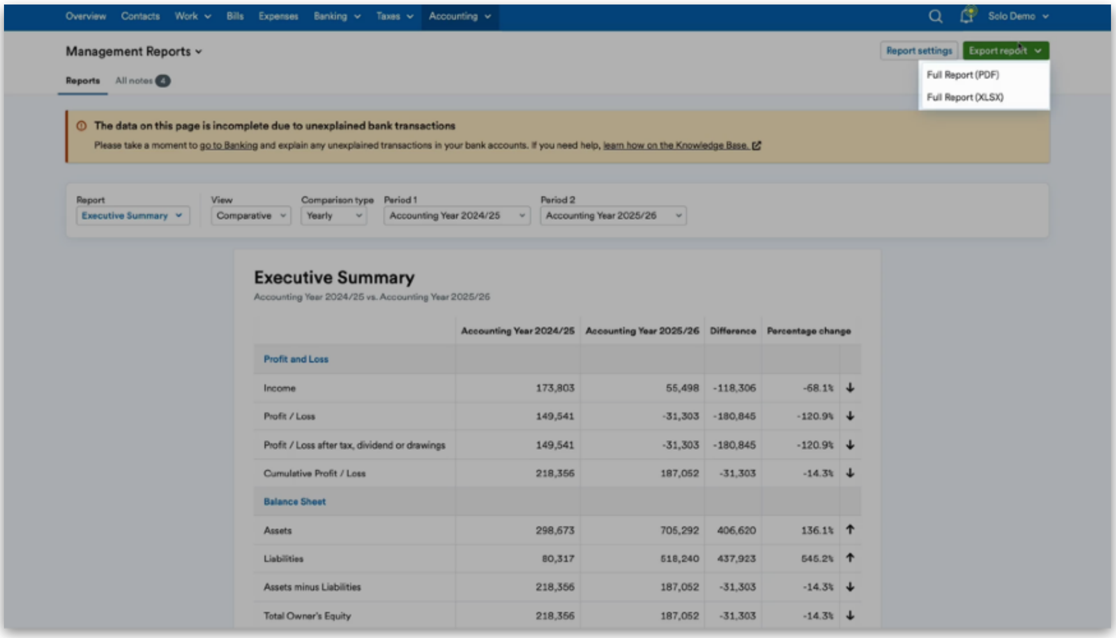
In the ‘All notes’ tab, you can add individual notes.



In the '**Report**' drop-down menu, you'll see the reports that'll be included in the export.



You can export the Management Reports by clicking on '**Export report**'. You can export the Full Report as a **PDF** or **XLSX** file.



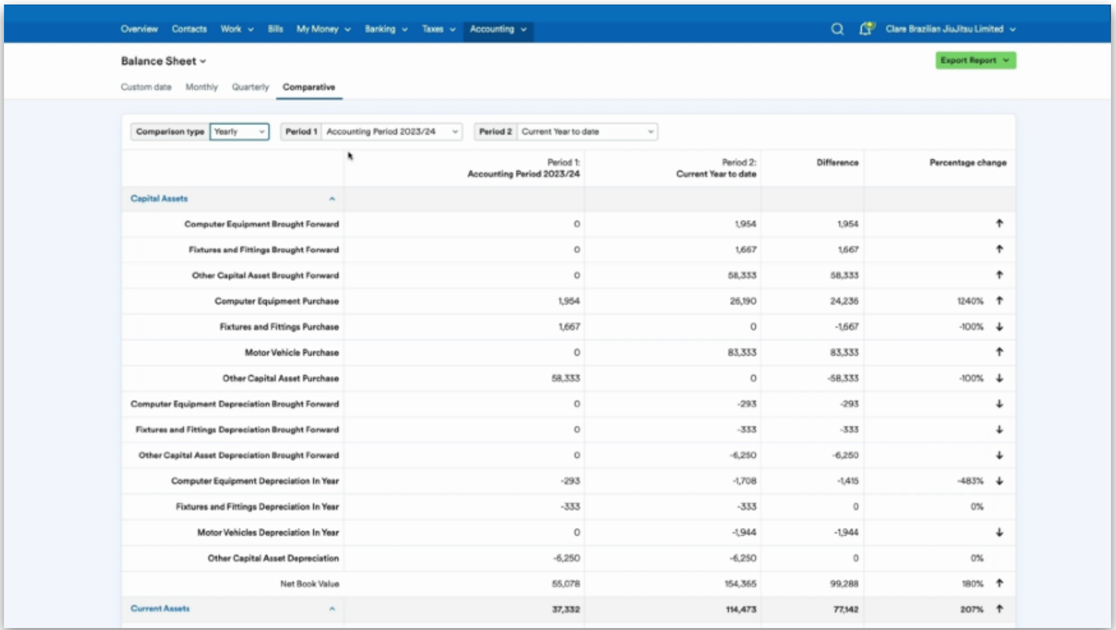
Profit & Loss Report

Gross Profit Line: The Profit & Loss report now includes a **Gross Profit** line, offering a clearer picture of your business's profitability.

Balance Sheet

Comparative Reporting: The Balance Sheet now allows for comparative analysis. To access this feature:

1. Navigate to the '**Balance Sheet**'
2. Select '**Comparative**'
3. Choose your '**Comparison Type**': 'Yearly', 'Quarterly', or 'Custom Period'.
4. Define '**Period 1**' (the period you want to compare) and '**Period 2**' (the period you want to compare it against).



	Period 1: Accounting Period 2023/24	Period 2: Current Year to date	Difference	Percentage change
Capital Assets				
Computer Equipment Brought Forward	0	1,954	1,954	↑
Fixtures and Fittings Brought Forward	0	1,667	1,667	↑
Other Capital Asset Brought Forward	0	58,333	58,333	↑
Computer Equipment Purchase	1,954	26,190	24,236	1240% ↑
Fixtures and Fittings Purchase	1,667	0	-1,667	-100% ↓
Motor Vehicle Purchase	0	83,333	83,333	↑
Other Capital Asset Purchase	58,333	0	-58,333	-100% ↓
Computer Equipment Depreciation Brought Forward	0	-293	-293	↓
Fixtures and Fittings Depreciation Brought Forward	0	-333	-333	↓
Other Capital Asset Depreciation Brought Forward	0	-6,250	-6,250	↓
Computer Equipment Depreciation In Year	-293	-1,708	-1,415	-483% ↓
Fixtures and Fittings Depreciation In Year	-333	-333	0	0%
Motor Vehicles Depreciation In Year	0	-1,944	-1,944	↓
Other Capital Asset Depreciation	-6,250	-6,250	0	0%
Net Book Value	55,078	154,365	99,288	180% ↑
Current Assets	37,332	114,473	77,142	207% ↑

After completing these steps, you'll be able to view the **difference** and **percentage change** between the two periods in your Balance Sheet report.

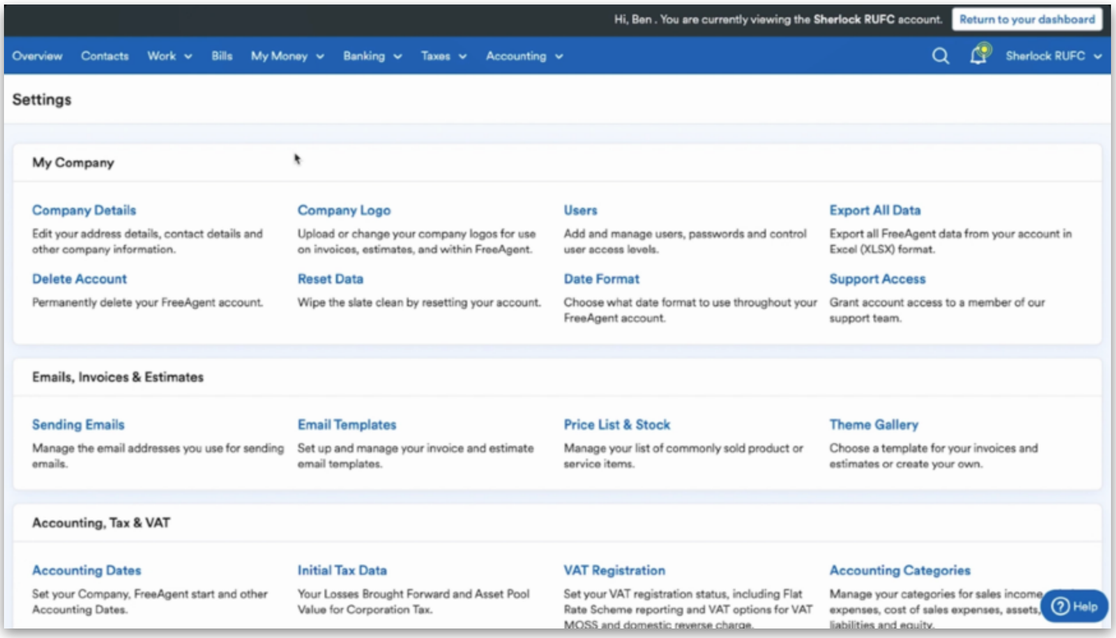
Expanded/Contracted Headers: The headers for Capital Assets and Owner's Equity have been updated to expand and contract, similar to the other report sections, for easier navigation.

To export your Balance Sheet report, click '**Export Report**'. From the drop-down menu, select the format you prefer: CSV or PDF.

Settings

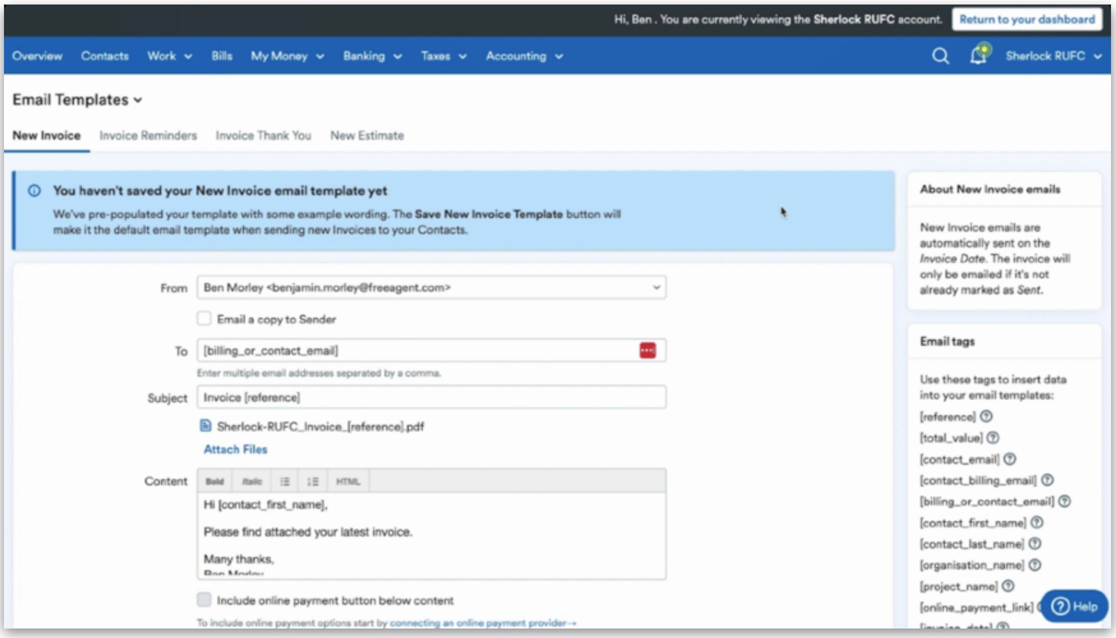
Next, let's take a look at some of the most commonly used settings that your client may want to make use of or that you may want to set up for them.

To access the 'Settings' area, select your client's business name in the top-right of their FreeAgent account and then select '**Settings**'.



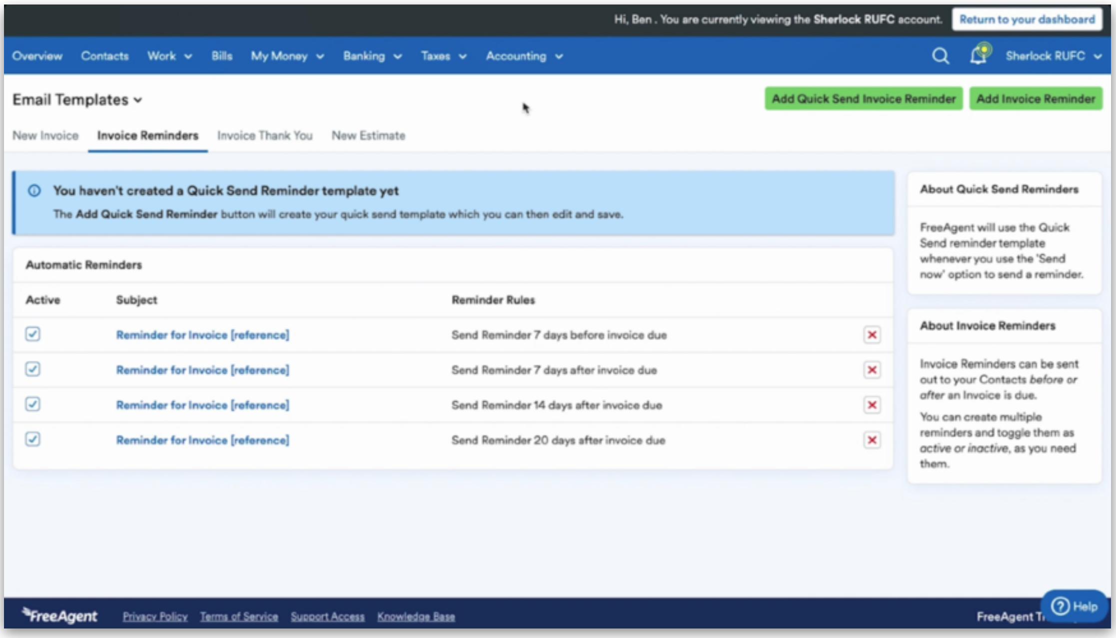
Email Templates

The ‘Email Templates’ area is where you or your client can set up generic email templates using the email tags on the right of the screen. These templates can then be used to send out invoices, payment reminders, estimates and thank you emails.



Invoice Reminders

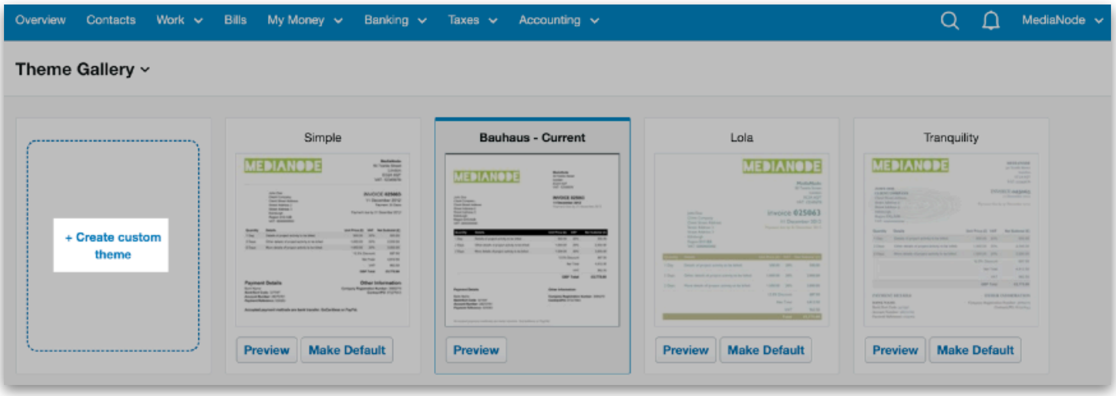
Multiple payment reminders can be set up to be sent to your client’s customers at different points of an unpaid invoice being open and then overdue. Each invoice reminder can have a different custom message allowing you or your client to tailor it to the status of the outstanding invoice.



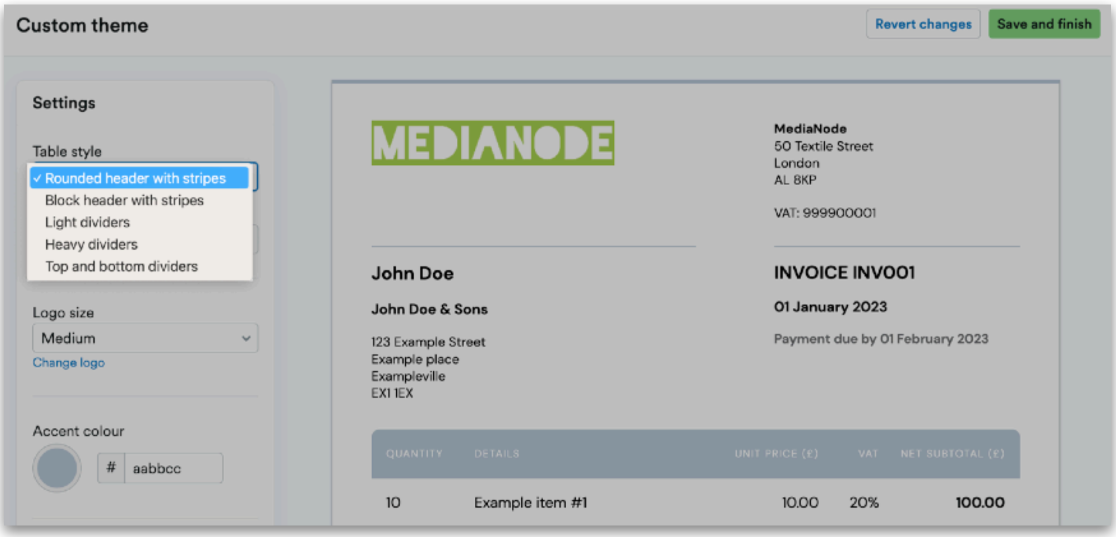
Theme customisation

To create a custom theme for invoices and estimates, select '**Settings**' from the drop-down menu in the top-right corner, then select '**Theme Settings**' from the 'Emails, Invoices & Estimates' section.

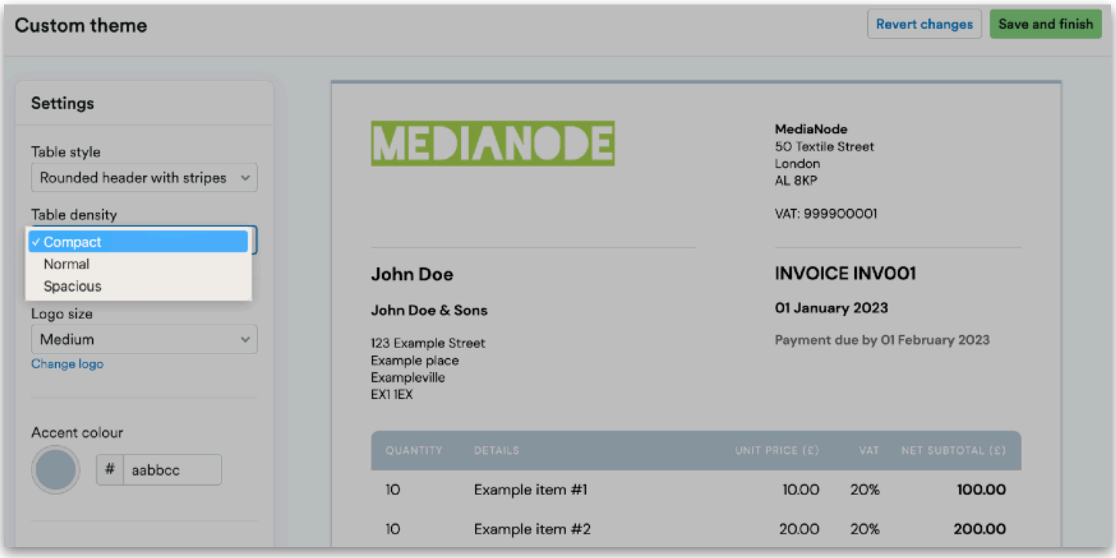
Next, select '**Create custom theme**'.



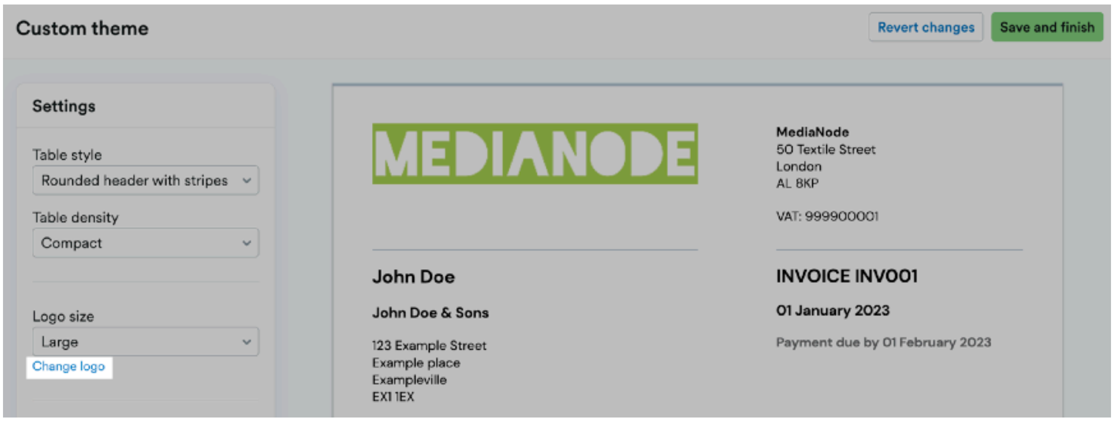
Adjusting 'Table style' lets you choose whether you'd like the table rows split using dividers or using coloured accents on alternate rows.



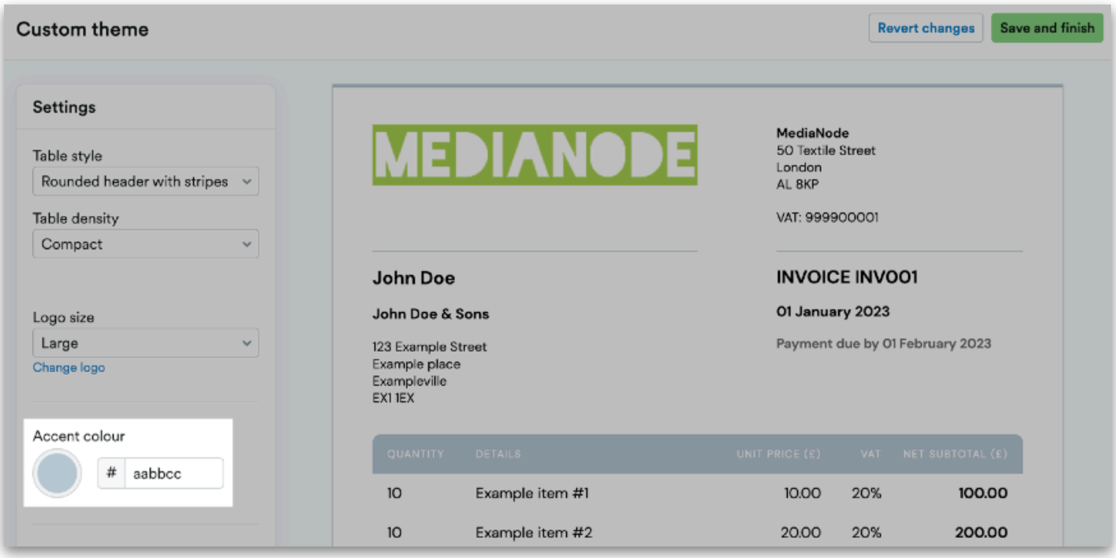
Adjusting 'Table density' lets you choose how spacious or compact you'd like the table content to be.



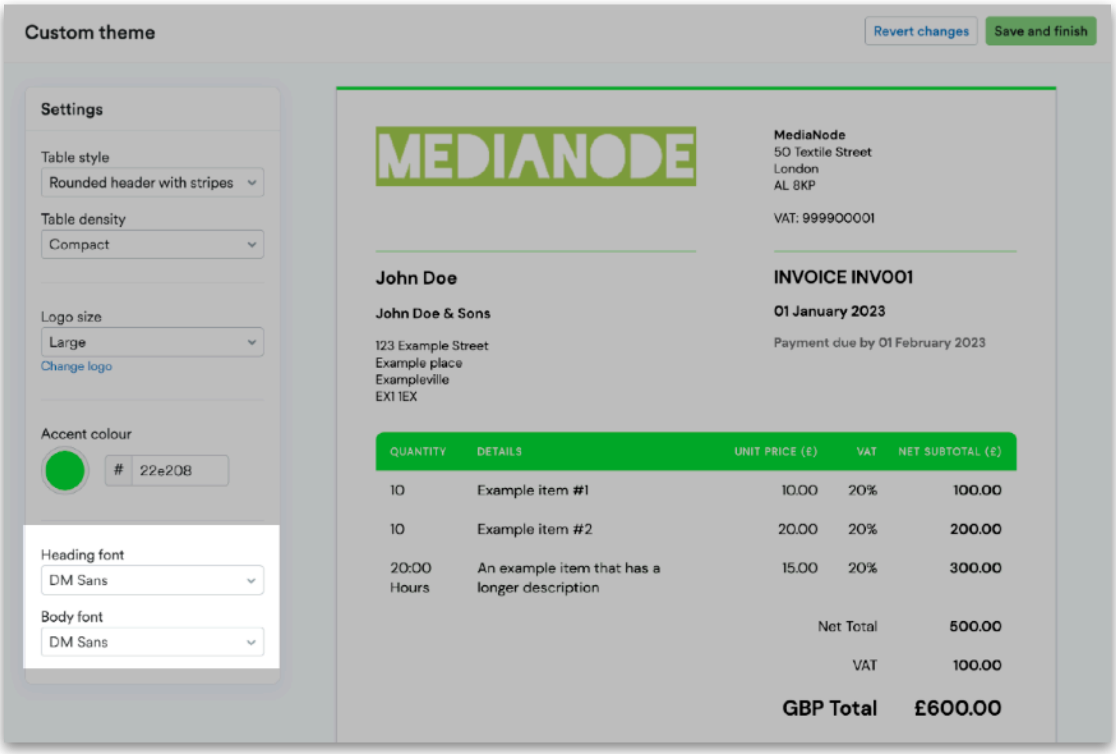
Once you've added the business's logo, you can adjust the size by choosing from the different size options.



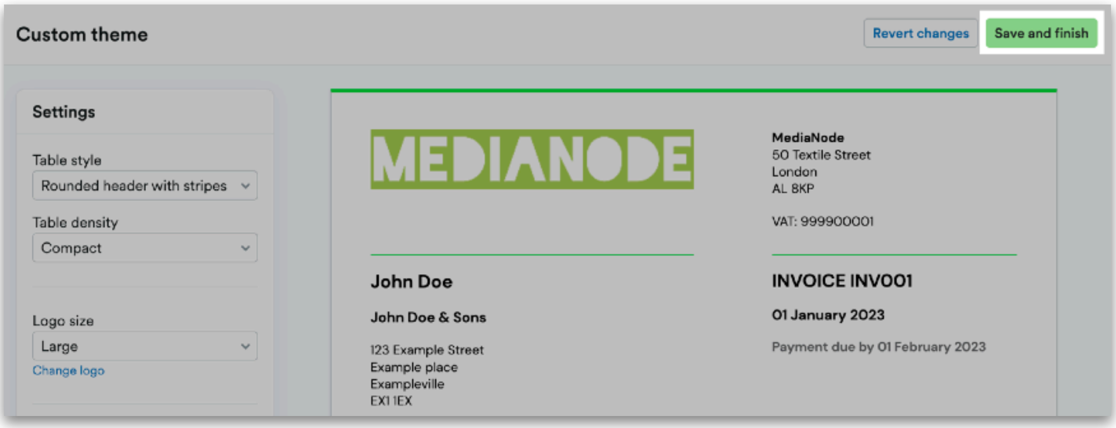
You can adjust the accent colour of the invoice by selecting the circle below 'Accent colour'. You can either select a colour using the colour picker or by entering the RGB code.



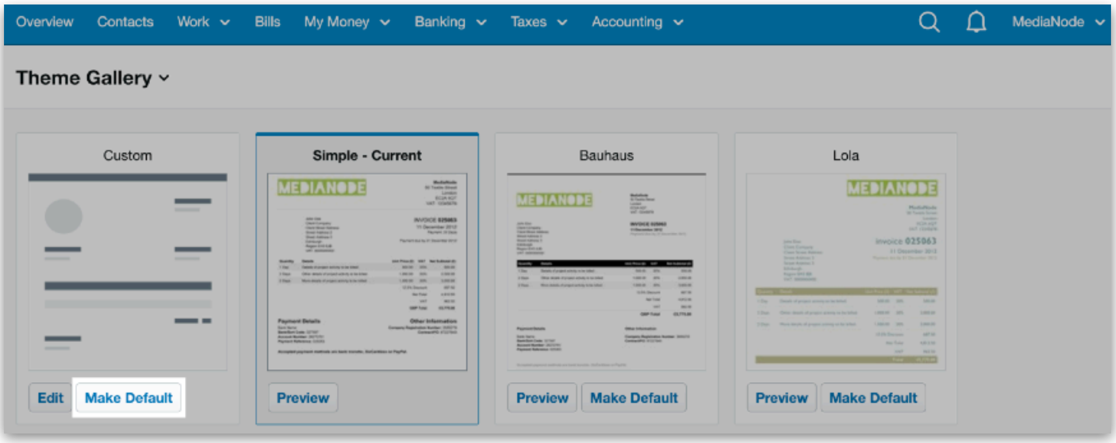
You can select a different font for your heading and body content using the drop-down menus. You can choose from a library of 38 fonts.



Once you're happy with how your theme looks, select '**Save and finish**'. To undo the changes and return to the default theme or your previously saved version, select '**Revert changes**'.

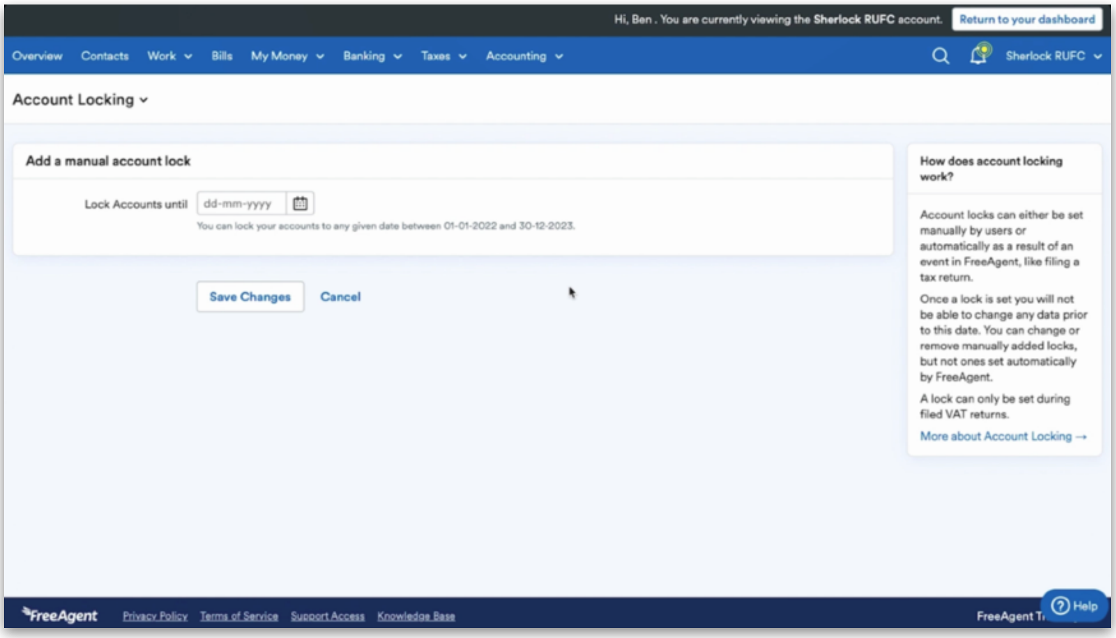


You can apply a custom theme to all your current draft invoices and any future invoices and estimates that you create by navigating back to the Theme Gallery and selecting ‘**Make default**’ below the ‘Custom’ thumbnail. Alternatively, you can apply the theme to an individual invoice or estimate.



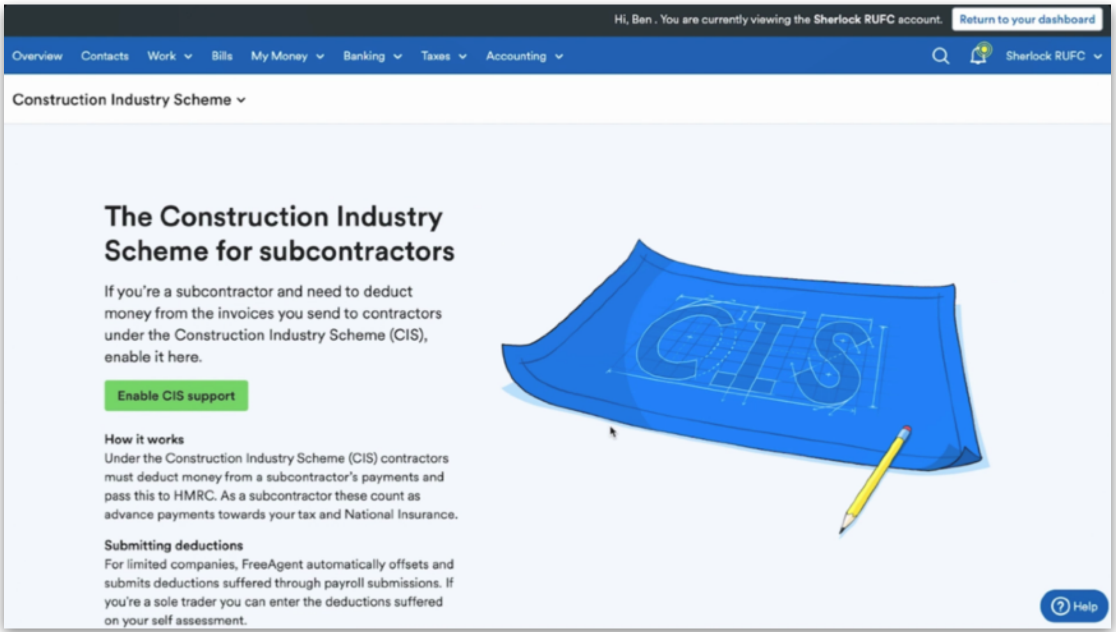
Account Locking

The account locking option allows you to apply account locks within your client’s accounts, similar to the account lock applied when enabling the year end process. However, this account lock can be removed by your client if they have the user permission level 8.



Construction Industry Scheme

The Construction Industry Scheme option in ‘Settings’ is for Subcontractors and not Contractors. This option will allow the CIS deduction to be handled appropriately for sales invoices raised within your client’s FreeAgent licence.

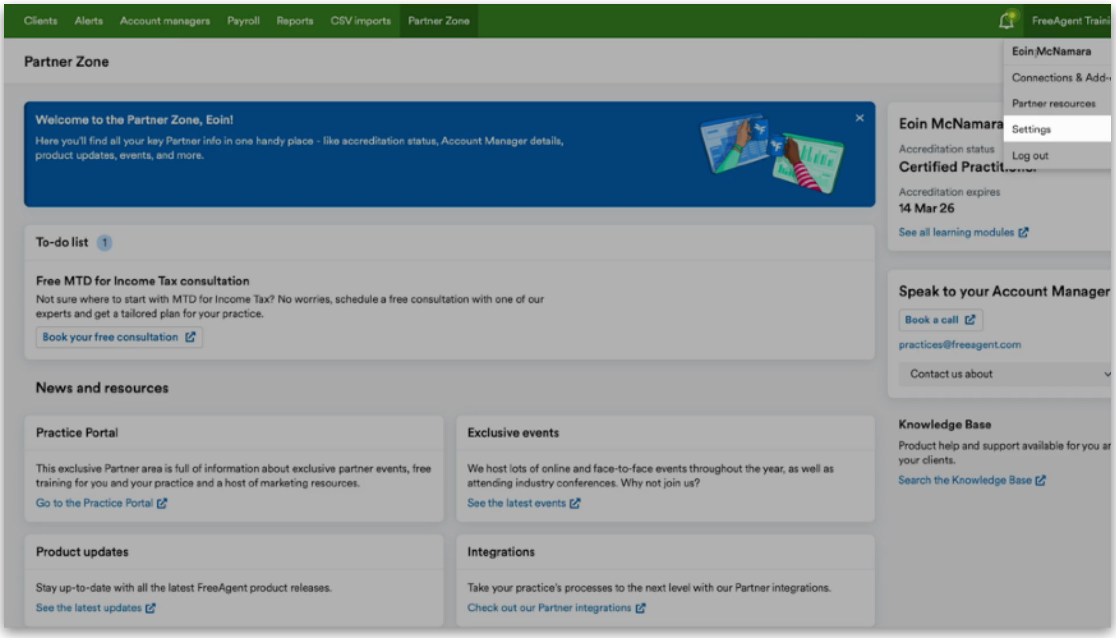


Please note that FreeAgent does not have the functionality to submit the CIS300 return for contractors and is aimed mostly at your subcontractor clients. However, we do have a method to handle the bookkeeping of the CIS deduction, which we can offer if required. See the Payroll module for more details.

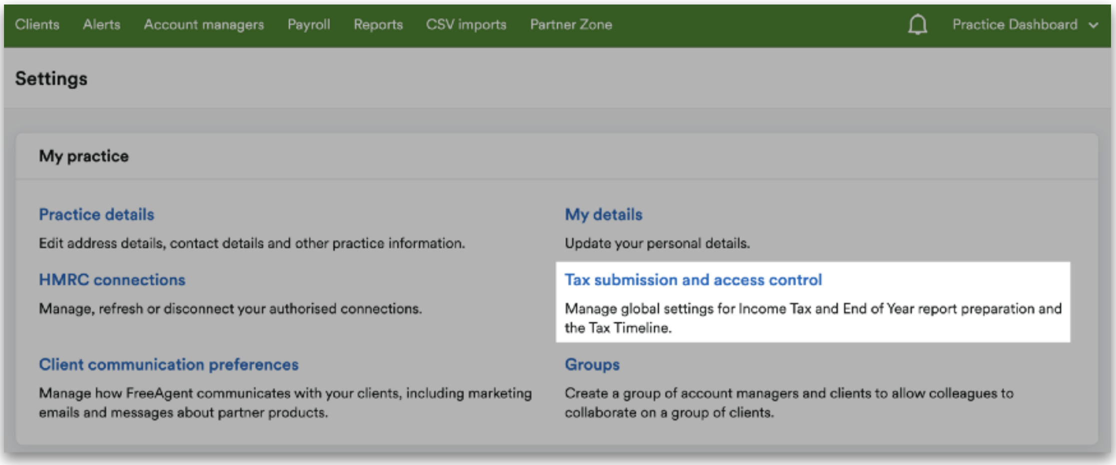
8. Tax submission and access controls

You can now control your clients' access and controls for tax submissions within the Practice Dashboard.

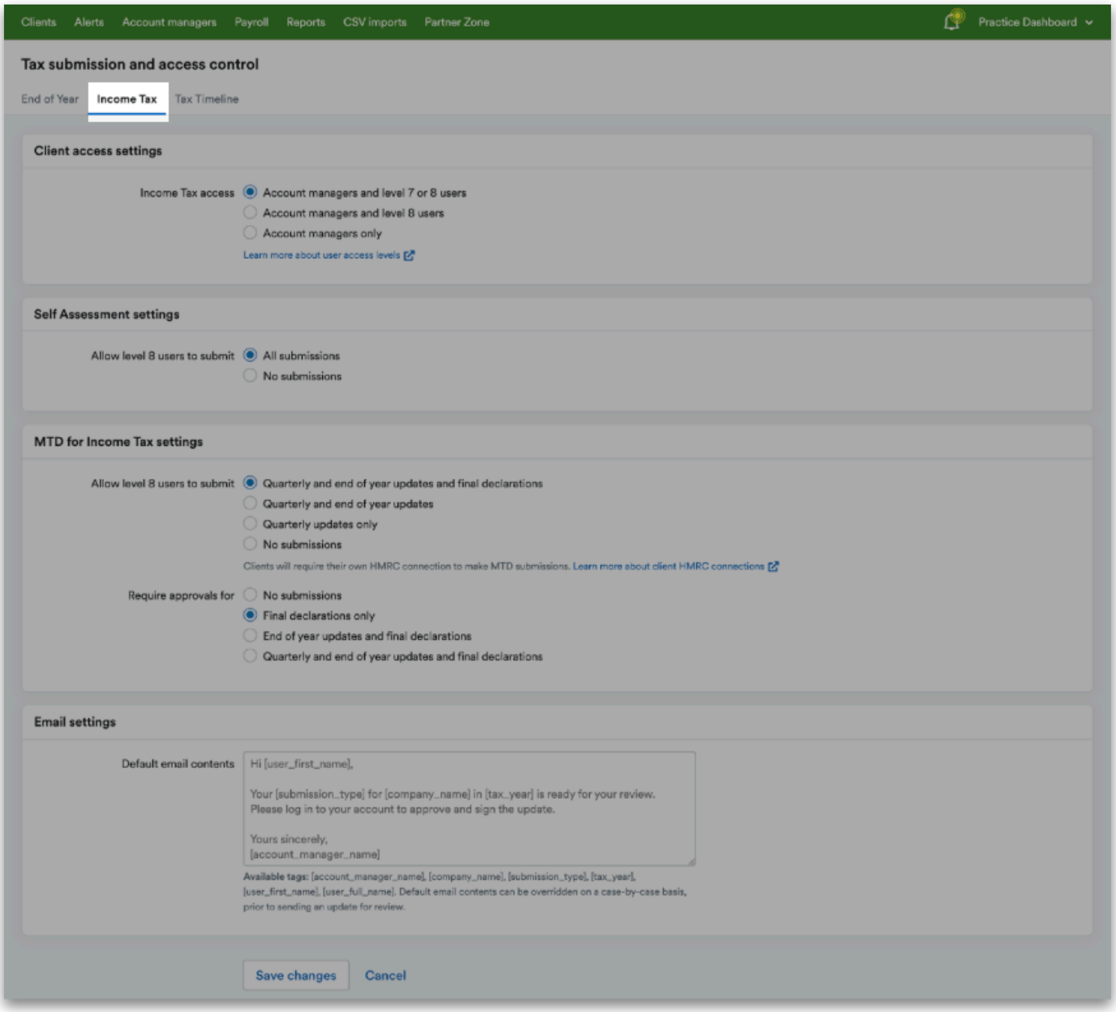
You can control both global and individual client access and controls.
To access this area in FreeAgent, select your practice name on the top-right and select ‘**Settings**’.



In the ‘My Practice’ section, select ‘**Tax submission and access control**’.



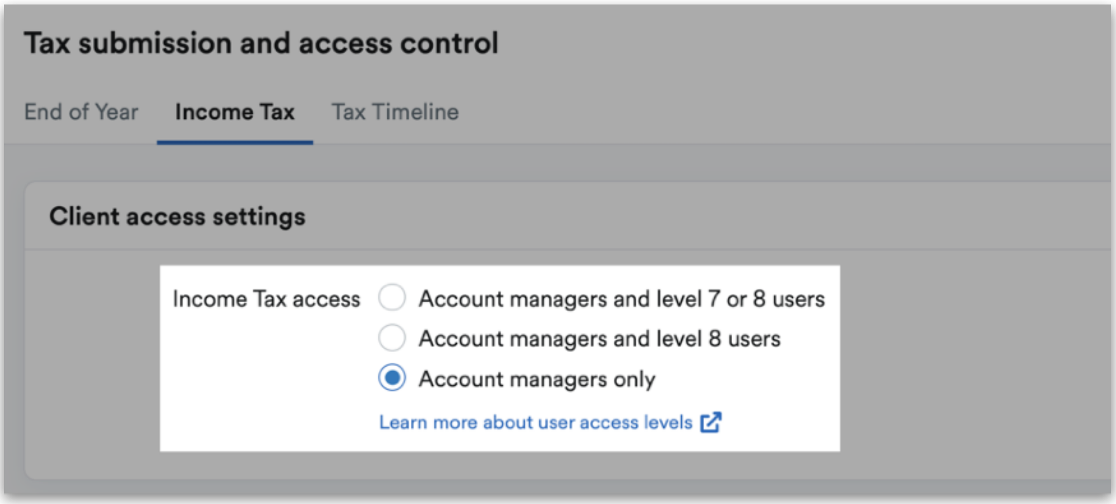
Then, select the '**Income Tax**' tab. This will give you access to change the clients' access to Income Tax and update clients' Self Assessment and Making Tax Digital (MTD) for Income Tax submission settings.



Income Tax access

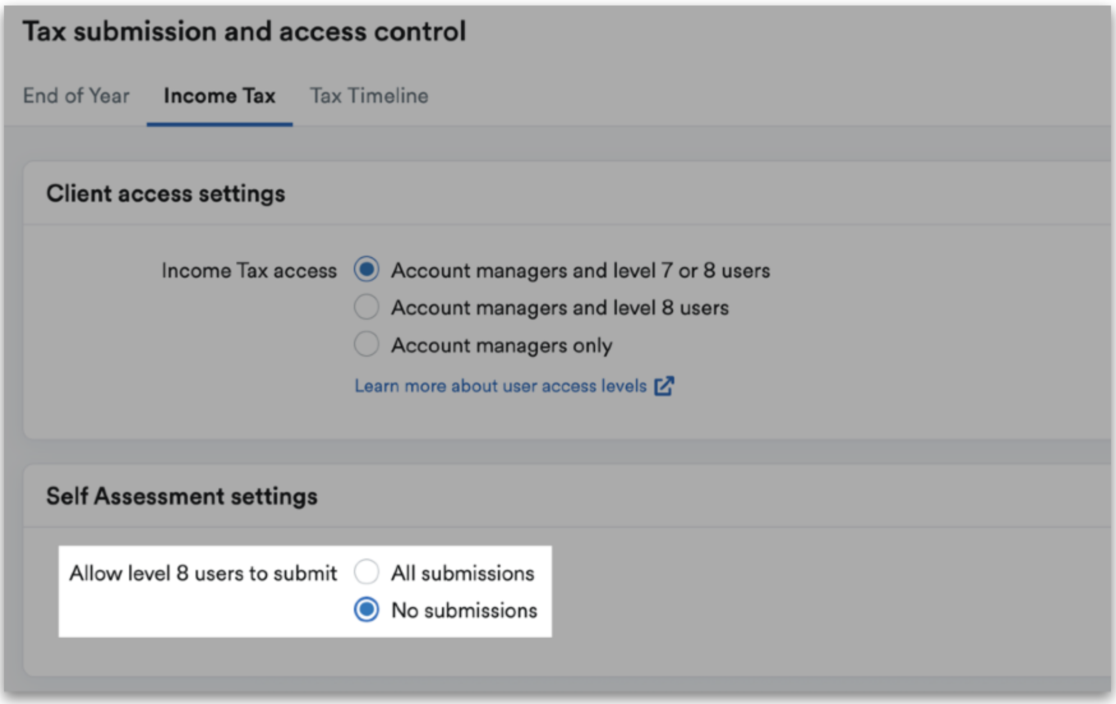
In the 'Client access settings' section, you can set who can access the Income Tax area of their FreeAgent account.

You can choose to give access to account managers only, account managers and level 8 users, or account managers and level 7 or 8 users.



Self Assessment settings

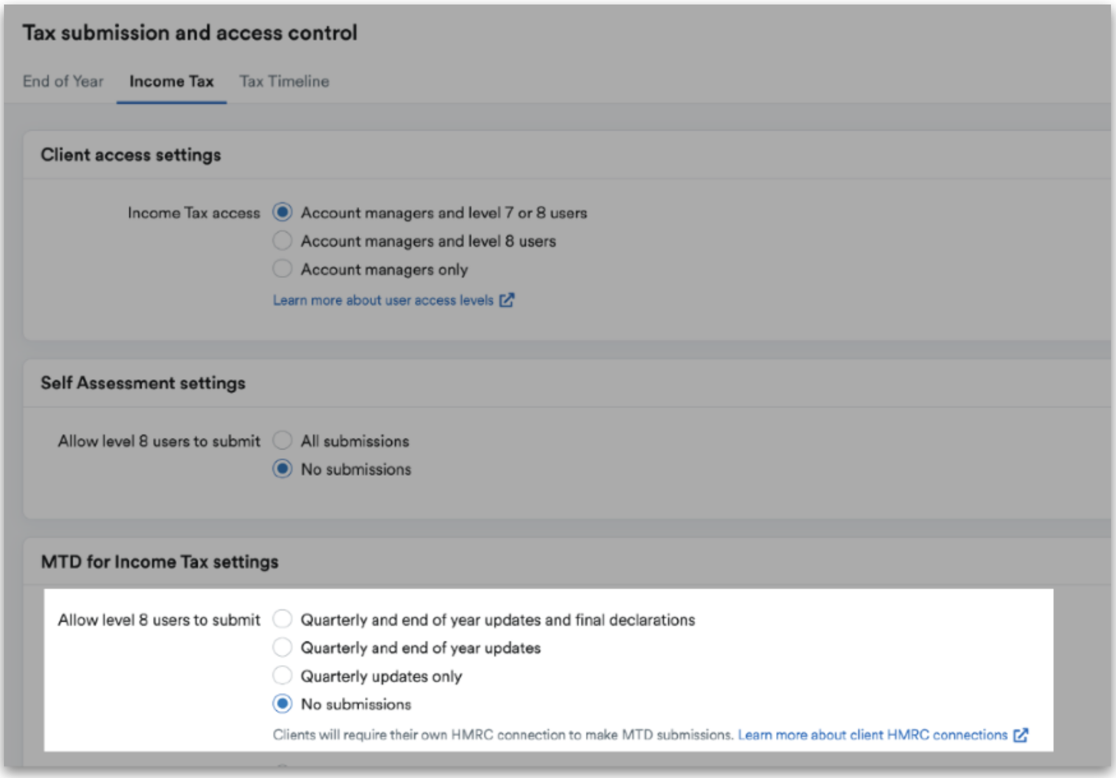
The next section is 'Self Assessment settings' which allows you to choose whether clients with full (level 8) access who need to complete Self Assessment forms can make Self Assessment submissions themselves. This option will only be available if you have given Income Tax access to level 8 users.



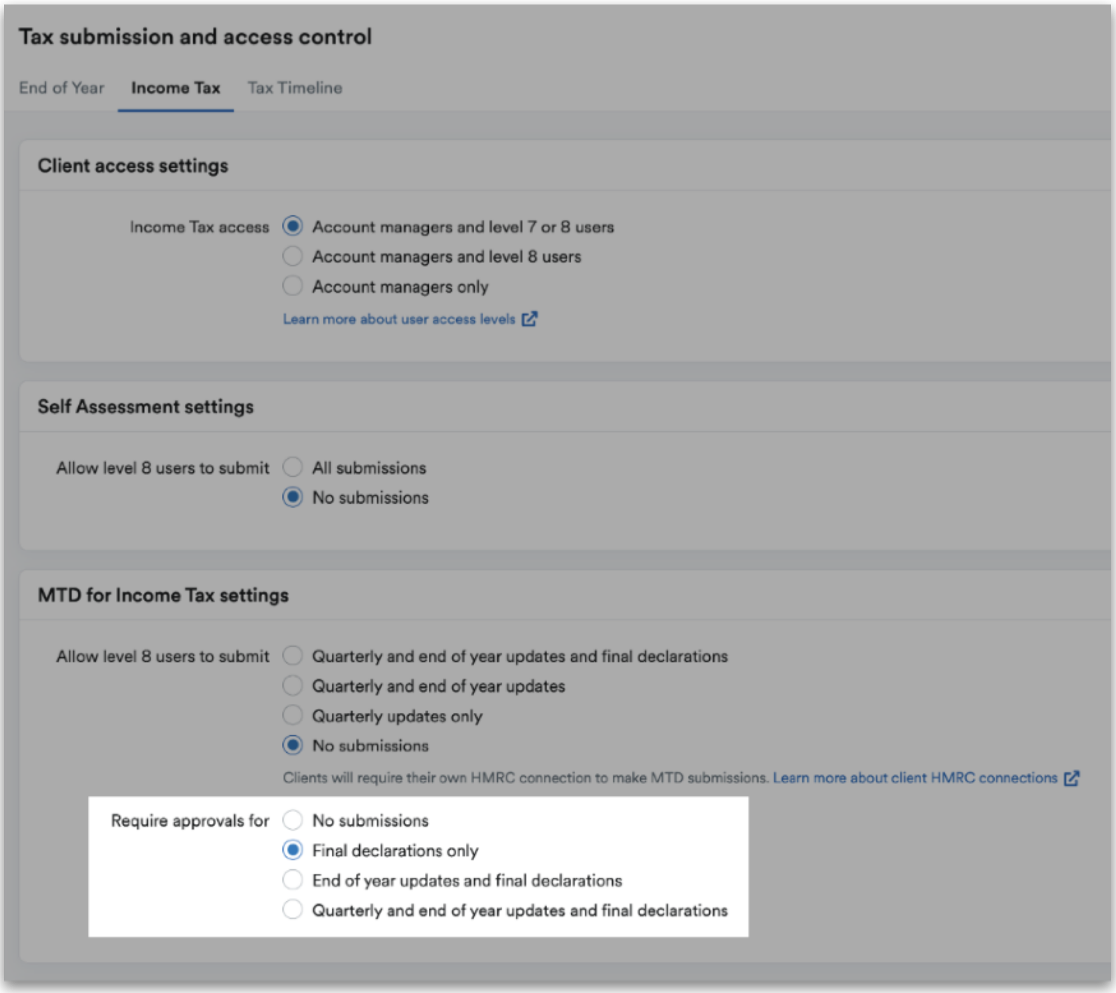
MTD for Income Tax settings

The 'MTD for Income Tax settings' section allows you to control your clients' ability to submit quarterly updates, end-of-year updates and final declarations through FreeAgent.

In the 'Allow Level 8 users to submit' section, you can choose whether clients with full (level 8) access can make submissions for quarterly updates, end of year updates and final declarations.

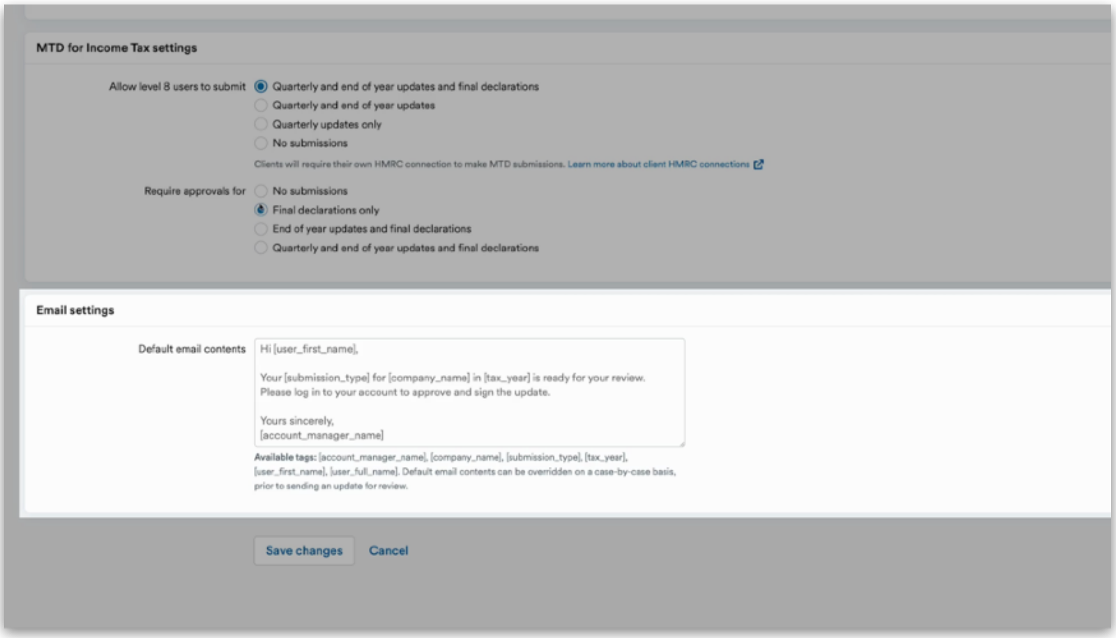


In the 'Require approvals for' section, you can choose which areas you would like to switch on client approvals for. You can choose 'No submissions', 'Final declarations only', 'End of year updates and final declarations' or 'Quarterly and end-of-year updates and final declarations'.

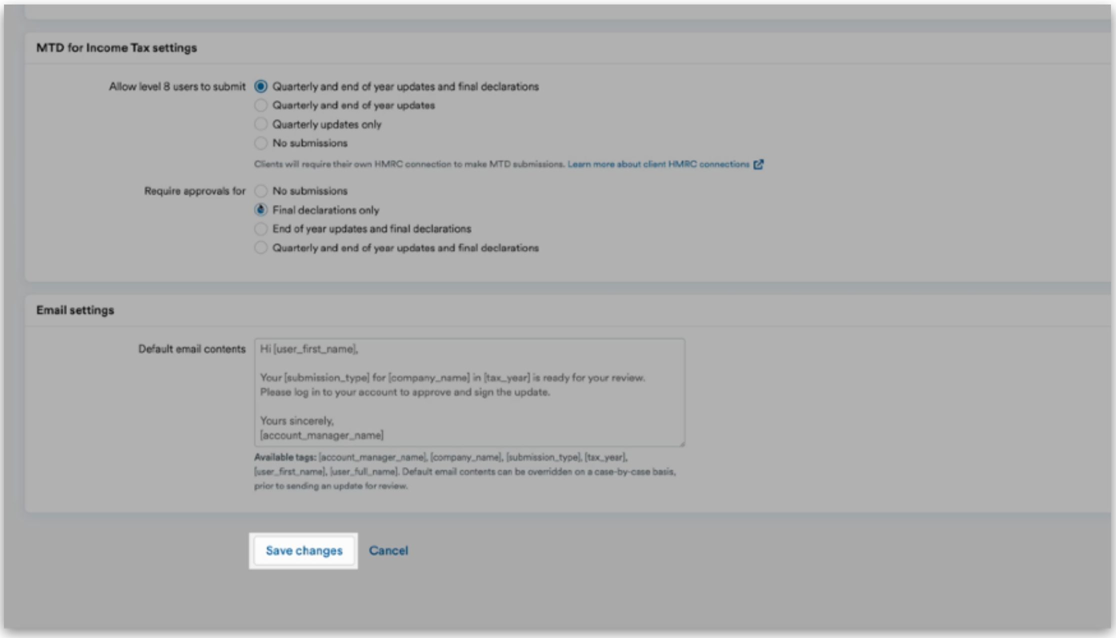


The 'Email settings' section controls the contents of the email that will be sent to the client when you ask for approvals.

You can add email tags to this box from the list of available tags below the content box to make it pull in that specific client's relevant information.



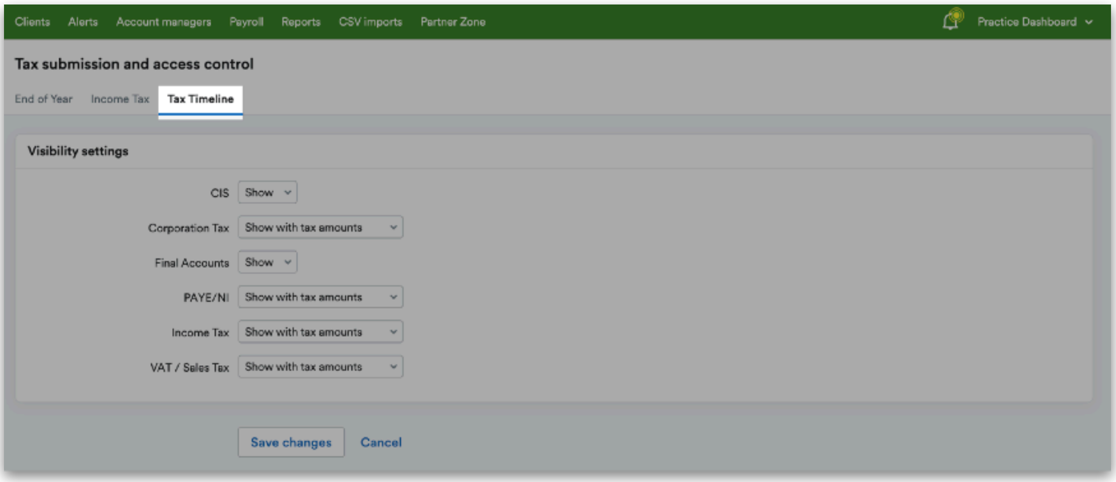
Once you have completed all the changes, select '**Save changes**'.



Tax Timeline settings

The Tax Timeline is one of the tiles on the Overview screen in the desktop and mobile app.

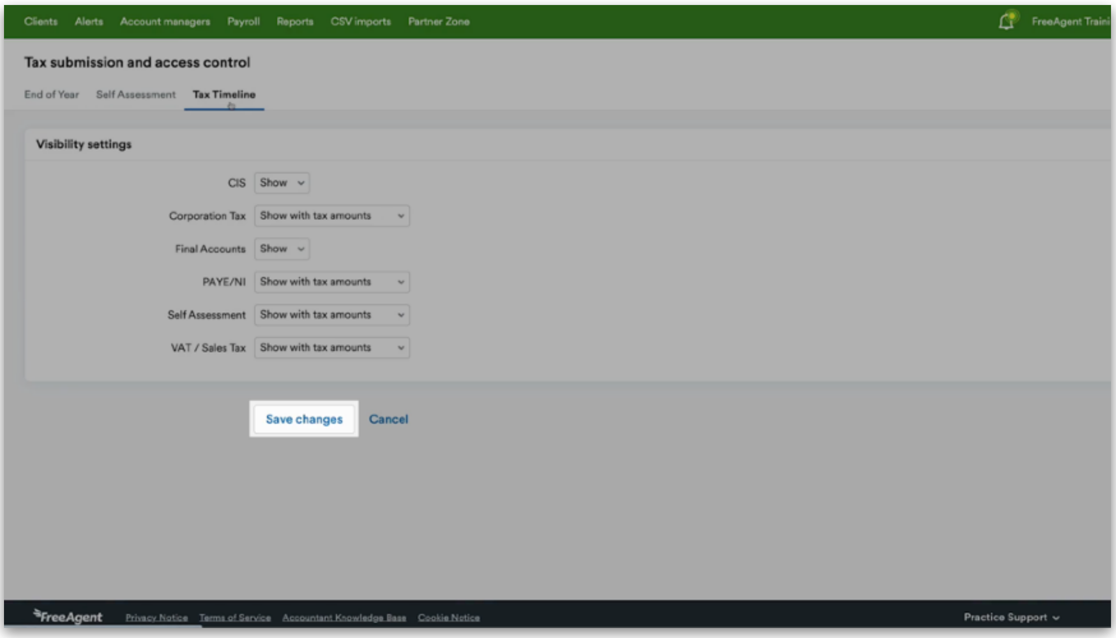
In the ‘Tax submission and access control page’, select the ‘**Tax Timeline**’ tab.



In this area, you can select what all of your clients can see in the tile. The options are:

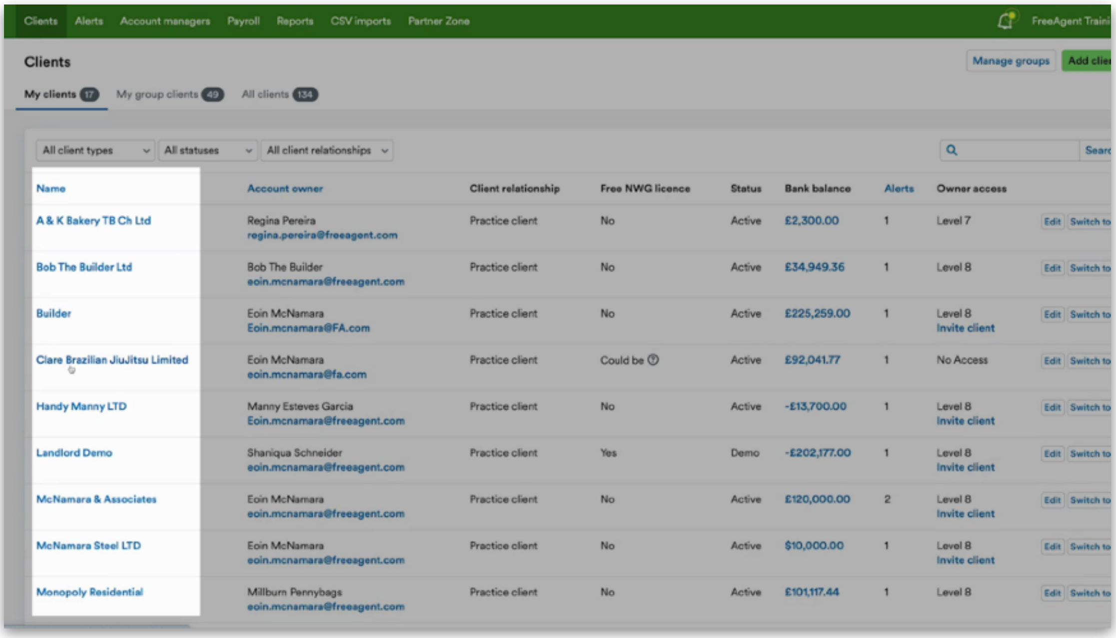
- ‘**Hide**’ - which will remove that piece of information from the Tax Timeline
- ‘**Show**’ - which will only show the date when that particular item of tax is due
- ‘**Show with tax amounts**’ - which will show the amount of tax due and the due date.

Select ‘**Save changes**’ to reflect these new Tax timeline settings.

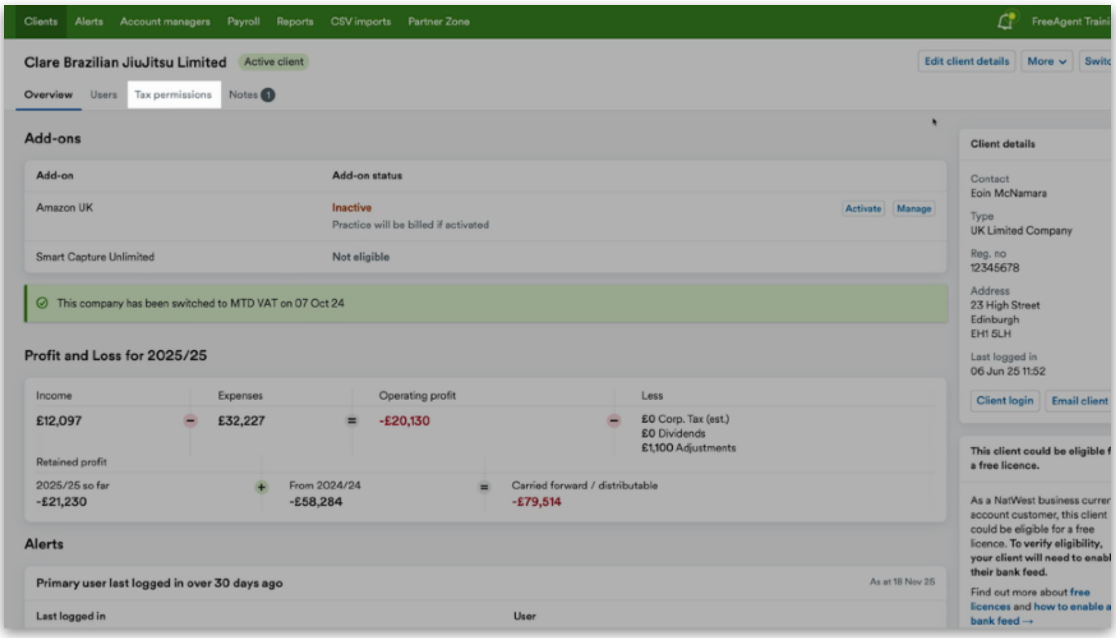


Individual client settings

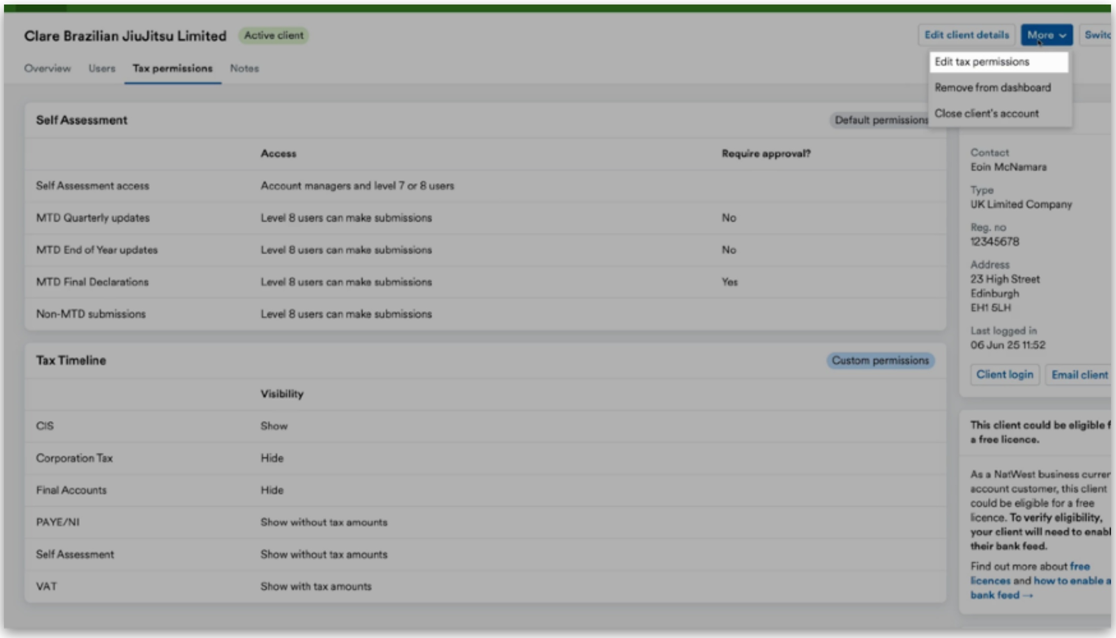
You can also change individual settings for each client by navigating to the '**Clients**' tab and selecting the relevant client.



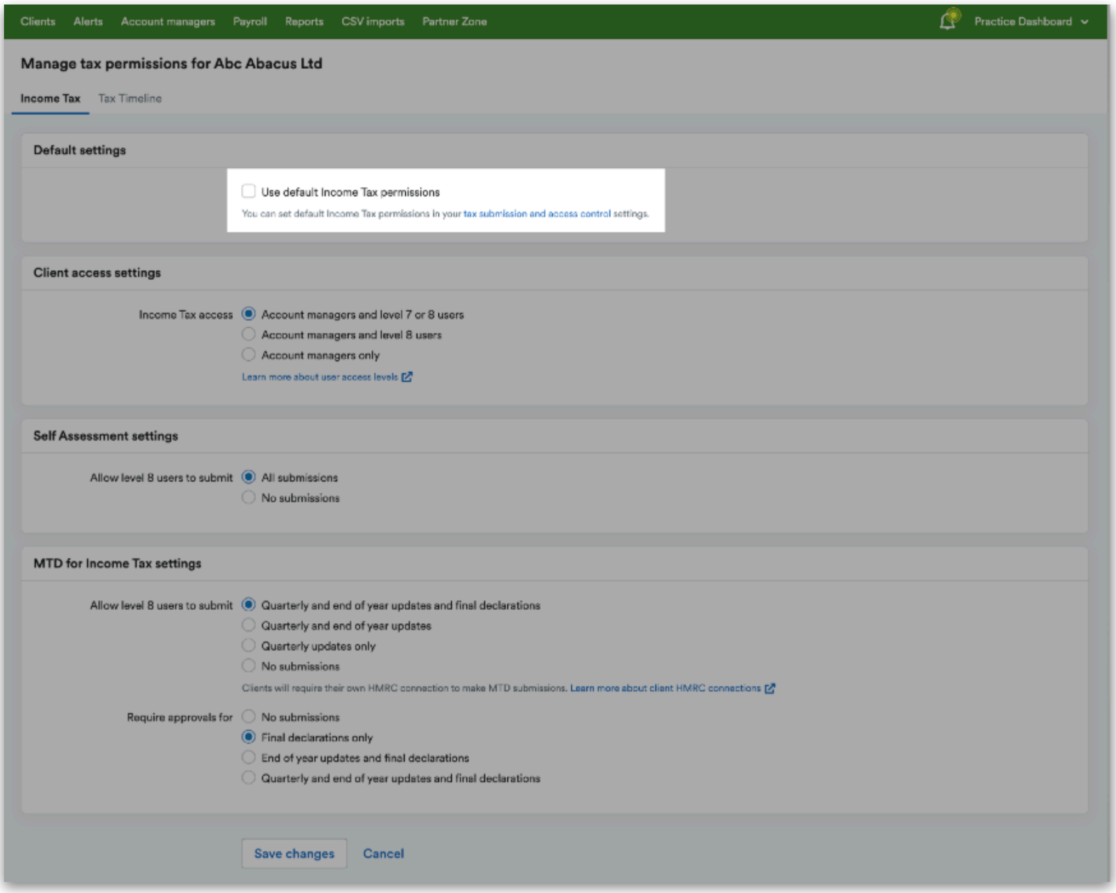
Select the '**Tax permissions**' tab. This will show the client's 'Income Tax' and 'Tax Timeline' settings.



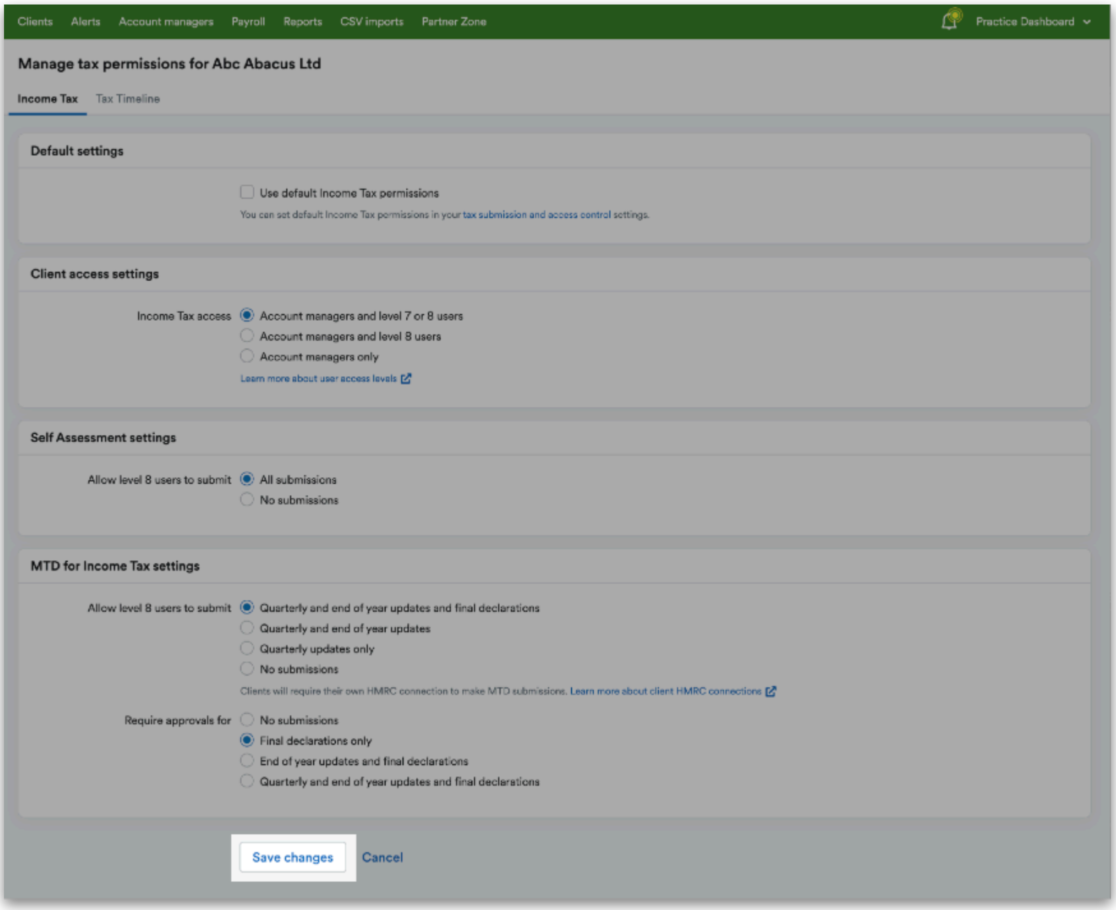
To change these settings, navigate to the '**More**' drop-down menu and select '**Edit tax permissions**'.



To change the default, you need to deselect the '**Use default Income Tax permissions**'.



Once changes are made, select ‘**Save changes**’.



Need more help?

What we’ve covered in these modules should give you the confidence to complete the accreditation exam and the tools to manage your client’s accounts within FreeAgent.

There are various resources that will help you on your FreeAgent journey. If you run into issues or have any specific questions about you or your clients’ data in FreeAgent, click the ‘**Help**’ button in the bottom-right corner when you’re logged into FreeAgent.

Then, Ruby the robot will either suggest some answers from our Accountant Knowledge Base or connect you with our Practice support team via live chat if it’s during office hours, or to leave a message.

You may be asked to provide a support code when contacting us. This code is used to identify who you are and locate your Practice Dashboard, so that the Practice support team can assist you further.

This support code can be found by navigating to your Practice Dashboard and selecting ‘Practice Support’ from within the dark banner at the bottom of the page.

We hope these learning modules have been helpful, and please don’t hesitate to get in touch with your account manager if you have any questions.

Support for you and 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
Telephone: 0800 025 3800

Please have your account manager ID ready when contacting the Practice Support team.