# Essentials – Part 1

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

2026

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

# Contents

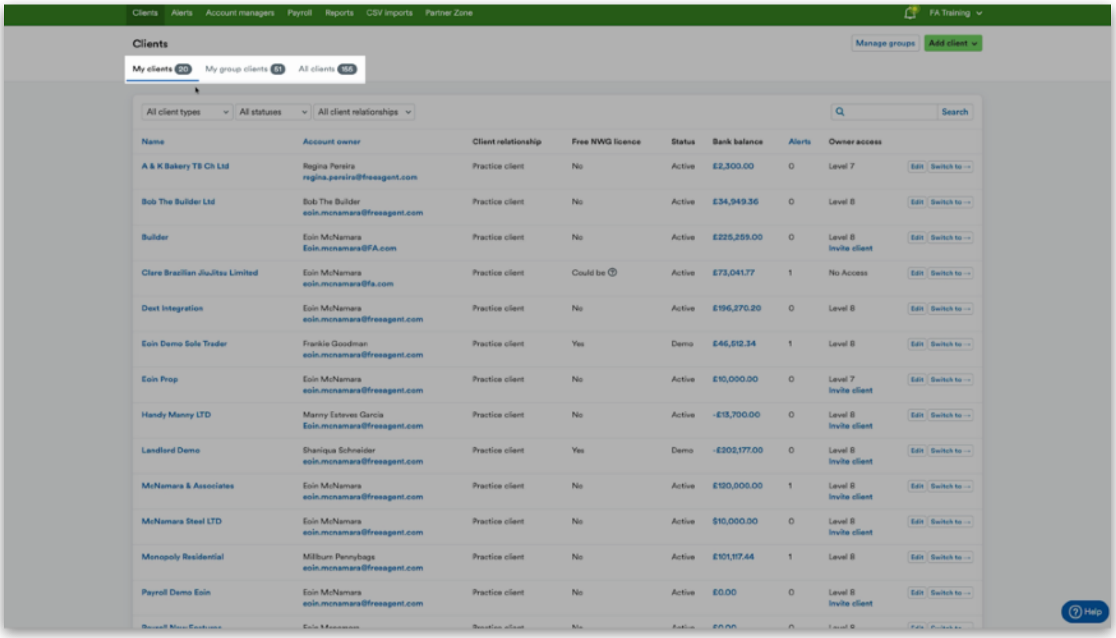
# Your Practice Dashboard

## 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'.




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 and is only available to **Admin** and **Comprehensive** account managers.

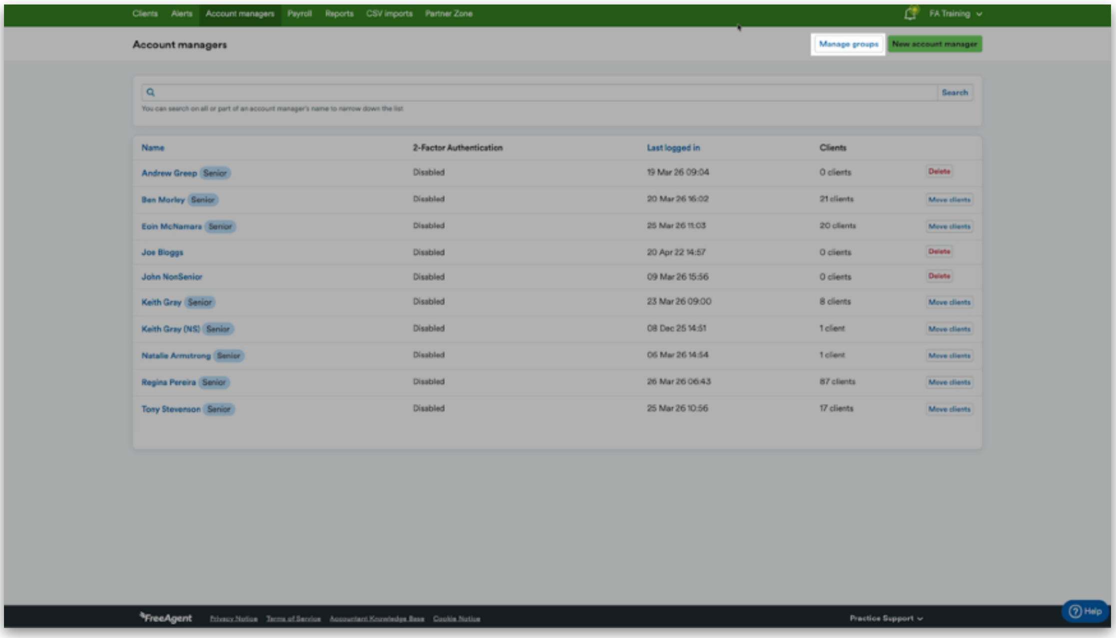
## Groups

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

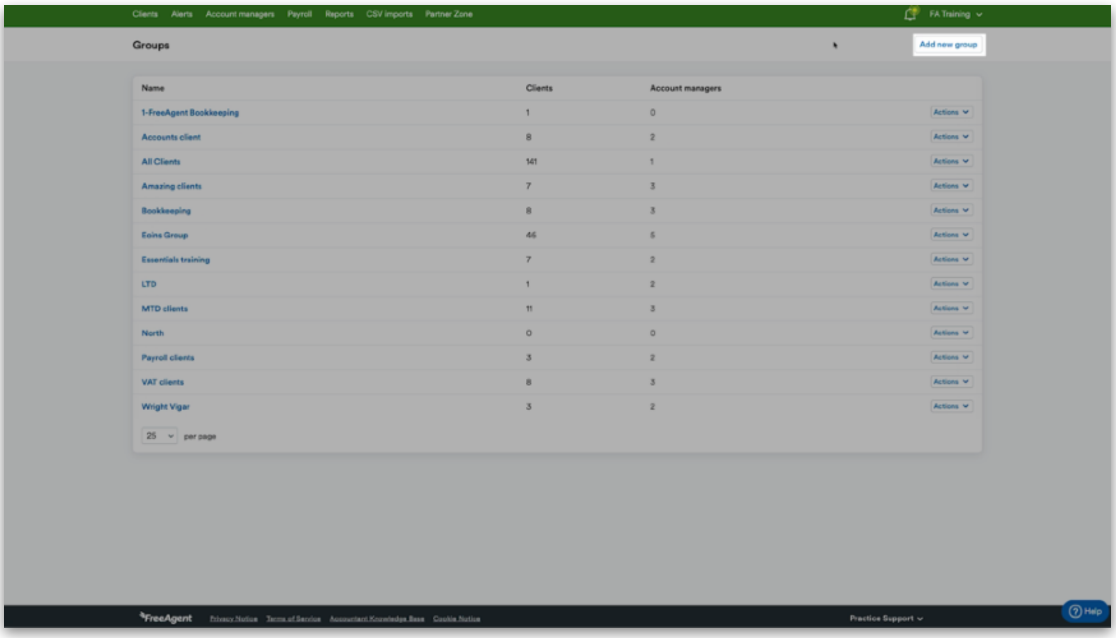
You can manage groups from both the 'Clients' tab and the 'Account managers' tab.

You must be a practice user with an **Admin** or **Comprehensive** role to create and edit groups.

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

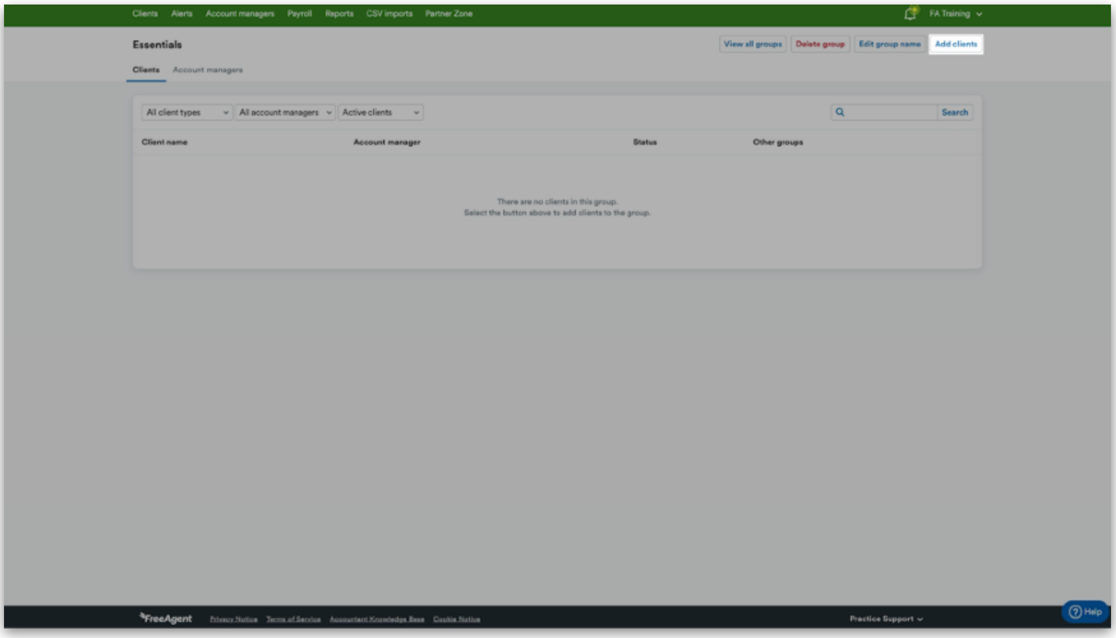



If you want to create a new group, you can select ‘**Add new group**’.



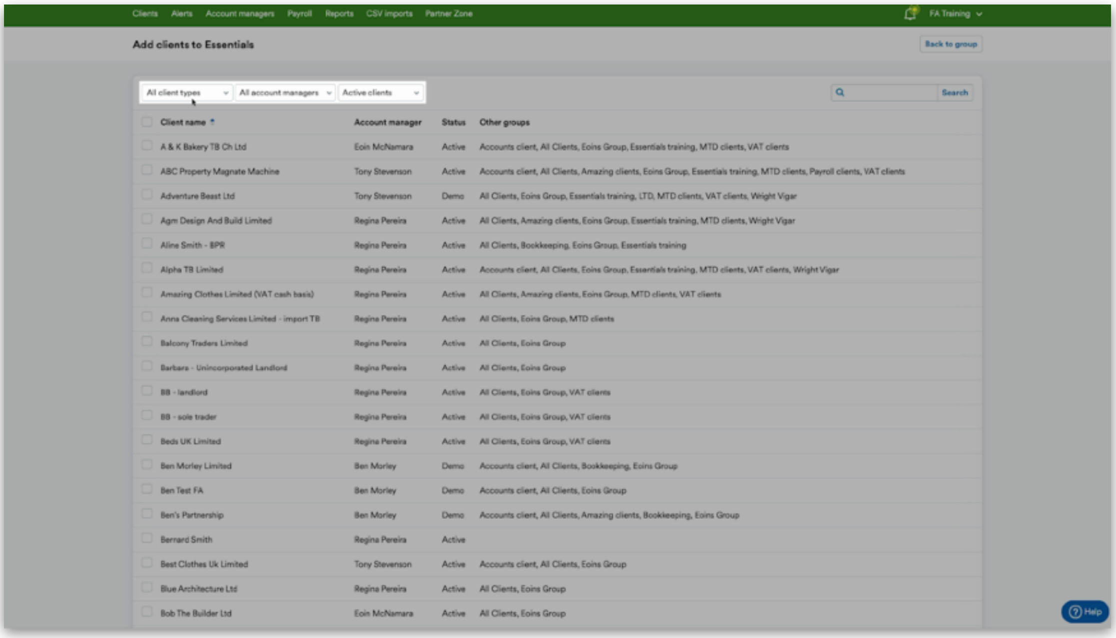
You can click on the name of an existing group to add account managers and clients to that group in bulk.

To add clients in bulk, select the ‘**Clients**’ tab and then select ‘**Add clients**’.

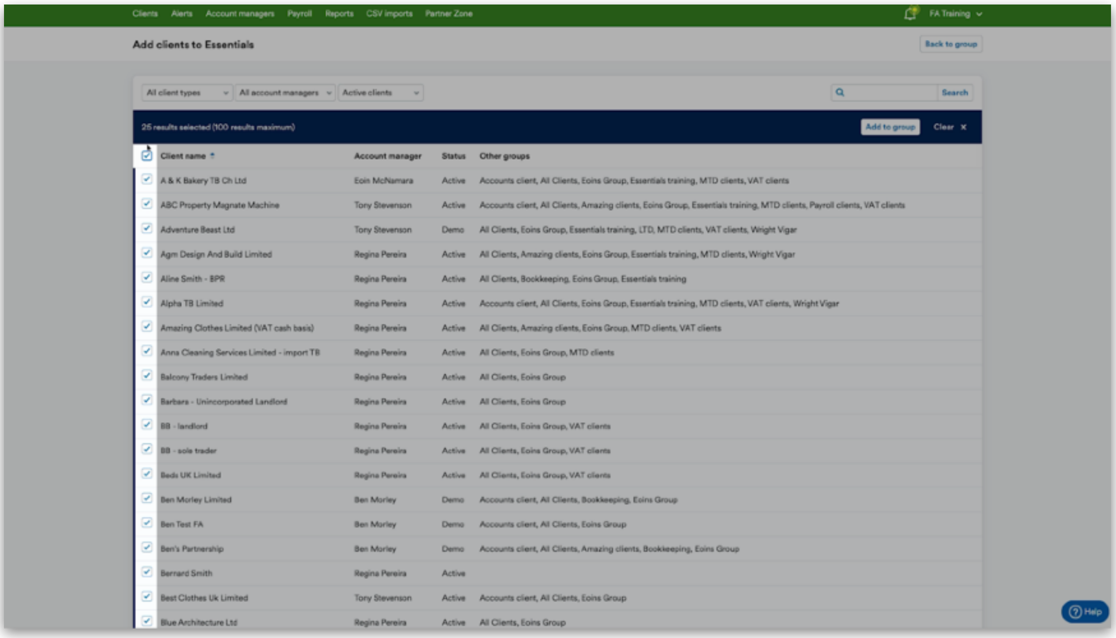



This will then show all clients on the dashboard.

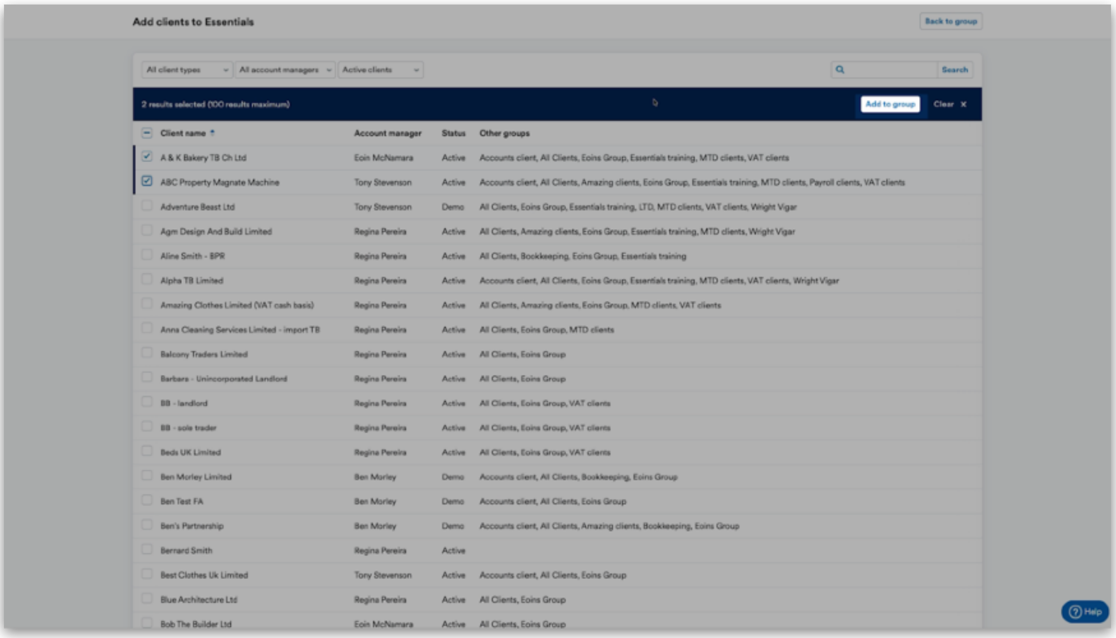
You can filter by licence type, account manager, and client status from the drop-down menus.



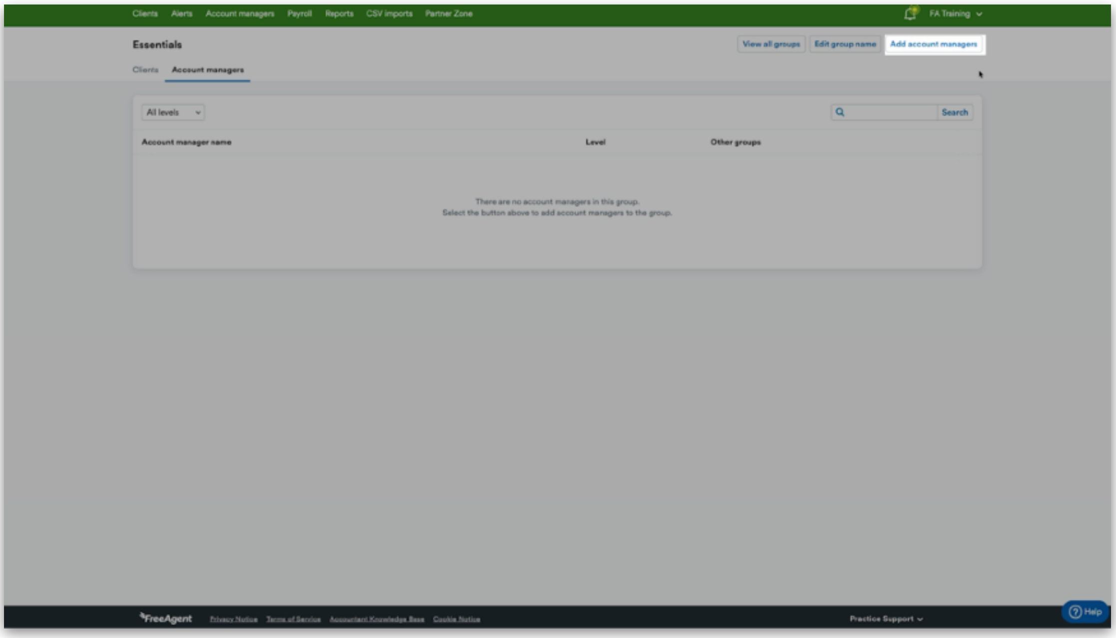
You can select all the clients displayed by selecting the checkbox next to the ‘Client name’ heading, or you can select the checkbox beside each client you want to add in bulk.




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

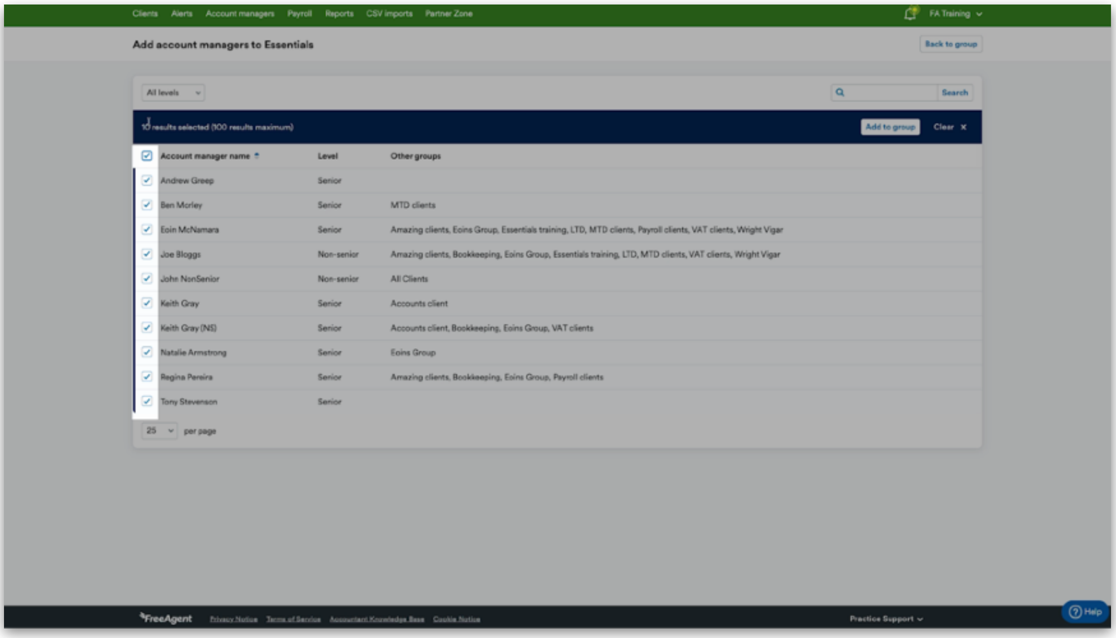


You can also add account managers to a group in bulk by selecting the ‘**Account managers**’ tab within the relevant group and then selecting ‘**Add account managers**’.

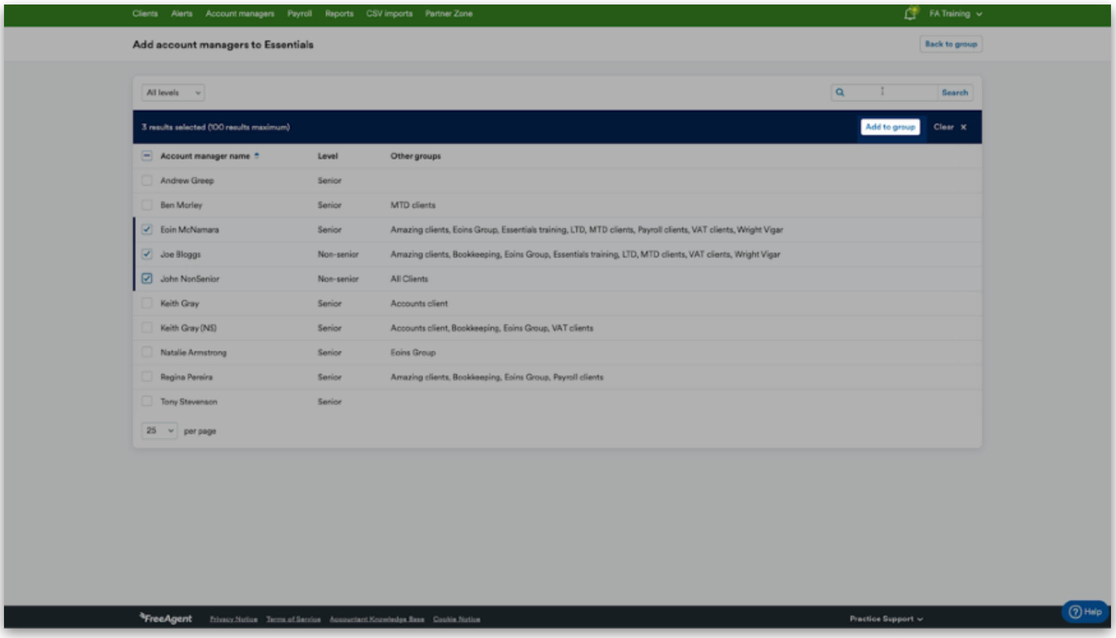



You can filter by level.

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.

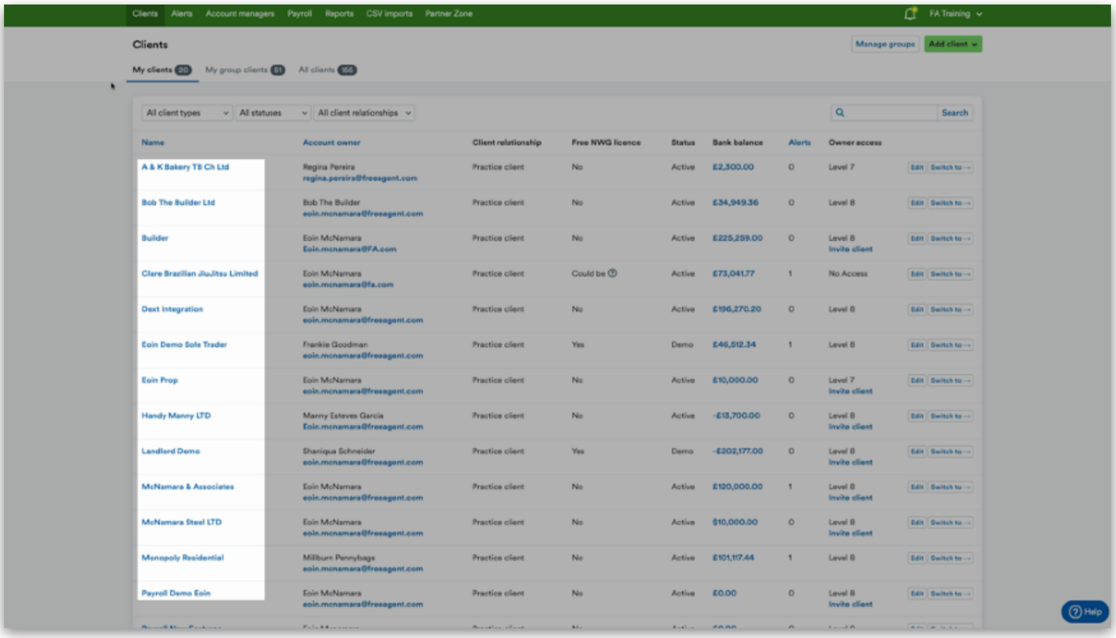


Once you have selected all the relevant account managers, select ‘**Add to group**’.

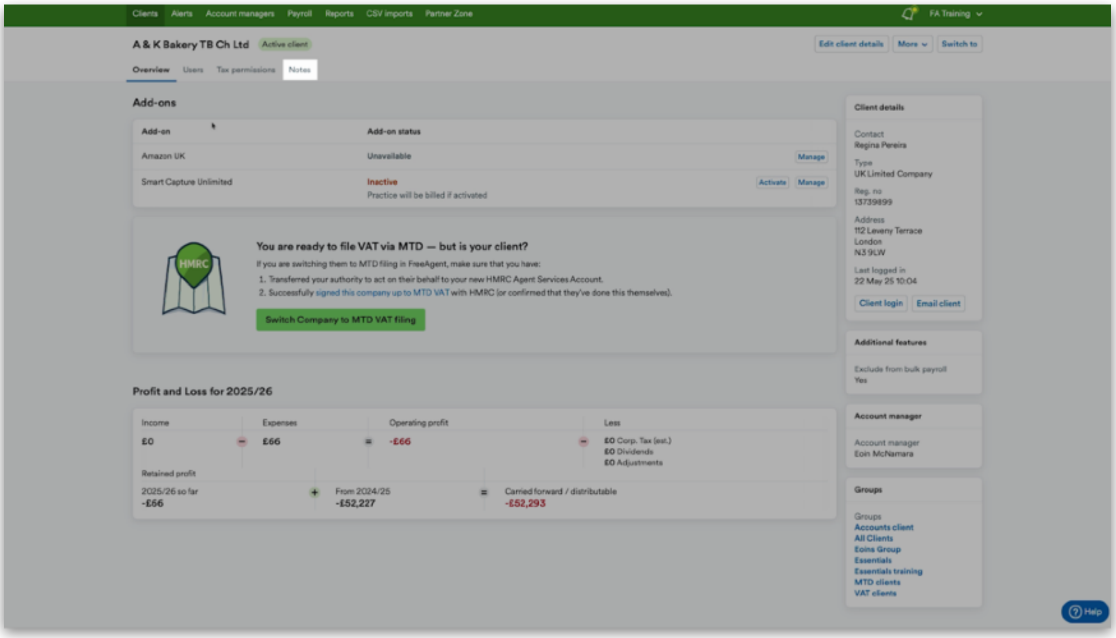



## Notes

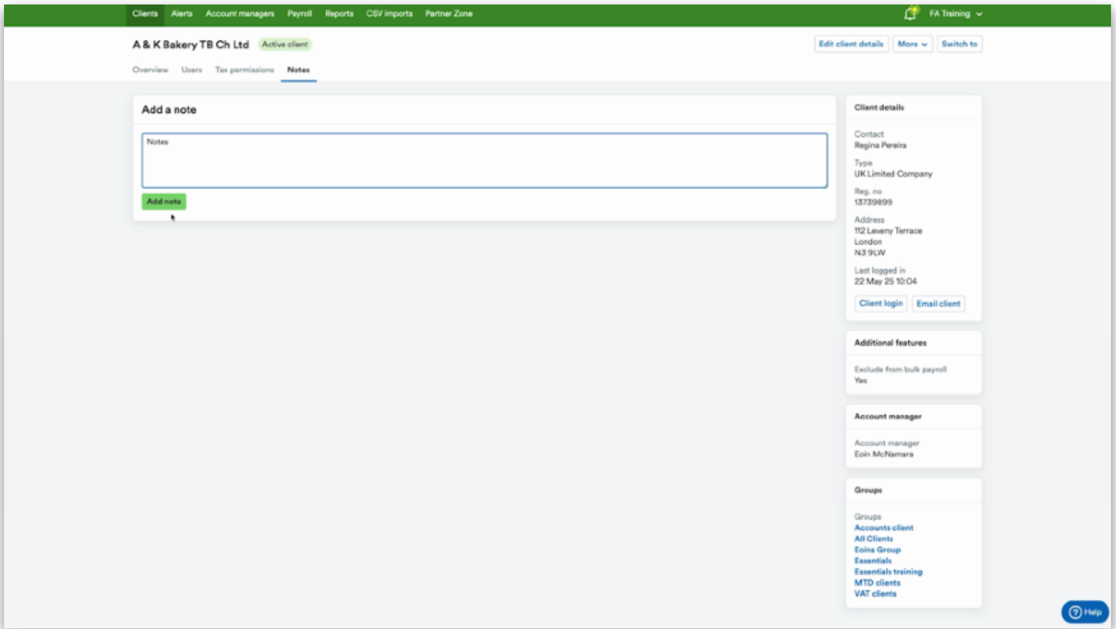
Notes can be added to your client’s profile on your Practice Dashboard. Firstly, select the relevant client’s name from the list on the ‘Clients’ tab to view their client profile.



Select the ‘**Notes**’ tab.




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.



## Account managers

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

There are four roles for account managers: **Admin**, **Comprehensive**, **Standard** and **Limited**. The main difference between the four roles is their client access.

An account manager with an **Admin** role has full access to all clients, features and settings.

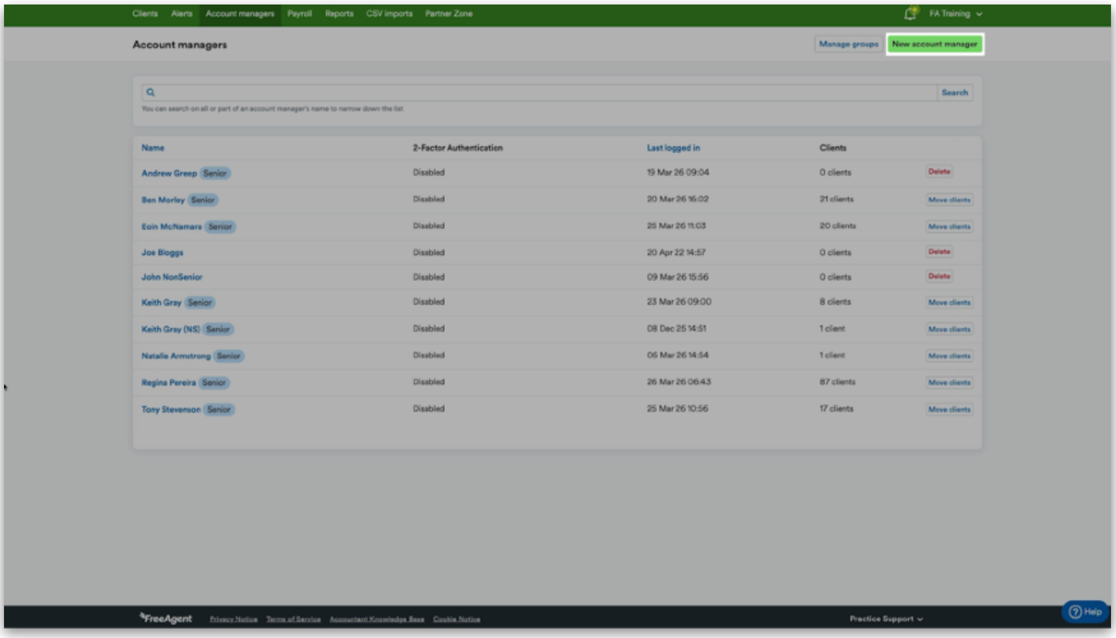
An account manager with a **Comprehensive** role can access all clients. They can add, edit and remove clients, and assign clients to other account managers. They can also view reports for all clients and activate and cancel add-ons. An account manager with a **Comprehensive** role **can't** add, edit, or delete account managers. They also **can't** set practice payment preference for add-ons.

An account manager with a **Standard** role can access assigned clients and can create, close and remove assigned clients. They can also view reports for assigned clients and activate and cancel add-ons. An account manager with a **Standard** role **can't** export all clients. They also **can't** assign clients to other account managers.

An account manager with a **Limited** role can access assigned clients, view reports for assigned clients and prepare payroll in bulk. An account manager with a **Limited** role **can't** export all clients, or assign clients to other account managers. They also can't create, close or remove clients, file payroll or import clients in bulk. They also **can't** activate or cancel add-ons.

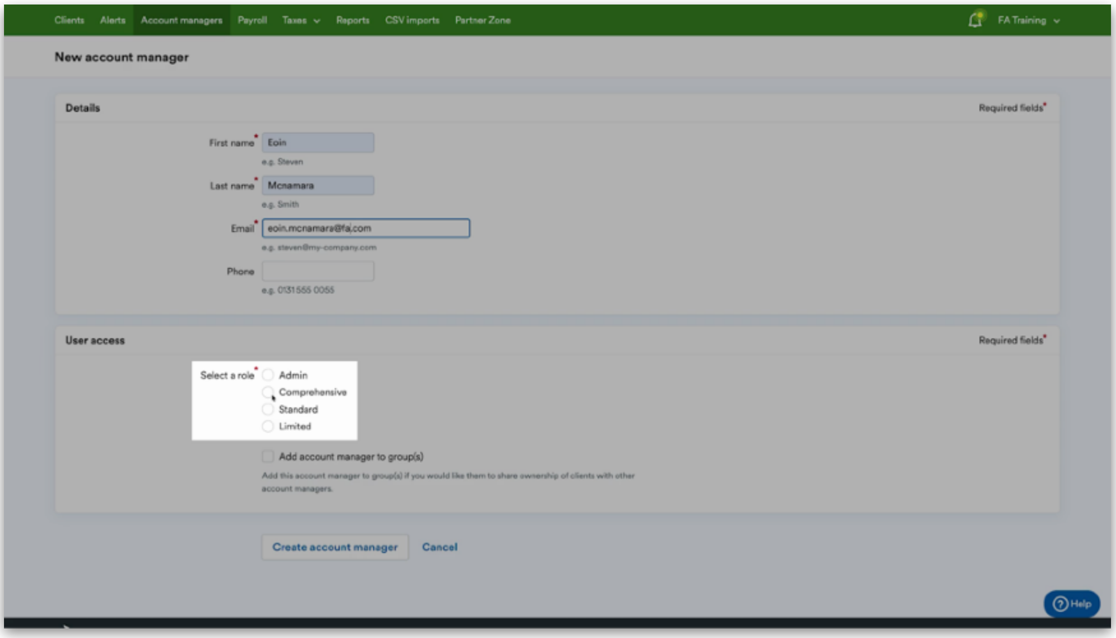
To add additional account managers, you must have an **Admin** role.

To add additional account managers, click the green ‘**New account manager**’ button in the top right of the screen.

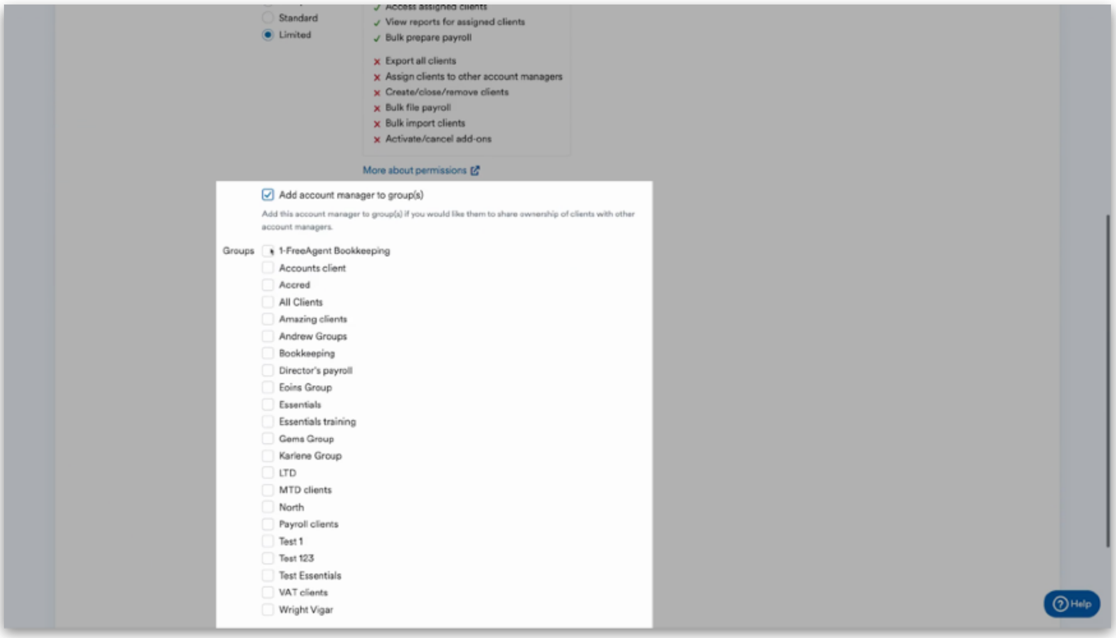



Next, enter their contact details.

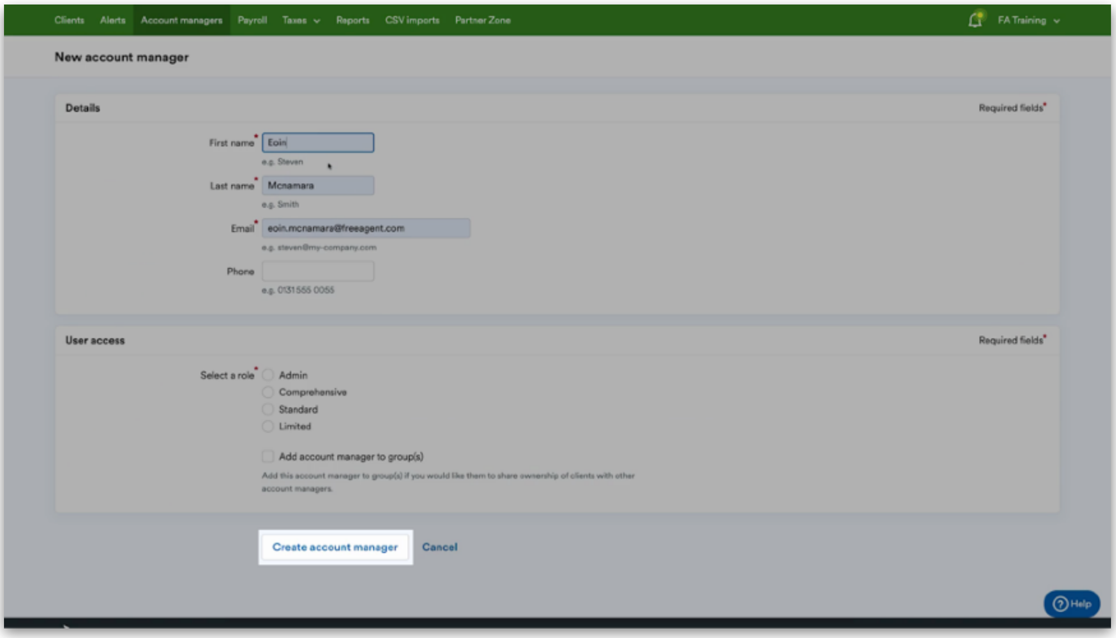
If you want this person to be a senior account manager, tick the checkbox next to the relevant account manager role you want to assign to them.



If you'd like to add the new account manager to an existing group, select the '**Add account manager to group(s)**' checkbox and then select the group(s) you wish to add them to.




Select '**Create account manager**' to complete the process.

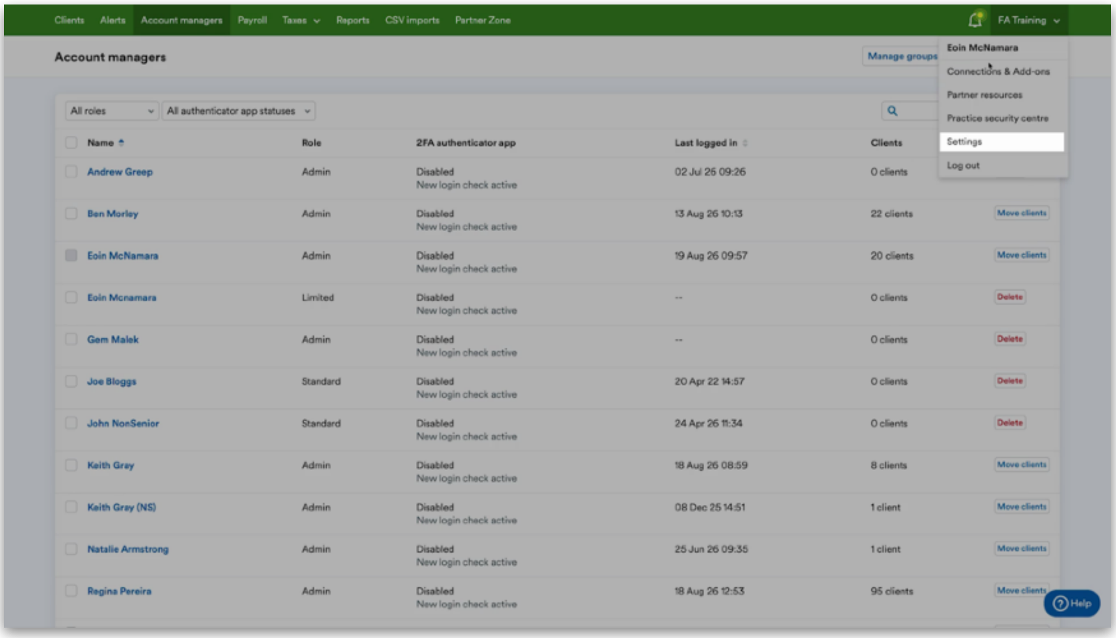



There's no limit to the number of staff you can add to your practice's FreeAgent account; however, it's important to make sure each member of staff is added to the account individually.

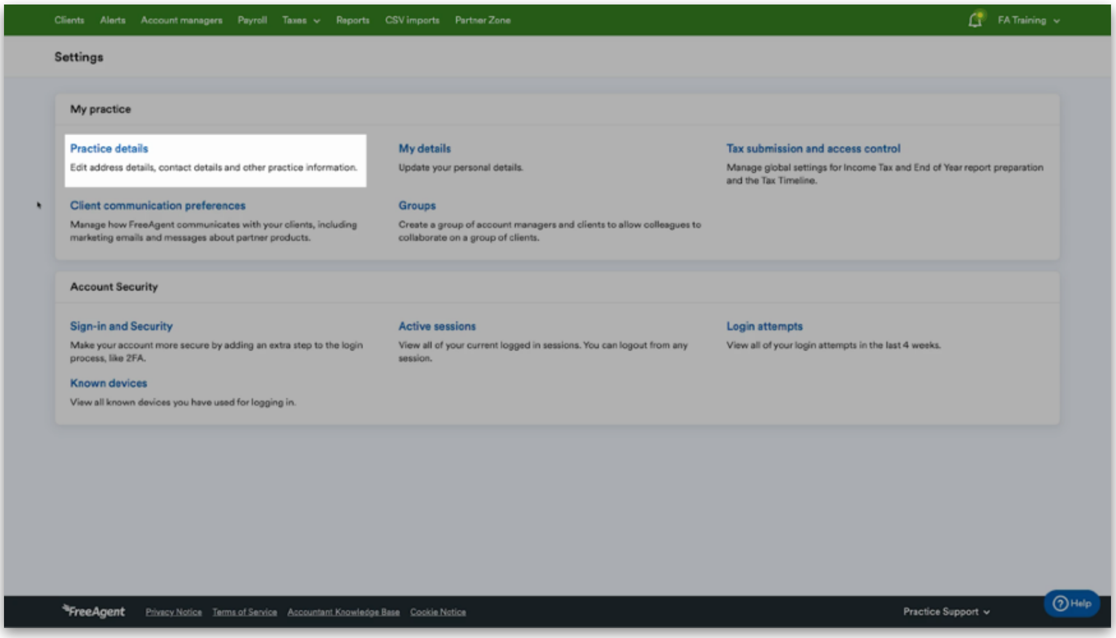
Each user has an individual login and password to keep their details secure. This also means we can communicate with all members of your practice about feature updates and improvements, so everyone is kept up to date.

## Practice Dashboard Settings

The Settings area is where you can manage your practice's details in FreeAgent. Navigate to your practice's name and select '**Settings**'.




In the 'My practice' section, select '**Practice details**'.



Here, you can update your practice's contact information and logo.

## HMRC Connections

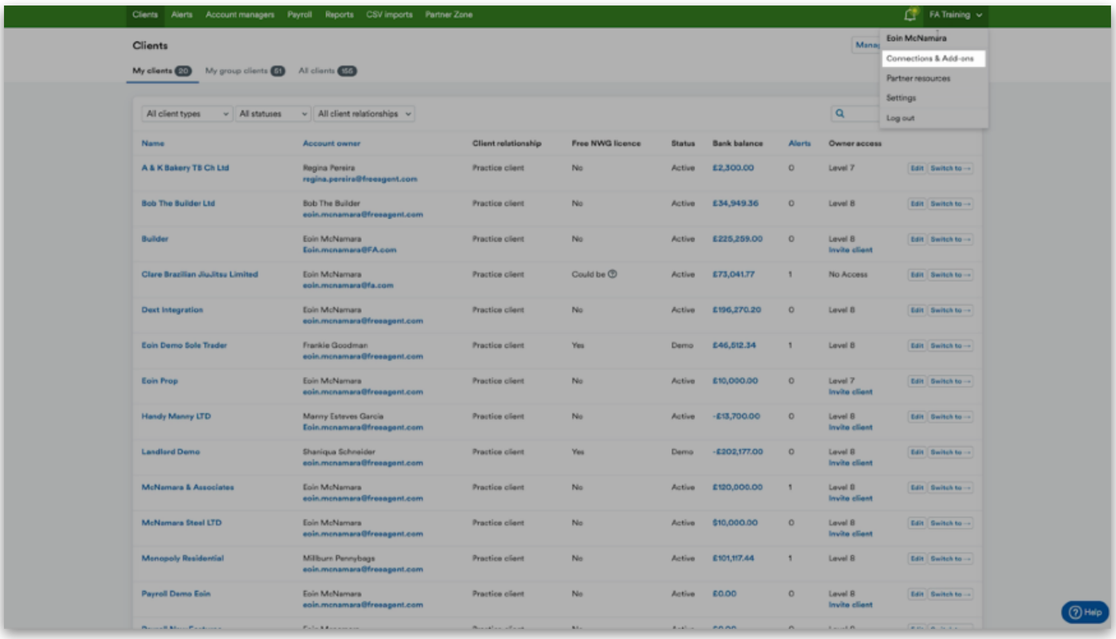
First, you'll need to create an agent services account with HMRC for your practice if you haven't already got one. This will generate a new Government Gateway ID which will give your practice access to HMRC's MTD for Income Tax and VAT services.

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.

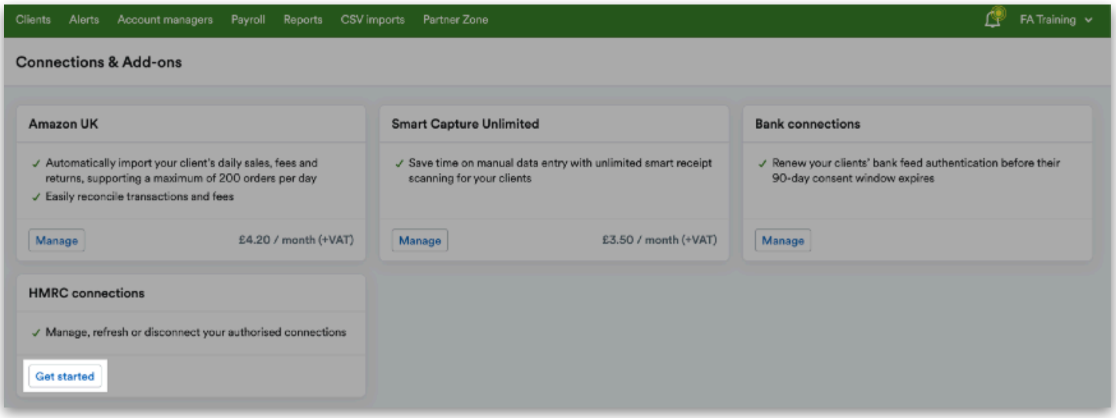
Once you've successfully created your agent services account and any new clients have authorised your new agent relationship, you'll need to use your agent services account credentials to connect FreeAgent to HMRC. This connection only needs to be set up by one account manager and will allow all account managers on the dashboard to use the connection to file MTD VAT returns for the relevant clients.

The Account manager must have an **Admin**, **Comprehensive** or **Standard** role to make this connection with HMRC.

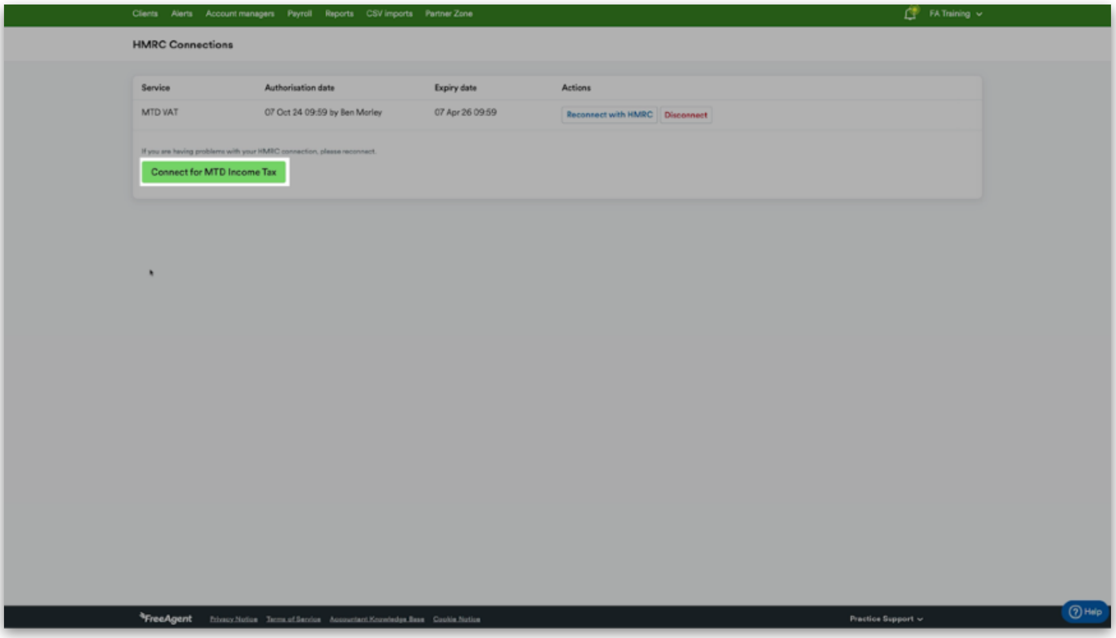
To do this, log in to your Practice Dashboard, navigate to your practice name and select '**Connections & Add-ons**' from the drop-down menu.



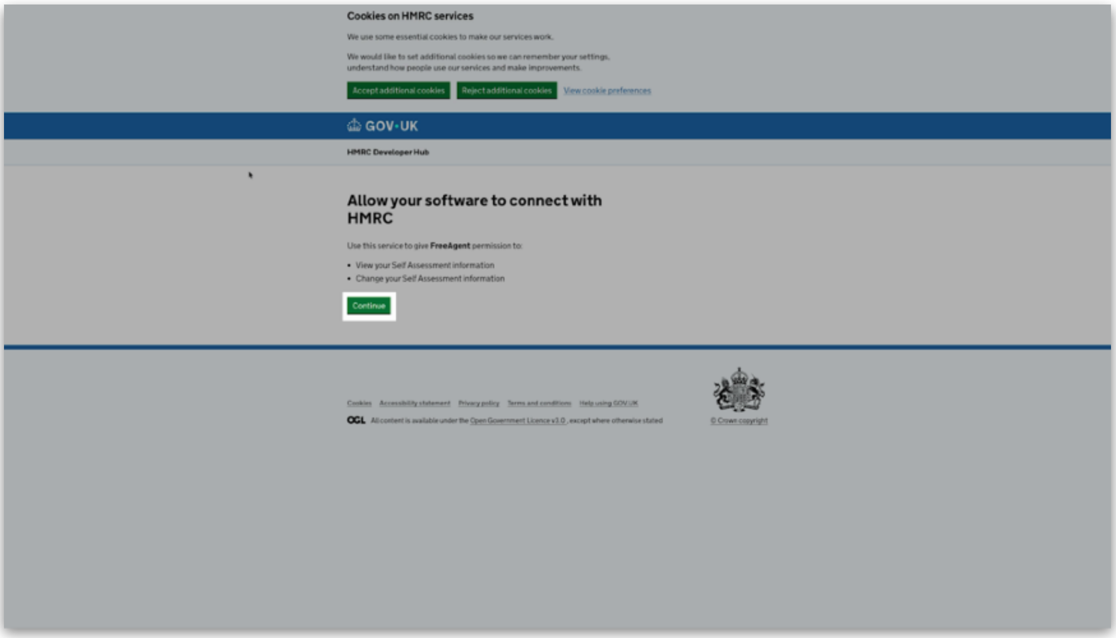
Then, select ‘Get started’ in the ‘HMRC connections’ section.




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.

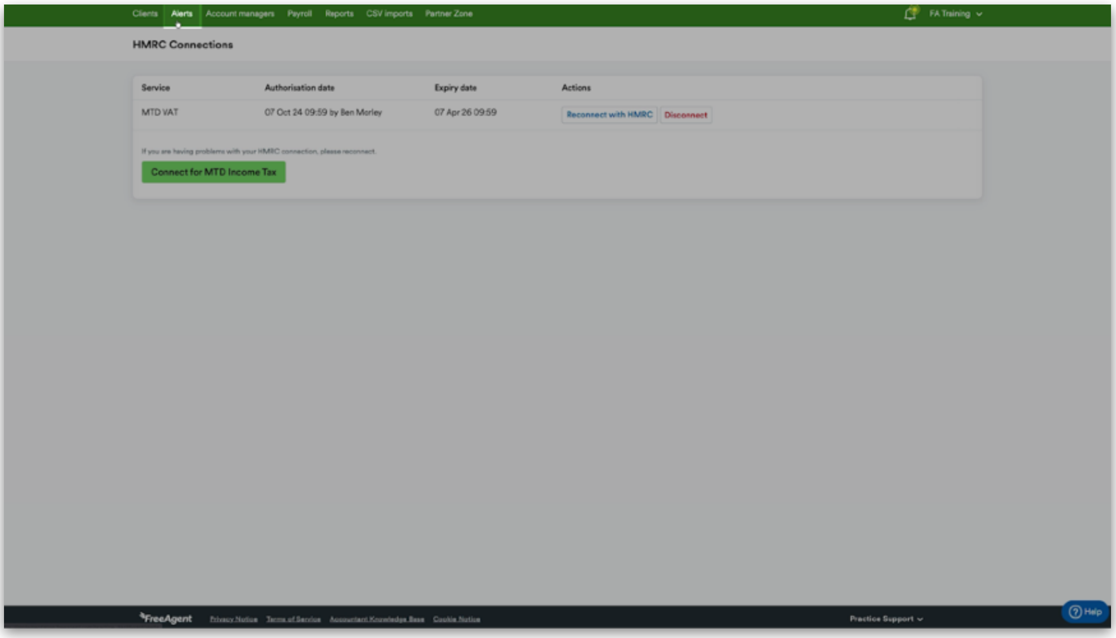



Please note that once you’ve connected FreeAgent to HMRC, you’ll need to update the connection every 18 months. You’ll also need to repeat this process for VAT.

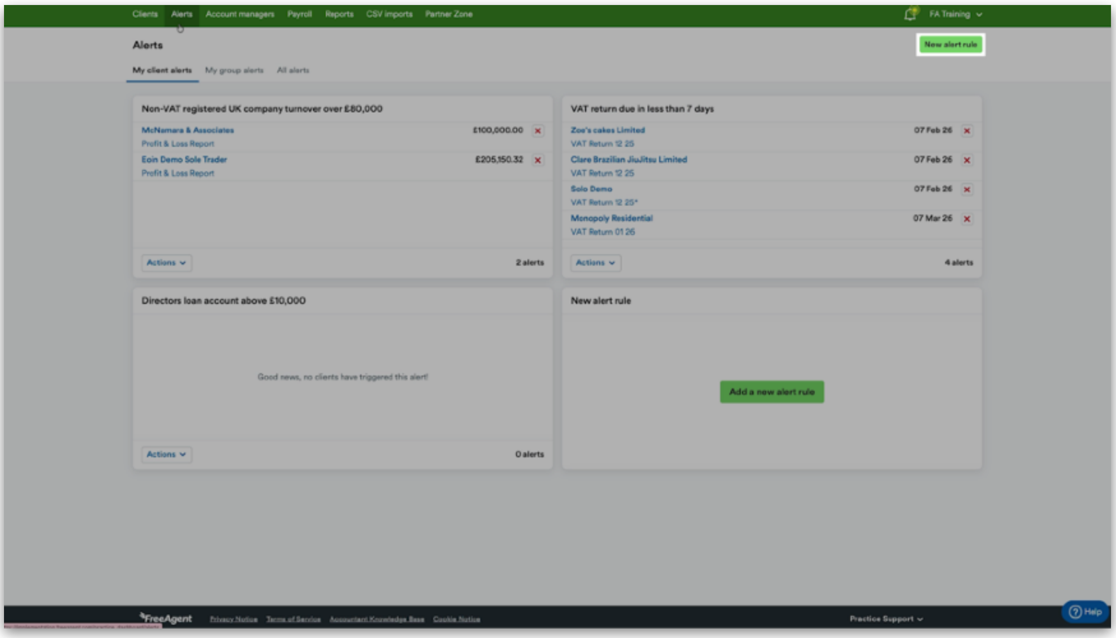
## Alerts

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.

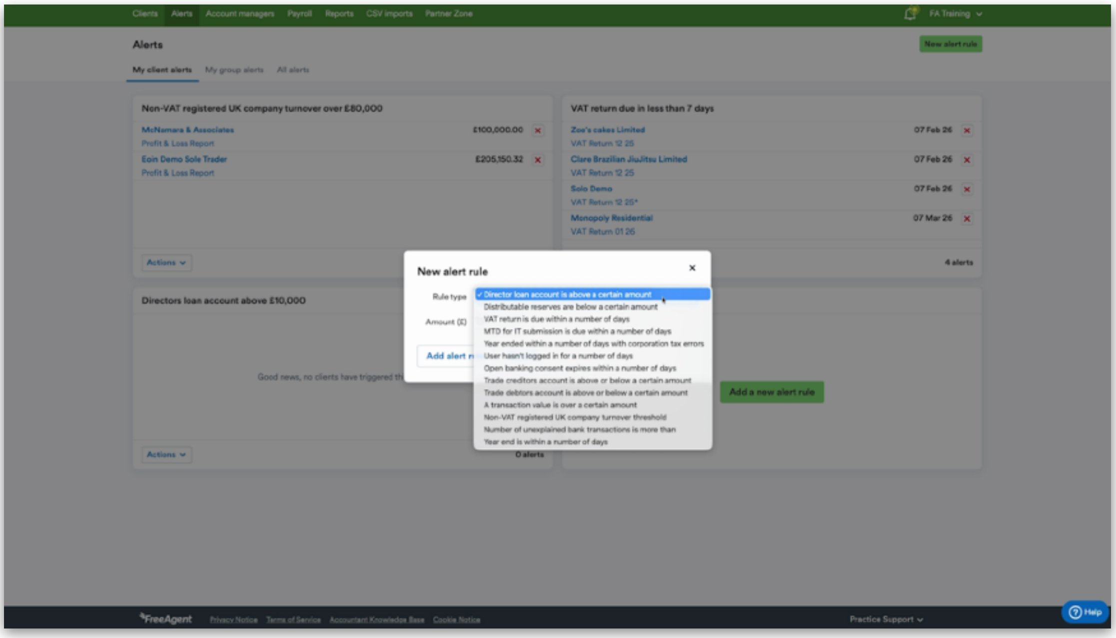
Navigate to the '**Alerts**' tab.




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

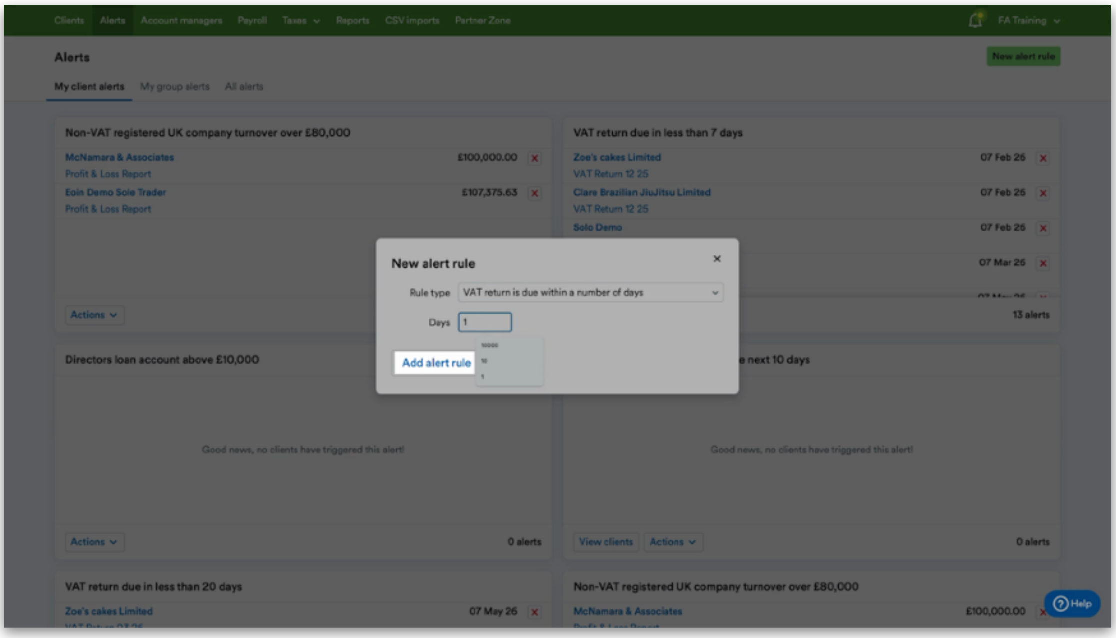


In the pop-up window, click ‘**Rule type**’ and select which option you’d like to track within your clients’ accounts from the drop-down menu.



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.

Once you’ve filled in the details for your chosen alert rule, select ‘**Add alert rule**’ to complete the process.



## Add-ons

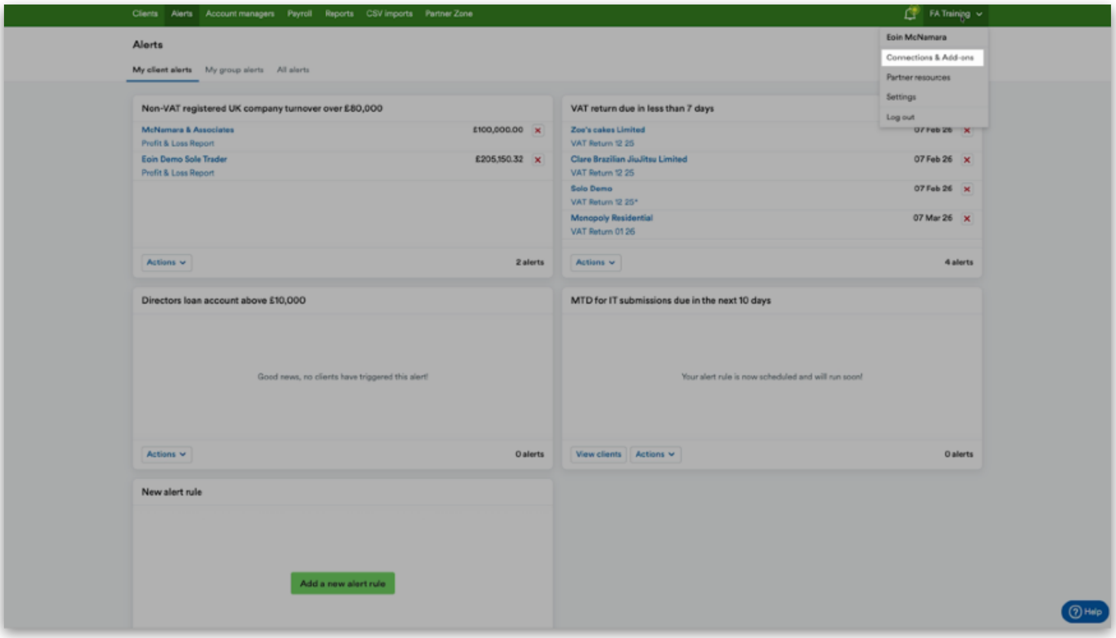
FreeAgent is packed with functionality that makes life easier for you and your clients, but we appreciate that some businesses have particular needs and would benefit from specialised tools. These tools take the form of add-ons that your clients can choose to subscribe to.

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.

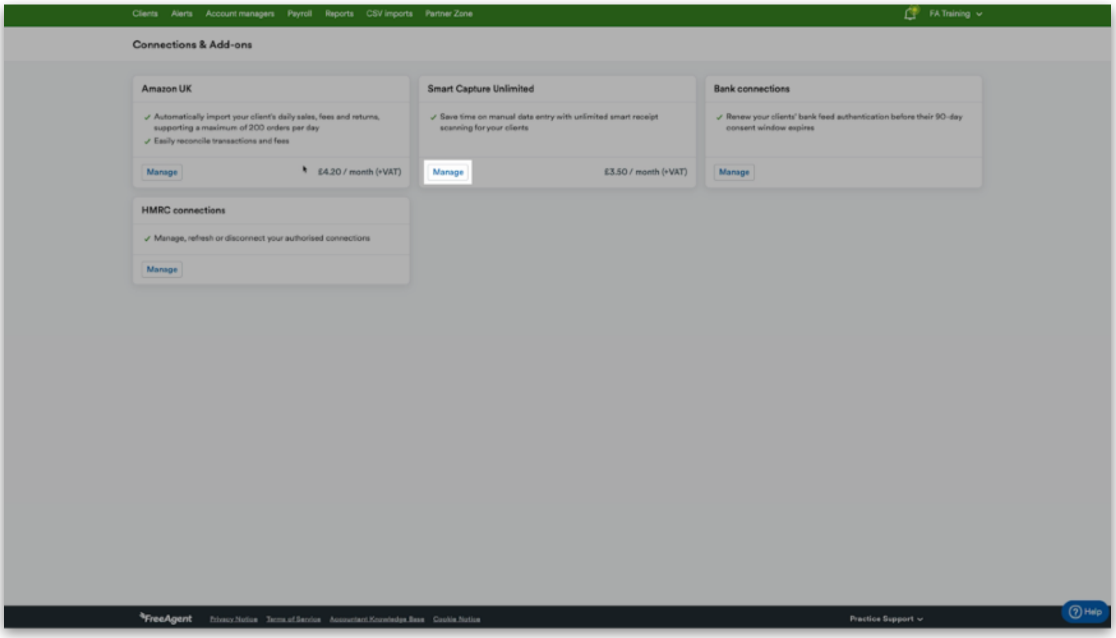
Until the practice's default settings have been confirmed, clients will be able to activate add-ons and be responsible for the cost of the add-on.

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

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



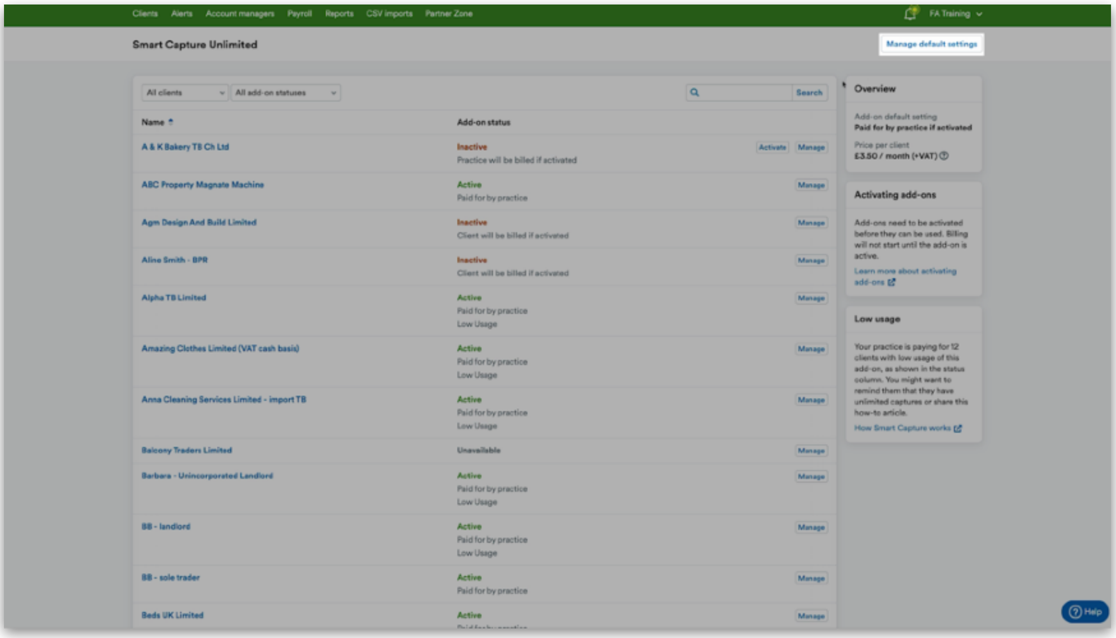
Select ‘**Manage**’ on the relevant add-on panel.



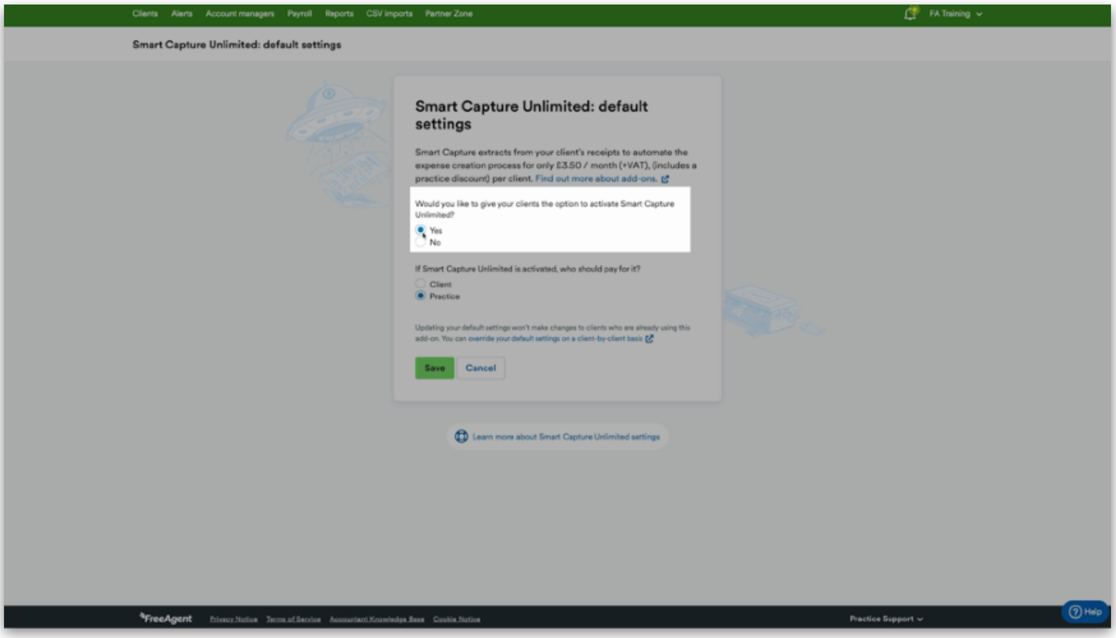

First, select whether or not you’d like your clients to be able to activate the add-on themselves, by default.

Select ‘**Manage default settings**’.

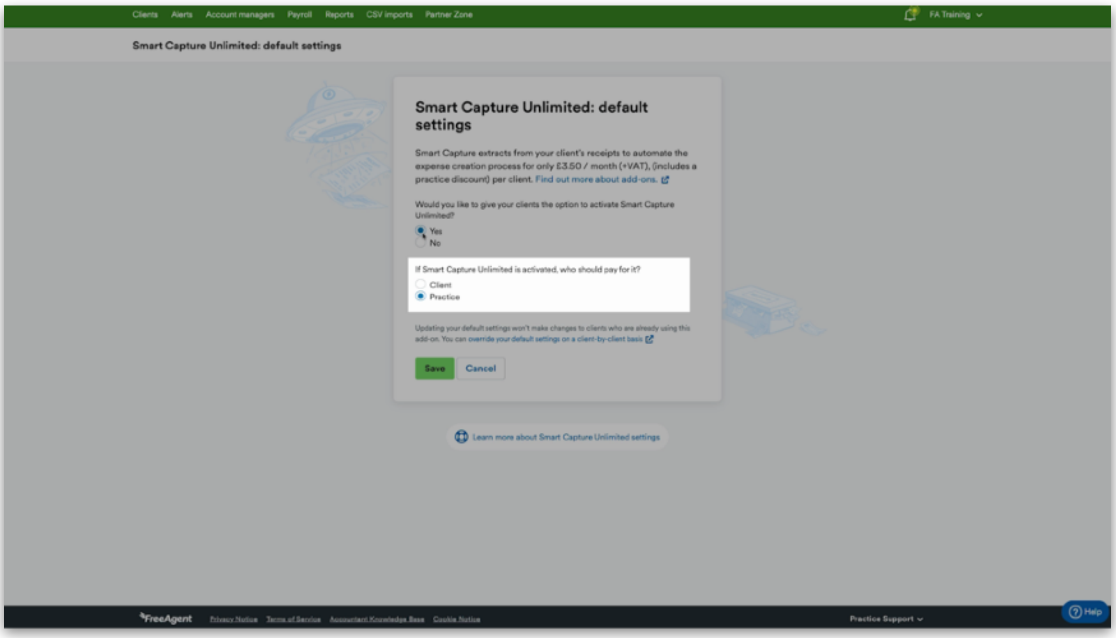
Please note that you must have an **Admin** role to access this area on your dashboard.



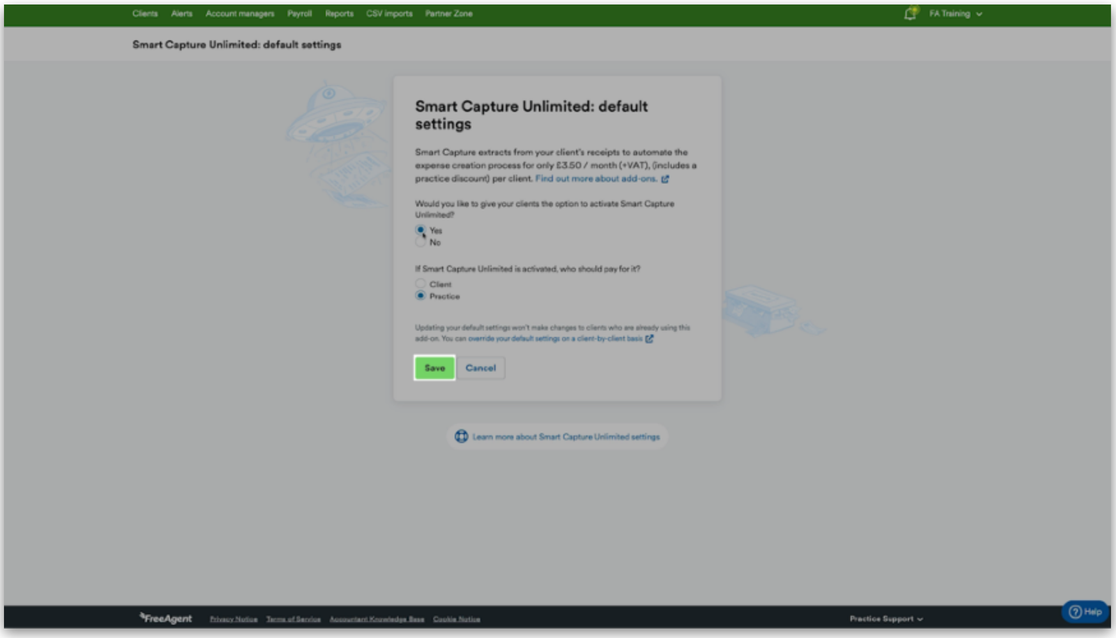
The first question is ‘Would you like to give your clients the option to activate [the connection or add-on]?’. Selecting ‘**Yes**’ will allow your client to enable the add-on within their FreeAgent account if they’re the account owner or have full (level 8) access.




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.



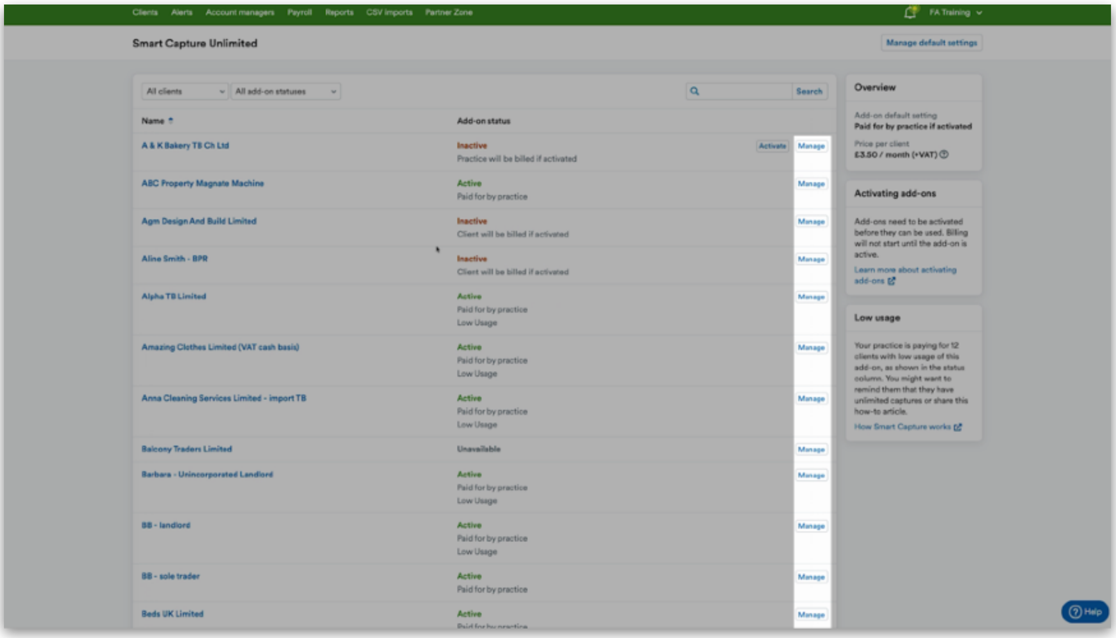
Once the default settings have been chosen for the add-on, select ‘**Save**’ to complete the process.




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.

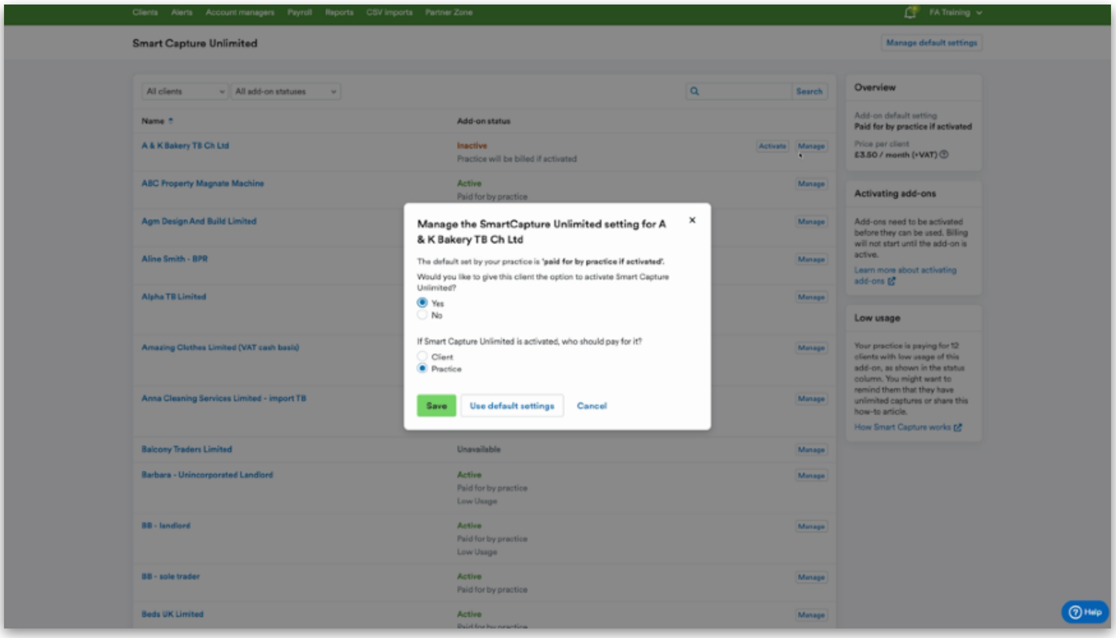
The practice’s default add-on settings will be applied to all clients, however, you can set specific settings for individual clients, choose whether they can activate add-ons themselves and whether the cost of the add-ons will be paid for by the practice or the client.

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



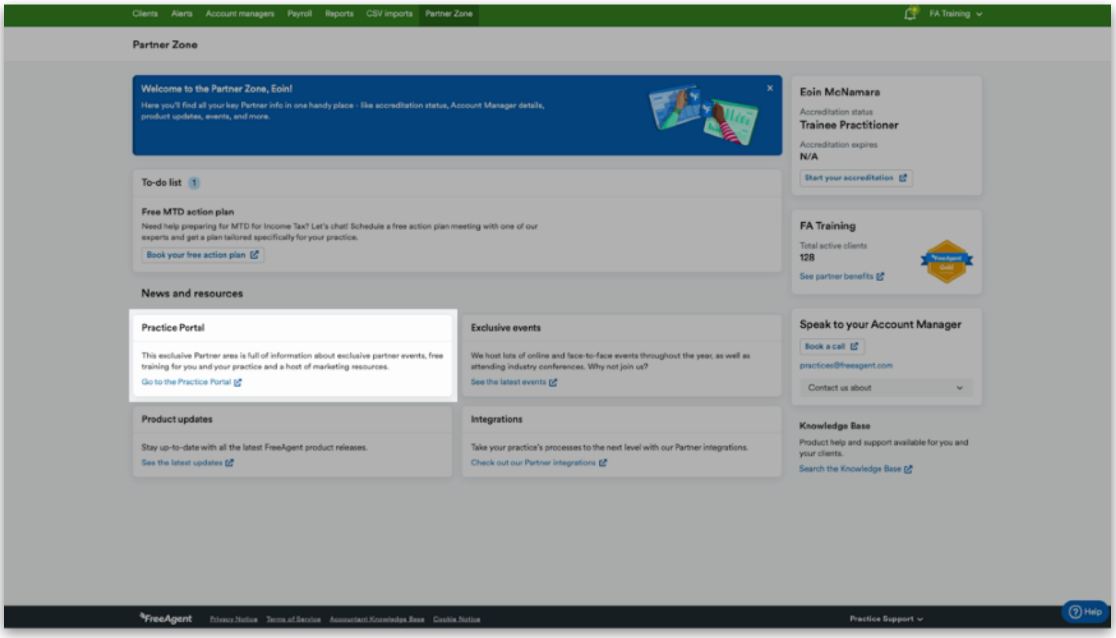

Make the required changes to whether the client can activate add-ons themselves (if they’re the account owner or have full (level 8) access to FreeAgent), and whether the subscriptions will be paid for by the practice or by the client in the pop-up window.

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. Then, to access the Practice Portal, select, '**Go to the Practice Portal**' from the page.



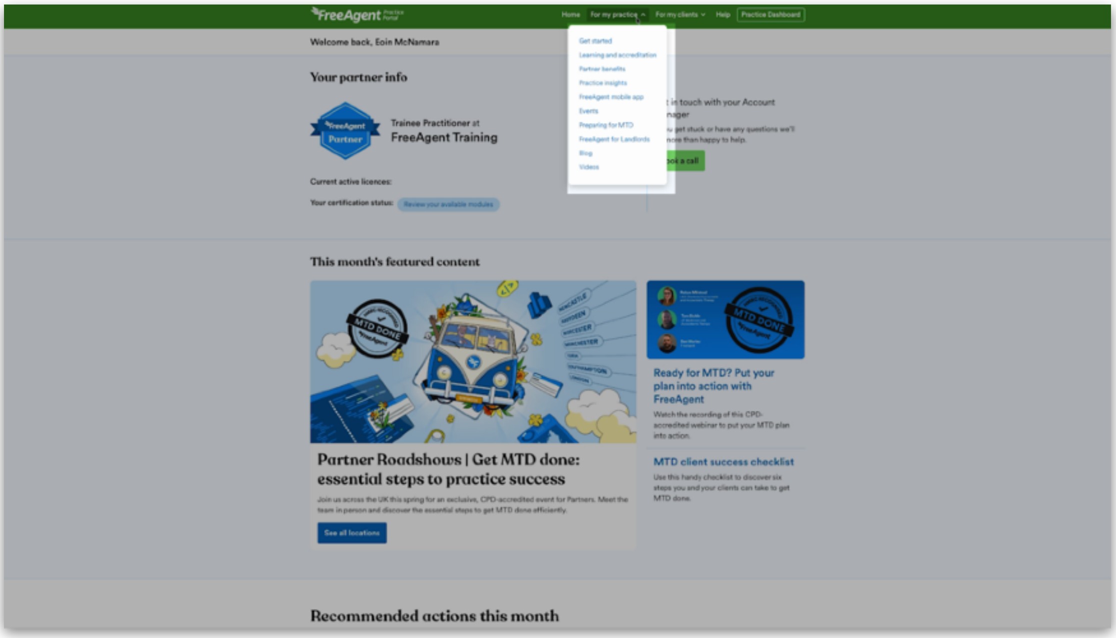

Here, you can access a wealth of support for you and your clients, including downloadable guides, marketing resources, videos to share with your clients and the latest information about FreeAgent's innovations. In addition, you'll also find invitations to attend regular webinar events as well as any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

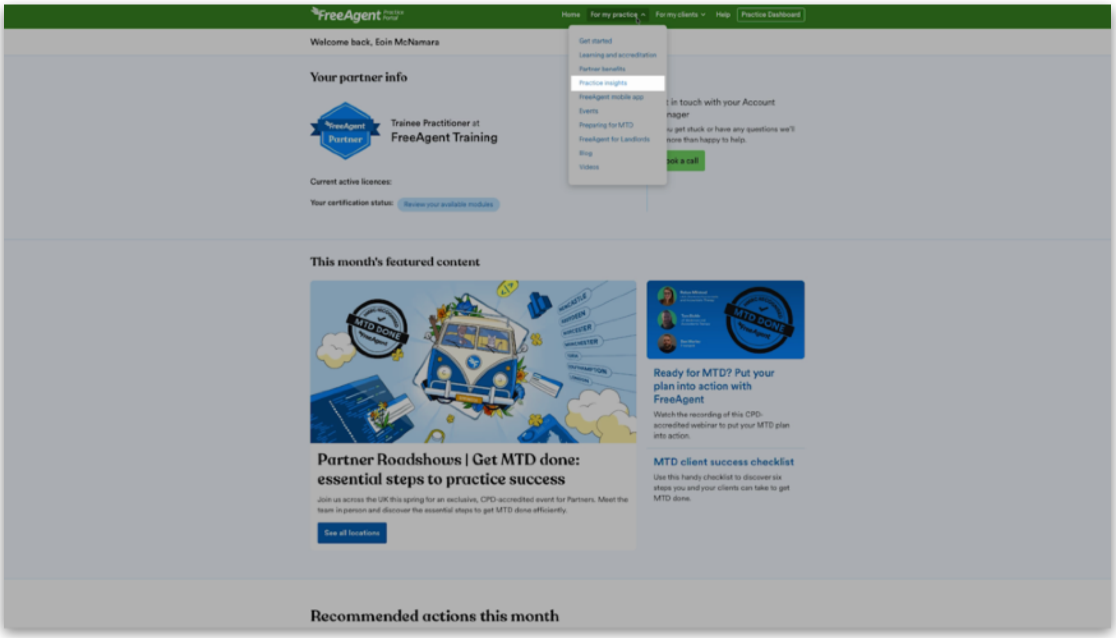
## For my practice

The ‘**For my practice**’ menu 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 ‘**Practice insights**’ area has three unique downloadable reports that will show you exactly how your clients are using FreeAgent.




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

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.

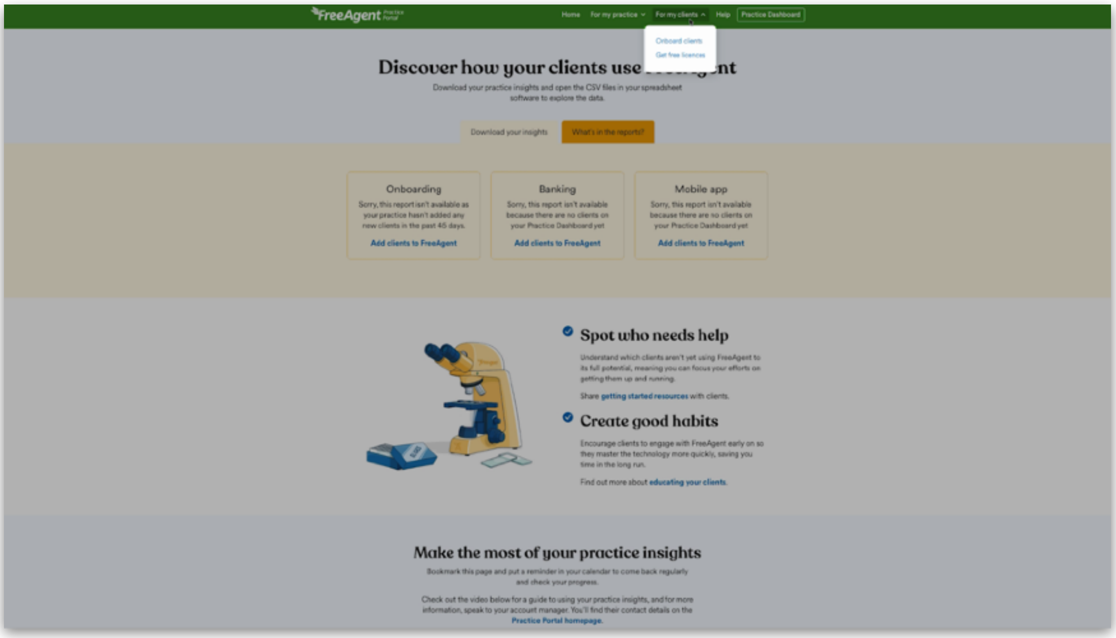

The ‘**Mobile app**’ report details which of your clients are not using the FreeAgent mobile app and the clients that have previously used it, but have not logged in to the app for a while.


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.

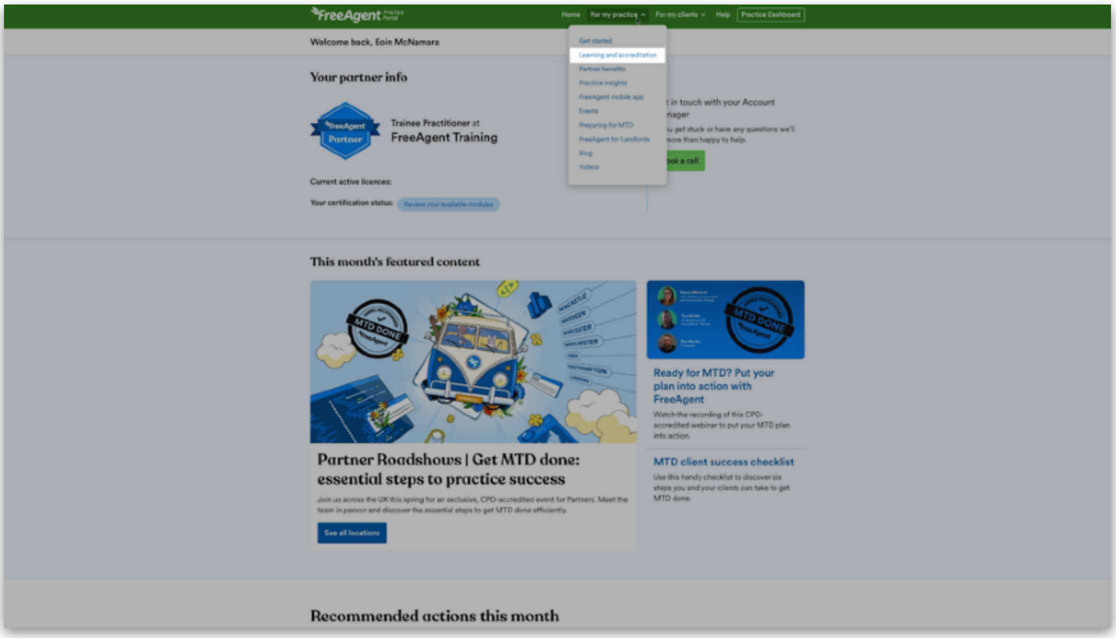
Here, you’ll find our tips for introducing FreeAgent to your clients, including shareable videos and email templates, as well as step-by-step guidance for onboarding new clients to FreeAgent.



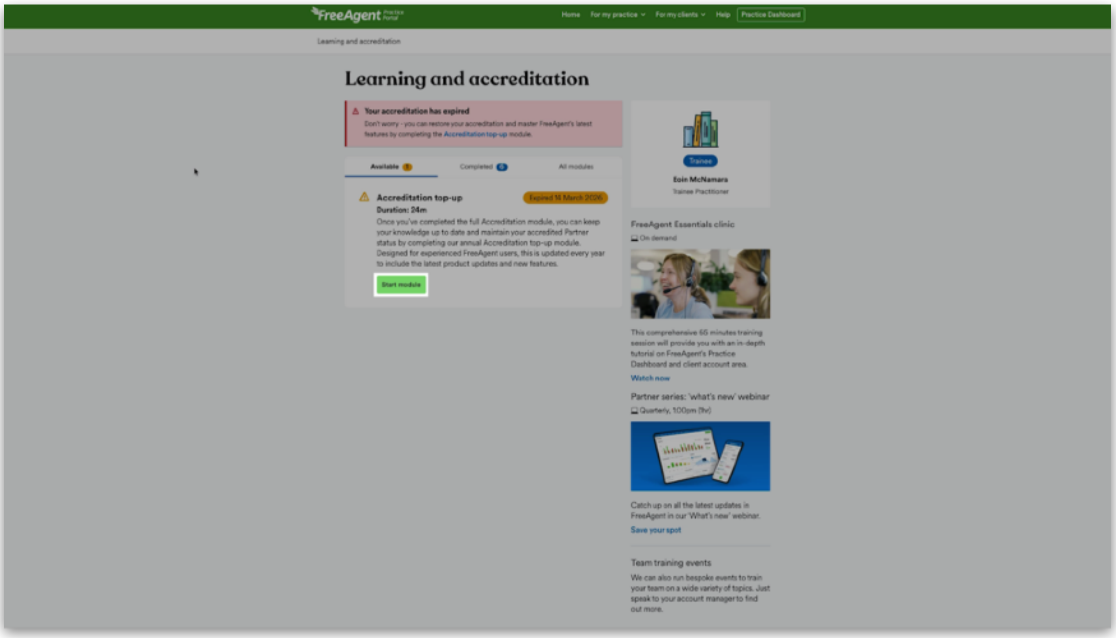

## Accreditation

The ‘Learning and accreditation’ area within the Practice Portal is personalised for each individual account manager who has access to your Practice Dashboard.

To navigate to this area, click ‘**Learning and accreditation**’ from the ‘**For my practice**’ drop-down menu.

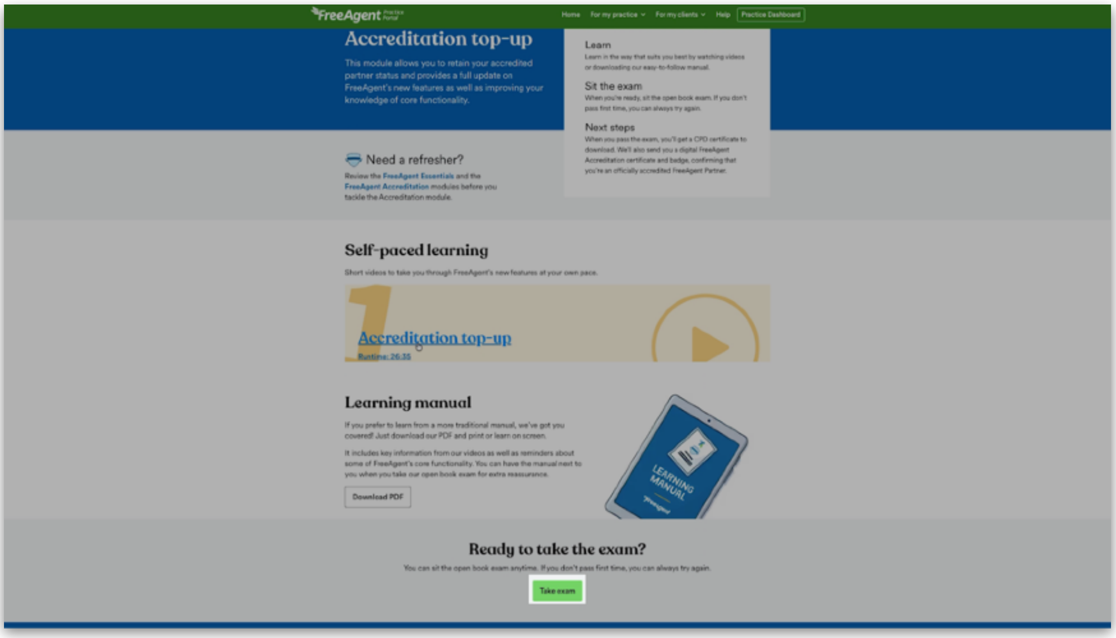



This is where you can access all of the learning modules - including this one - that will aid you on your FreeAgent journey. Select ‘**Start module**’ to begin.



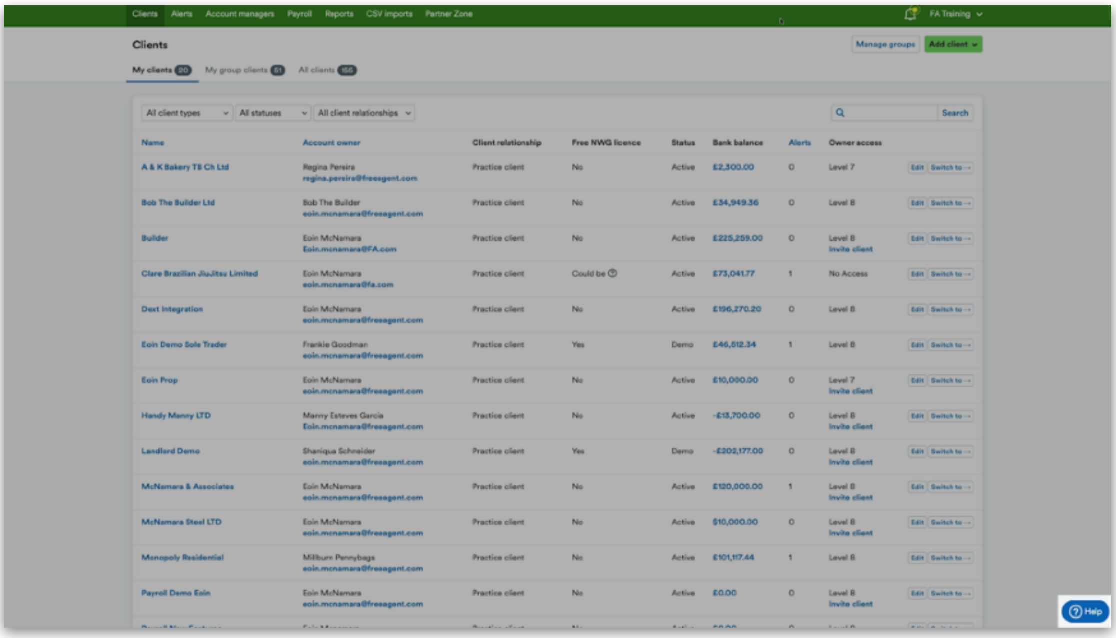

Each module includes guided videos of FreeAgent that you can watch to increase your knowledge of FreeAgent. There are also downloadable PDF manuals that cover all of the material from each module.

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.

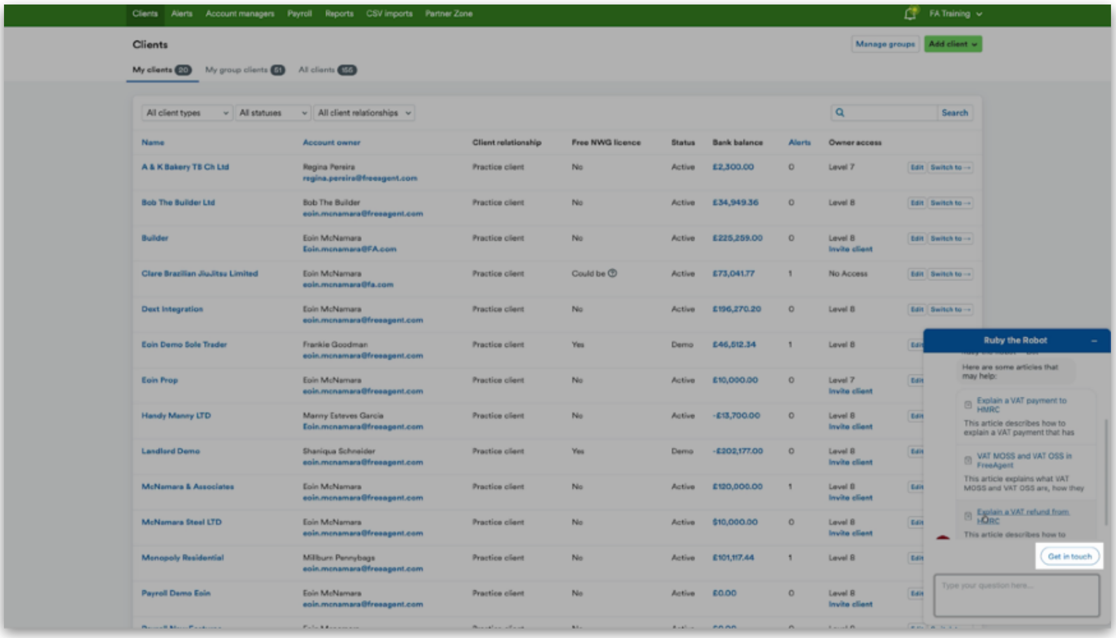



## Knowledge Base, Practice Support and Ruby the Robot

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.



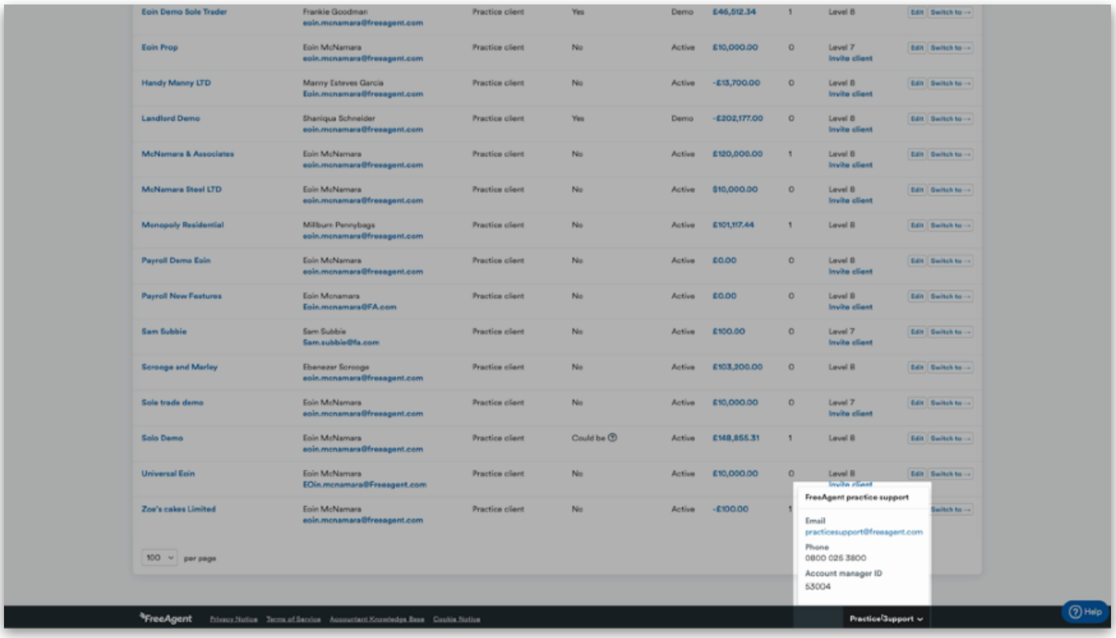
A chat window will pop up. Use the chat to ask our automated assistant - Ruby the Robot - a question. Ruby will attempt to suggest an article from our Knowledge Base to help answer your query. If Ruby is unable to help, click '**Get in touch**' to contact our support team.



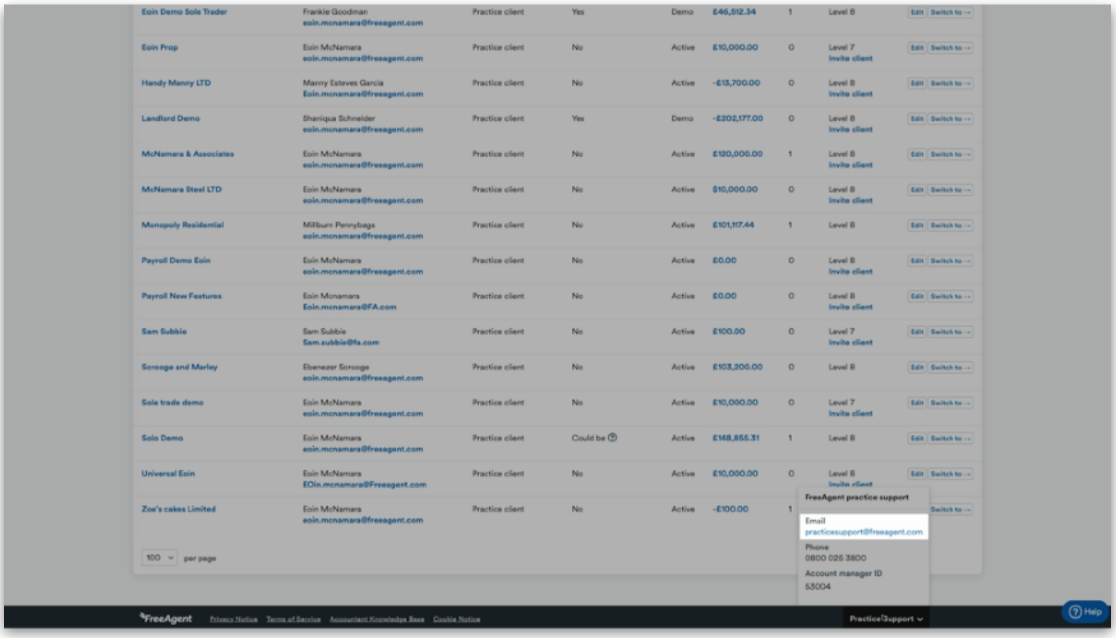

You will be given the option to connect with our Practice Support team by live chat if it's during support hours, or to leave a message if it's outside of support hours.

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.

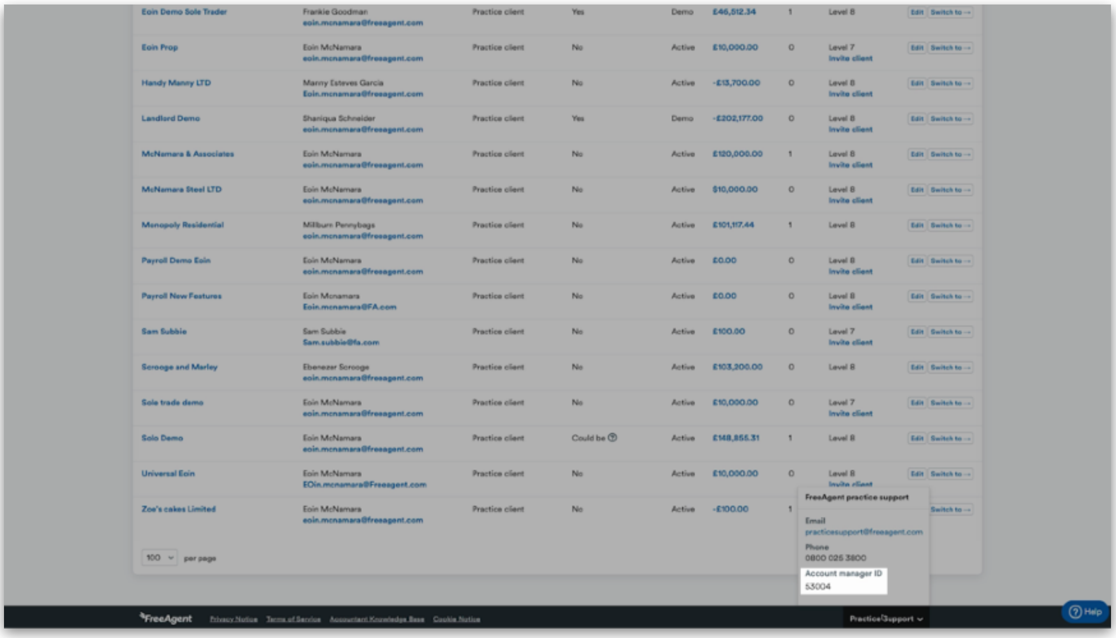
You can find the phone number to contact the Practice Support team by clicking ‘**Practice Support**’ in the bottom-right corner of the screen.




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.



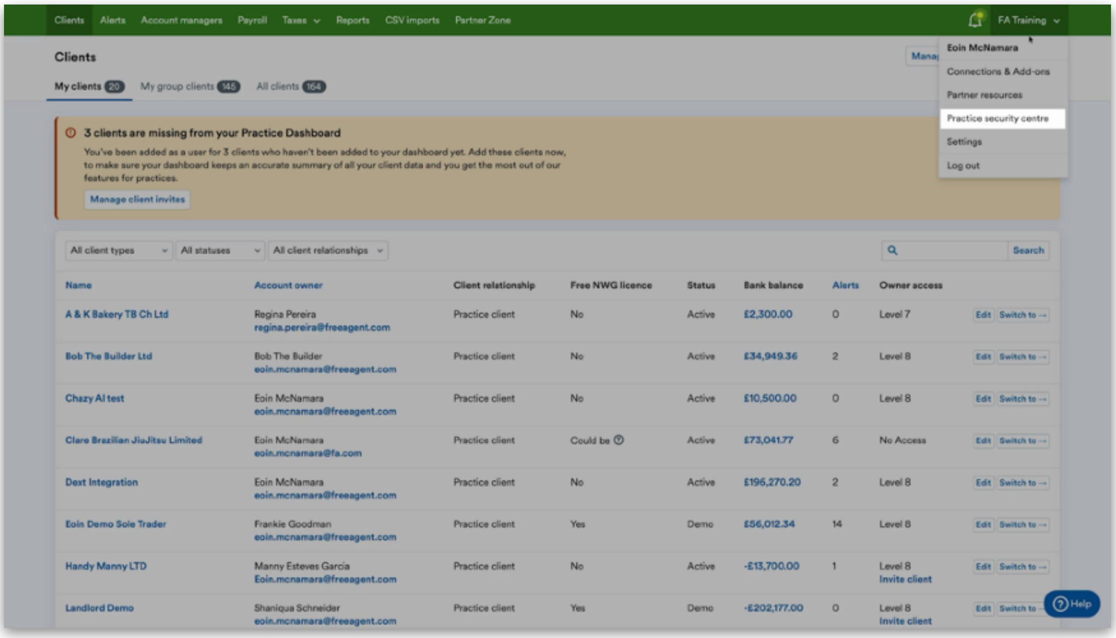
You'll also see your unique Account manager ID. Whichever way you decide to get in touch, you may be asked to provide this ID code as it's used to identify who you are and locate your Practice Dashboard.




## Practice Security Centre

The 'Practice security centre' page in the Practice Dashboard is designed to help you understand and improve your practice's security position.

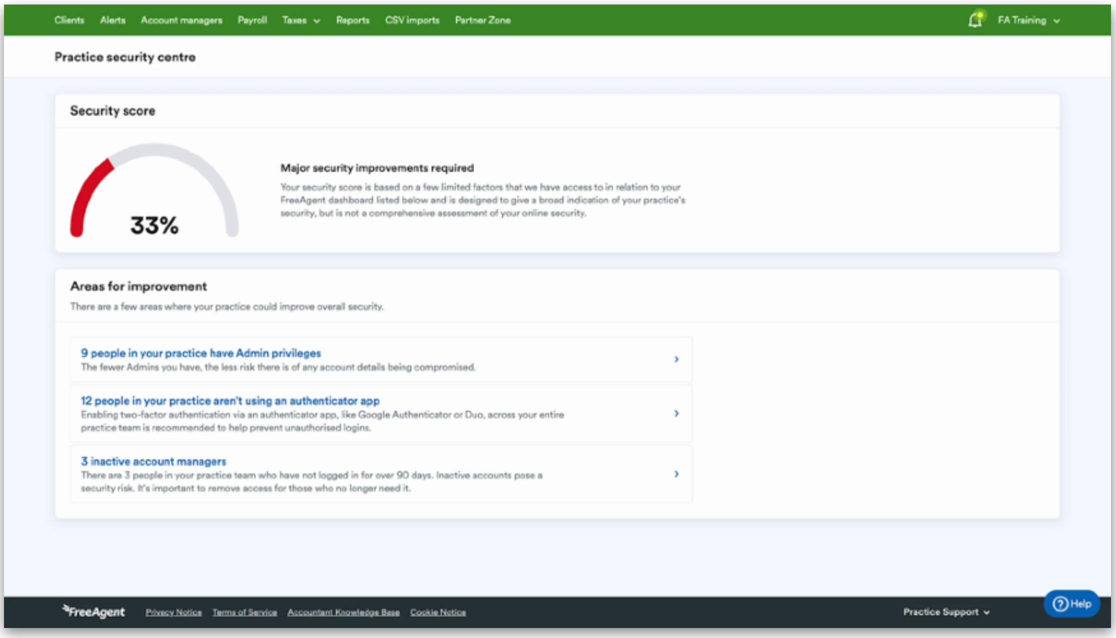
To view this area on the dashboard select '**Practice security centre**' from the drop-down menu below your practice name.



From here, you'll be able to review Admin access and adjust the roles for each account manager accordingly to suit the work they'll be carrying out.

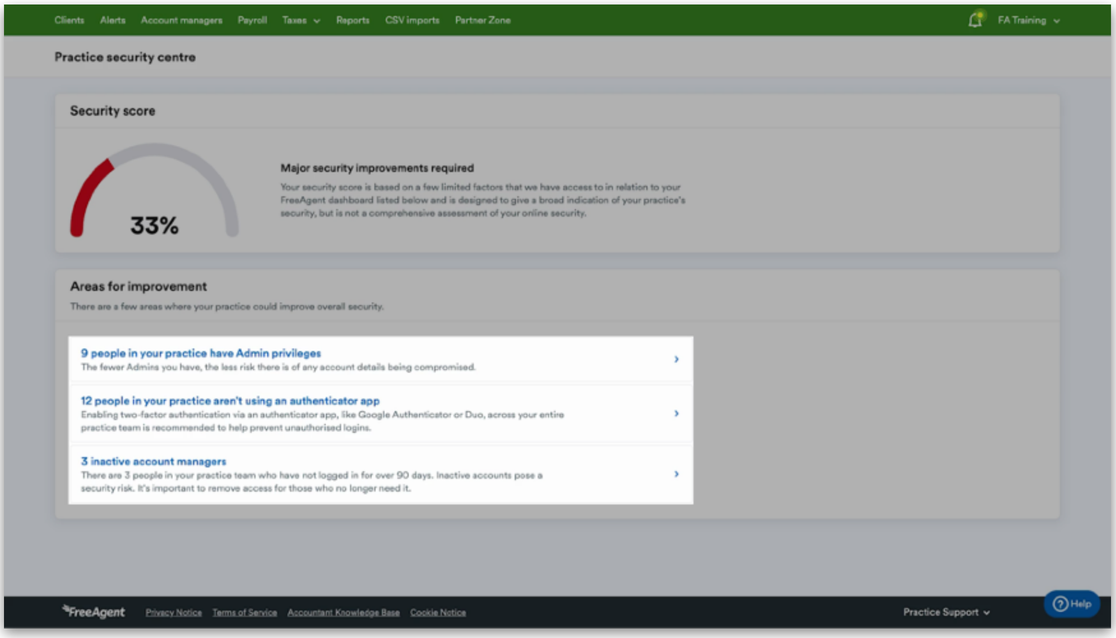
The security centre will also: highlight two-factor authentication (2FA) adoption from account managers, identify inactive users and identify inactive API connections. This will give your practice the flexibility and confidence to protect your practice and your clients' data.

In the 'Security Score' section we give you a percentage security score based on a few limited factors that we have access to in relation to your FreeAgent dashboard that are listed in the 'Areas for improvement' section. This is designed to give a broad indication of your practice's security, but is not a comprehensive assessment of your online security.




The 'Areas for improvement' segment identifies specific vulnerabilities that require attention to improve your practice's security. This section details each flagged concern, explaining why it poses a potential risk and providing recommended actions for resolution.

By selecting any individual item, you will be automatically directed to the relevant part of the practice dashboard to rectify the issue.



# 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 | | | ✅ |

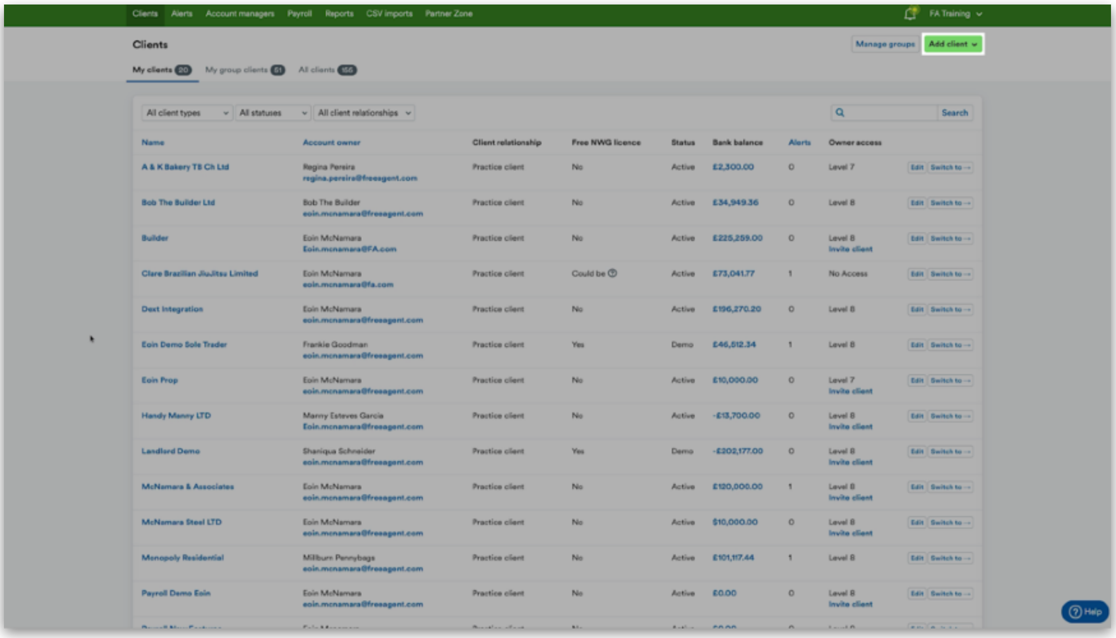
FreeAgent supports cash basis accounting for sole trader, partnership and unincorporated landlord accounts, as well as traditional accruals basis accounting.

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

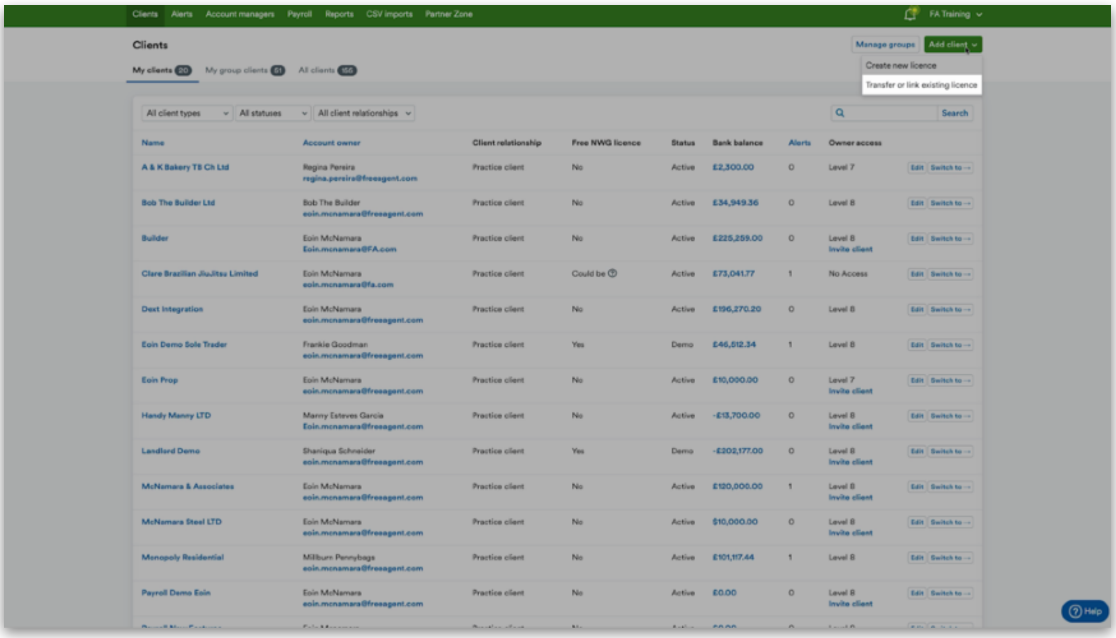
## Transferring licences to your Practice Dashboard

You must have an **Admin**, **Comprehensive** or **Standard** role to access this area on your 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'.

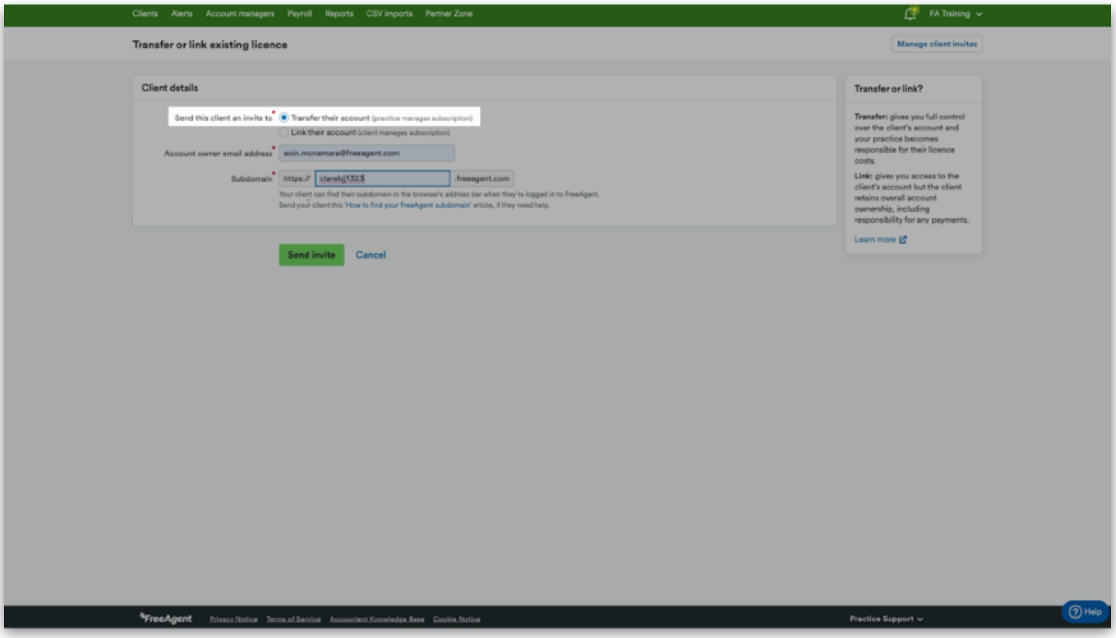


Select '**Transfer or link existing licence**' and enter the email address that your client uses to log in to FreeAgent along with their FreeAgent subdomain.

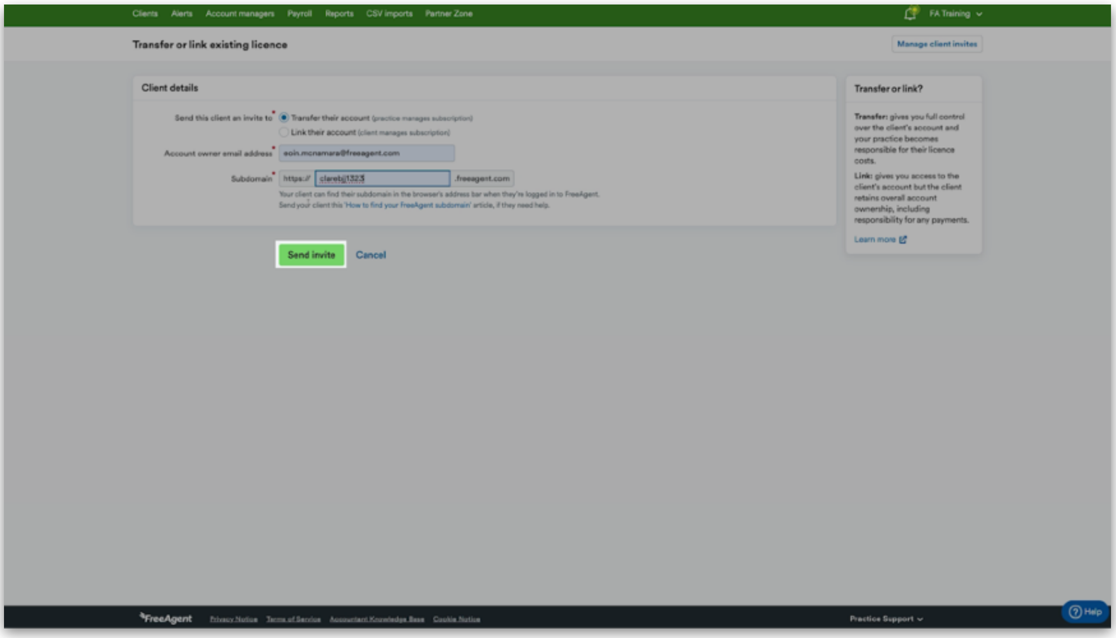


Their subdomain can be found within the URL that is displayed when your client is logged into FreeAgent.

Select the option to send this client an invite to ‘**Transfer their account**’.



Select ‘**Send invite**’ to complete 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

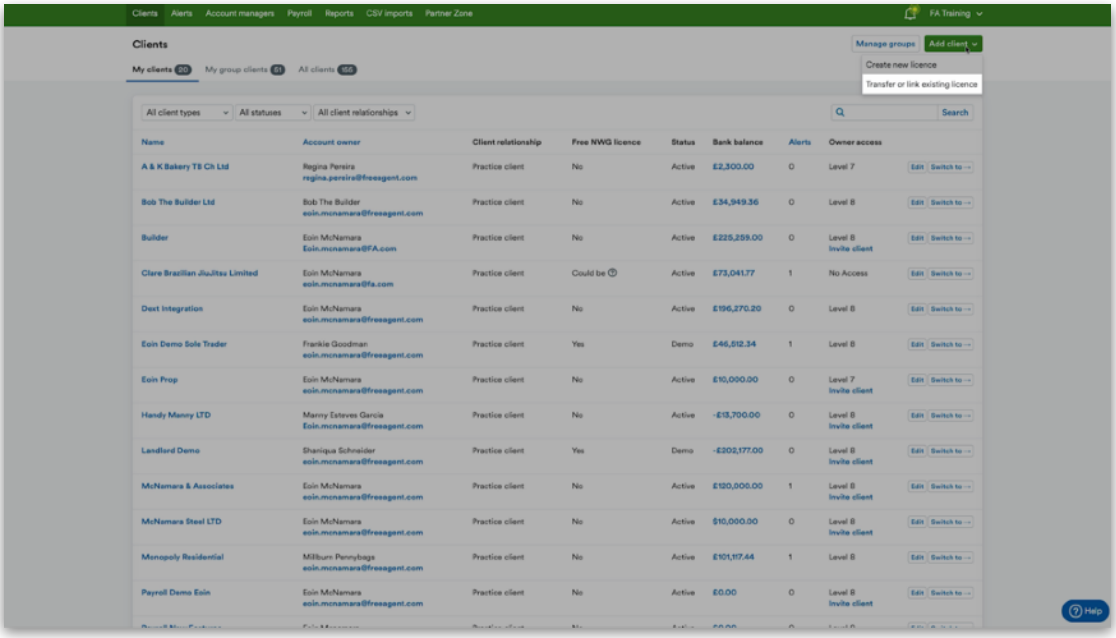
Mettle account; or a paid for licence, if they currently pay for their account. If you have any queries or questions around billing, please contact your FreeAgent Account Manager

## Link clients to your dashboard

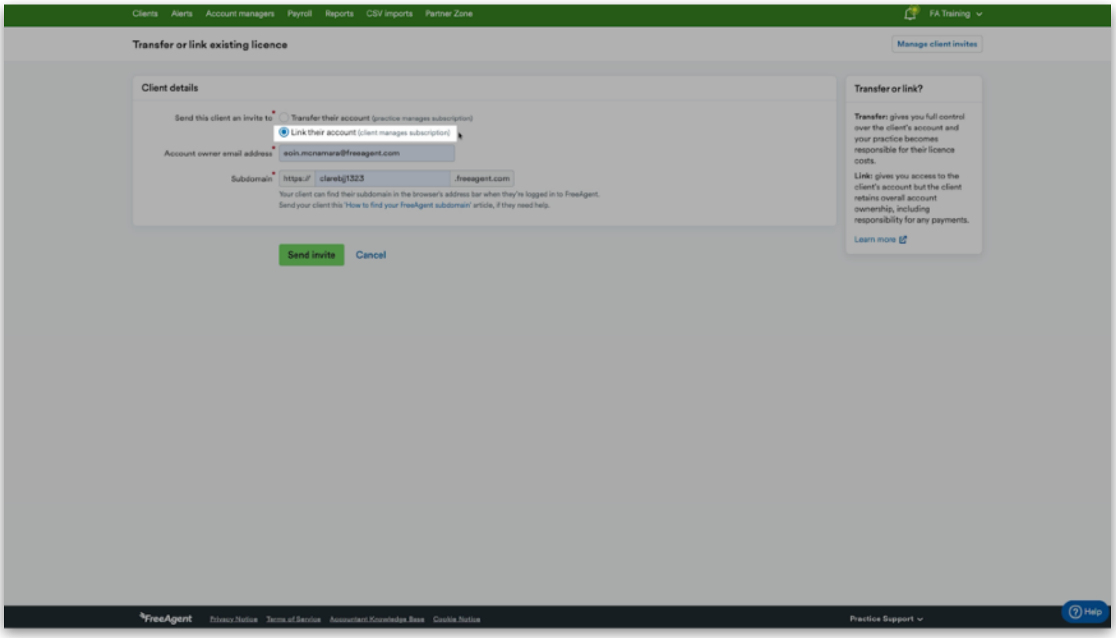
You must have an **Admin**, **Comprehensive** or **Standard** role to access this area on your dashboard.

You can link your client's account from the ‘Clients’ tab of the Practice Dashboard.

Select ‘**Add client**’ and then ‘**Transfer or link existing client**’.

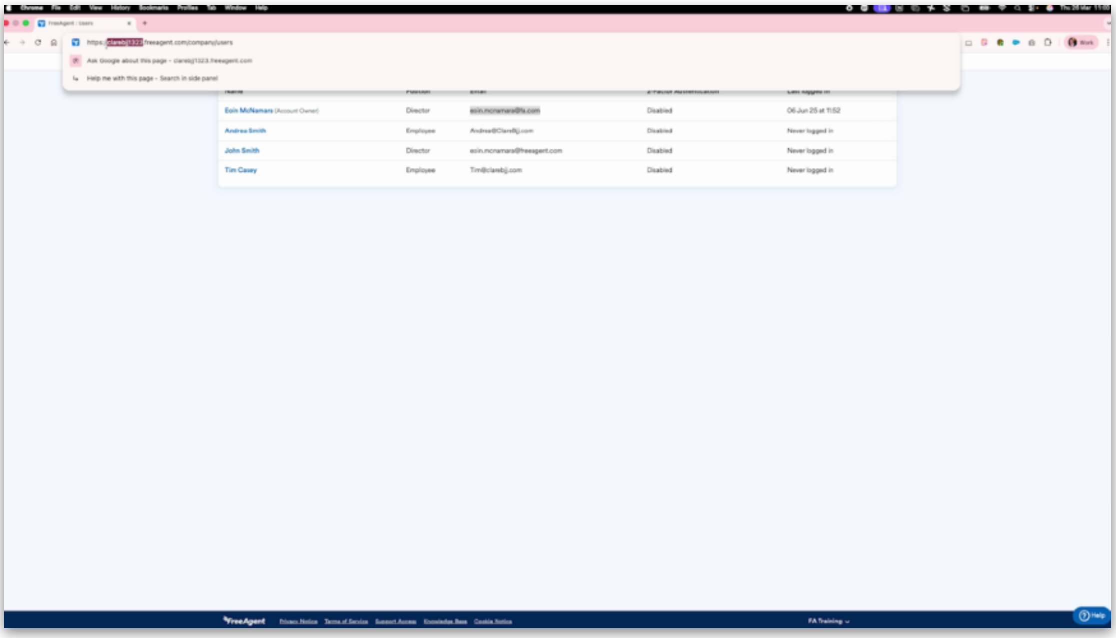


Select the option to send them an invite to ‘**Link their account**’.

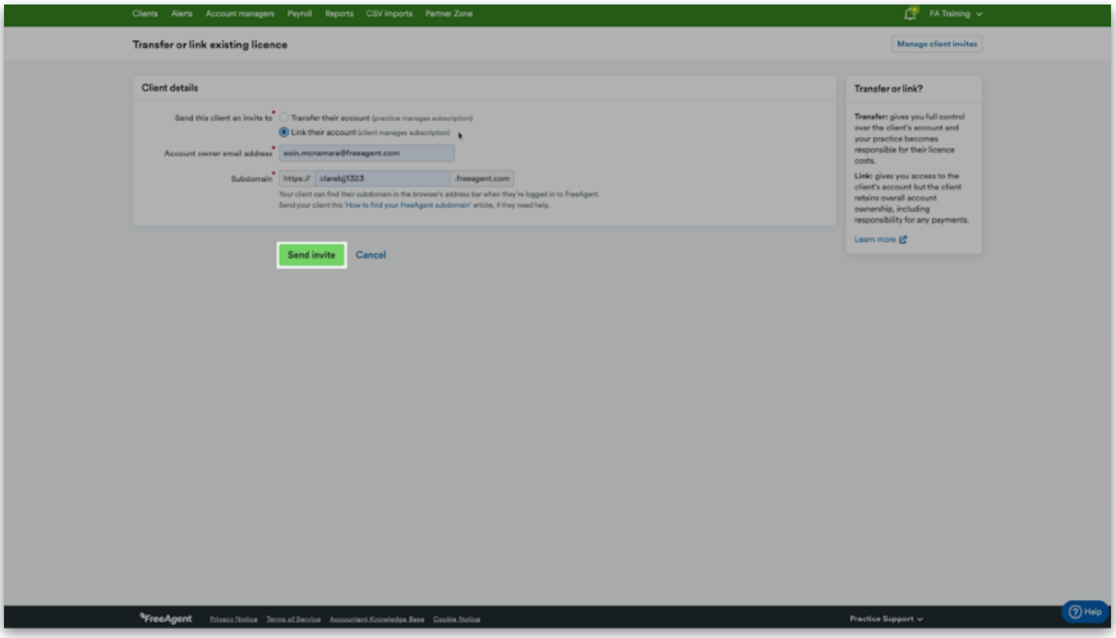



You must enter the ‘Account owner email address’ and their ‘Subdomain’. Your client can find these pieces of information in their account by navigating to the ‘Settings’ area and then selecting ‘Users’. The user with ‘(Account Owner)’ beside their name will have the necessary email.

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**’.

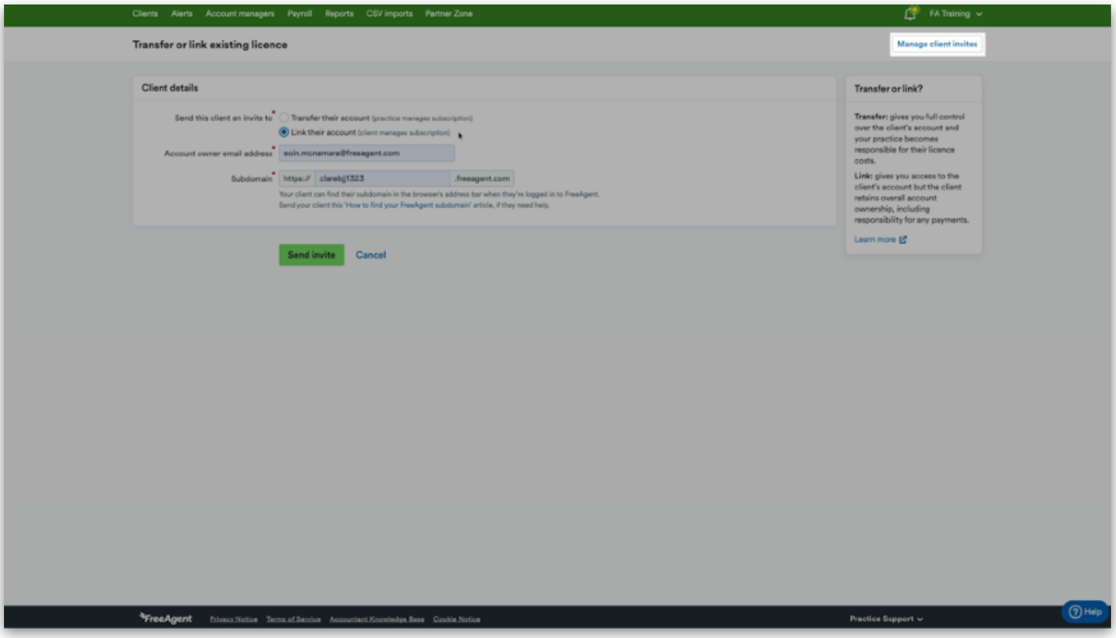



This will send a request via email stating you want to link them to your dashboard, and they must confirm.

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**'.



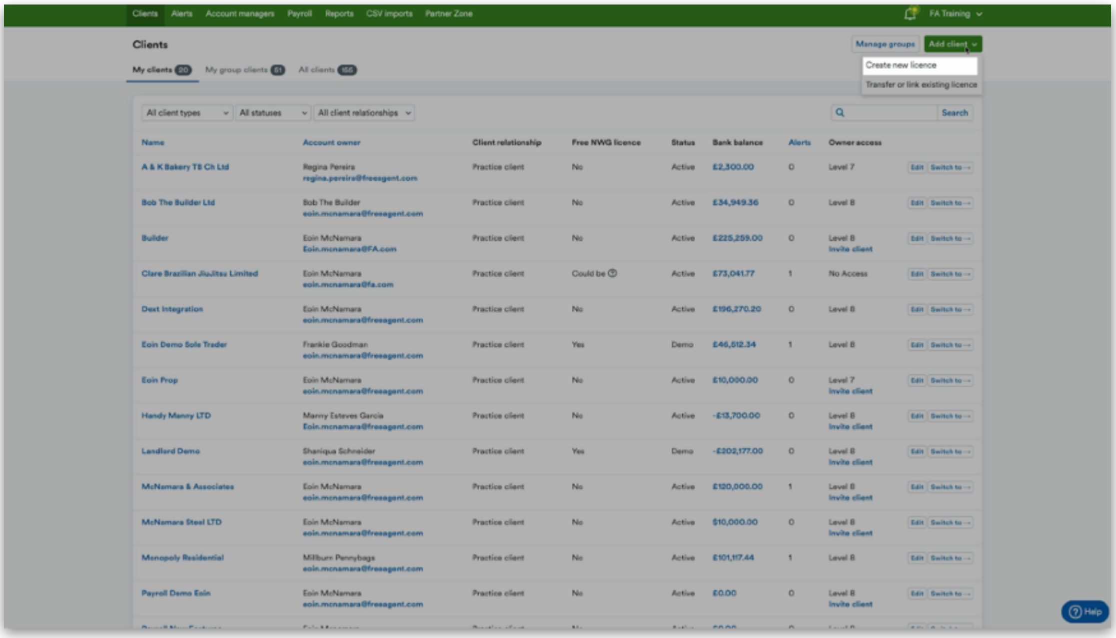

This will list all active linking requests. You have the option to resend and cancel the linking request. Once the client confirms the changes, they will appear on your dashboard.

## Adding a new client to FreeAgent

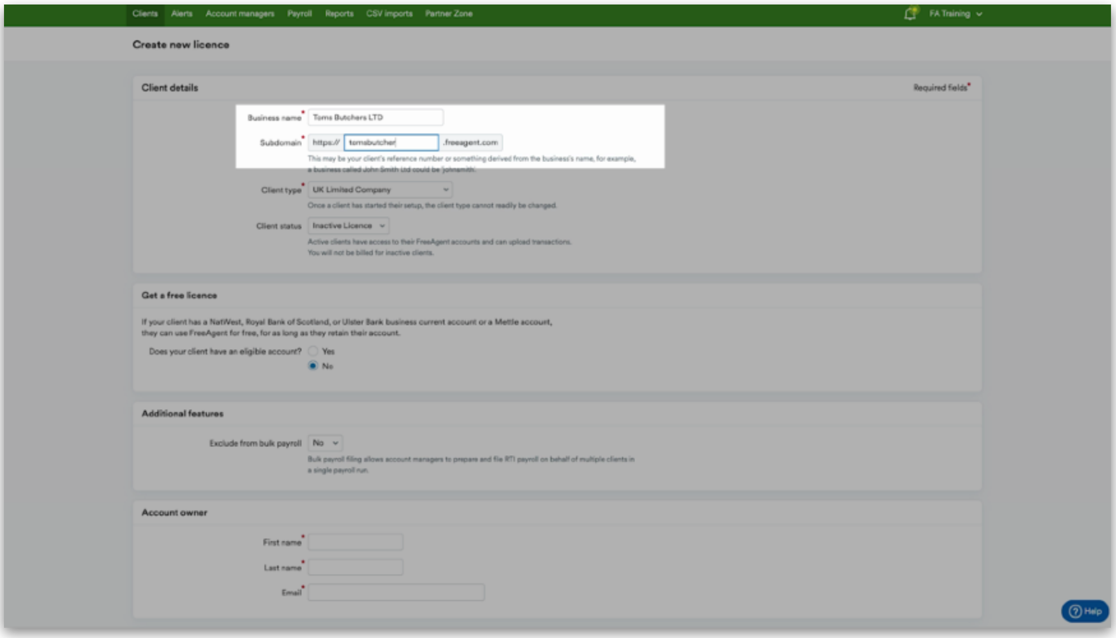
If your client is new to FreeAgent, you'll need to follow a different process for adding them to your Practice Dashboard.

You must have an **Admin**, **Comprehensive** or **Standard** role to access this area on your dashboard.

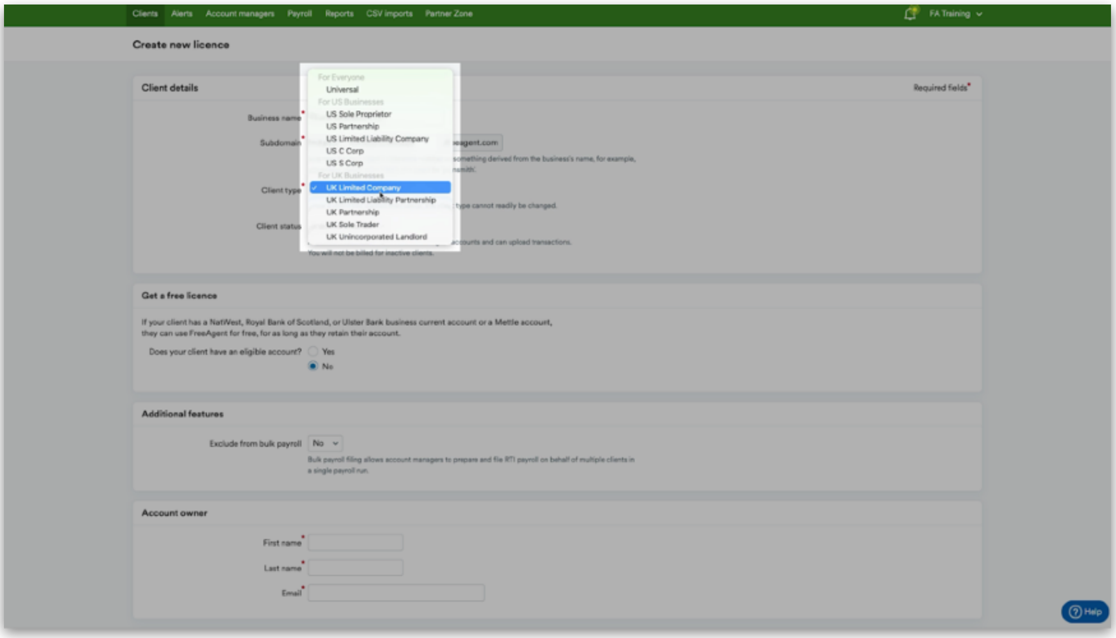
Select ‘**Add client**’ and then ‘**Create new licence**’.



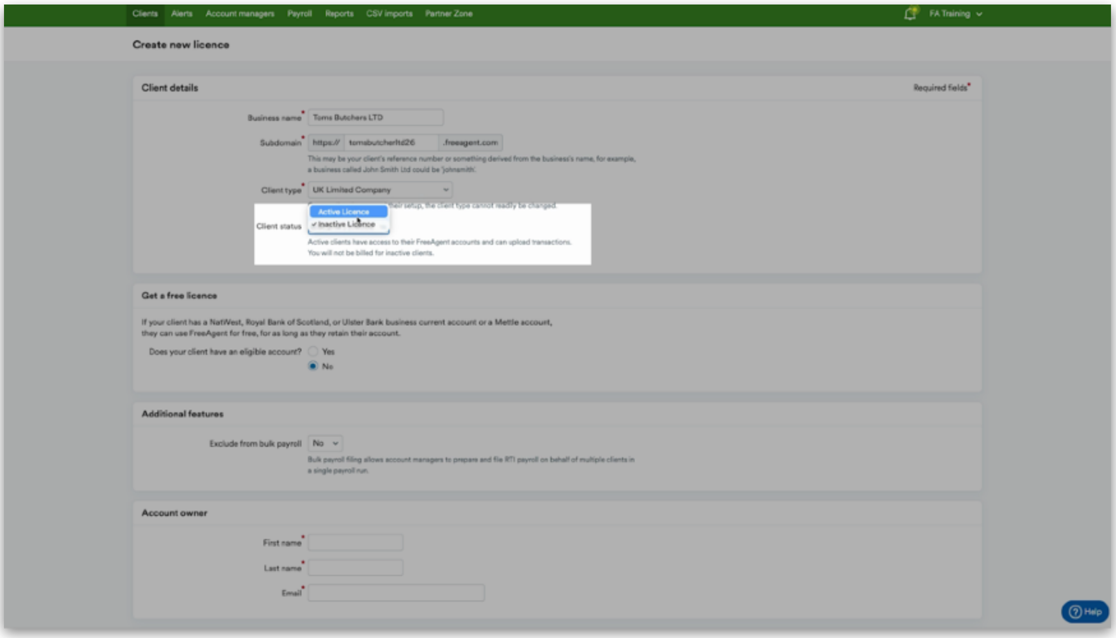

Enter the client’s business name and the subdomain you’d like them to use as the URL (web address) for their FreeAgent account. It needs to be unique, so you may need to add additional numbers or letters to the name of your client’s business. Feel free to get creative and remember to choose something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



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.



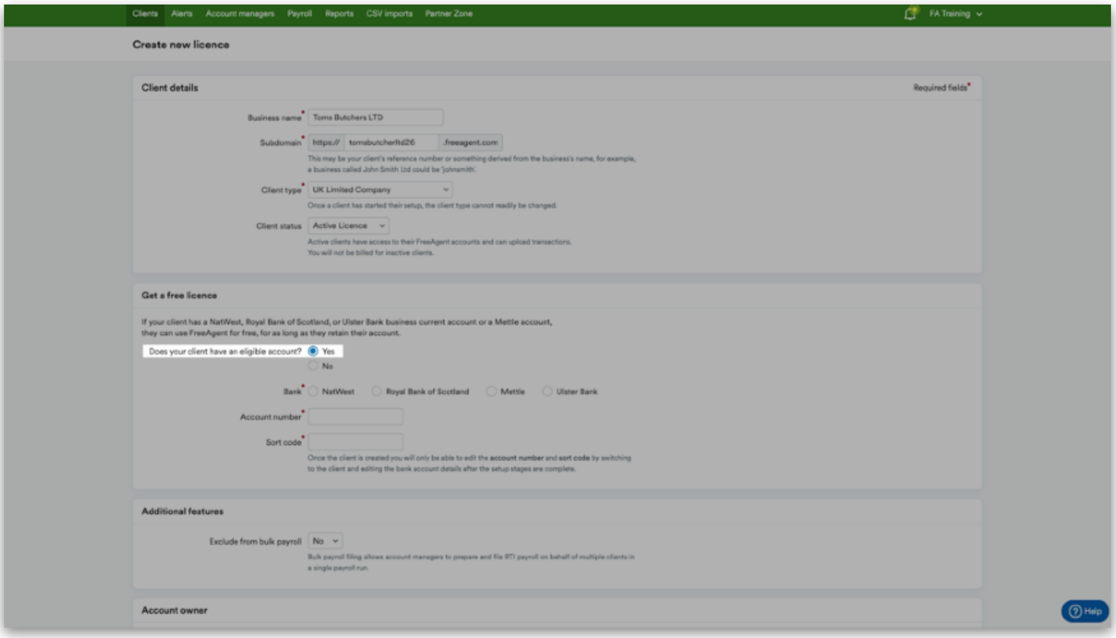

Next, select the client's status. An active client will have access to their FreeAgent account and will be able to upload bank transactions, etc. Clients who are inactive won't have any access to FreeAgent. Please note that a client can only be active once. If you change their status from 'Active' to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



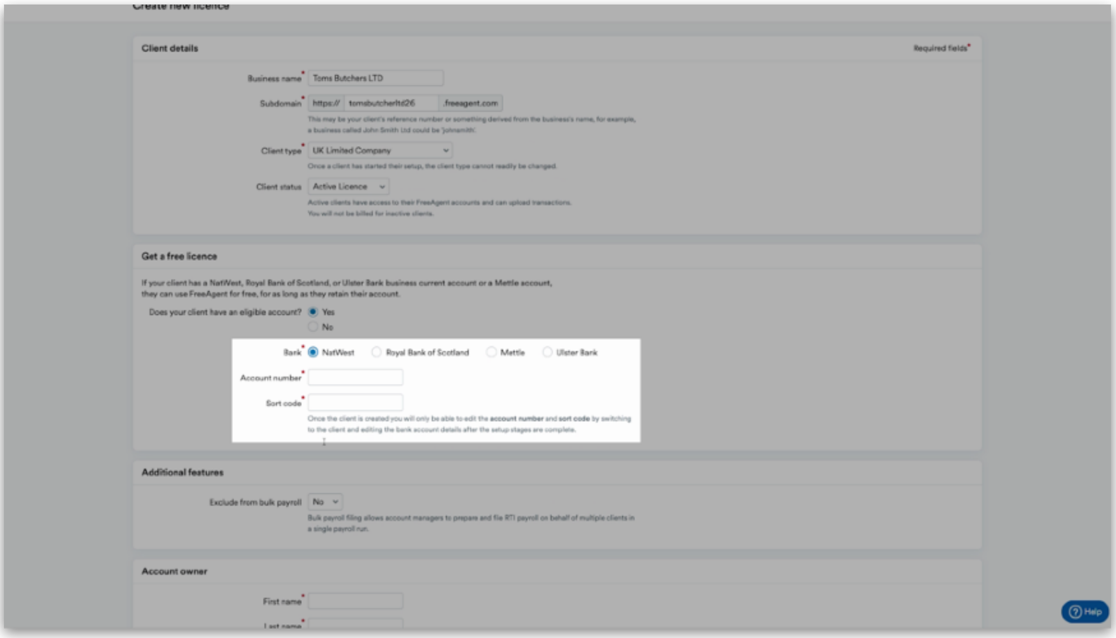
## Free accounts for your clients

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.

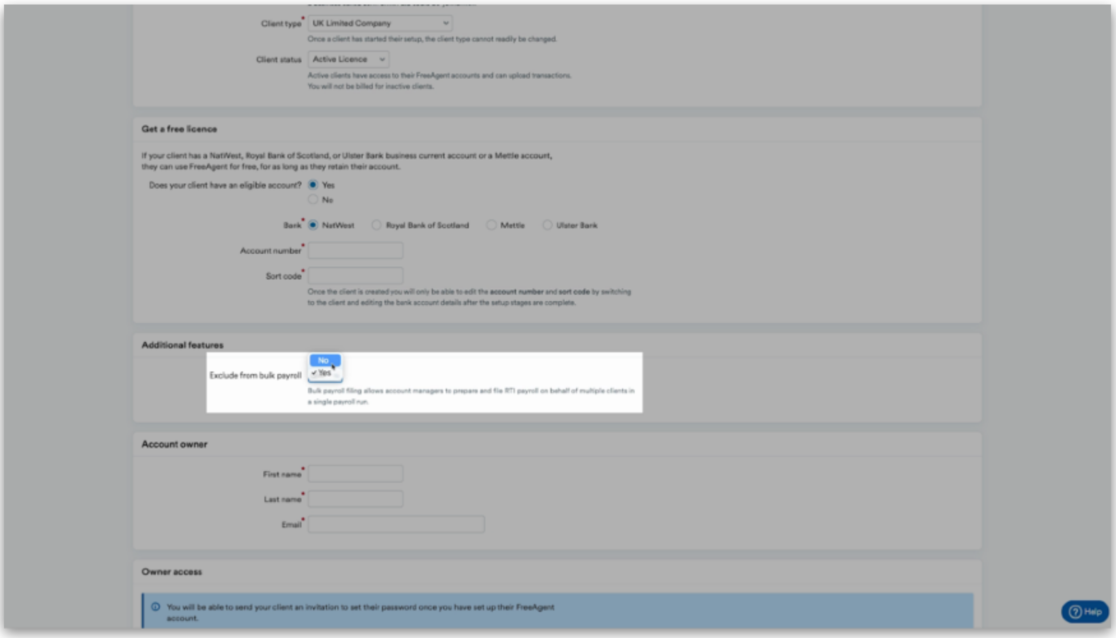
To add them to your dashboard, tick the '**Yes**' checkbox to the question 'Does your client have an eligible account?' in the 'Get a free Licence' section.



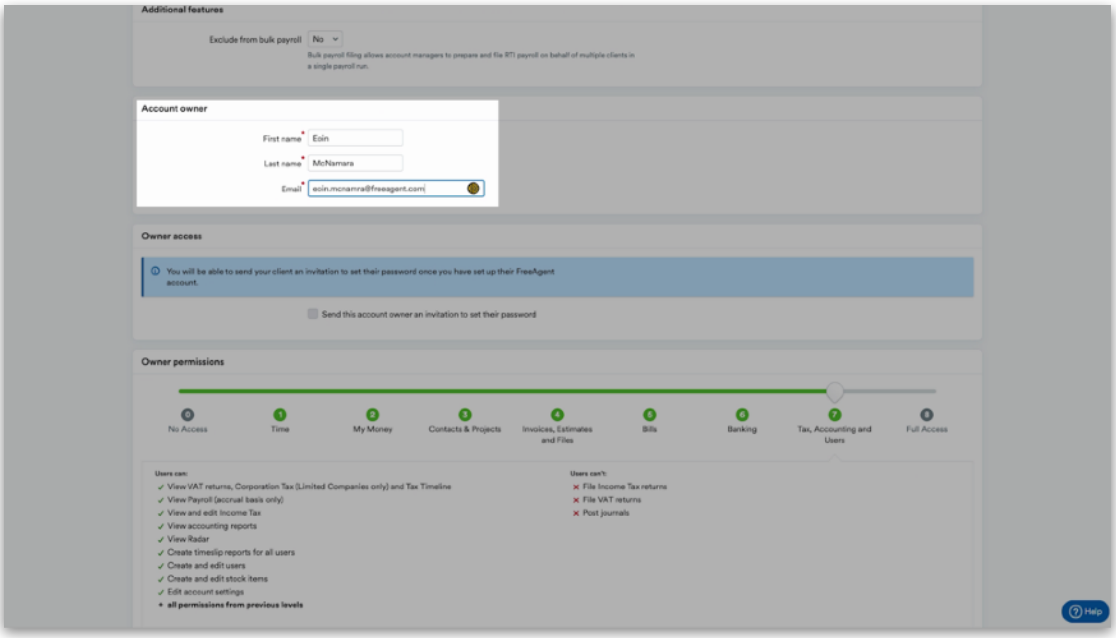

Select the relevant bank and enter the account number and sort code for your client's business bank account.



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**' in order to include the client in your next payroll run.



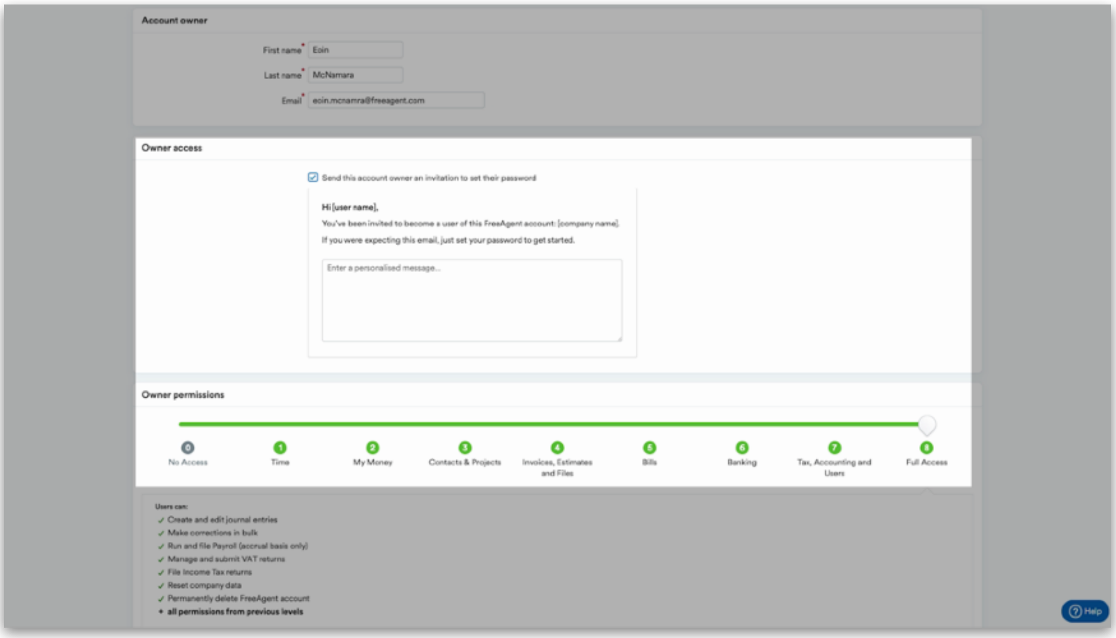

Enter your client's details in the 'Account Owner' section, including their name, address and the email address that your client will use to log in to FreeAgent.




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.

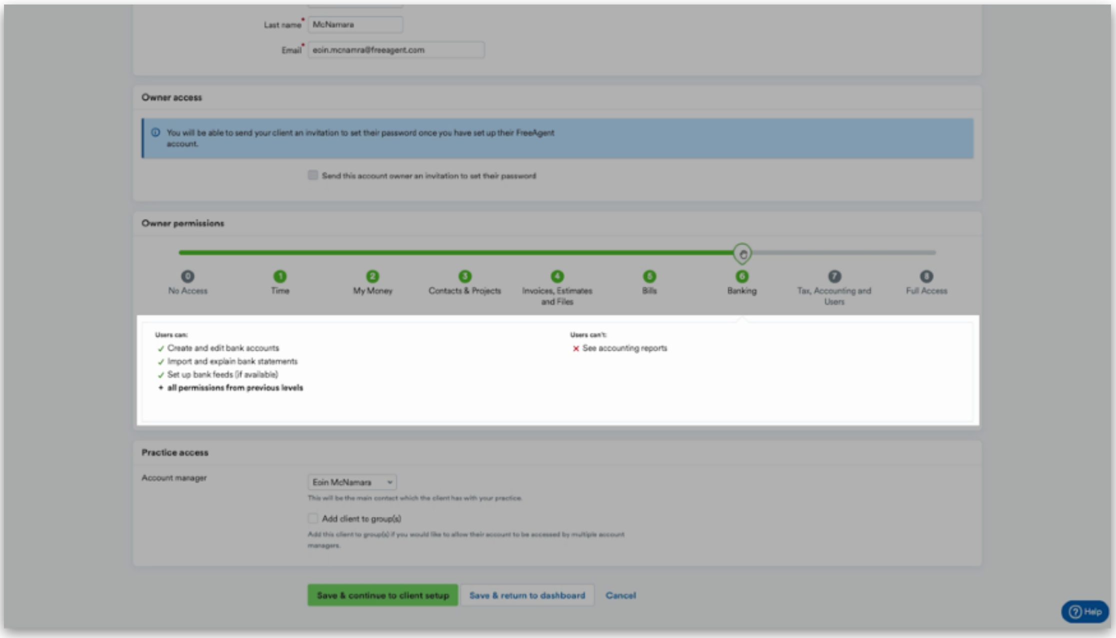



Make sure that you ask your client to follow the instructions in this invitation email to set their password, as they will need it to access FreeAgent. You don't need access to your client's password as you will be able to access their data and account from your Practice Dashboard.

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.

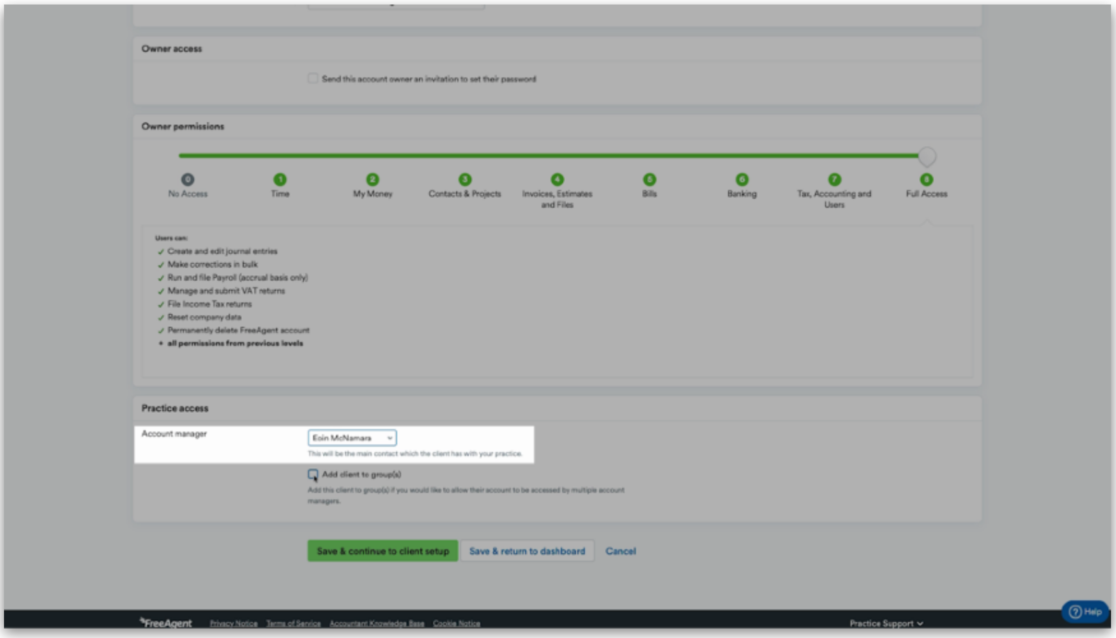
The permissions given with each level can be seen by adjusting the slider displayed in the 'Owner Permissions' section.

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

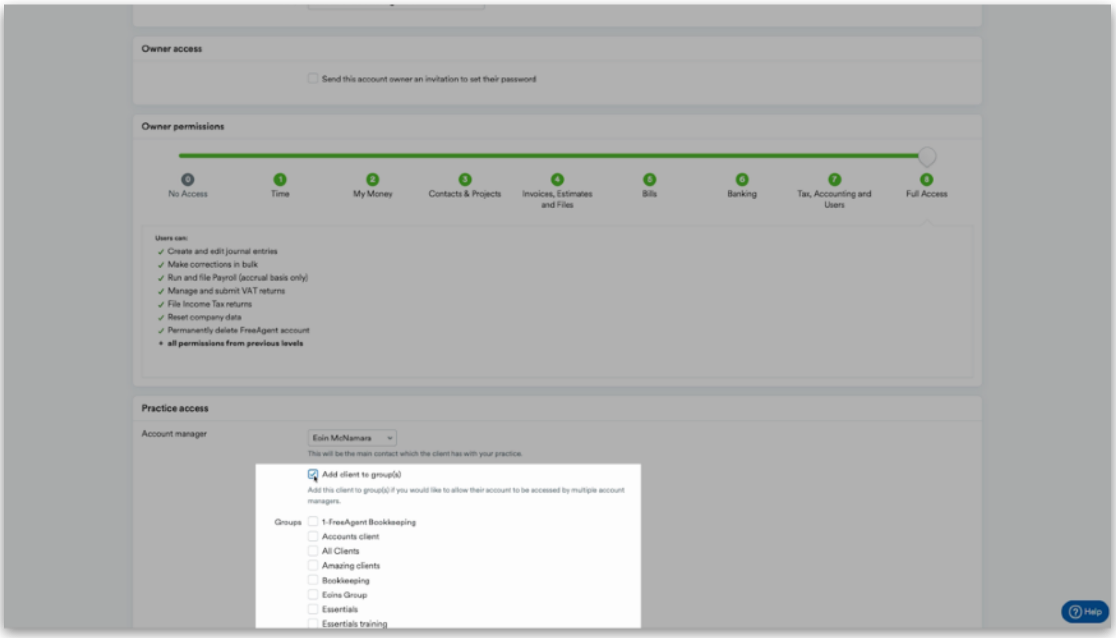



If a client has an access level of 0, they will not be able to log in to FreeAgent.

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'll need to have an **Admin** or **Comprehensive** role to assign an account manager to a client.

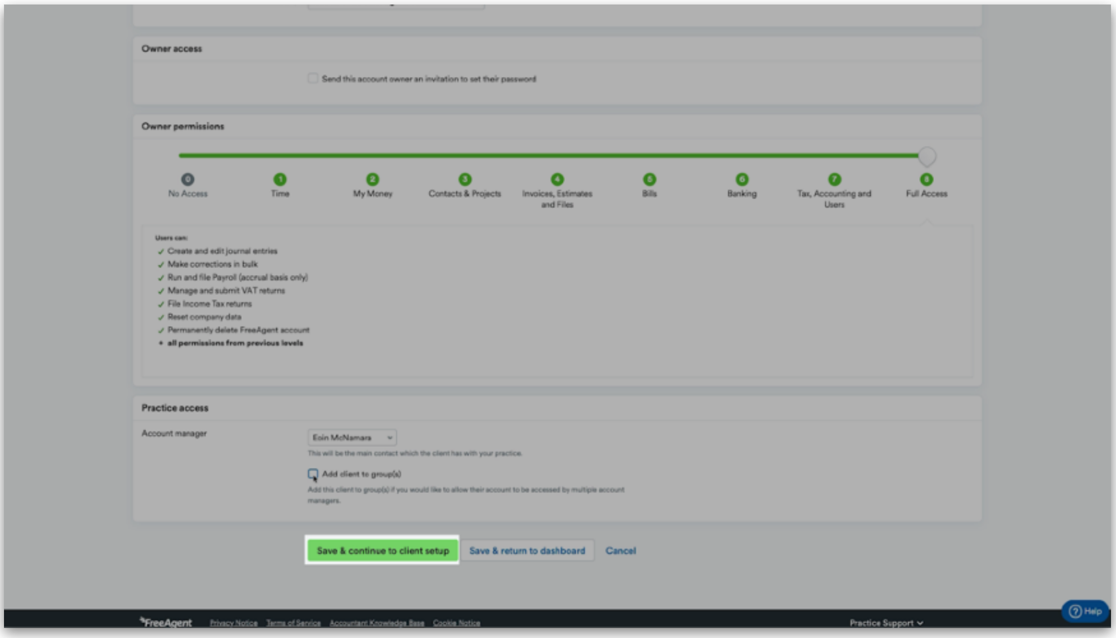


You can also assign the client to a previously created group. Click the checkbox next to '**Add client to group(s)**' and select the group you wish to assign the new client to.




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.

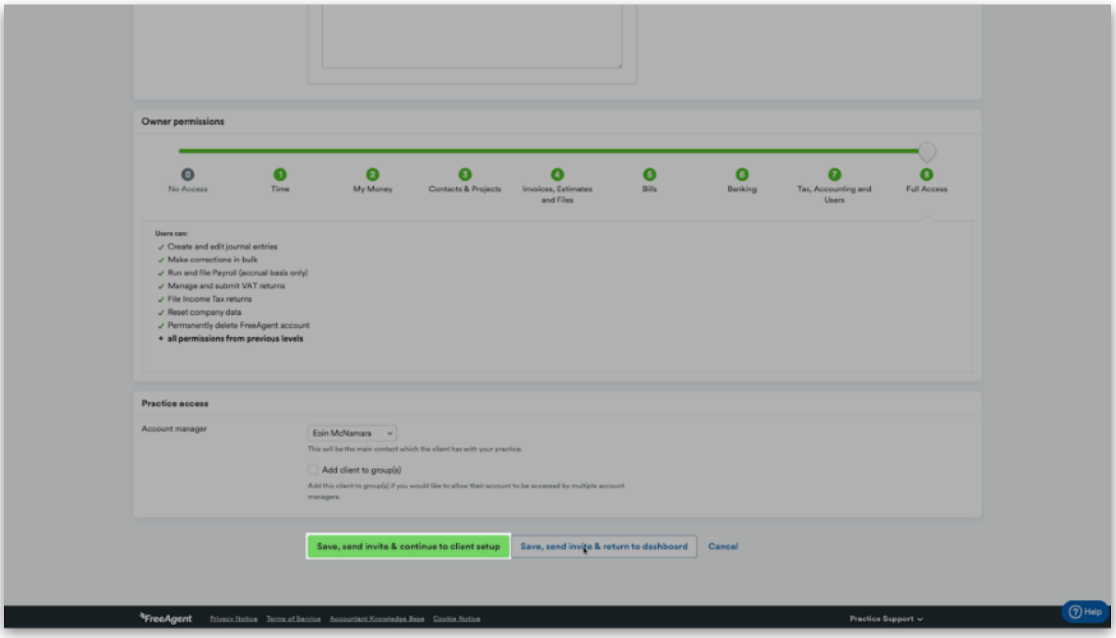
If you're completing the setup on behalf of your client, click '**Save & continue to client setup**'.



This switches you to the client account view of FreeAgent and takes you to the setup process.

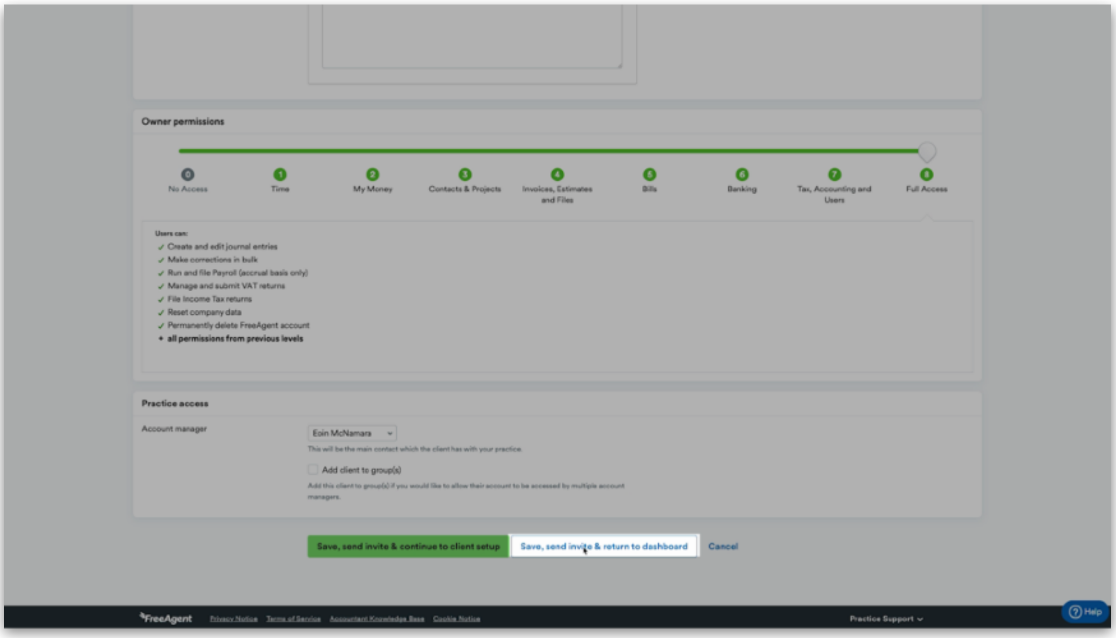
Follow the instructions provided, adding the relevant information for your client. After the final step, select ‘**Save and Finish**’ to complete the process.

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.

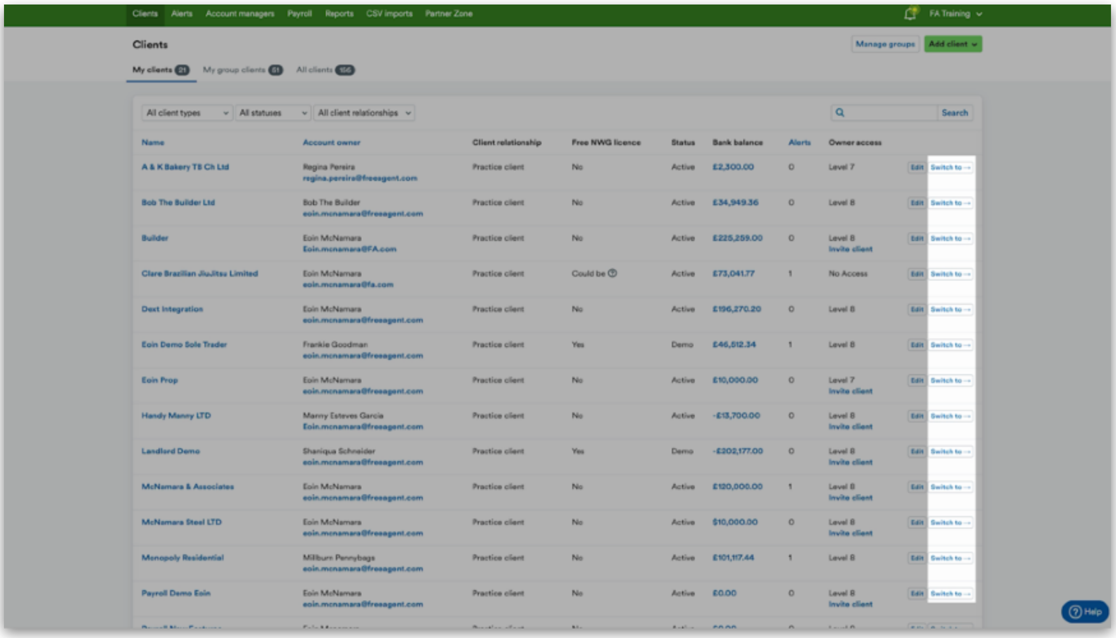



Then, when you're ready, switch to their account via your Practice Dashboard and complete the client setup process.

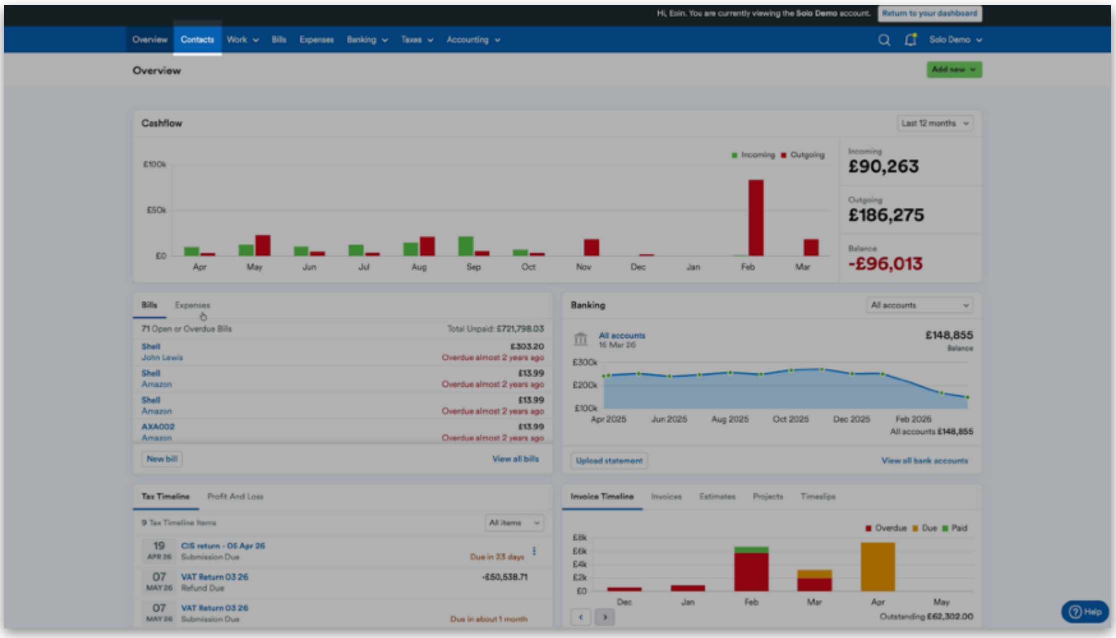
# Contacts, invoicing and credit notes

## Contacts

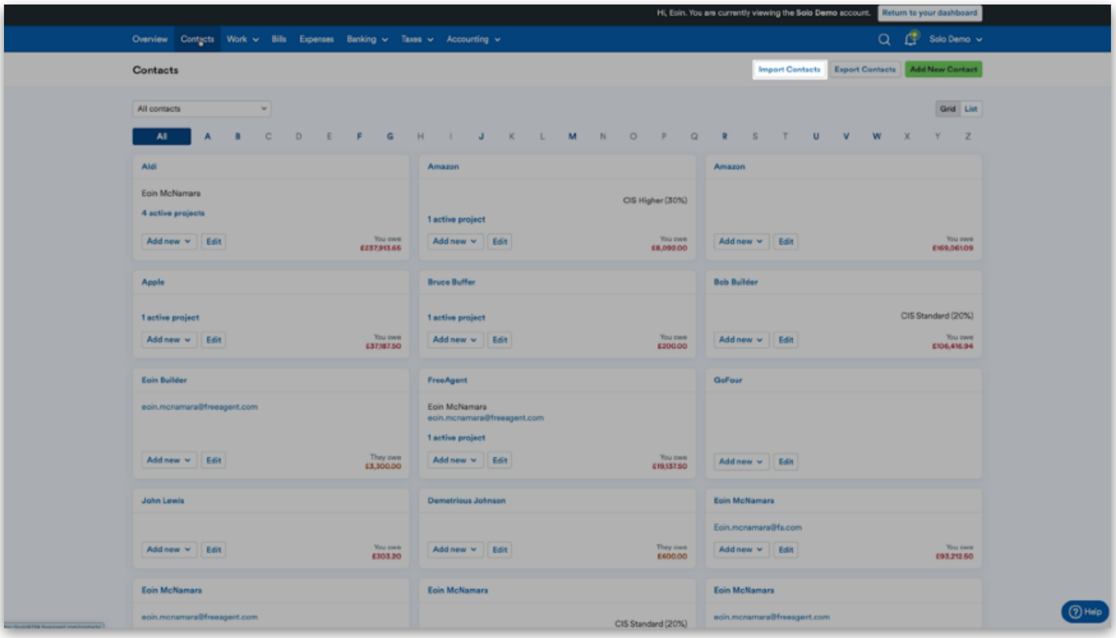
Contacts are your client's customers and suppliers in FreeAgent. To access this area, navigate to the relevant client on your Practice Dashboard and '**Switch to**' their account.



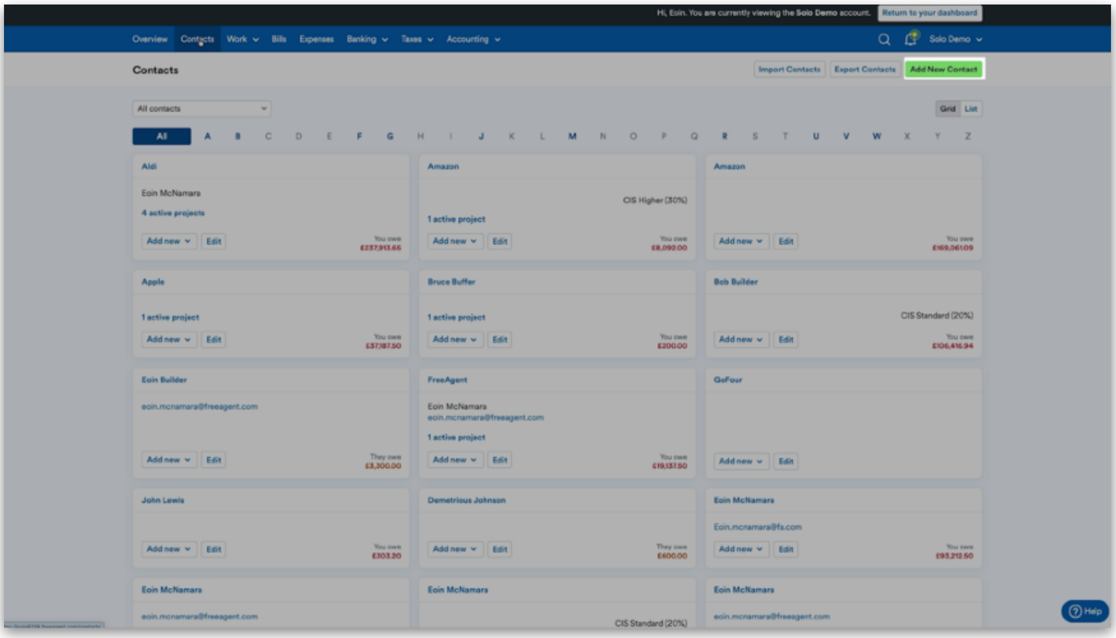
Click on the '**Contacts**' tab at the top of the screen to access your client's Contacts area.



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.



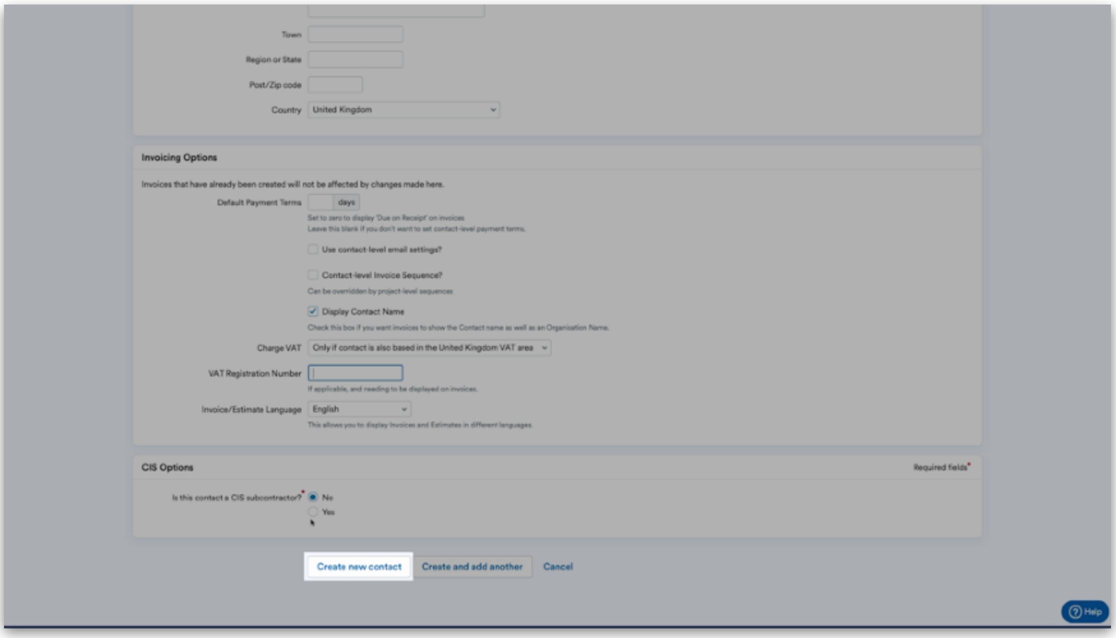
Alternatively, you can enter an individual contact by clicking on the green '**Add New Contact**' button.



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.

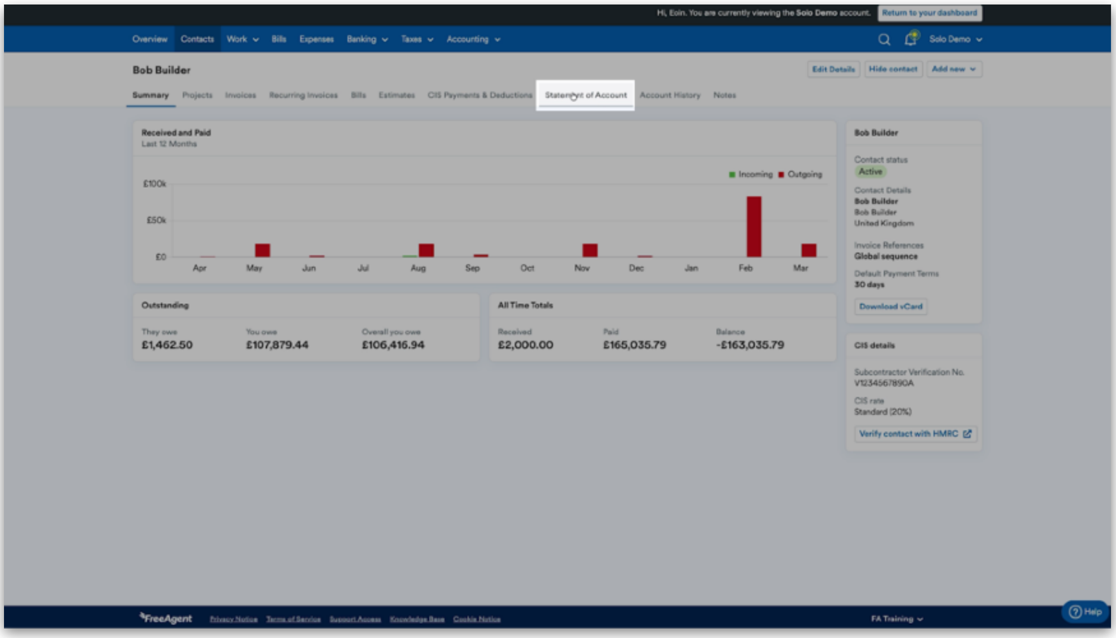
You can also add additional details for the contact including payment details, invoice sequencing, selecting whether to charge VAT and entering the contact's VAT registration number. The more information you enter here, the more will get pulled through to other areas of FreeAgent like sales invoicing.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



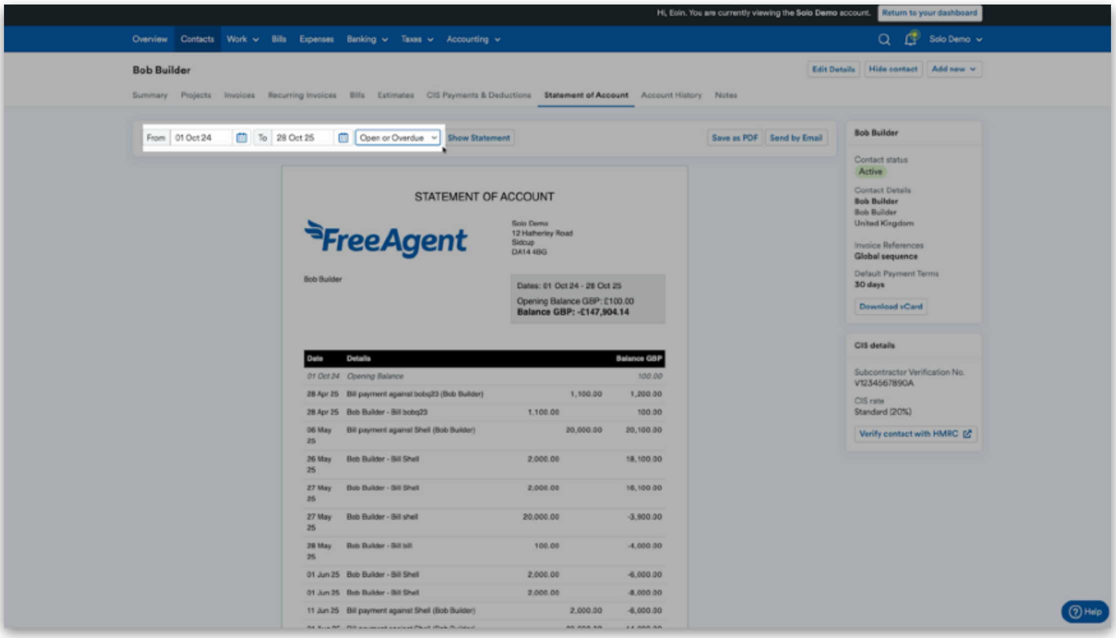

Once you've created a contact, you can click on their name in the 'Contacts' area and you'll be able to view all of the relevant transactions and data associated with them in FreeAgent.

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

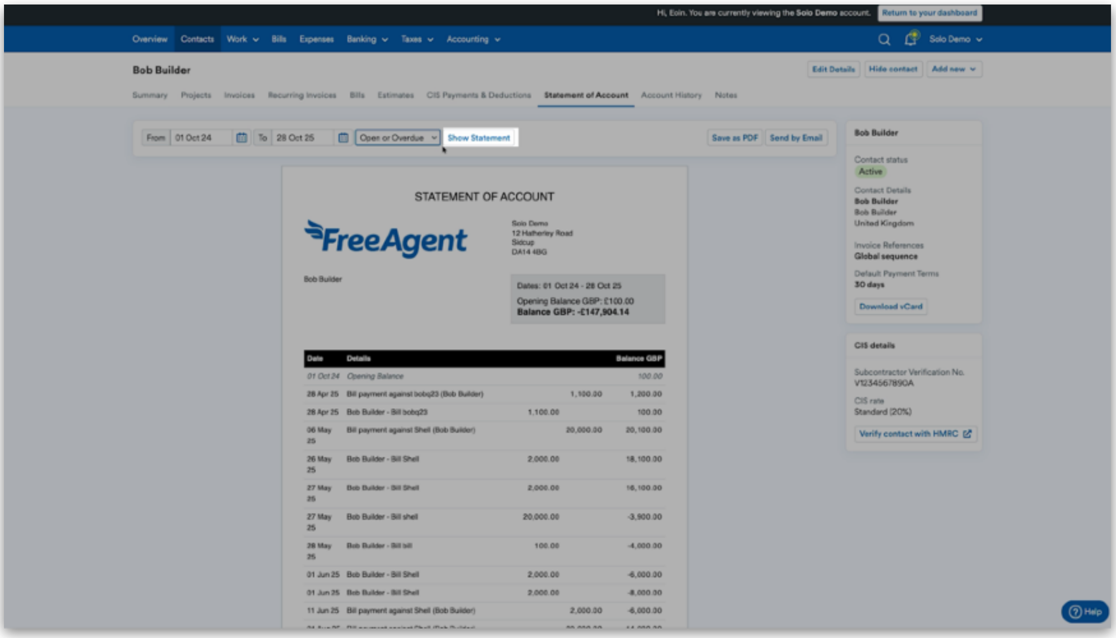
To do this, navigate to the ‘**Statement of Account**’ tab.



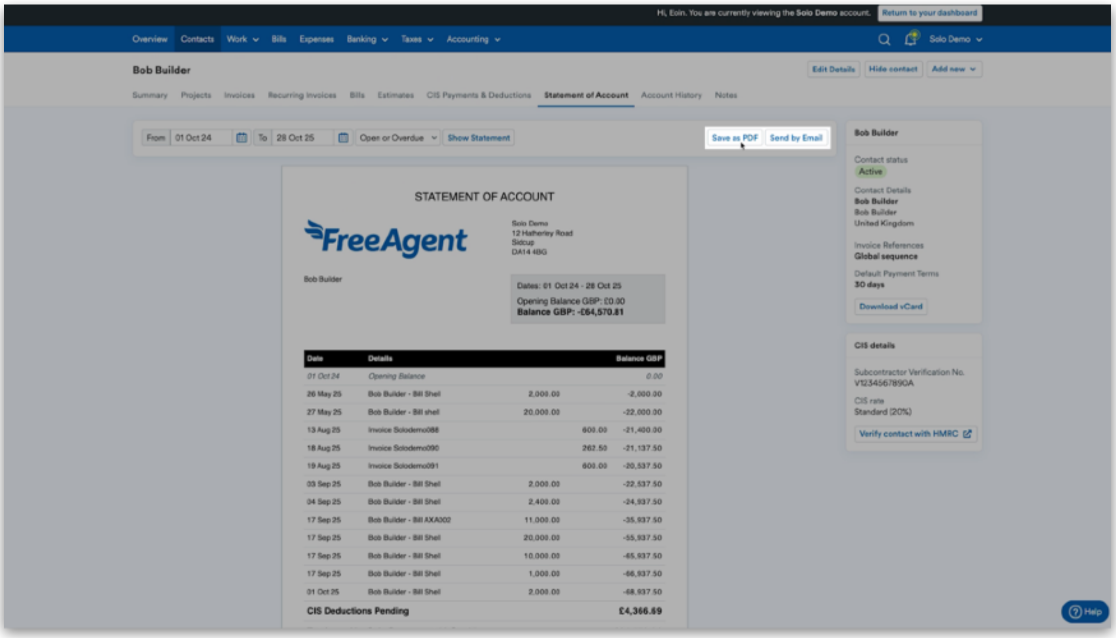

Add the relevant date range. You can either include all transactions or just the outstanding ones by selecting the relevant option from the drop-down menu.



Select ‘**Show Statement**’ to generate the statement.

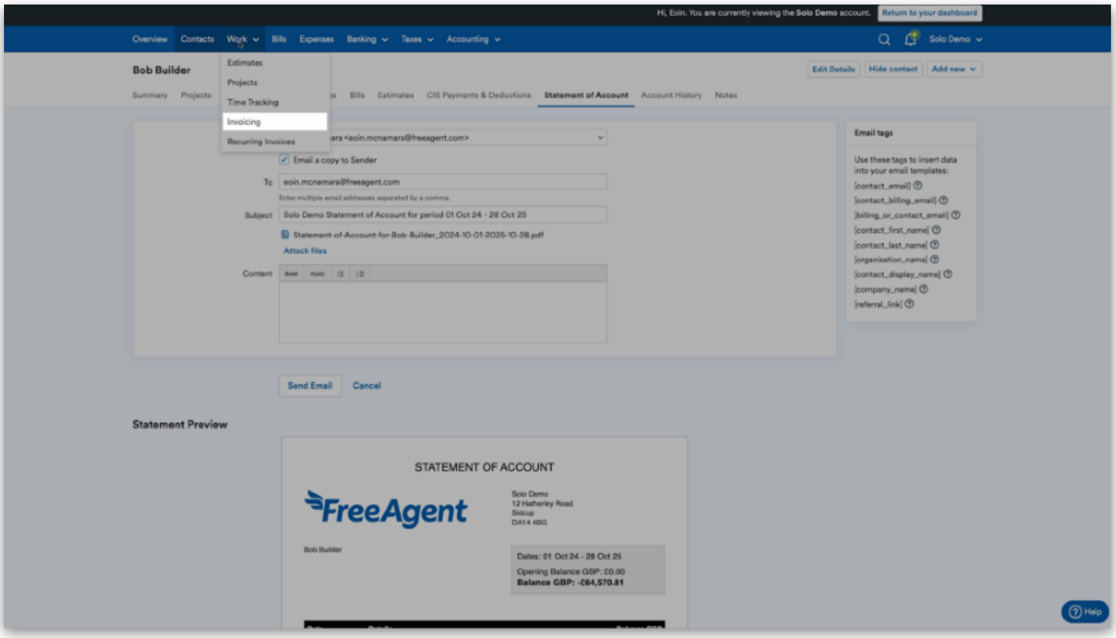



You can then save it as a PDF to print by clicking ‘**Save as PDF**’, or email it directly to the contact by clicking ‘**Send by Email**’.

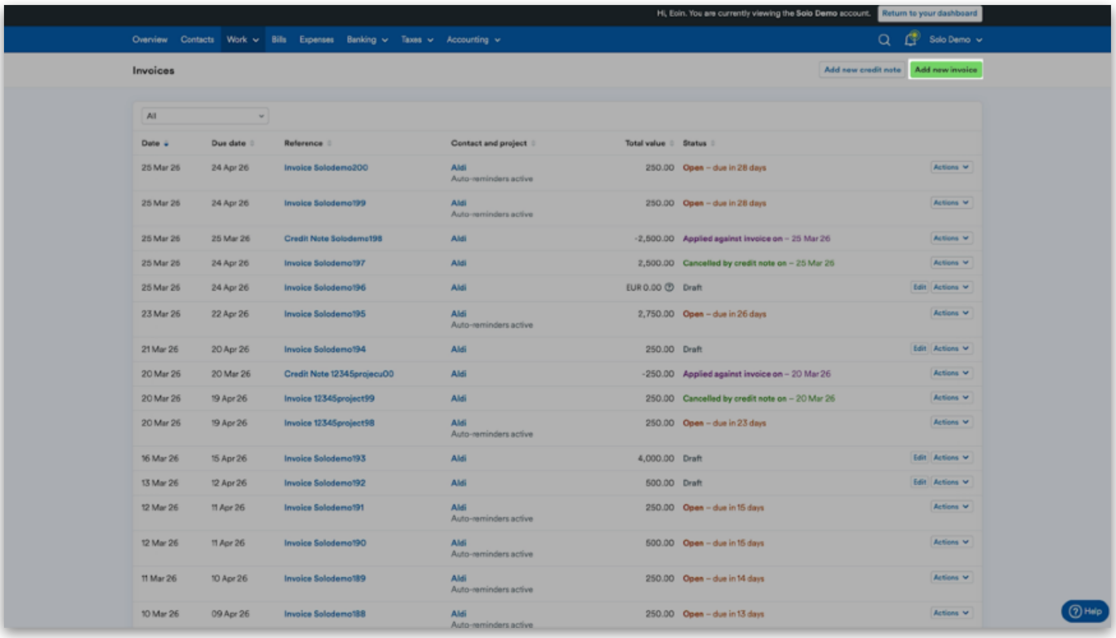


## Invoicing

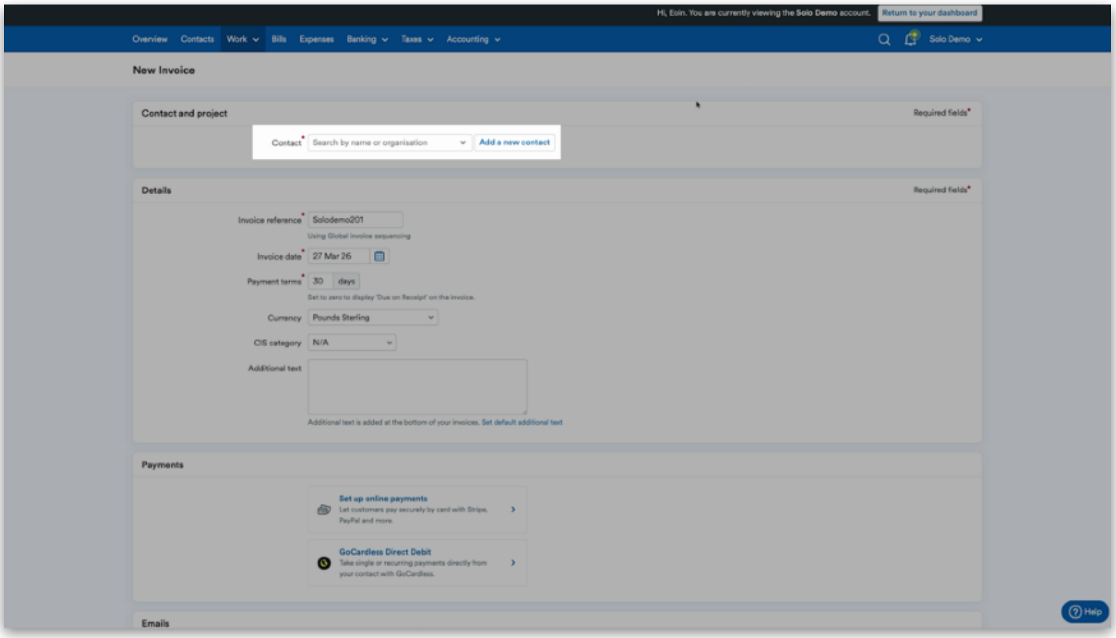
To navigate to the invoicing area in FreeAgent from within your client's account, select the '**Work**' tab and then choose '**Invoicing**' from the drop-down menu.




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.

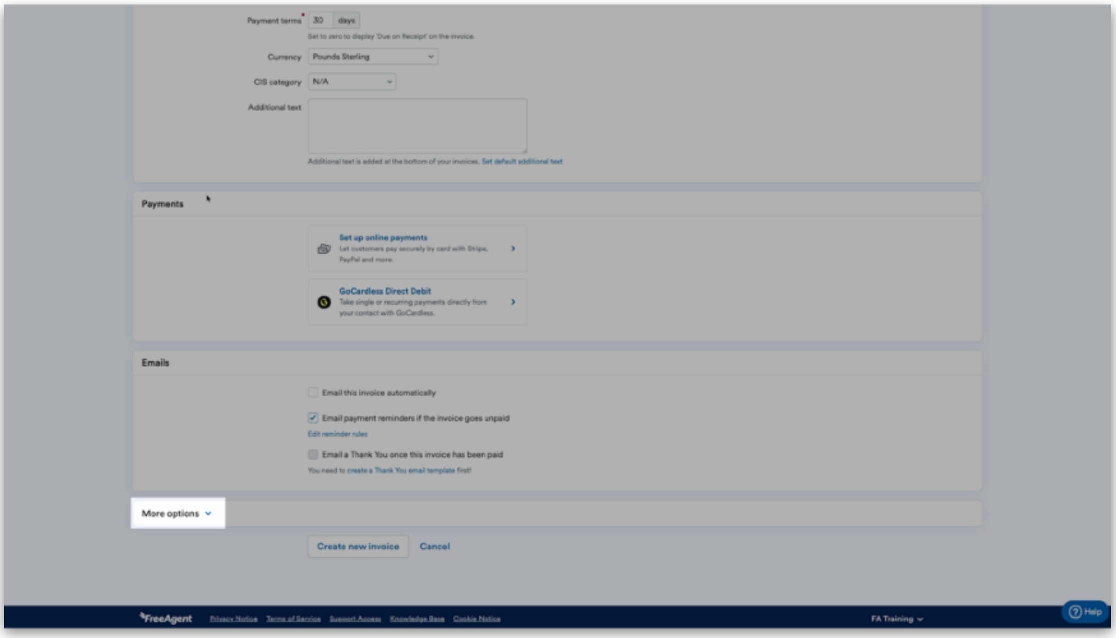



Next, complete the 'Invoice Details' section. If you're using global invoice sequencing for the invoices, FreeAgent will automatically increase the invoice reference number by one each time you create an invoice. Alternatively, you can enter your own reference if you'd prefer.

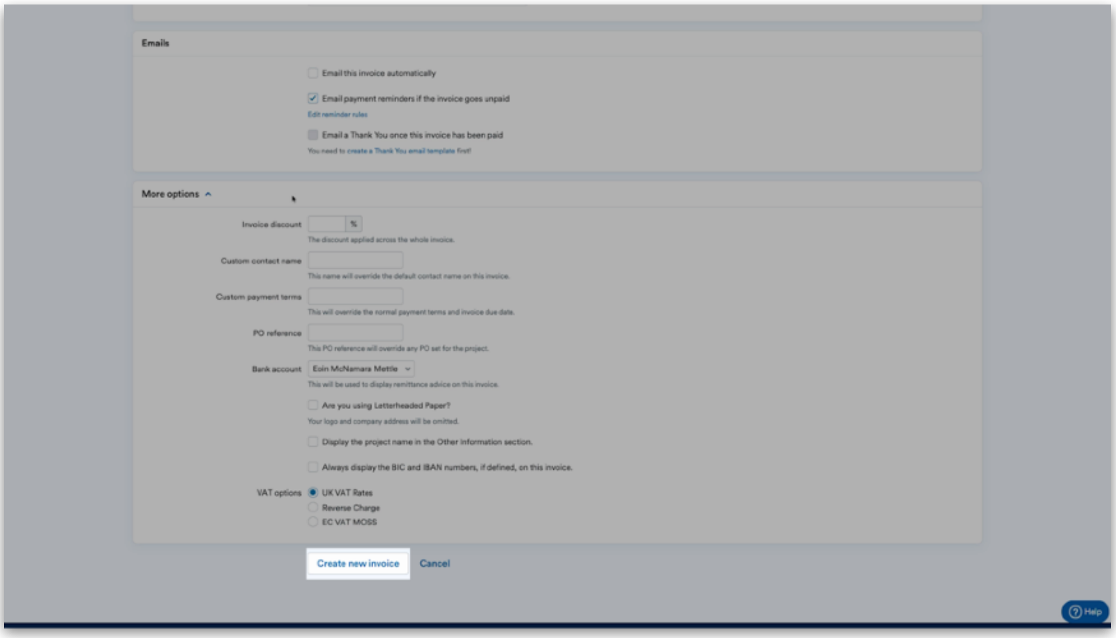
In this section, you can also add payment terms, select a currency, include additional details and select which invoice emails should be sent to the client.

There are various other options available to include.

Select the arrow next to ‘**More Options**’.

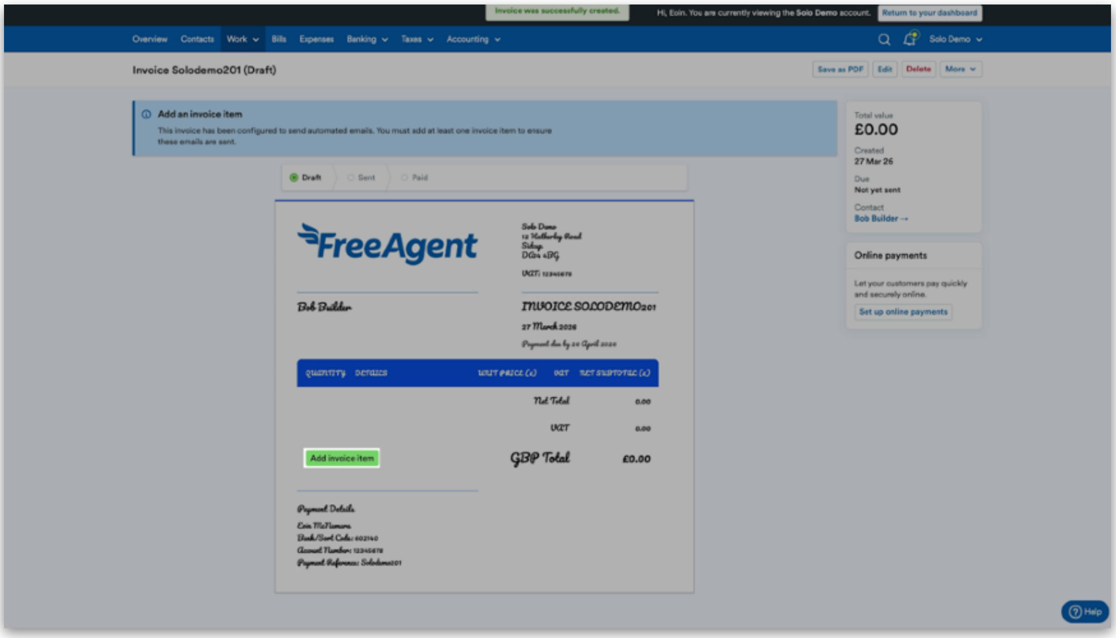



Then enter the relevant details if required and once you’re happy with the information, select ‘**Create new invoice**’.

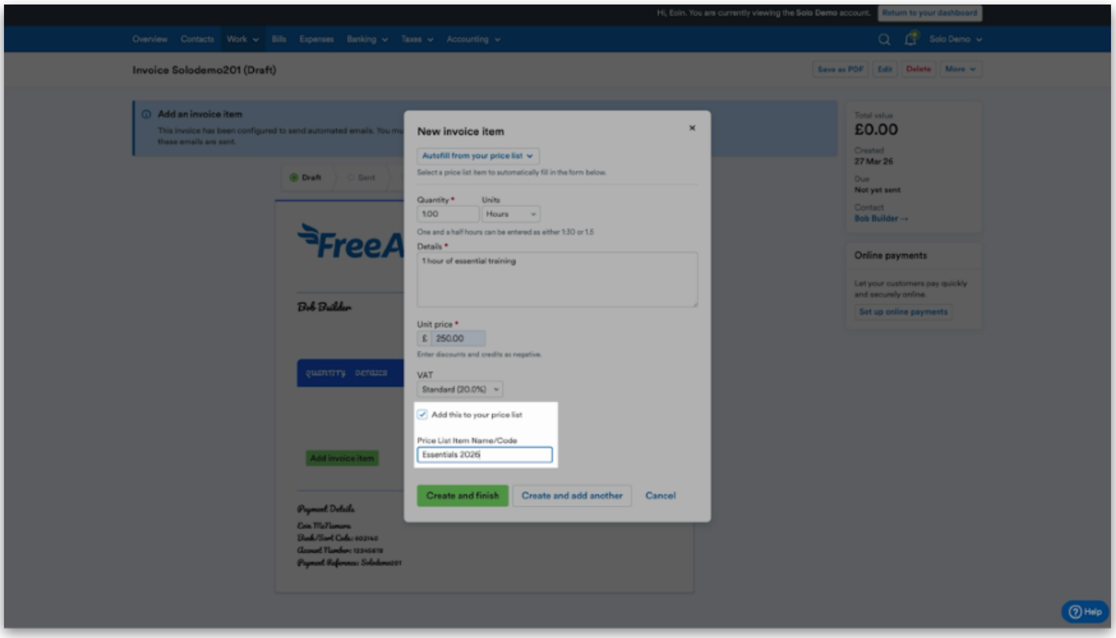



Next, you’ll need to add invoice items.

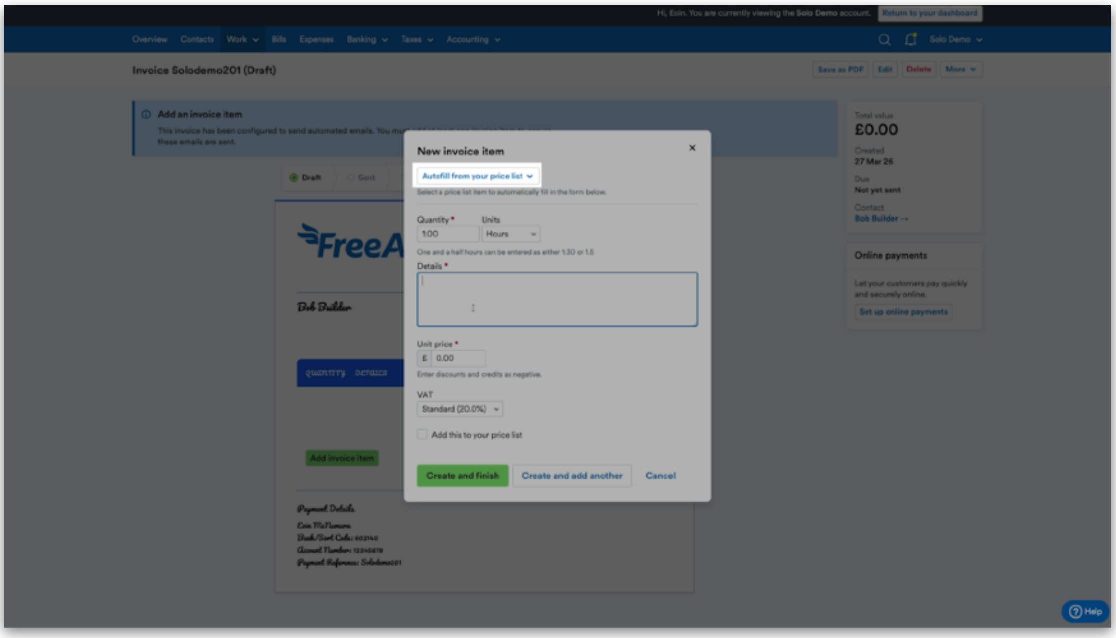
To do this, click on the green '**Add invoice item**' button and enter the relevant details for the item in the pop-up window.



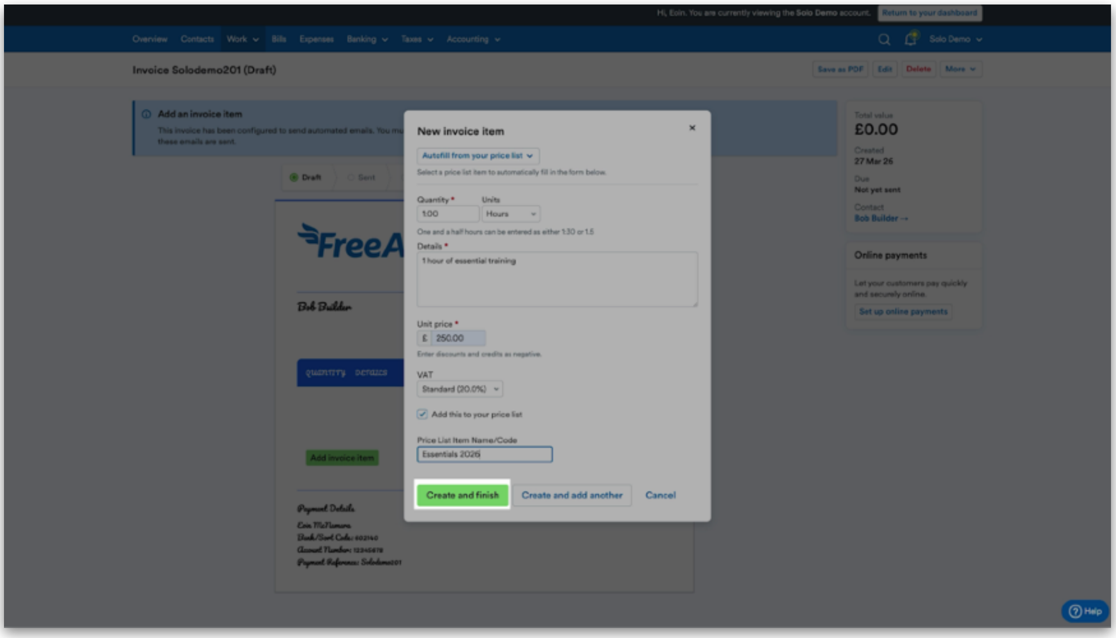

If your client sells the same items or services regularly, tick the '**Add this to your price list**' checkbox and give the item a title.



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.

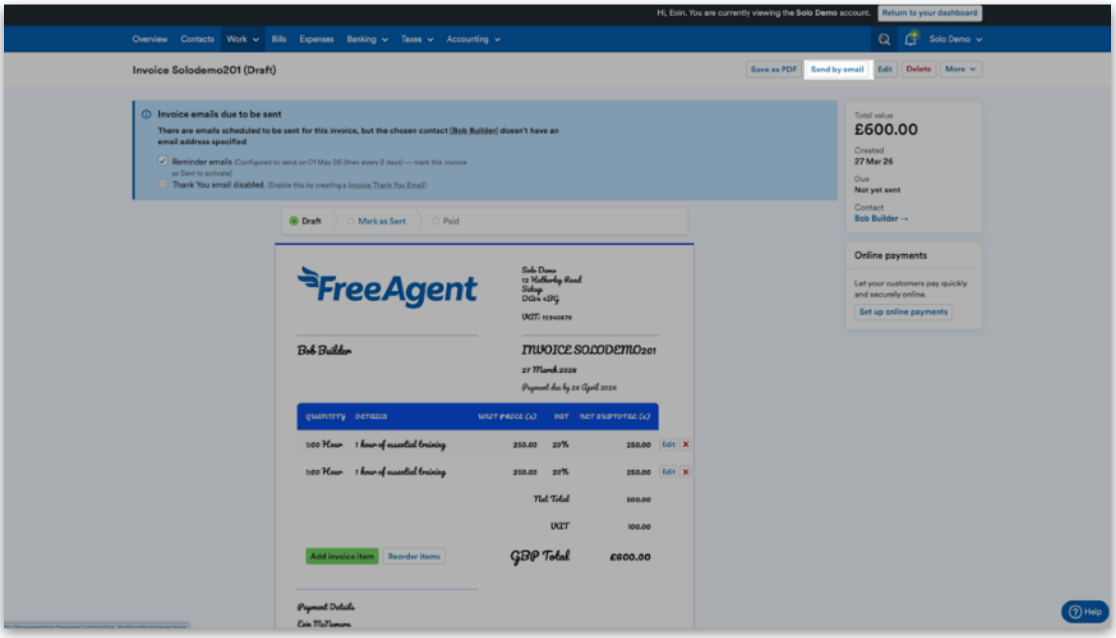



Once you're happy with the details for the invoice item, you have two options: you can either create it and another item or click '**Create and finish**' to complete the process.

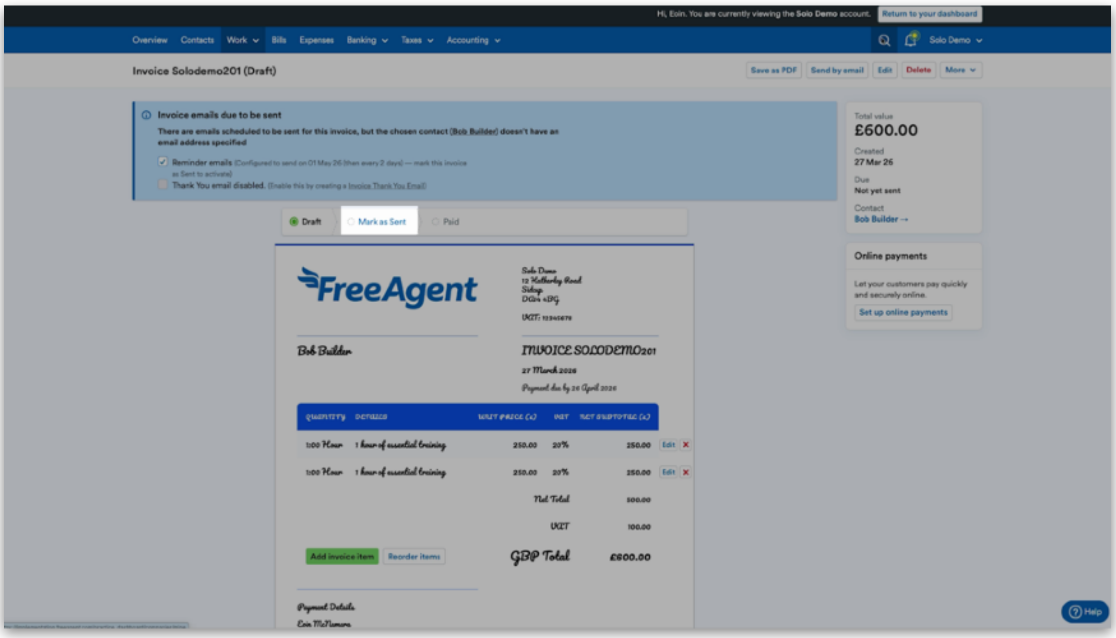



At this stage, the invoice is still marked as 'Draft', which means it will not be pulled through to the relevant accounting reports in FreeAgent.

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.

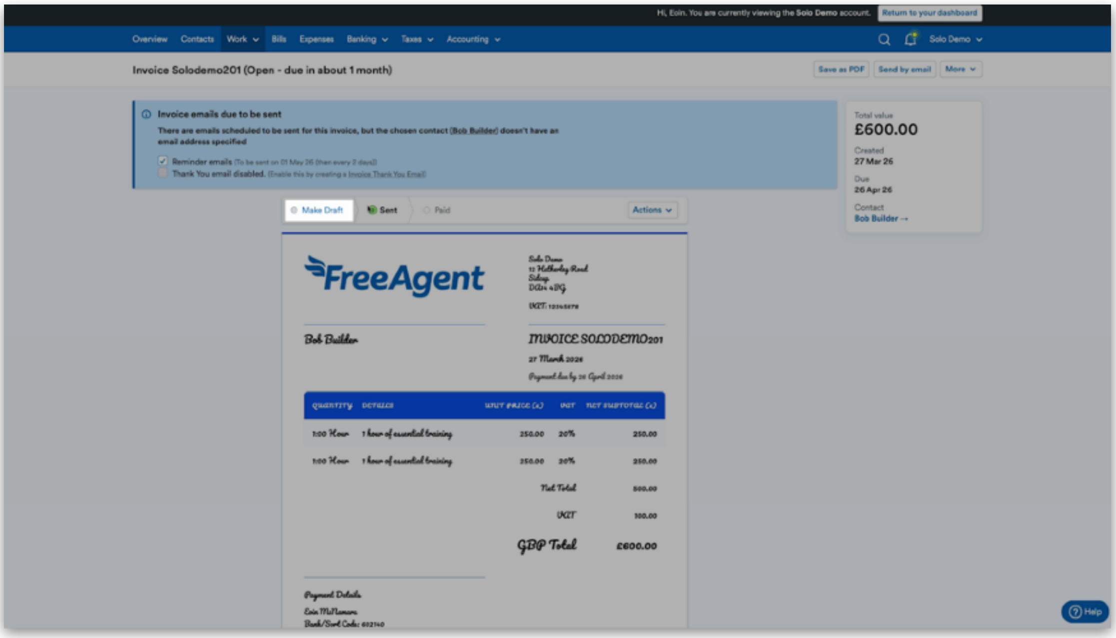



Alternatively, if you didn't select the option to email the invoice automatically, select '**Mark as Sent**' to activate the invoice and your client can then send the invoice to their customer manually.



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.

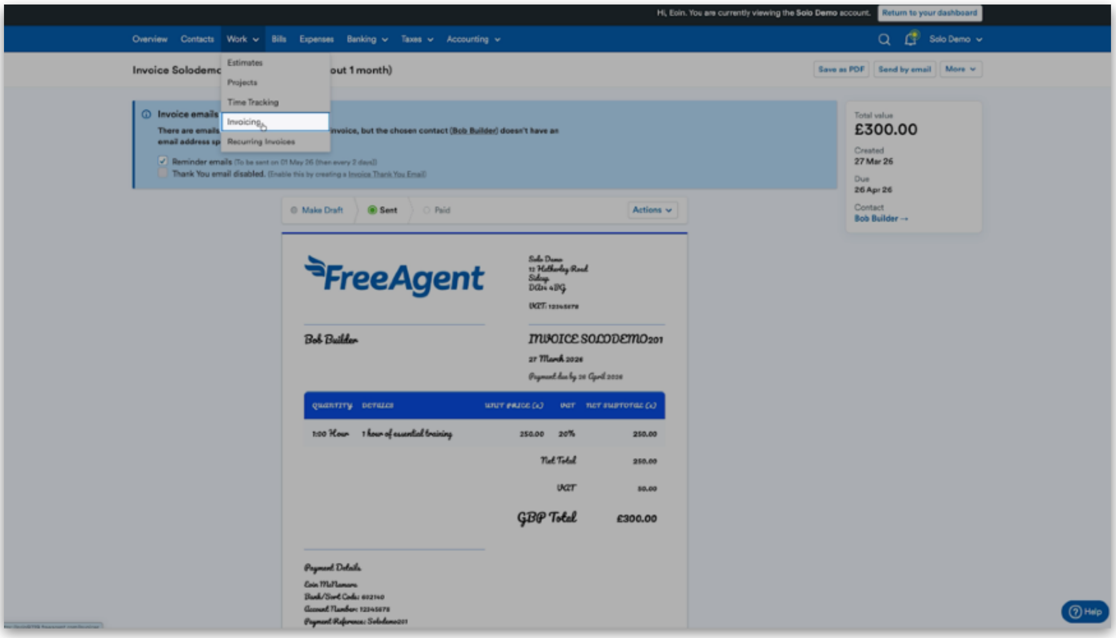
If you need to make changes to the invoice for any reason, select '**Make Draft**' and amend the invoice. Then, repeat the process to email the invoice or mark it as sent.



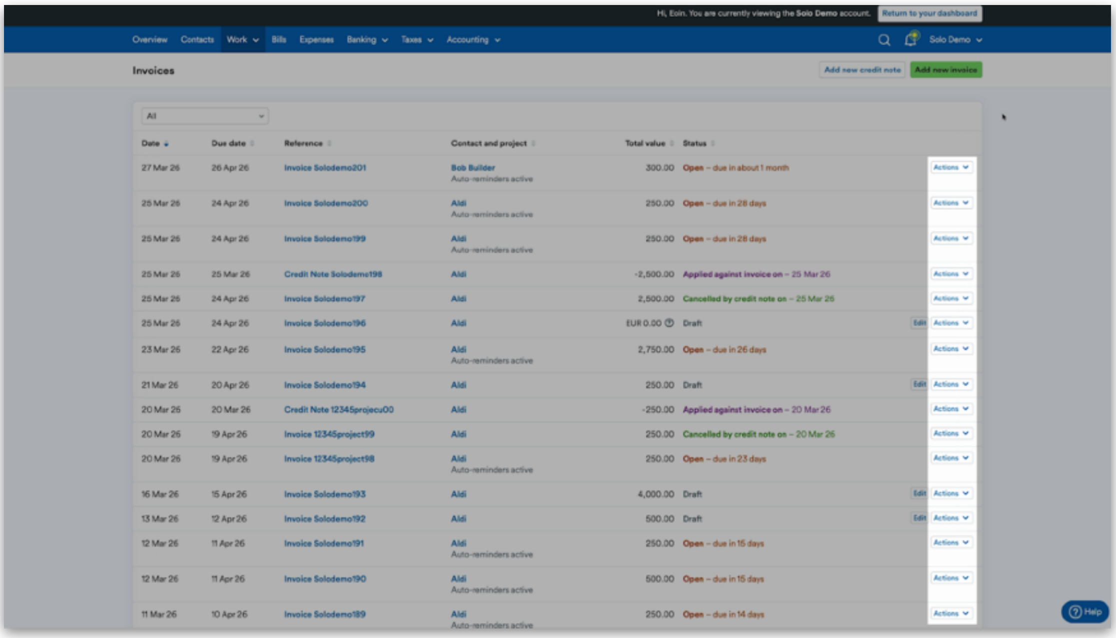

Please note that you can only do this if no payment has been marked against it. If one has, you can't make any changes until the payment has been removed. Your clients can also create and send invoices using the FreeAgent mobile app. To find out more about this, visit the Mobile module in the 'Learning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

## Invoice Quick Actions

Navigate to the ‘**Work**’ tab and select ‘**Invoicing**’ from the drop-down menu.

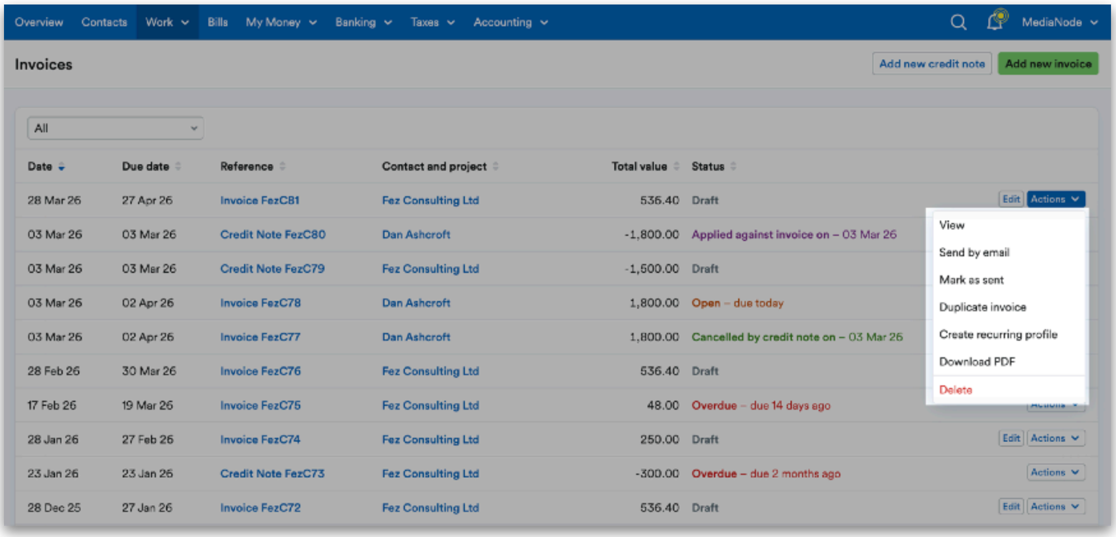



Select the ‘**Actions**’ drop-down menu next to the relevant invoice.

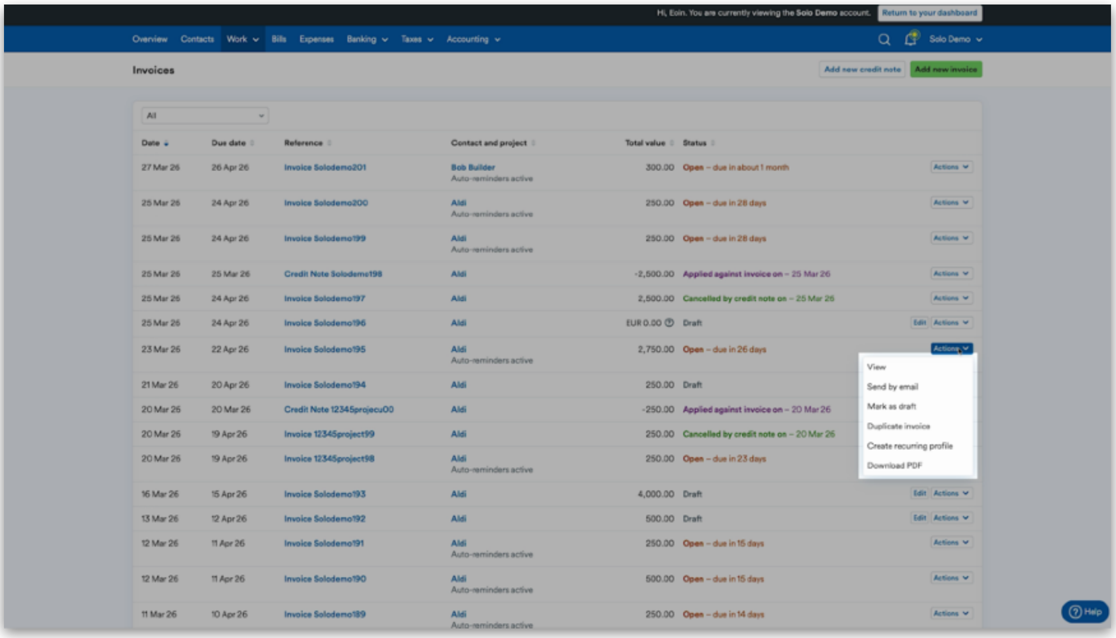



The status of the invoice will affect what options are given in the drop-down menu.

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.

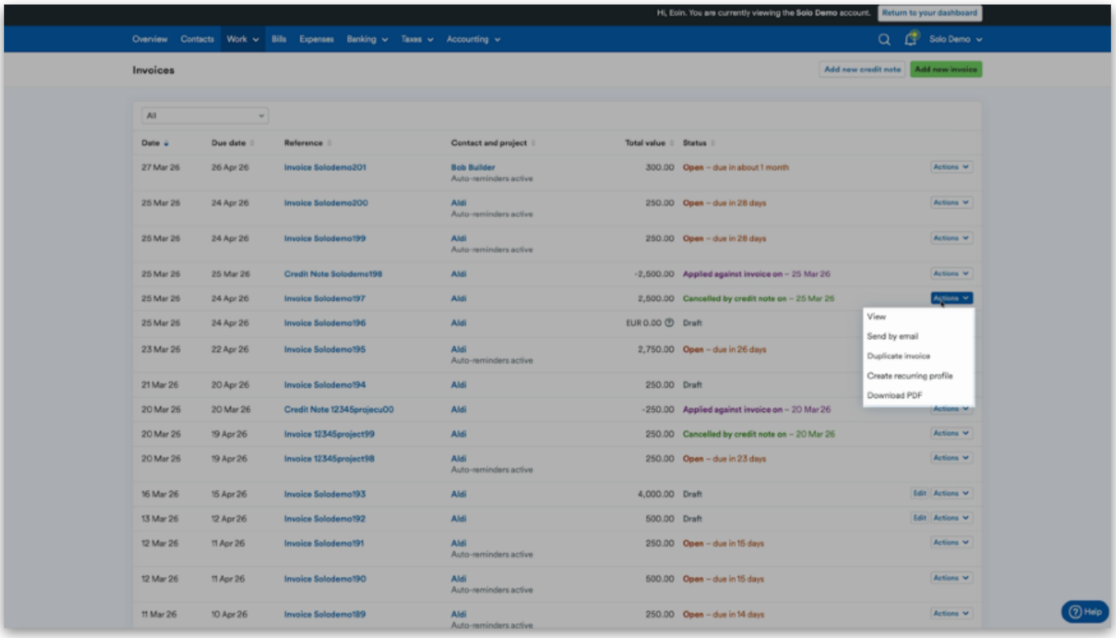



For invoices that are ‘Open’ or ‘Overdue’, you can ‘**View**’ the invoice, ‘**Send by email**’ or ‘**Resend by email**’, ‘**Mark as draft**’, ‘**Duplicate invoice**’, ‘**Create recurring profile**’ from the invoice, or ‘**Download PDF**’.



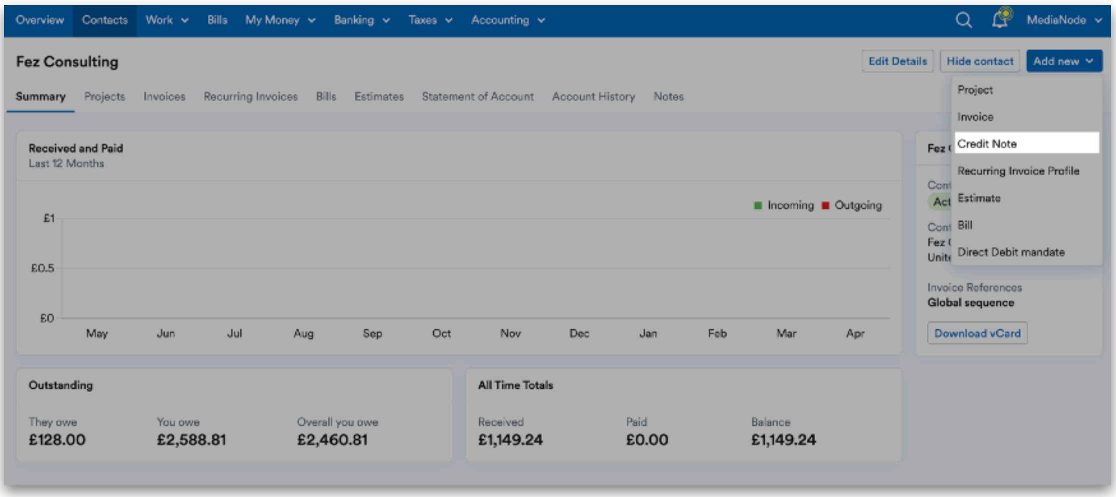

You also have the option to ‘**Send reminder**’ emails for overdue invoices.

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



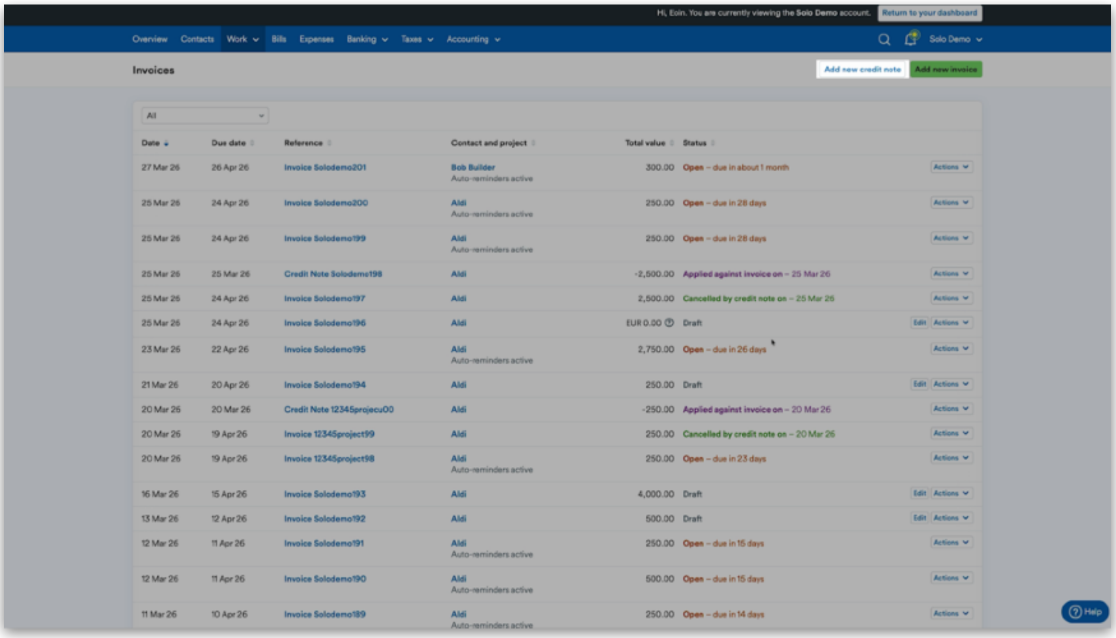

## Credit notes

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 menu.

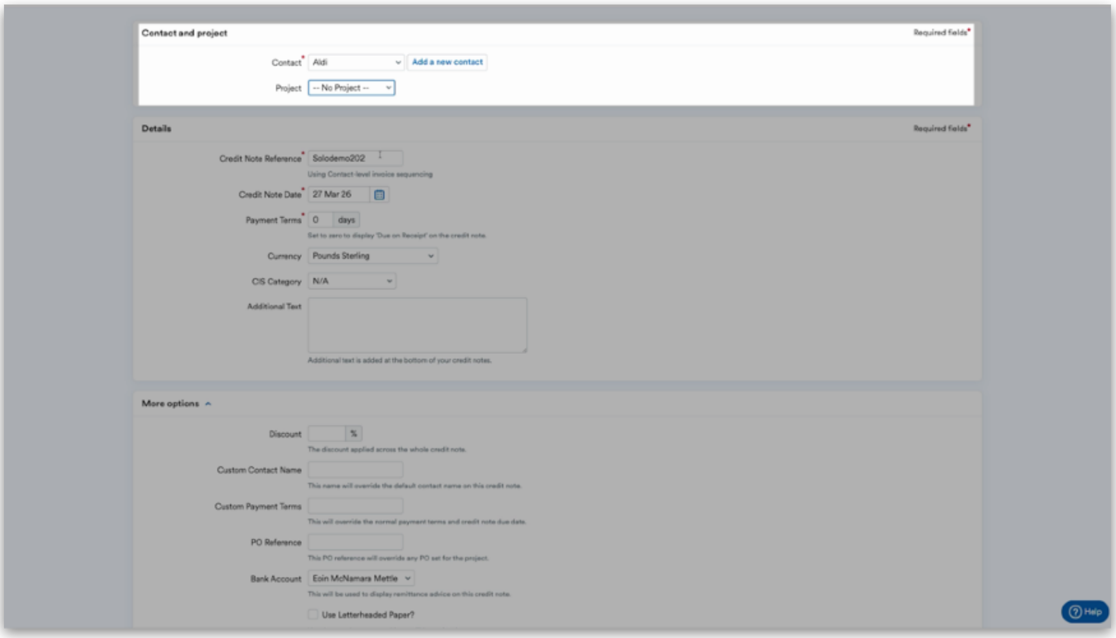



Alternatively, you can create a credit note from scratch via the 'Invoicing' section.

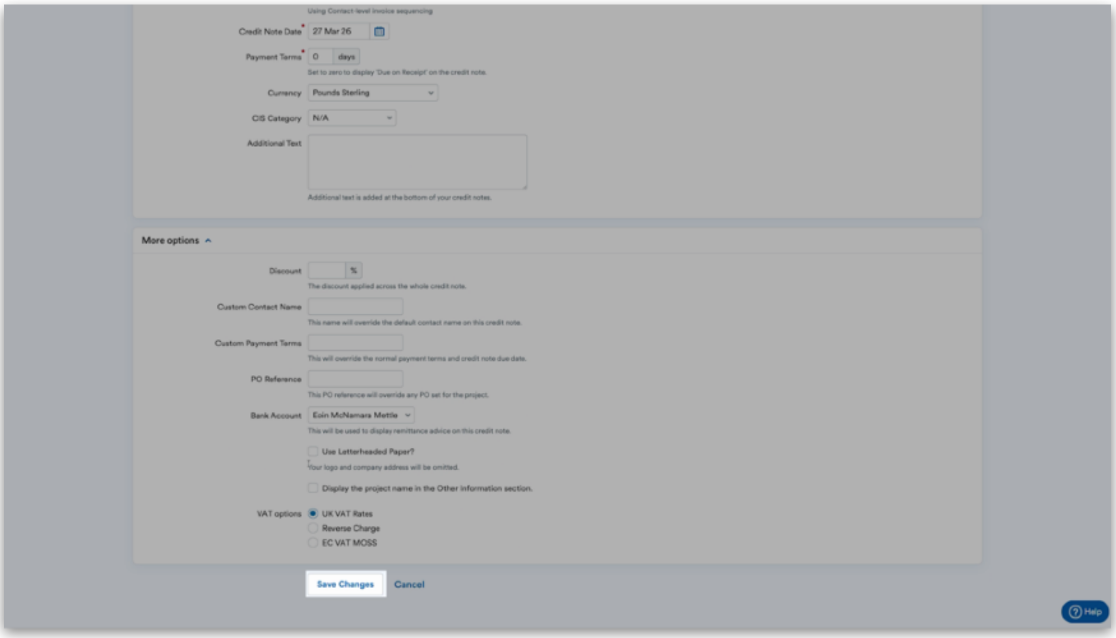
To do this, click on the '**Work**' tab, choose '**Invoicing**' and then select the '**Add new credit note**' button at the top right of the page.



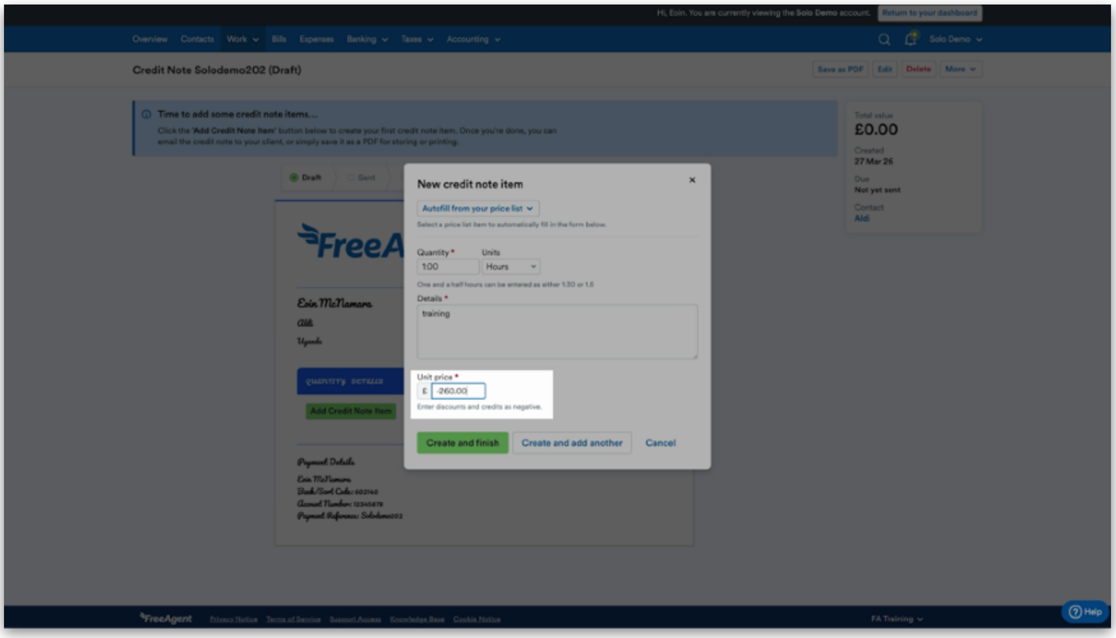

Whichever way you choose, you'll be taken to the new credit note screen. You'll notice that this page is very similar to the one shown earlier in the invoicing section, starting with adding a contact and project, if applicable.



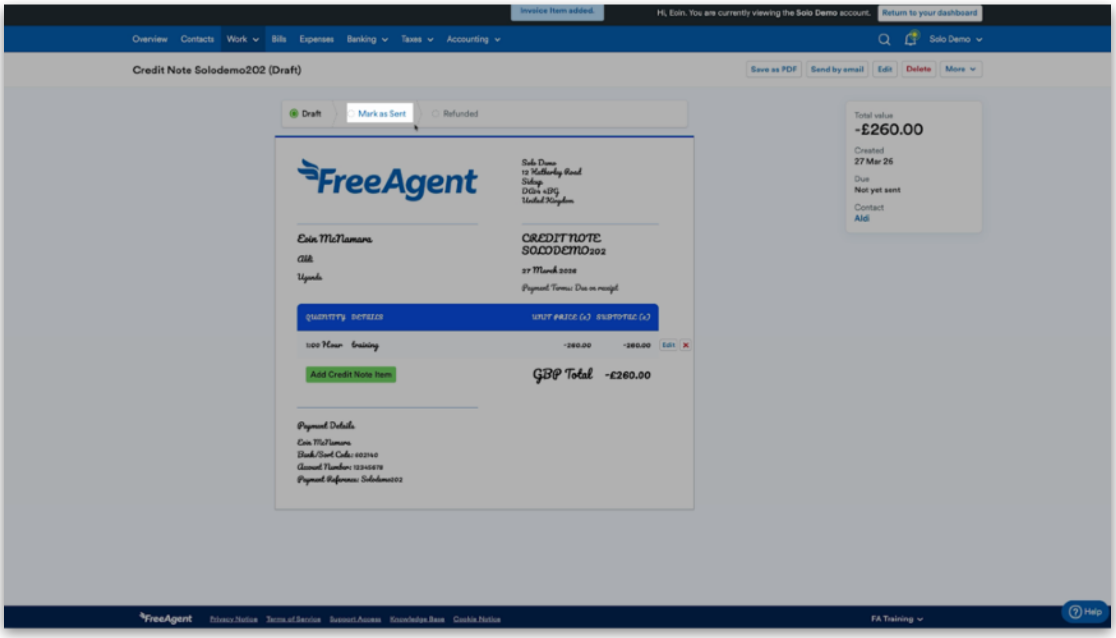
Next, add the credit note details, including a reference number, and any relevant extra information in the 'More Options' section. Once you're happy with it, select '**Save Changes**'.



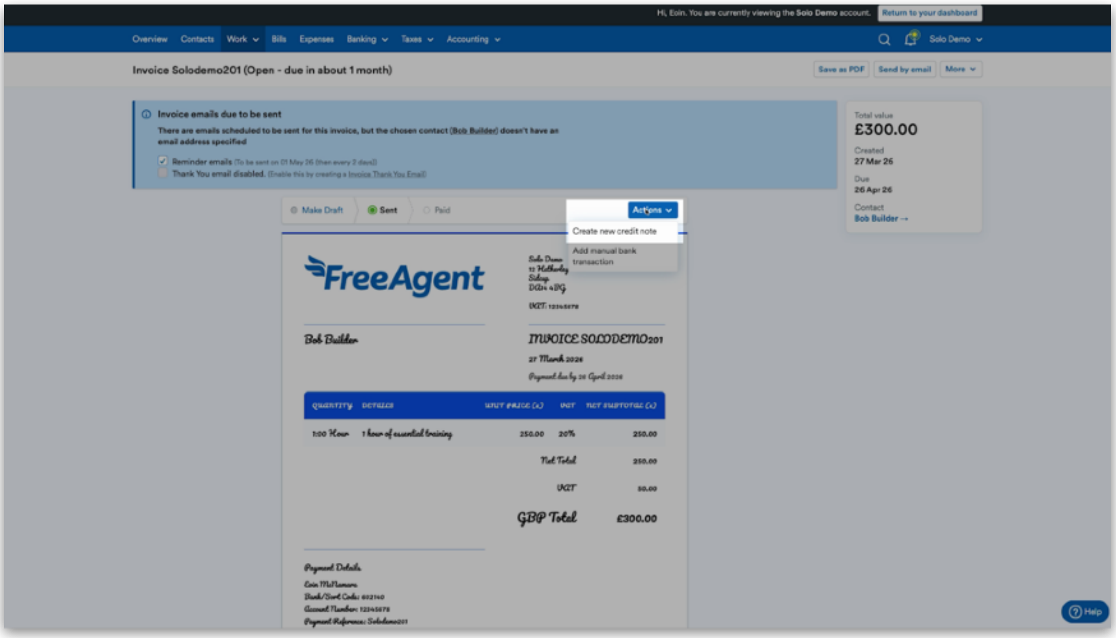

From here, follow the same process of adding line items as for invoicing. However, make sure the figures are negative.



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



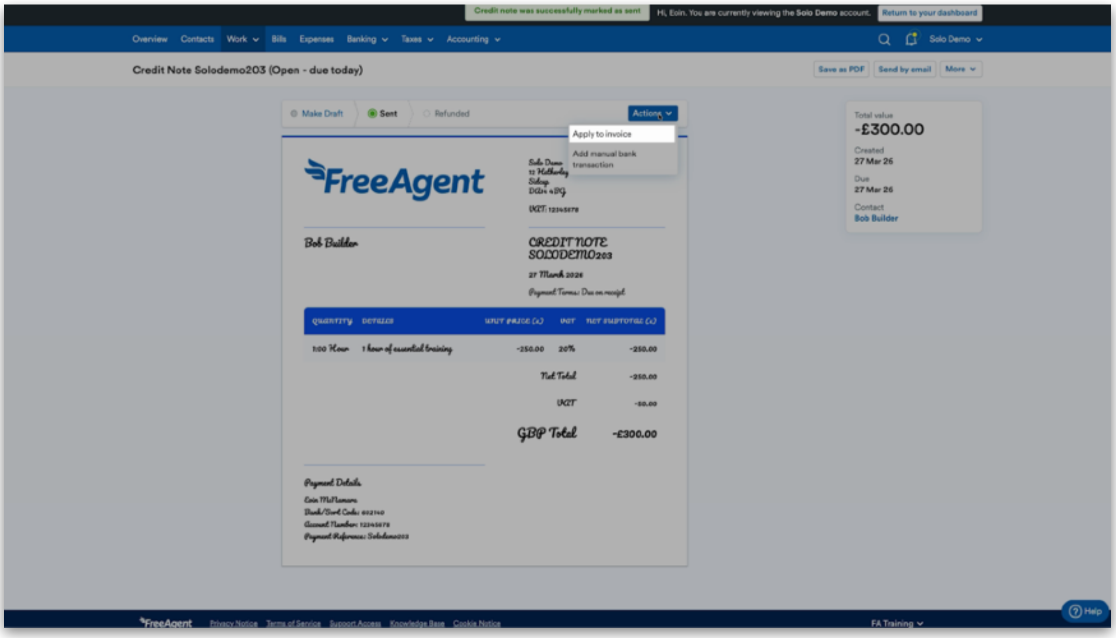

Alternatively, you can create a credit note from an existing invoice in FreeAgent. To do this, navigate to the 'Invoicing' area and select the invoice that you want to credit. Click on the '**Actions**' drop-down menu and select '**Create new credit note**'.




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.

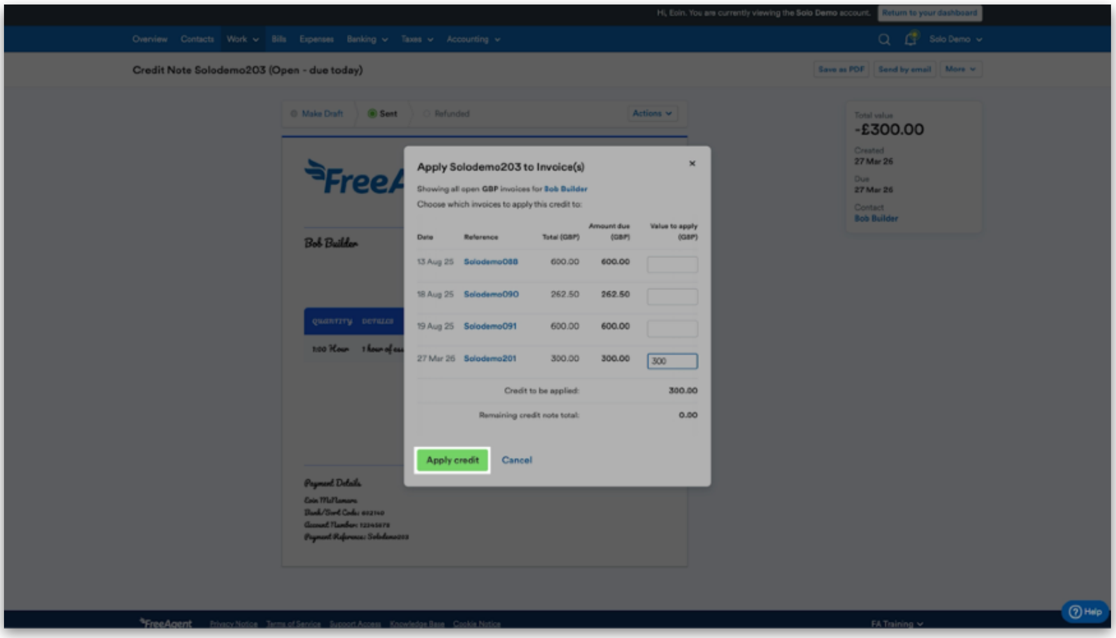
In the drop-down menu you'll have two options to mark the credit note as paid.

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.

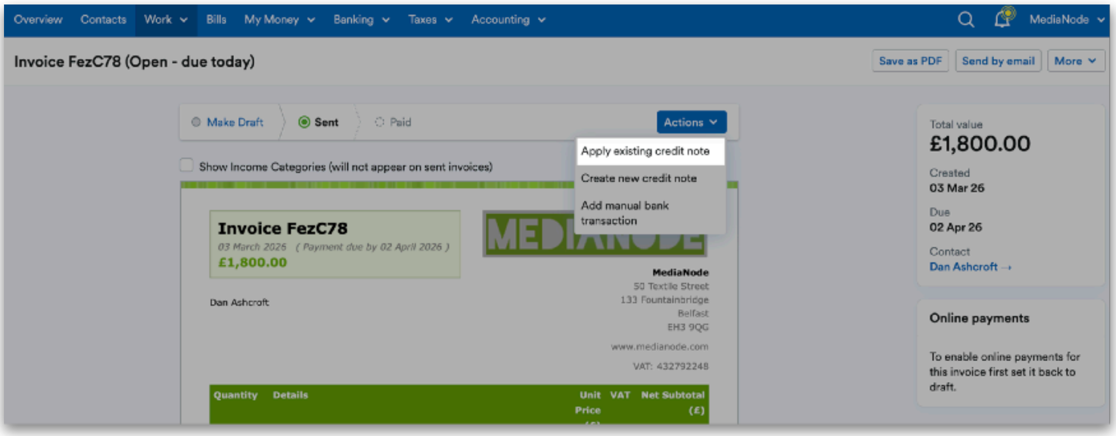
If you're looking to use the entire credit note then enter its full value, or you can split it out against various sales invoices for the contact. Select '**Apply Credit**' to complete the process.



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**'.



# 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
**Telephone:** 0800 025 3800

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