



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

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Your Practice Dashboard

Clients area

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

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

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

Name	Account owner	Client relationship	Free NWG licence	Status	Bank balance	Alerts	Owner access
A & K Bakery TS Ch Ltd	Regina Pereira regina.pereira@freeagent.com	Practice client	No	Active	£2,300.00	0	Level 7 Edit Switch to...
Bob The Builder Ltd	Bob The Builder eoin.mcnamara@freeagent.com	Practice client	No	Active	£34,949.36	0	Level 8 Edit Switch to...
Builder	Eoin McNamara eoin.mcnamara@fa.com	Practice client	No	Active	£225,259.00	0	Level 8 Edit Switch to...
Clare Brazilian JiuJitsu Limited	Eoin McNamara eoin.mcnamara@fa.com	Practice client	Could be	Active	£73,041.77	1	No Access Edit Switch to...
Deat Integration	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£196,270.20	0	Level 8 Edit Switch to...
Eoin Demo Sole Trader	Frankie Goodman eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	£46,012.34	1	Level 8 Edit Switch to...
Eoin Prep	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 7 Invite client Edit Switch to...
Handy Manny LTD	Manny Esteves Garcia Eoin.mcnamara@freeagent.com	Practice client	No	Active	-£13,700.00	0	Level 8 Invite client Edit Switch to...
Landlord Demo	Shanique Schneider eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	-£300,177.00	0	Level 8 Invite client Edit Switch to...
McNamara & Associates	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£100,000.00	1	Level 8 Invite client Edit Switch to...
McNamara Steel LTD	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8 Invite client Edit Switch to...
Monopoly Residential	Millum Pennington eoin.mcnamara@freeagent.com	Practice client	No	Active	£101,817.44	1	Level 8 Edit Switch to...
Payroll Demo Eoin	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£0.00	0	Level 8 Invite client Edit Switch to...
Rebecca Marie Cookhouse	Eoin McNamara	Practice client	No	Active	£0.00	0	Level 8 Edit Switch to...

The 'My clients' tab shows you the clients assigned to you as an account manager. The 'My group clients' tab shows you the groups of clients assigned to you. The 'All clients' tab shows you all the clients on the Practice Dashboard and is only available to **Admin** and **Comprehensive** account managers.

Groups

You can add account managers and clients to a group 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'**.

The screenshot shows the 'Account managers' page in the FreeAgent system. The page has a green header with navigation tabs: Clients, Alerts, Account managers (selected), Payroll, Reports, CSV imports, and Partner Zone. On the right, there's a 'FA Training' dropdown. Below the header, the 'Account managers' section is active, showing a search bar and a 'Manage groups' button. The main content area displays a table of account managers.

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

The footer contains the FreeAgent logo, links to Privacy Notice, Terms of Service, Accountant Knowledge Base, and Contact Us, along with a 'Practice Support' link and a 'Help' button.

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

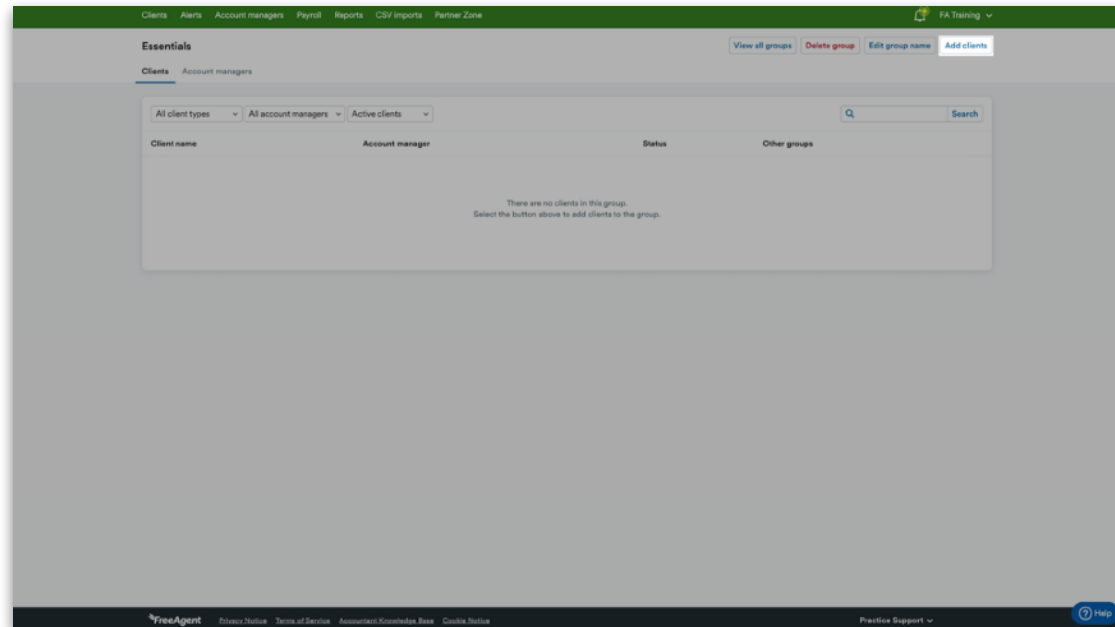
The screenshot shows the 'Groups' page in the FreeAgent system. The page has the same green header as the previous screenshot. Below the header, the 'Groups' section is active, showing an 'Add new group' button. The main content area displays a table of groups.

Name	Clients	Account managers	
1-FreeAgent Bookkeeping	1	0	Actions
Accounts client	8	2	Actions
All Clients	161	1	Actions
Amazing clients	7	3	Actions
Bookkeeping	8	3	Actions
Eoin Group	46	5	Actions
Essentials training	7	2	Actions
LTD	1	2	Actions
MTD clients	11	3	Actions
North	0	0	Actions
Payroll clients	3	2	Actions
VAT clients	8	3	Actions
Wright Vigor	3	2	Actions

At the bottom left of the table, there is a pagination control showing '25 per page'. The footer is identical to the previous screenshot.

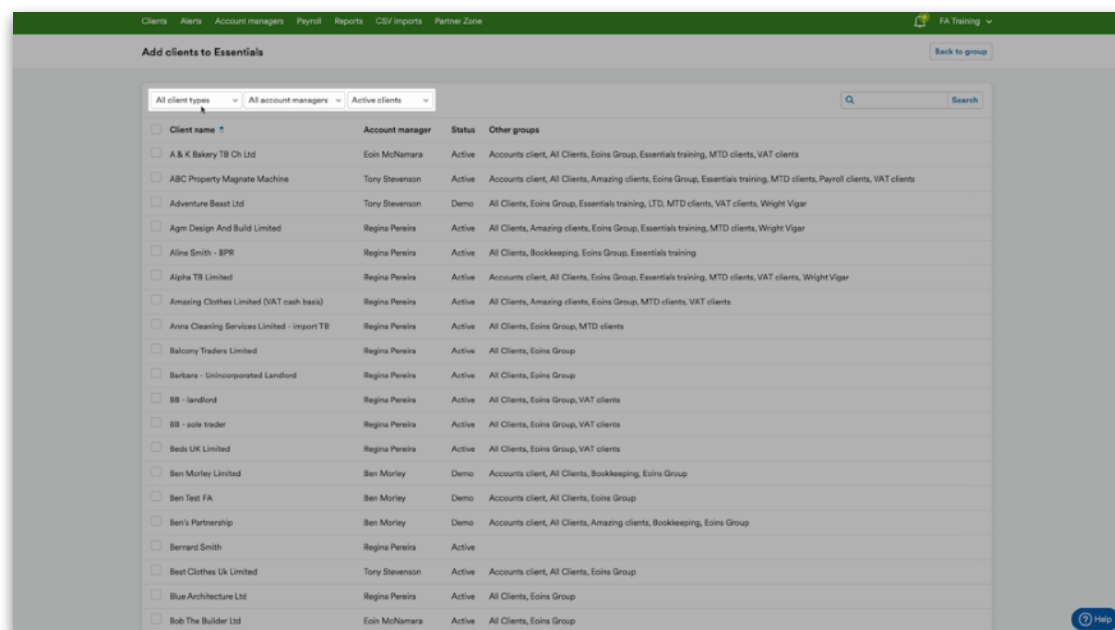
You can click on the name of an existing group to add account managers and clients to that group in bulk.

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

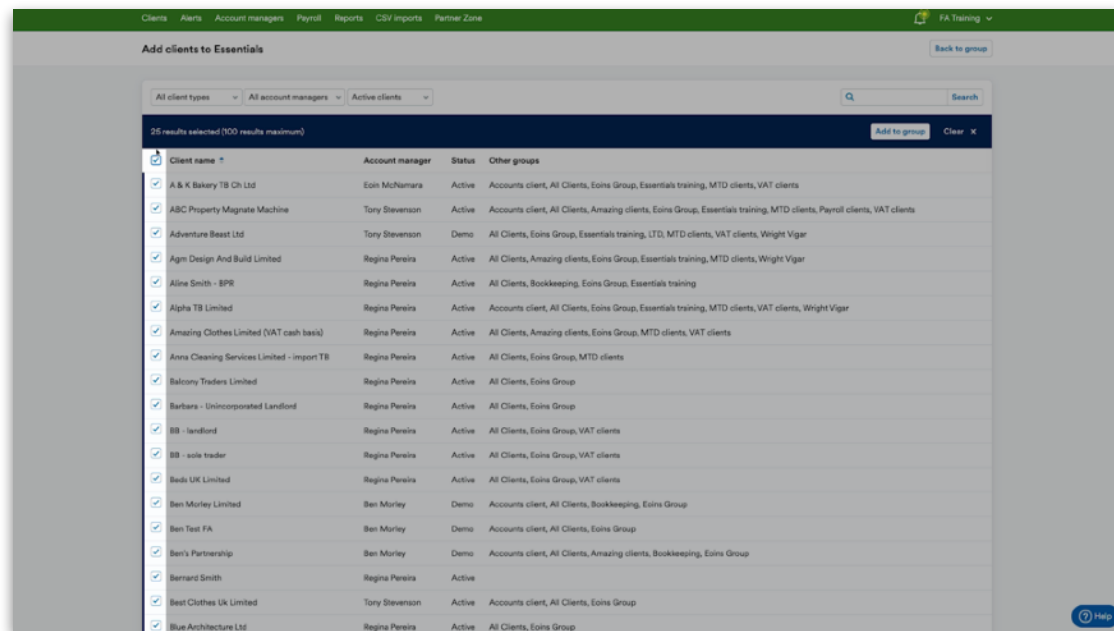


This will then show all clients on the dashboard.

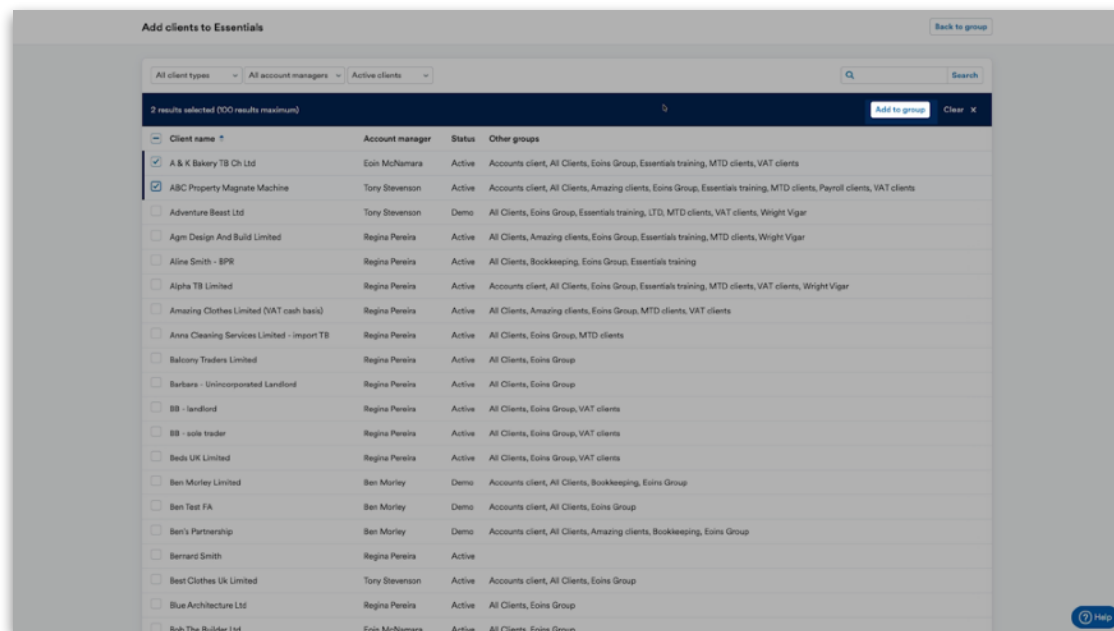
You can filter by licence type, account manager, and client status from the drop-down menus.



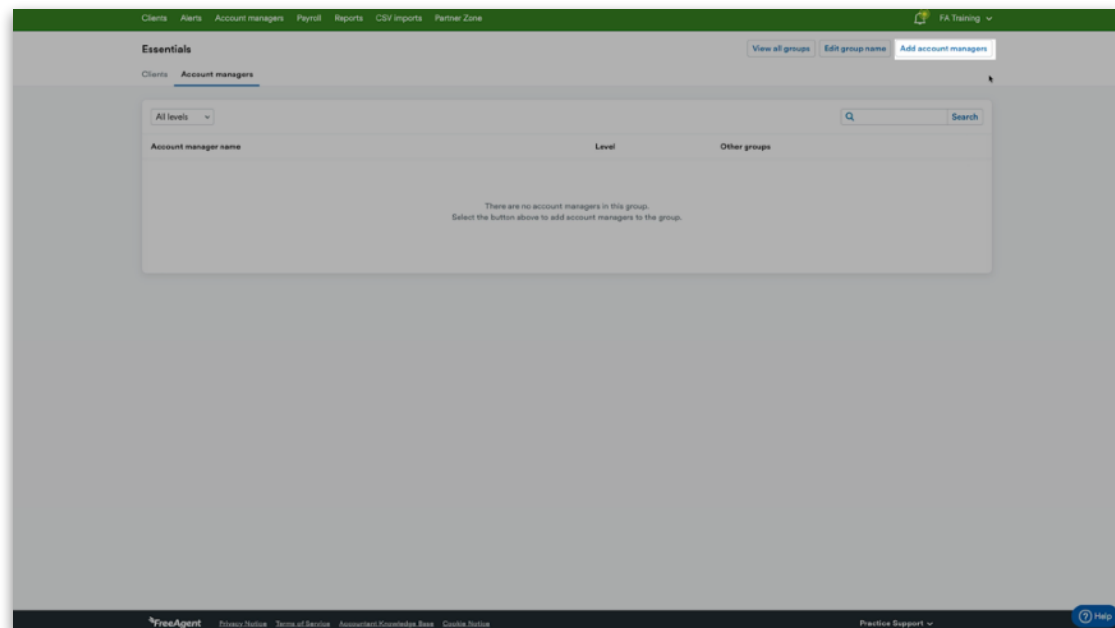
You can select all the clients displayed by selecting the checkbox next to the 'Client name' heading, or you can select the checkbox beside each client you want to add in bulk.



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

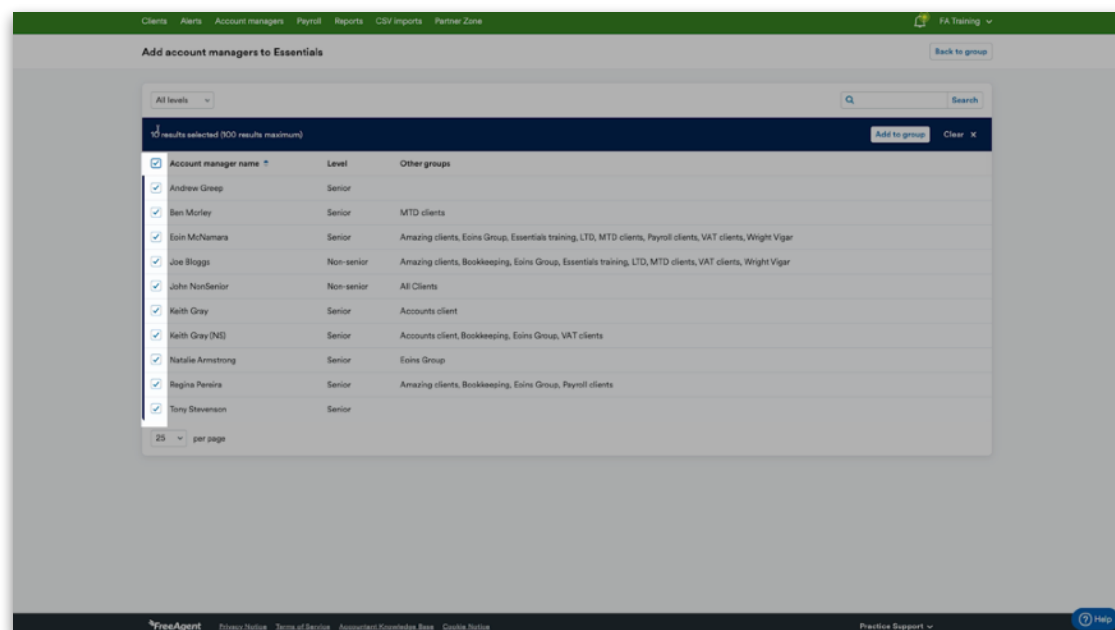


You can also add account managers to a group in bulk by selecting the **'Account managers'** tab within the relevant group and then selecting **'Add account managers'**.

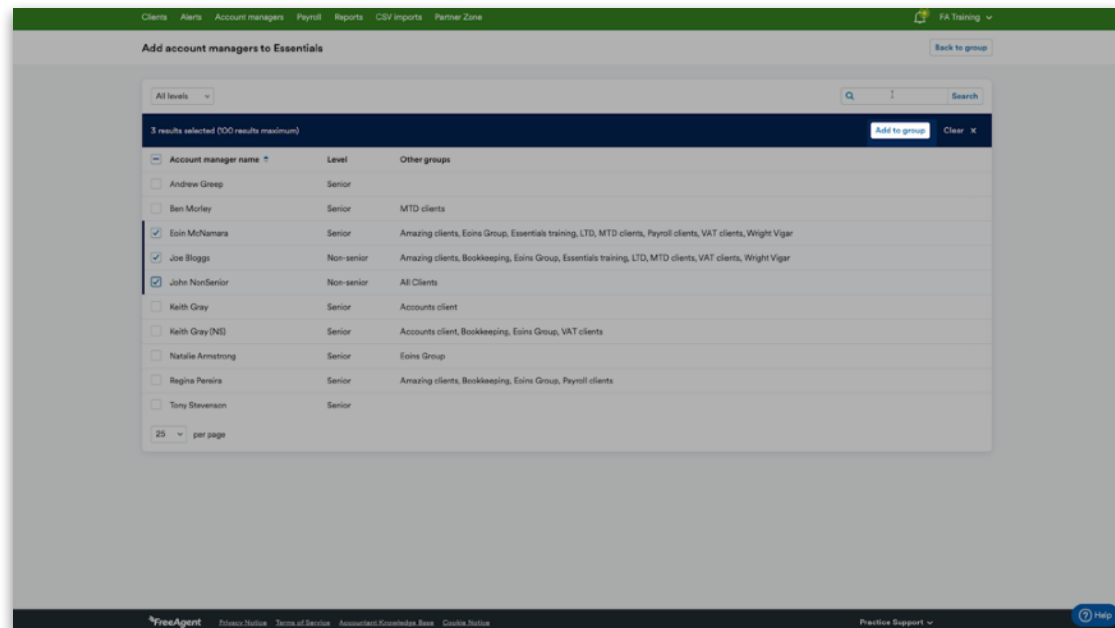


You can filter by level.

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

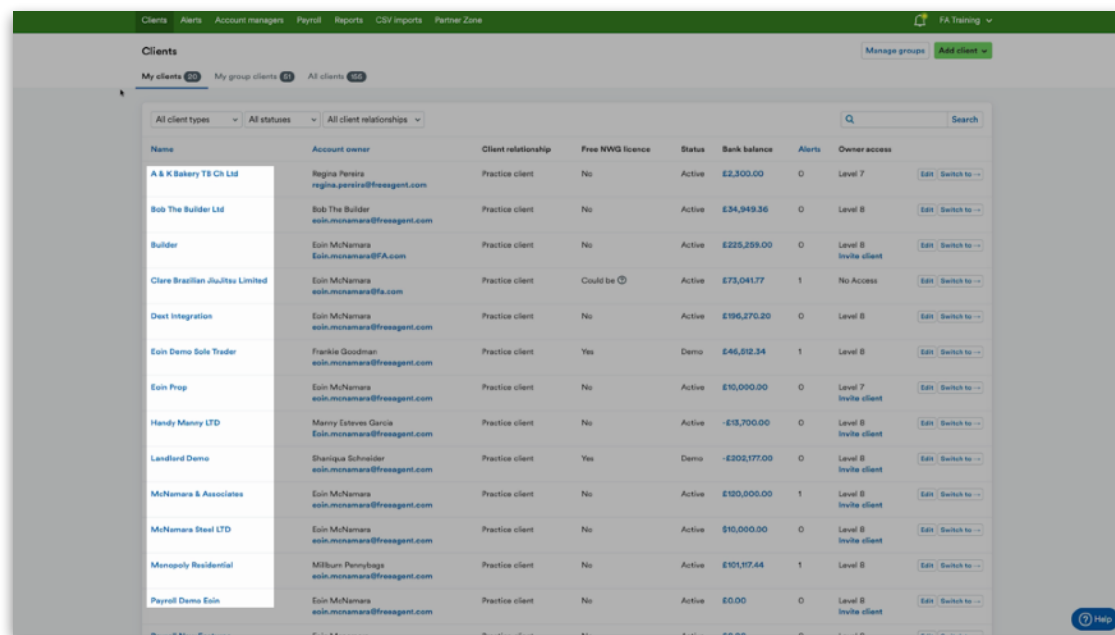


Once you have selected all the relevant account managers, select **‘Add to group’**.



Notes

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



Select the **'Notes'** tab.

The screenshot shows the client profile for 'A & K Bakery TB Ch Ltd' with the 'Notes' tab selected. The interface includes a top navigation bar with links like 'Clients', 'Alerts', 'Account managers', 'Payroll', 'Reports', 'CRM imports', and 'Partner Zone'. The client's status is 'Active client'. Below the tabs, there's a section for 'Add-ons' with a table showing 'Amazon UK' as 'Unavailable' and 'Smart Capture Unlimited' as 'Inactive'. A central message from HMRC states: 'You are ready to file VAT via MTD — but is your client?' followed by instructions and a 'Switch Company to MTD VAT filing' button. The 'Profit and Loss for 2025/26' section displays a table with Income (£0), Expenses (£66), Operating profit (-£66), and Less (EO Corp. Tax, EO Dividends, EO Adjustments), resulting in a Carried forward / distributable amount of -£52,293. The right sidebar contains 'Client details' (Contact: Regina Pereira, Type: UK Limited Company, Address: 102 Leveny Terrace, London, N3 9LW), 'Additional features' (Exclude from bulk payroll: Yes), 'Account manager' (Eoin McNamara), and 'Groups' (Accounts client, All Clients, Eoin Group, Essentials, Essentials training, MTD clients, VAT clients).

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

This screenshot shows the same client profile page, but with the 'Add a note' form open. The form has a text input field labeled 'Notes' and a green 'Add note' button. The rest of the page layout, including the navigation bar, client details, and financial summary, remains the same as in the previous screenshot.

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.

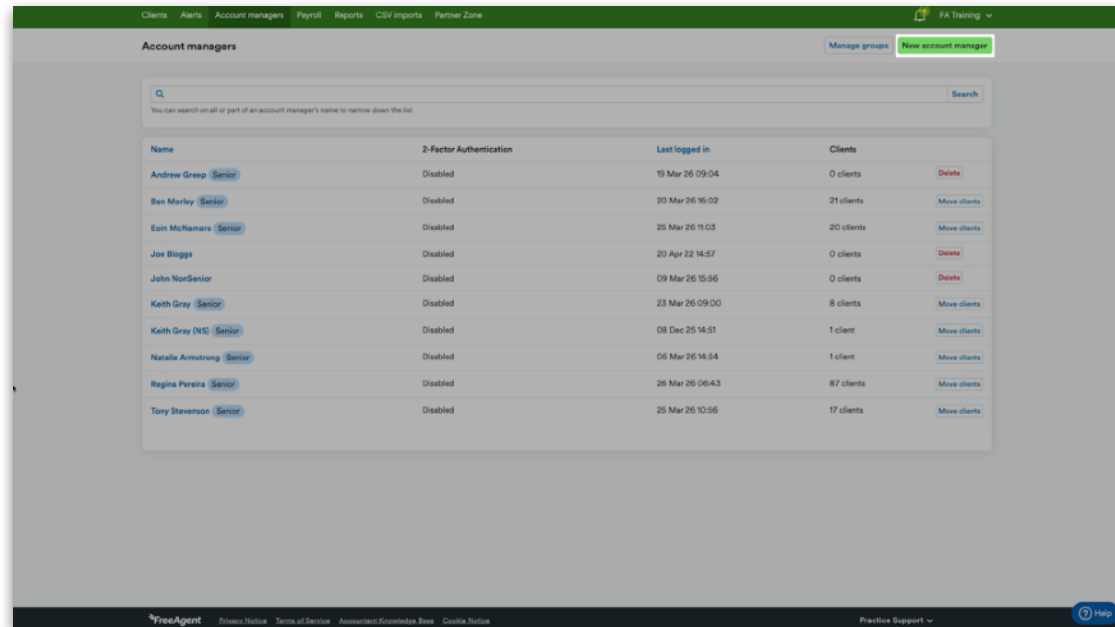
An account manager with a **Comprehensive** role can access all clients. They can add, edit and remove clients, and assign clients to other account managers. They can also view reports for all clients and activate and cancel add-ons. An account manager with a **Comprehensive** role **can't** add, edit,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

Details

First name e.g. Steven

Last name e.g. Smith

Email e.g. steven@my-company.com

Phone e.g. 031555 0055

User access

Select a role ☐ Admin ☒ Comprehensive ☐ Standard ☐ Limited

☐ Add account manager to group(s)
Add this account manager to group(s) if you would like them to share ownership of clients with other account managers.

[Create account manager](#) [Cancel](#)

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.

The screenshot shows a permissions menu on the left with options like 'Standard', 'Limited', 'Access assigned clients', 'View reports for assigned clients', 'Bulk prepare payroll', 'Export all clients', 'Assign clients to other account managers', 'Create/close/remove clients', 'Bulk file payroll', 'Bulk import clients', and 'Activate/cancel add-ons'. A 'More about permissions' link is below. The main dialog box is titled 'Add account manager to group(s)' and contains the text: 'Add this account manager to group(s) if you would like them to share ownership of clients with other account managers.' Below this is a list of groups under the heading '1-FreeAgent Bookkeeping', including 'Accounts client', 'Accred', 'All Clients', 'Amazing clients', 'Andrew Groups', 'Bookkeeping', 'Director's payroll', 'Eoin's Group', 'Essentials', 'Essentials training', 'Gema Group', 'Karlene Group', 'LTD', 'MTD clients', 'North', 'Payroll clients', 'Test 1', 'Test 123', 'Test Essentials', 'VAT clients', and 'Wright Vigar'. A 'Help' button is in the bottom right corner.

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

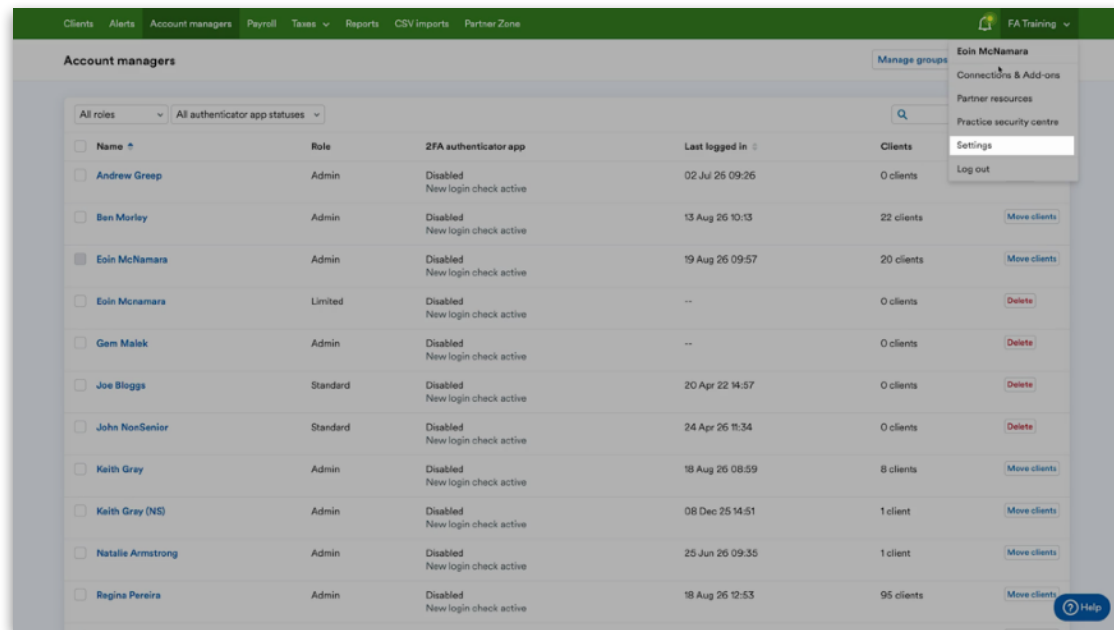
The screenshot shows the 'New account manager' form. It has a green header bar with navigation links: 'Clients', 'Alerts', 'Account managers', 'Payroll', 'Taxes', 'Reports', 'CSV imports', and 'Partner Zone'. The form is divided into two sections: 'Details' and 'User access'. The 'Details' section has fields for 'First name' (Eoin), 'Last name' (Mcnamara), 'Email' (eoin.mcnamara@freeagent.com), and 'Phone' (031555 0055). The 'User access' section has a 'Select a role' dropdown with options: 'Admin', 'Comprehensive', 'Standard', 'Limited', and 'Add account manager to group(s)'. Below the dropdown is the same explanatory text as in the previous screenshot. At the bottom are 'Create account manager' and 'Cancel' buttons. A 'Help' button is in the bottom right corner.

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.

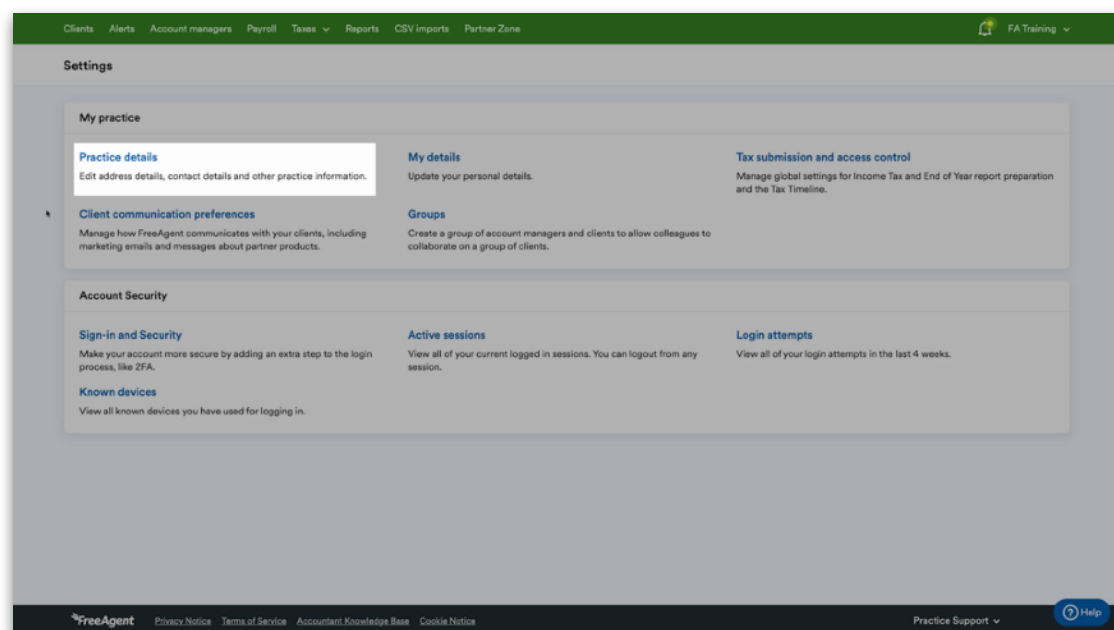
Each user has an individual login and password to keep their details secure. This also means we can communicate with all members of your practice about feature updates and improvements, so everyone is kept up to date.

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.

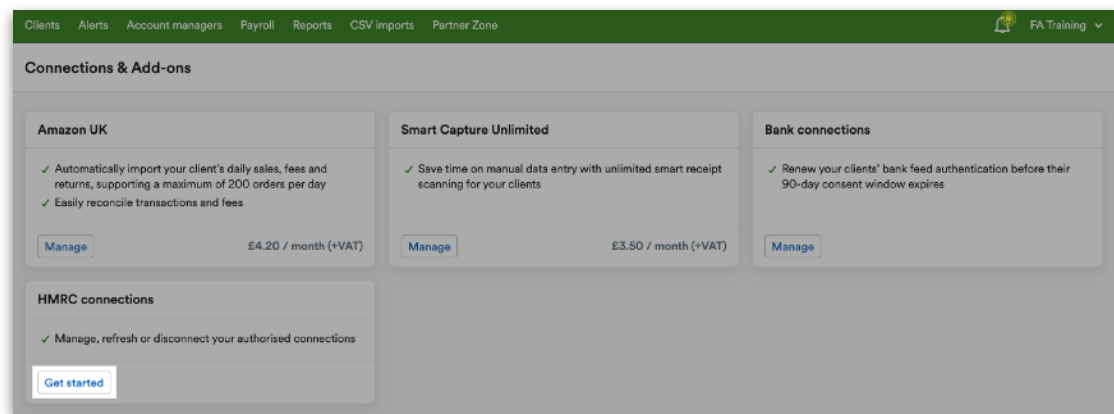
The Account manager must have an **Admin**, **Comprehensive** or **Standard** role to make this connection with HMRC.

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

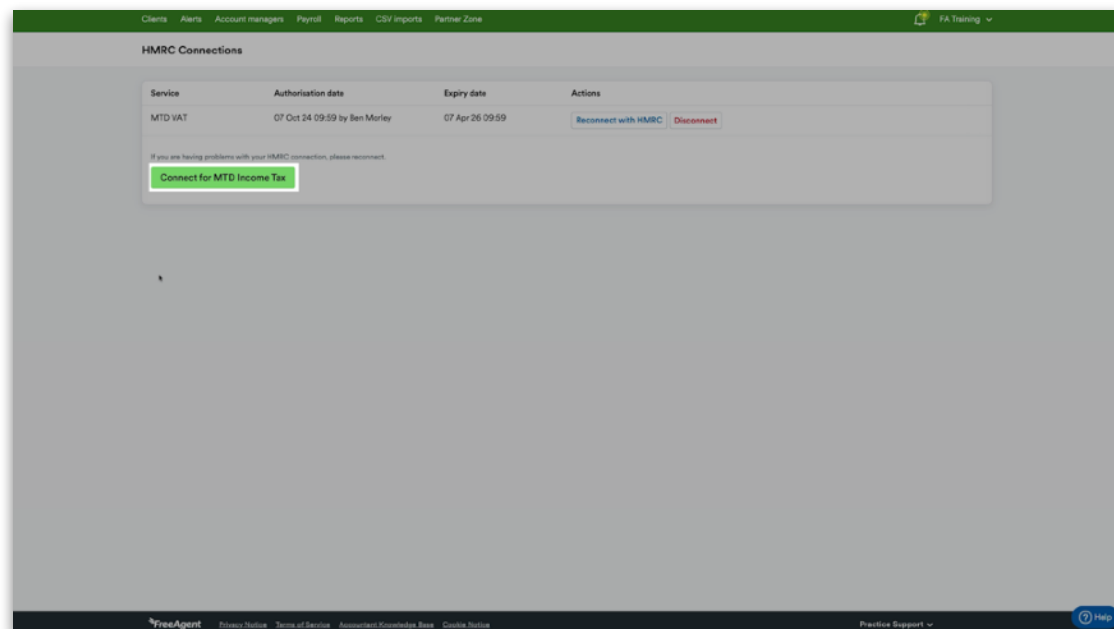
The screenshot shows the FreeAgent Practice Dashboard. The top navigation bar is green and contains the following tabs: Clients, Alerts, Account managers, Payroll, Reports, CSV imports, and Partner Zone. The 'Clients' tab is selected. Below the navigation bar, there's a 'Clients' section with filters for 'My clients' (20), 'My group clients' (0), and 'All clients' (60). A dropdown menu is open for 'Eoin McNamara', showing options: 'Connections & Add-ons', 'Partner resources', 'Settings', and 'Log out'. The main area displays a table of clients with the following columns: Name, Account owner, Client relationship, Free NWG licence, Status, Bank balance, Alerts, and Owner access. The table lists 15 clients, including A & K Bakery TS Ch Ltd, Bob The Builder Ltd, Builder, Clare Brazilian JiuJitsu Limited, Dext Integration, Eoin Demo Sole Trader, Eoin Prop, Handy Manny LTD, Landlord Demo, McNamara & Associates, McNamara Steel LTD, Menopoly Residential, and Payroll Demo Eoin.

Name	Account owner	Client relationship	Free NWG licence	Status	Bank balance	Alerts	Owner access
A & K Bakery TS Ch Ltd	Regina Pereira regina.pereira@freeagent.com	Practice client	No	Active	£2,300.00	0	Level 7 Edit Switch to...
Bob The Builder Ltd	Bob The Builder eoin.mcnamara@freeagent.com	Practice client	No	Active	£34,949.36	0	Level 8 Edit Switch to...
Builder	Eoin McNamara eoin.mcnamara@fa.com	Practice client	No	Active	£225,259.00	0	Level 8 Invite client Edit Switch to...
Clare Brazilian JiuJitsu Limited	Eoin McNamara eoin.mcnamara@fa.com	Practice client	Could be	Active	£73,041.77	1	No Access Edit Switch to...
Dext Integration	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£196,270.20	0	Level 8 Edit Switch to...
Eoin Demo Sole Trader	Frankie Goodman eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	£46,812.34	1	Level 8 Edit Switch to...
Eoin Prop	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 7 Invite client Edit Switch to...
Handy Manny LTD	Manny Esteves Garcia eoin.mcnamara@freeagent.com	Practice client	No	Active	-£13,700.00	0	Level 8 Invite client Edit Switch to...
Landlord Demo	Shanique Schneider eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	-£305,177.00	0	Level 8 Invite client Edit Switch to...
McNamara & Associates	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£100,000.00	1	Level 8 Invite client Edit Switch to...
McNamara Steel LTD	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8 Invite client Edit Switch to...
Menopoly Residential	Milburn Pennybags eoin.mcnamara@freeagent.com	Practice client	No	Active	£101,117.44	1	Level 8 Edit Switch to...
Payroll Demo Eoin	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£0.00	0	Level 8 Invite client Edit Switch to...

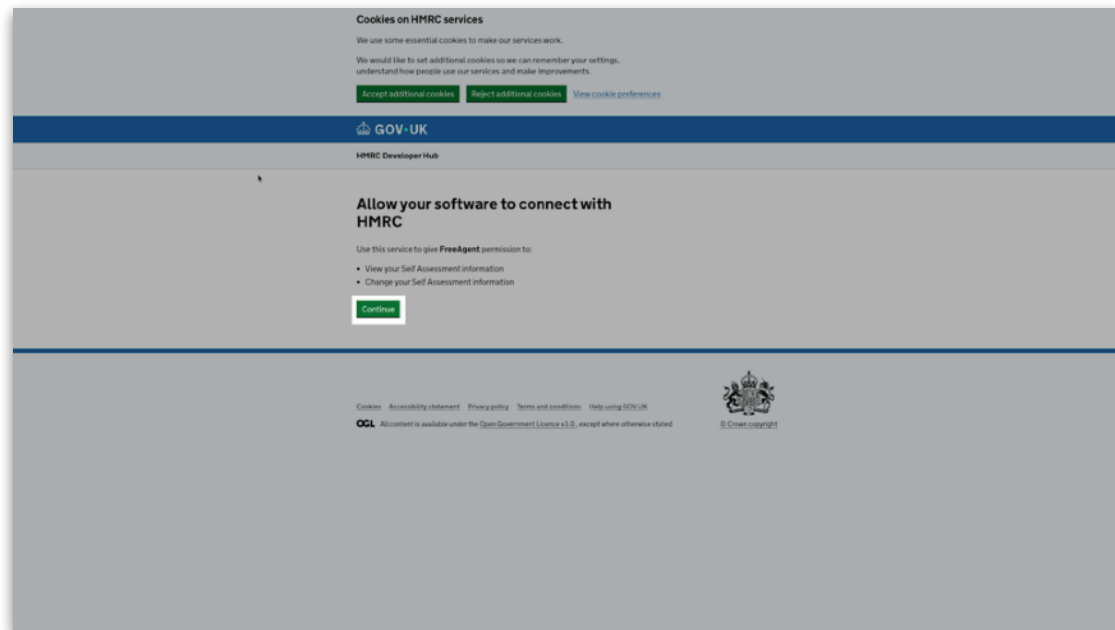
Then, select 'Get started' in the 'HMRC connections' section.



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.

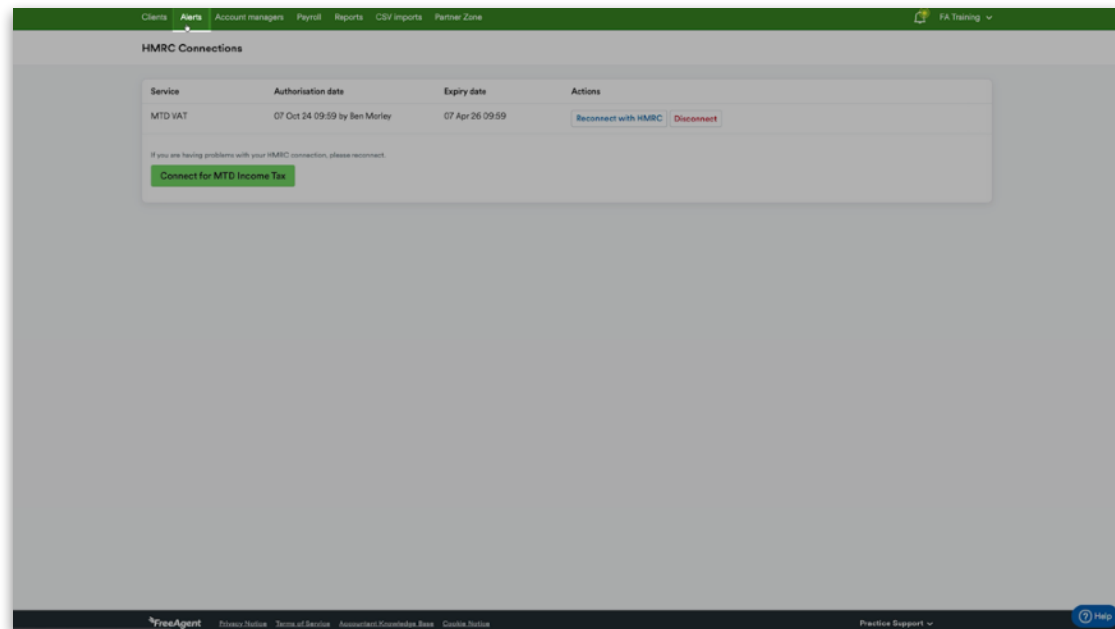


Please note that once you've connected FreeAgent to HMRC, you'll need to update the connection every 18 months. You'll also need to repeat this process for VAT.

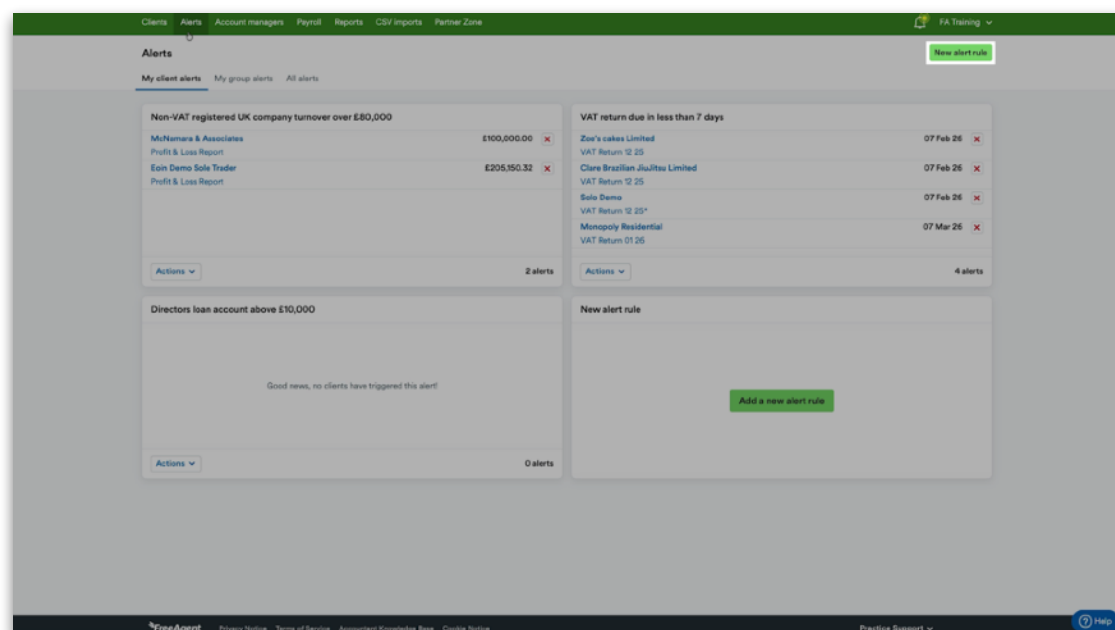
Alerts

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.

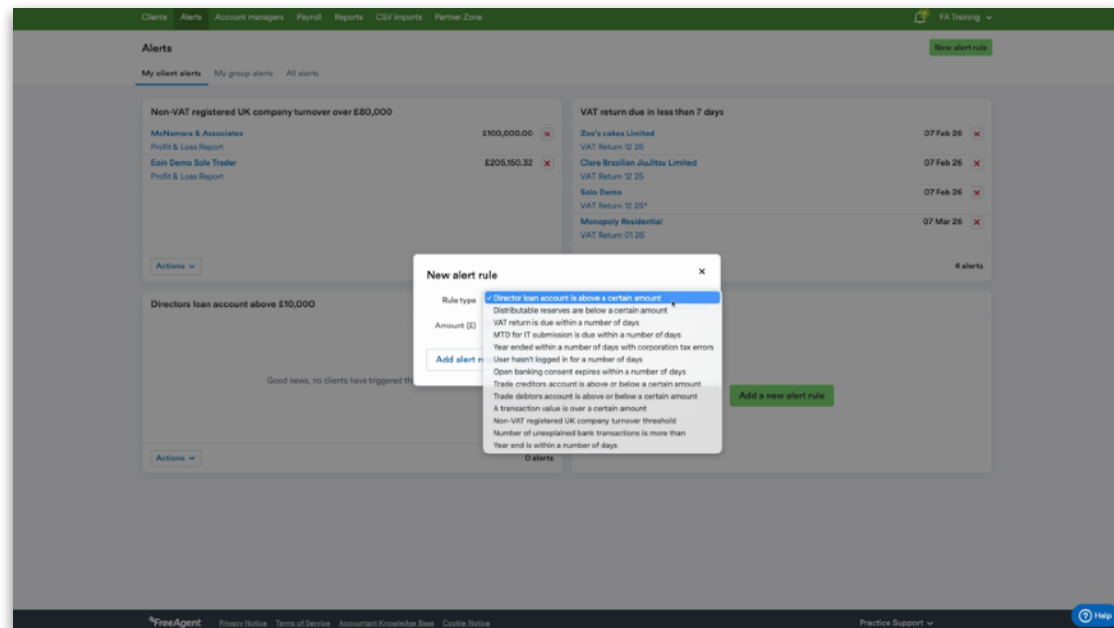
Navigate to the **'Alerts'** tab.



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

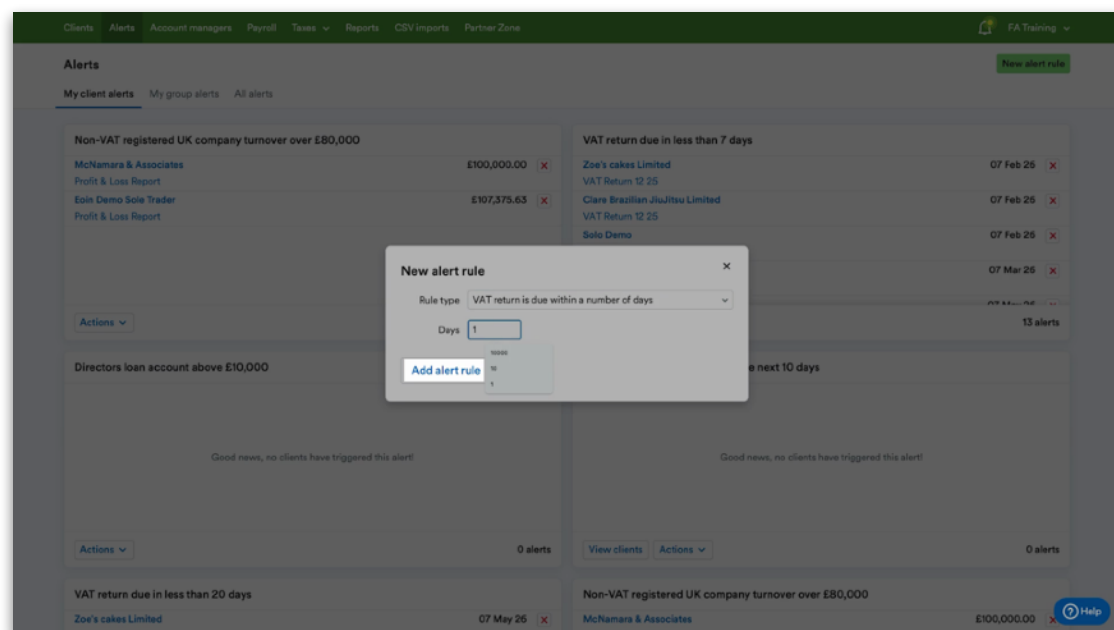


In the pop-up window, click **'Rule type'** and select which option you'd like to track within your clients' accounts from the drop-down menu.



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

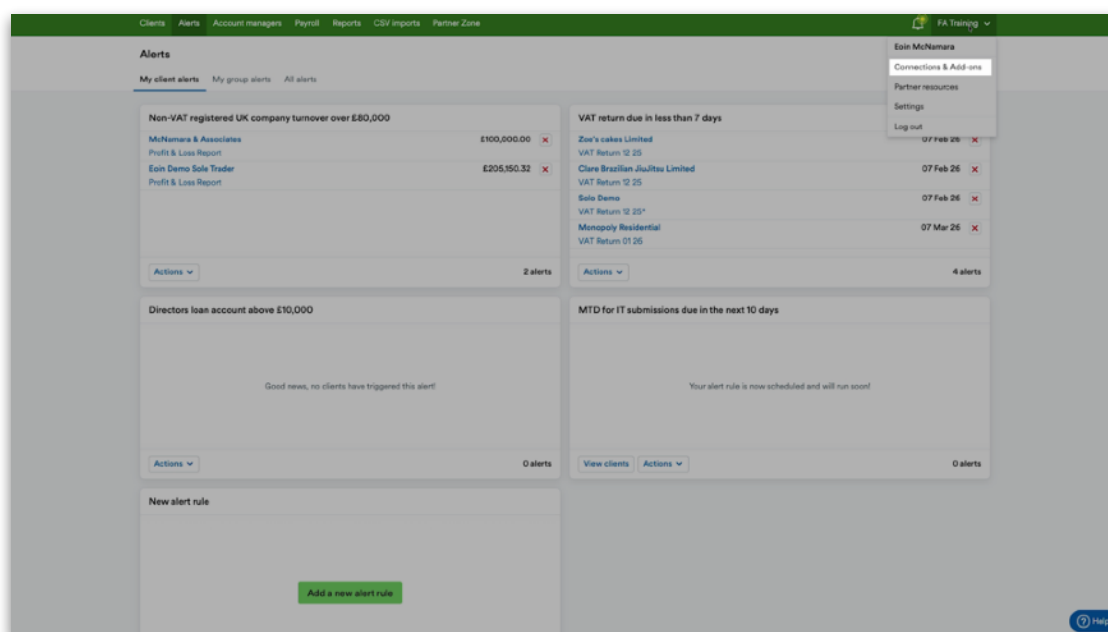
FreeAgent is packed with functionality that makes life easier for you and your clients, but we appreciate that some businesses have particular needs and would benefit from specialised tools. These tools take the form of add-ons that your clients can choose to subscribe to.

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.

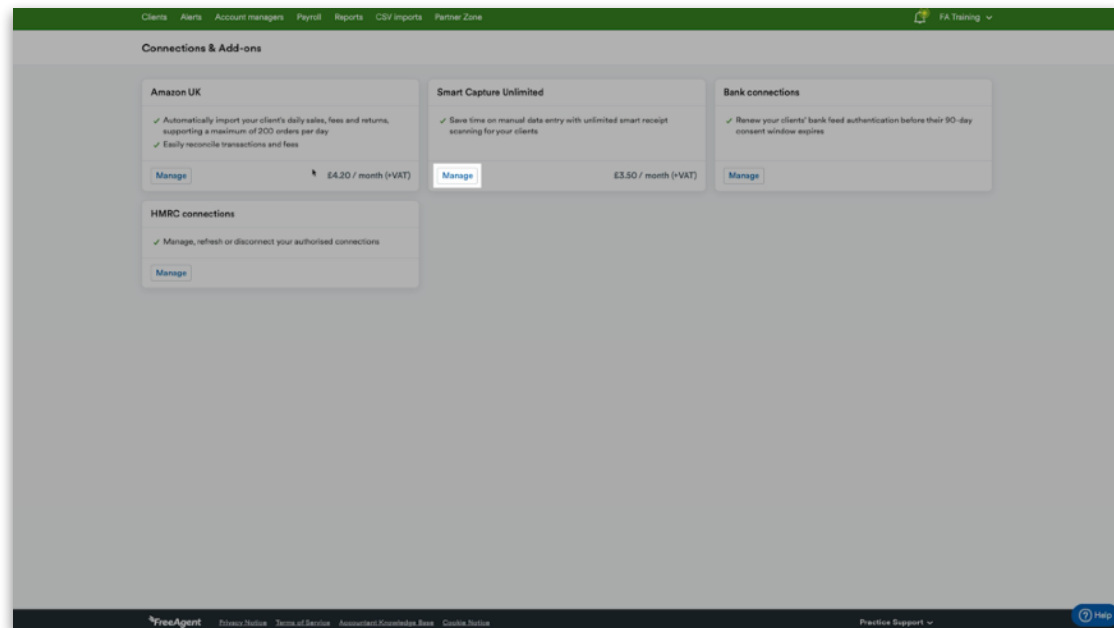
Until the practice's default settings have been confirmed, clients will be able to activate add-ons and be responsible for the cost of the add-on.

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.



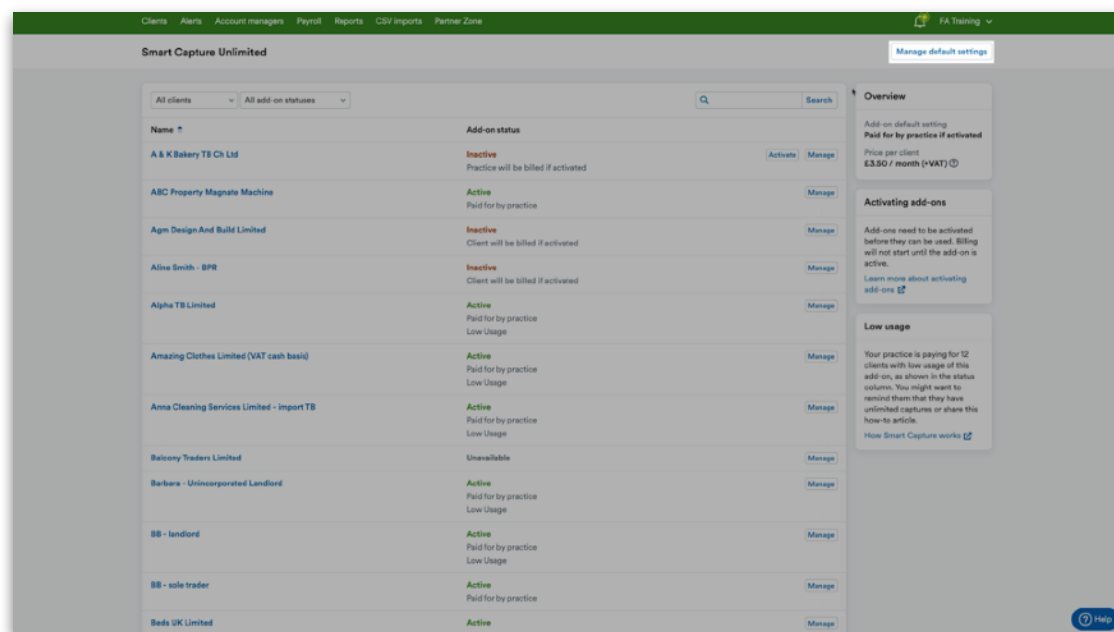
Select '**Manage**' on the relevant add-on panel.



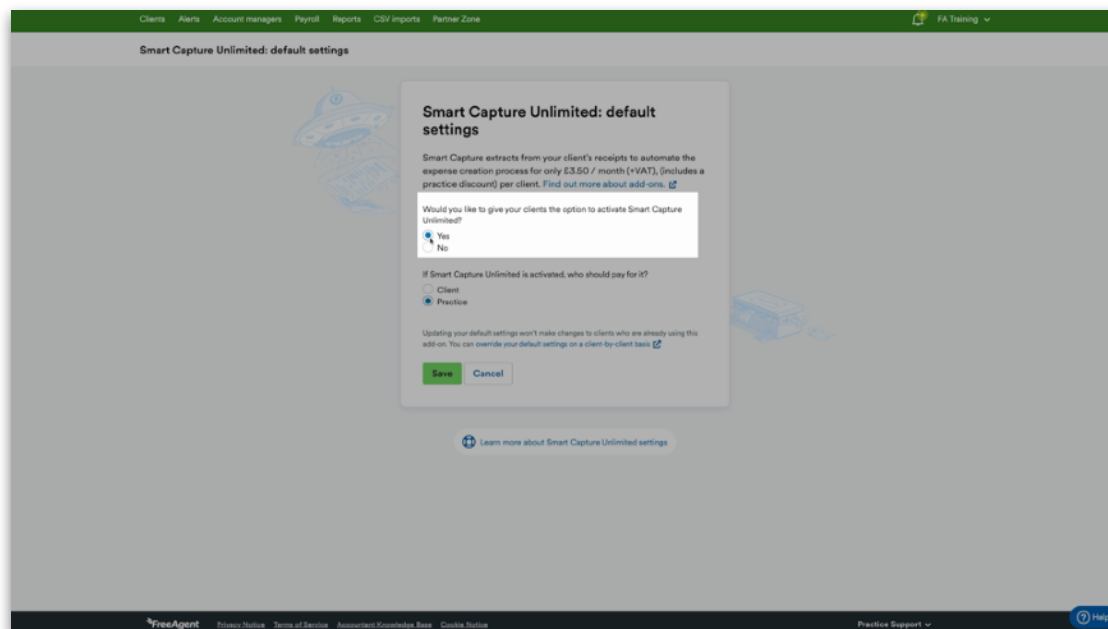
First, select whether or not you'd like your clients to be able to activate the add-on themselves, by default.

Select '**Manage default settings**'.

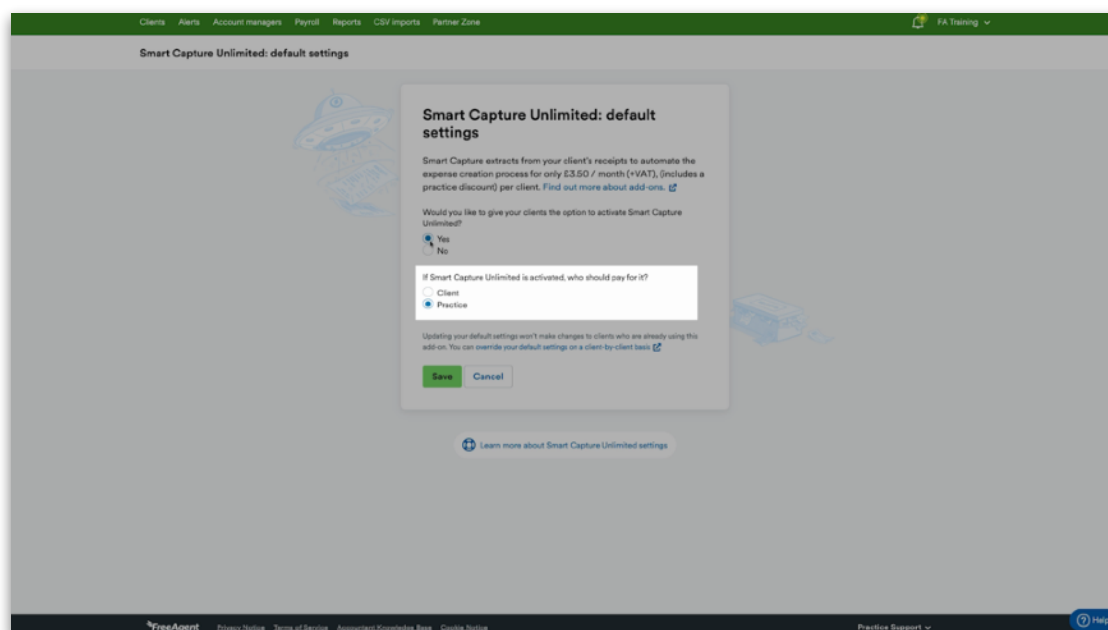
Please note that you must have an **Admin** role to access this area on your dashboard.



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.



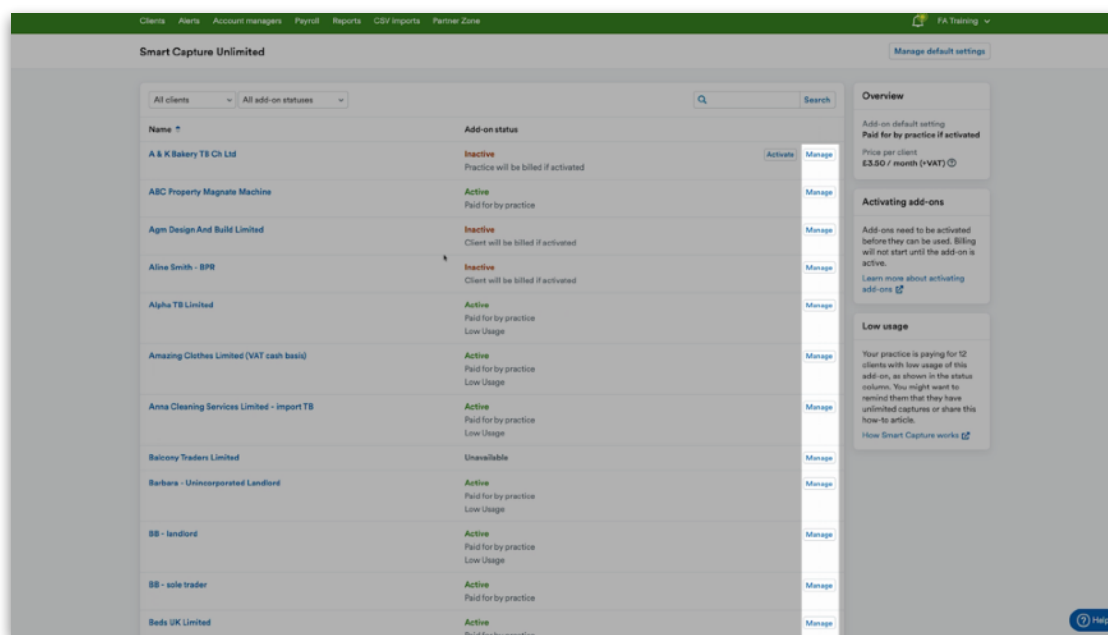
Once the default settings have been chosen for the add-on, select **'Save'** to complete the process.

The screenshot shows the 'Smart Capture Unlimited: default settings' dialog box. The dialog has a title bar and a main content area. The title is 'Smart Capture Unlimited: default settings'. The main content area contains the following text: 'Smart Capture extracts from your client's receipts to automate the expense creation process for only £3.50 / month (+VAT), (includes a practice discount) per client. [Find out more about add-ons.](#)'. Below this, it asks 'Would you like to give your clients the option to activate Smart Capture Unlimited?' with two radio buttons: 'Yes' (selected) and 'No'. Then it asks 'If Smart Capture Unlimited is activated, who should pay for it?' with two radio buttons: 'Client' and 'Practice' (selected). At the bottom, it says 'Updating your default settings won't make changes to clients who are already using this add-on. You can override your default settings on a client-by-client basis.' Below this are 'Save' and 'Cancel' buttons. At the bottom of the dialog is a link 'Learn more about Smart Capture Unlimited settings'. The background of the screenshot shows the FreeAgent software interface with a green header bar containing 'Clients', 'Alerts', 'Account managers', 'Payroll', 'Reports', 'CSV imports', and 'Pillar Zone'. The footer bar contains 'FreeAgent', 'Privacy Notice', 'Terms of Service', 'Assessment Knowledge Base', 'Contact Us', 'Practice Support', and a 'Help' button.

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.

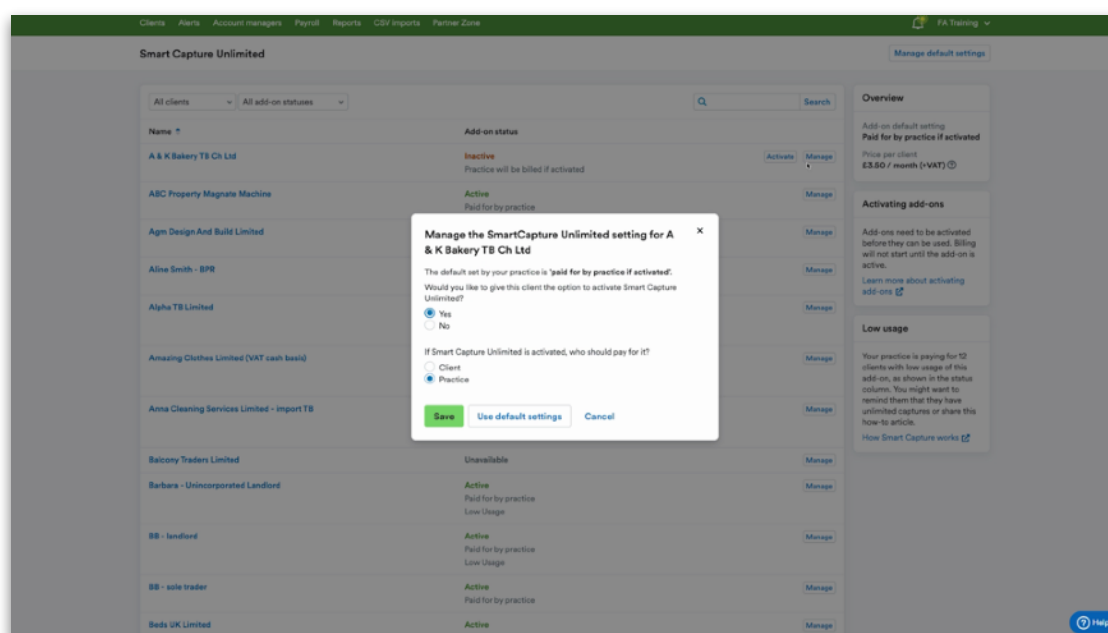
The practice's default add-on settings will be applied to all clients, however, you can set specific settings for individual clients, choose whether they can activate add-ons themselves and whether the cost of the add-ons will be paid for by the practice or the client.

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



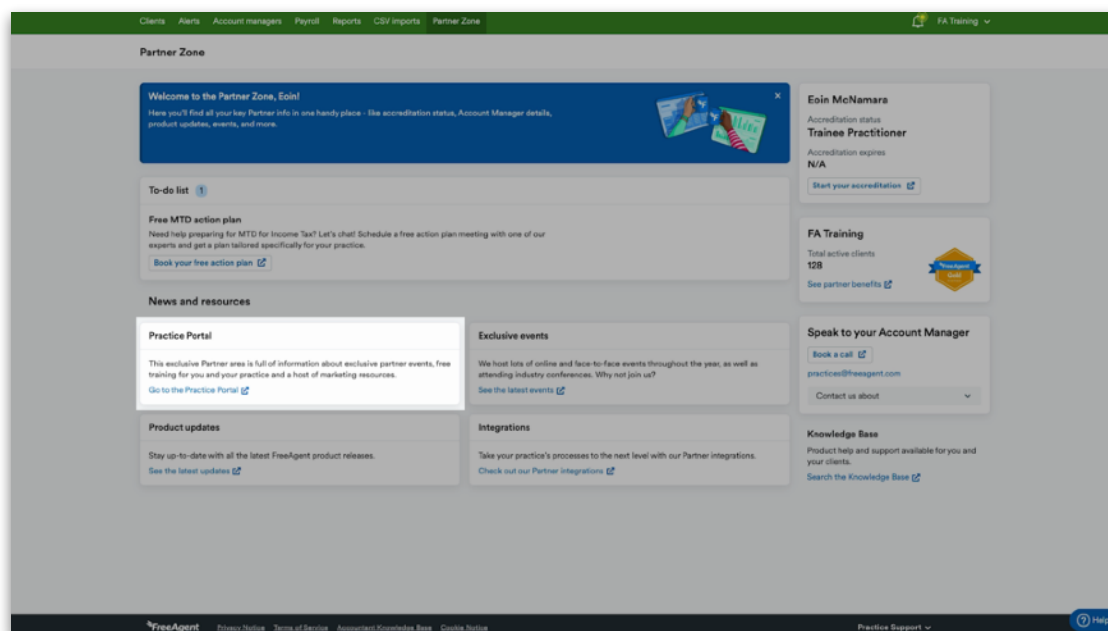
Make the required changes to whether the client can activate add-ons themselves (if they’re the account owner or have full (level 8) access to FreeAgent), and whether the subscriptions will be paid for by the practice or by the client in the pop-up window.

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.



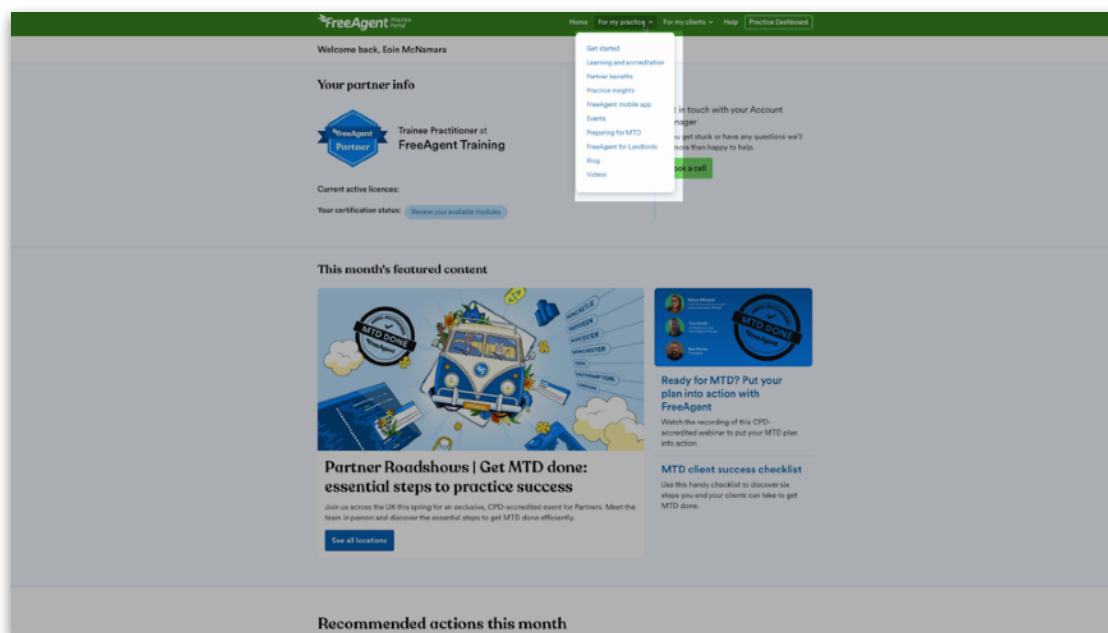
Here, you can access a wealth of support for you and your clients, including downloadable guides, marketing resources, videos to share with your clients and the latest information about FreeAgent's innovations. In addition, you'll also find invitations to attend regular webinar events as well as any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

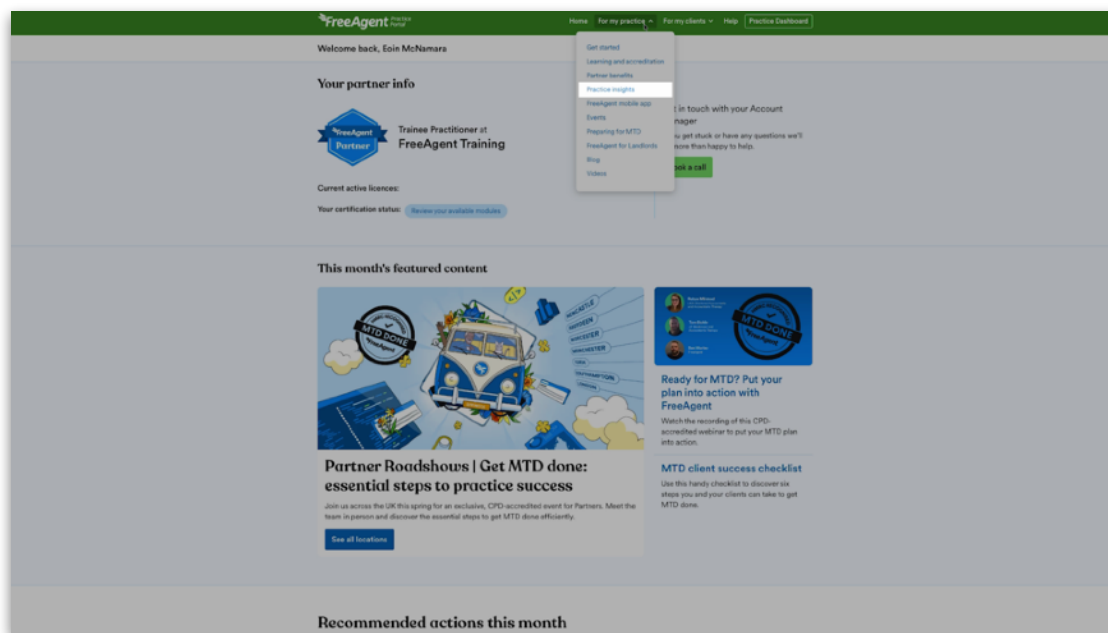
For my practice

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.

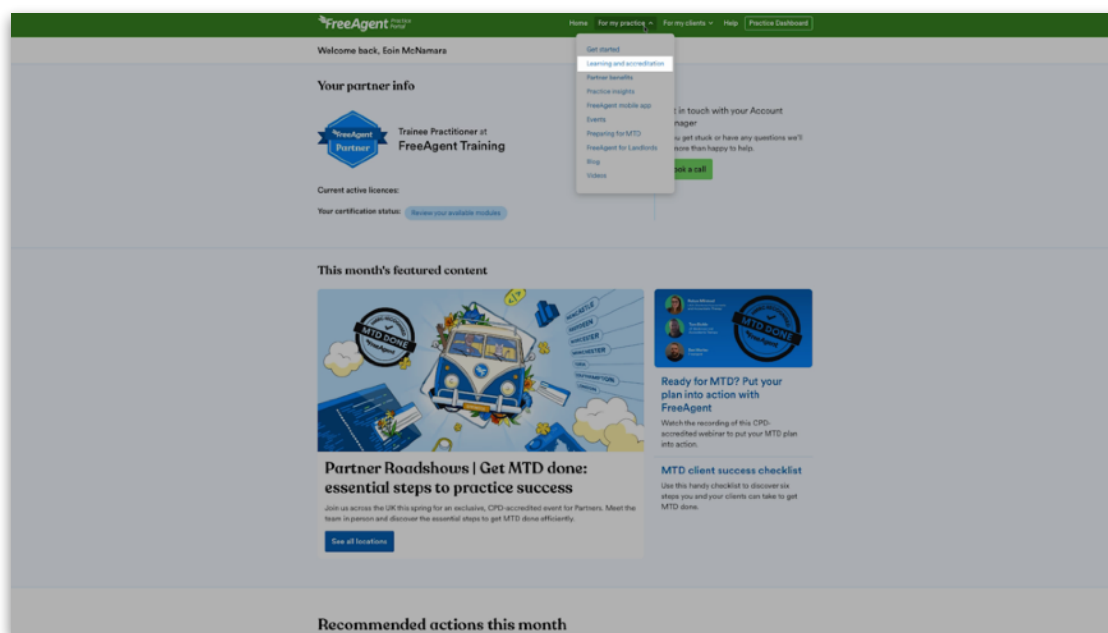
Here, you’ll find our tips for introducing FreeAgent to your clients, including shareable videos and email templates, as well as step-by-step guidance for onboarding new clients to FreeAgent.



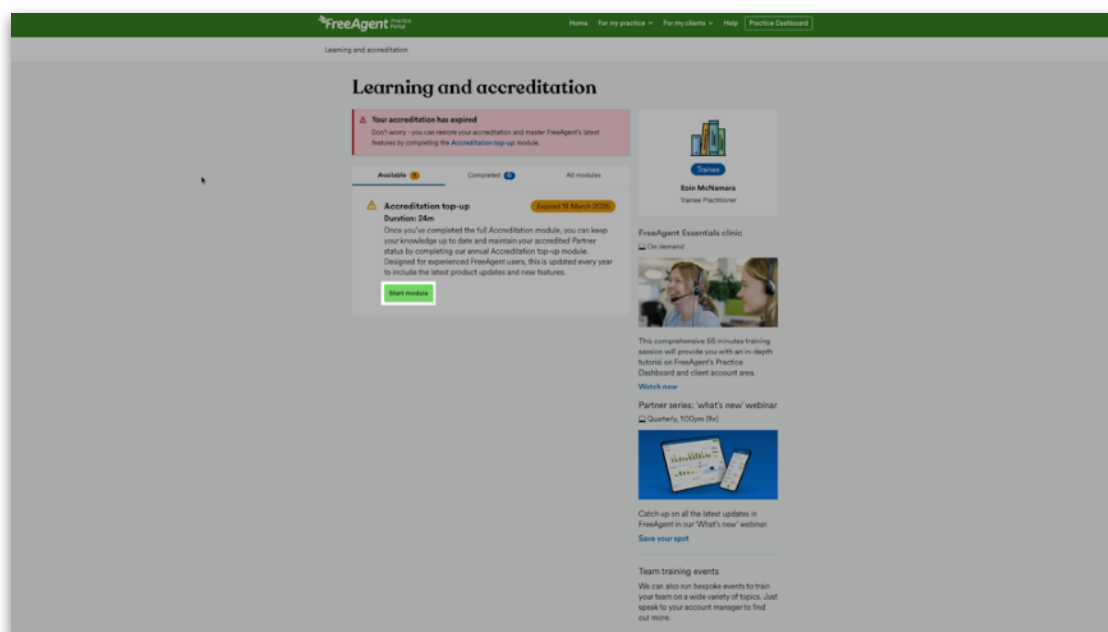
Accreditation

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.

The screenshot shows the 'Accreditation top-up' module in the FreeAgent interface. It includes sections for 'Learn' (watching videos or downloading the manual), 'Sit the exam' (when ready), and 'Next steps' (after passing). A 'Need a refresher?' section suggests revisiting the Essentials and Accreditation modules. Below this is a 'Self-paced learning' section with a video player for '1 Accreditation top-up' (25:35). A 'Learning manual' section offers a PDF download. At the bottom, a 'Ready to take the exam?' section features a green 'Take exam' button.

Knowledge Base, Practice Support and Ruby the Robot

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

The screenshot shows the 'Clients' management interface in FreeAgent. It includes a table of clients with columns for Name, Account owner, Client relationship, Free NWG licence, Status, Bank balance, Alerts, and Owner access. The table lists various clients, including A & K Bakery TS Ch Ltd, Bob The Builder Ltd, Builder, Clare Brazilian JiuJitsu Limited, Dext Integration, Eoin Demo Sole Trader, Eoin Prop, Handy Manny LTD, Lendford Demo, McNamara & Associates, McNamara Steel LTD, Monopoly Residential, and Payroll Demo Eoin. A 'Help' button is visible in the bottom right corner.

Name	Account owner	Client relationship	Free NWG licence	Status	Bank balance	Alerts	Owner access
A & K Bakery TS Ch Ltd	Regina Persira regina.persira@freeagent.com	Practice client	No	Active	£2,300.00	0	Level 7 Edit Switch to --
Bob The Builder Ltd	Bob The Builder eoin.mcnamara@freeagent.com	Practice client	No	Active	£34,949.36	0	Level 8 Edit Switch to --
Builder	Eoin McNamara Eoin.mcnamara@fa.com	Practice client	No	Active	£225,259.00	0	Level 8 Invite client Edit Switch to --
Clare Brazilian JiuJitsu Limited	Eoin McNamara eoin.mcnamara@fa.com	Practice client	Could be	Active	£73,041.77	1	No Access Edit Switch to --
Dext Integration	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£196,370.20	0	Level 8 Edit Switch to --
Eoin Demo Sole Trader	Frankie Goodman eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	£46,012.34	1	Level 8 Edit Switch to --
Eoin Prop	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 7 Invite client Edit Switch to --
Handy Manny LTD	Manny Esteves Garcia Eoin.mcnamara@freeagent.com	Practice client	No	Active	-£13,700.00	0	Level 8 Invite client Edit Switch to --
Lendford Demo	Shanique Schneider eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	-£300,177.00	0	Level 8 Invite client Edit Switch to --
McNamara & Associates	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£100,000.00	1	Level 8 Invite client Edit Switch to --
McNamara Steel LTD	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8 Invite client Edit Switch to --
Monopoly Residential	Milburn Pennybags eoin.mcnamara@freeagent.com	Practice client	No	Active	£101,117.44	1	Level 8 Edit Switch to --
Payroll Demo Eoin	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£0.00	0	Level 8 Invite client Edit Switch to --

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.

The screenshot displays the 'Clients' management interface. At the top, there's a navigation bar with links: Clients, Alerts, Account managers, Payroll, Reports, CSV imports, and Partner Zone. Below this, the 'Clients' section is active, showing filters for 'My clients' (22), 'My group clients' (0), and 'All clients' (22). A search bar is present. The main table lists client details:

Name	Account owner	Client relationship	Free NWG licence	Status	Bank balance	Alerts	Owner access
A & K Bakery TB Ch Ltd	Regina Pereira regina.pereira@freagent.com	Practice client	No	Active	£2,300.00	0	Level 7 Edit Switch to...
Bob The Builder Ltd	Bob The Builder eoin.mcnamara@freagent.com	Practice client	No	Active	£34,949.36	0	Level 8 Edit Switch to...
Builder	Eoin McNamara Eoin.mcnamara@fa.com	Practice client	No	Active	£225,259.00	0	Level 8 Edit Switch to...
Clare Brazilian Juultra Limited	Eoin McNamara eoin.mcnamara@fa.com	Practice client	Could be	Active	£73,041.77	1	No Access Edit Switch to...
Dext Integration	Eoin McNamara eoin.mcnamara@freagent.com	Practice client	No	Active	£196,270.20	0	Level 8 Edit Switch to...
Eoin Demo Sole Trader	Frankie Goodman eoin.mcnamara@freagent.com	Practice client	Yes	Demo	£46,612.34	1	Level 8 Edit
Eoin Prop	Eoin McNamara eoin.mcnamara@freagent.com	Practice client	No	Active	£10,000.00	0	Level 7 Edit
Handy Manny LTD	Manny Esteves Garcia Eoin.mcnamara@freagent.com	Practice client	No	Active	-£13,700.00	0	Level 8 Edit
Landlord Demo	Shanique Schneider eoin.mcnamara@freagent.com	Practice client	Yes	Demo	-£302,177.00	0	Level 8 Edit
McNamara & Associates	Eoin McNamara eoin.mcnamara@freagent.com	Practice client	No	Active	£130,000.00	1	Level 8 Edit
McNamara Steel LTD	Eoin McNamara eoin.mcnamara@freagent.com	Practice client	No	Active	£10,000.00	0	Level 8 Edit
Monopoly Residential	Milburn Pennings eoin.mcnamara@freagent.com	Practice client	No	Active	£101,117.44	1	Level 8 Edit
Payroll Demo Eoin	Eoin McNamara eoin.mcnamara@freagent.com	Practice client	No	Active	£0.00	0	Level 8 Edit

On the right, a chat window for 'Ruby the Robot' is open. It displays a list of suggested articles from the Knowledge Base, such as 'Explain a VAT payment to HMRC' and 'VAT MOSS and VAT OSS in FreeAgent'. At the bottom of the chat window, there is a 'Get in touch' button and a text input field for asking questions.

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

Our phone lines have the same opening and closing hours as our chat, which are 9am to 5pm Monday to Thursday, and 9am to 4pm on Friday.

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

The screenshot shows a table of clients in the FreeAgent system. The table has columns for client name, email, status, and various financial metrics. A popup window titled 'FreeAgent practice support' is open in the bottom right corner, displaying the following contact information:

- Email: practicesupport@freeagent.com
- Phone: 0800 026 3800
- Account manager ID: 53004

The table contains the following data:

Client Name	Email	Status	Balance	Level	Actions
Eoin Demo Sole Trader	Frankie Goodman eoin.mcnamara@freeagent.com	Practice client	Yes	Demo £46,812.34	1 Level 8 Edit Switch to --
Eoin Prop	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active £10,000.00	0 Level 7 Invite client Edit Switch to --
Handy Manny LTD	Manny Esteves Garcia eoin.mcnamara@freeagent.com	Practice client	No	Active -£13,700.00	0 Level 8 Invite client Edit Switch to --
Landlord Demo	Shanique Schneider eoin.mcnamara@freeagent.com	Practice client	Yes	Demo -£202,177.00	0 Level 8 Invite client Edit Switch to --
McNamara & Associates	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active £100,000.00	1 Level 8 Invite client Edit Switch to --
McNamara Steel LTD	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active \$10,000.00	0 Level 8 Invite client Edit Switch to --
Monopoly Residential	Milburn Pennybags eoin.mcnamara@freeagent.com	Practice client	No	Active £101,817.44	1 Level 8 Edit Switch to --
Payroll Demo Eoin	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active £0.00	0 Level 8 Invite client Edit Switch to --
Payroll New Features	Eoin McNamara Eoin.mcnamara@FA.com	Practice client	No	Active £0.00	0 Level 8 Invite client Edit Switch to --
Sam Subbie	Sam Subbie Sam.subbie@fa.com	Practice client	No	Active £100.00	0 Level 7 Invite client Edit Switch to --
Serengey and Marley	Ebenezer Serengey eoin.mcnamara@freeagent.com	Practice client	No	Active £103,305.00	0 Level 8 Edit Switch to --
Sole trade demo	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active £10,000.00	0 Level 7 Invite client Edit Switch to --
Solo Demo	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	Could be Ⓢ	Active £148,855.31	1 Level 8 Edit Switch to --
Universal Eoin	Eoin McNamara Eoin.mcnamara@Freeagent.com	Practice client	No	Active £10,000.00	0 Level 8 Edit Switch to --
Zoe's cakes Limited	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active -£100.00	1 Level 8 Invite client Edit Switch to --

At the bottom of the screen, there is a navigation bar with links: Privacy Notice, Terms of Service, Accountant Knowledge Base, Cookie Notice, and a 'Practice Support' button with a help icon.

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

This screenshot is identical to the one above, showing the FreeAgent client list and the 'FreeAgent practice support' popup with the same contact information:

- Email: practicesupport@freeagent.com
- Phone: 0800 026 3800
- Account manager ID: 53004

The table and navigation bar are also identical to the previous screenshot.

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.

Name	Account owner	Client relationship	Free NWG licence	Status	Bank balance	Alerts	Owner access
Eoin Demo Sole Trader	Frankie Goodman eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	£46,012.34	1	Level 8 Edit Switch to --
Eoin Prop	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 7 Invite client Edit Switch to --
Handy Manny LTD	Manny Esteves Garcia Eoin.mcnamara@freeagent.com	Practice client	No	Active	-£13,700.00	0	Level 8 Invite client Edit Switch to --
Landlord Demo	Shaniqua Schneider eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	-£202,177.00	0	Level 8 Invite client Edit Switch to --
McNamara & Associates	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£100,000.00	1	Level 8 Invite client Edit Switch to --
McNamara Steel LTD	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8 Invite client Edit Switch to --
Monopoly Residential	Milburn Perrybogs eoin.mcnamara@freeagent.com	Practice client	No	Active	£101,817.44	1	Level 8 Invite client Edit Switch to --
Payroll Demo Eoin	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£0.00	0	Level 8 Invite client Edit Switch to --
Payroll New Features	Eoin McNamara Eoin.mcnamara@FA.com	Practice client	No	Active	£0.00	0	Level 8 Invite client Edit Switch to --
Sam Subbie	Sam Subbie Sam.subbie@fa.com	Practice client	No	Active	£100.00	0	Level 7 Invite client Edit Switch to --
Sergeant and Marley	Ebenezer Scroggie eoin.mcnamara@freeagent.com	Practice client	No	Active	£103,305.00	0	Level 8 Invite client Edit Switch to --
Solo trade demo	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 7 Invite client Edit Switch to --
Solo Demo	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	Could be	Active	£168,855.31	1	Level 8 Invite client Edit Switch to --
Universal Eoin	Eoin McNamara Eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8 Invite client Edit Switch to --
Zoo's cakes Limited	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	-£100.00	1	Level 8 Invite client Edit Switch to --

FreeAgent practice support
Email: practicesupport@freeagent.com
Phone: 0800 026 3800
Account manager ID: 55004

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.

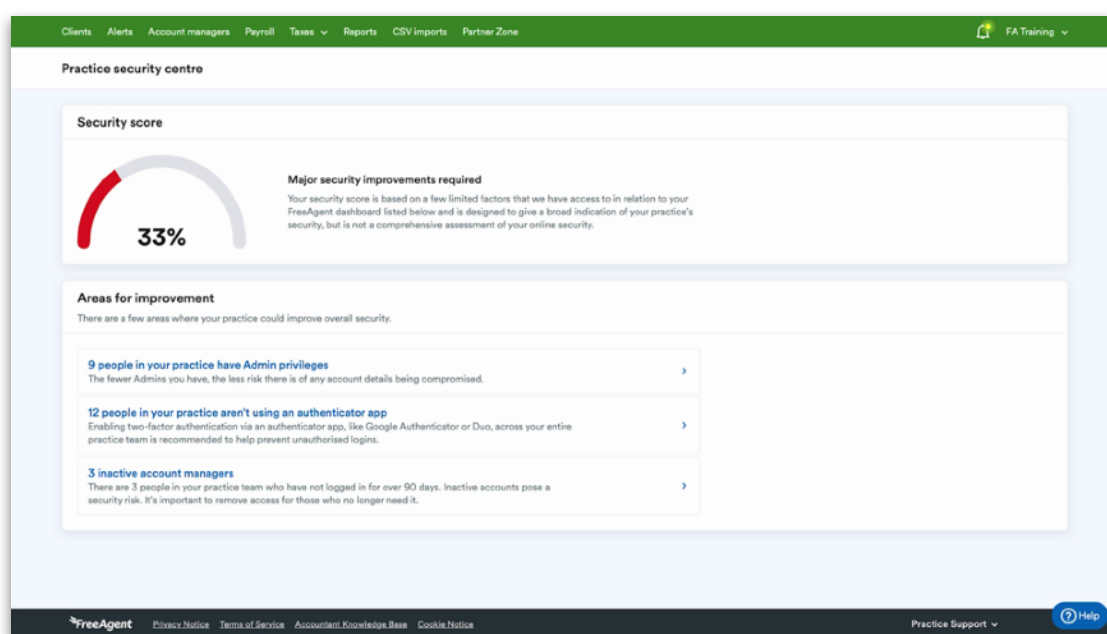
3 clients are missing from your Practice Dashboard
You've been added as a user for 3 clients who haven't been added to your dashboard yet. Add these clients now, to make sure your dashboard keeps an accurate summary of all your client data and you get the most out of our features for practices.
[Manage client invites](#)

Name	Account owner	Client relationship	Free NWG licence	Status	Bank balance	Alerts	Owner access
A & K Bakery TB Ch Ltd	Regina Pereira regina.pereira@freeagent.com	Practice client	No	Active	£2,300.00	0	Level 7 Edit Switch to --
Bob The Builder Ltd	Bob The Builder eoin.mcnamara@freeagent.com	Practice client	No	Active	£34,949.36	2	Level 8 Edit Switch to --
Chazy AI test	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,500.00	0	Level 8 Edit Switch to --
Clare Brazilian JiuJitsu Limited	Eoin McNamara eoin.mcnamara@fa.com	Practice client	Could be	Active	£73,041.77	6	No Access Edit Switch to --
Dext Integration	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£196,270.20	2	Level 8 Edit Switch to --
Eoin Demo Sole Trader	Frankie Goodman eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	£56,012.34	14	Level 8 Edit Switch to --
Handy Manny LTD	Manny Esteves Garcia Eoin.mcnamara@freeagent.com	Practice client	No	Active	-£13,700.00	1	Level 8 Invite client Edit Switch to --
Landlord Demo	Shaniqua Schneider eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	-£202,177.00	0	Level 8 Invite client Edit Switch to --

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.

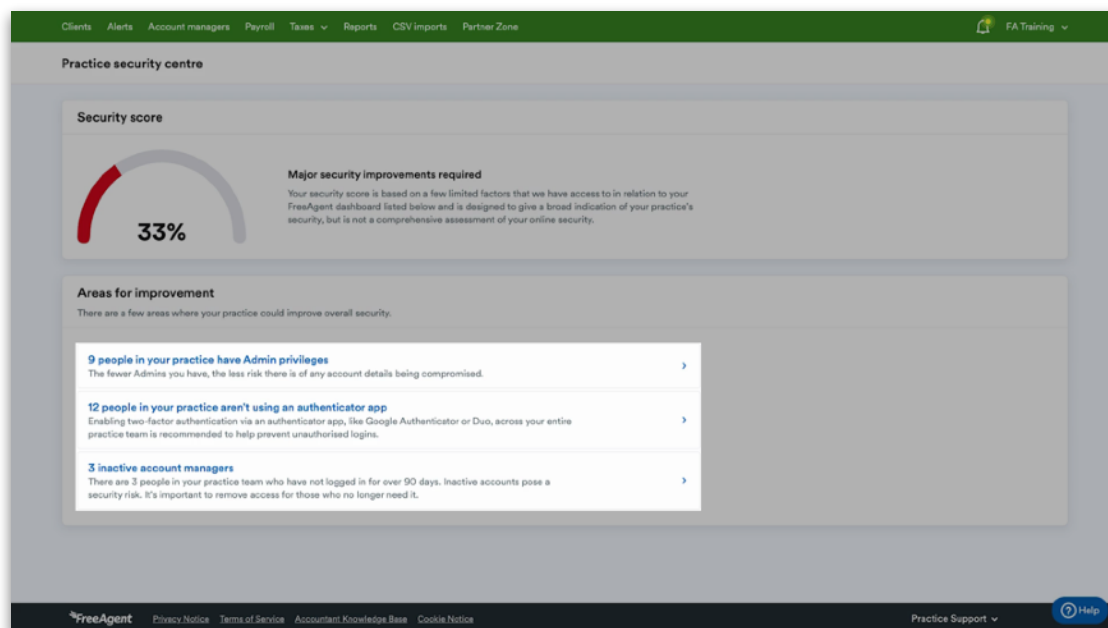
The security centre will also: highlight two-factor authentication (2FA) adoption from account managers, identify inactive users and identify inactive API connections. This will give your practice the flexibility and confidence to protect your practice and your clients' data.

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			✓

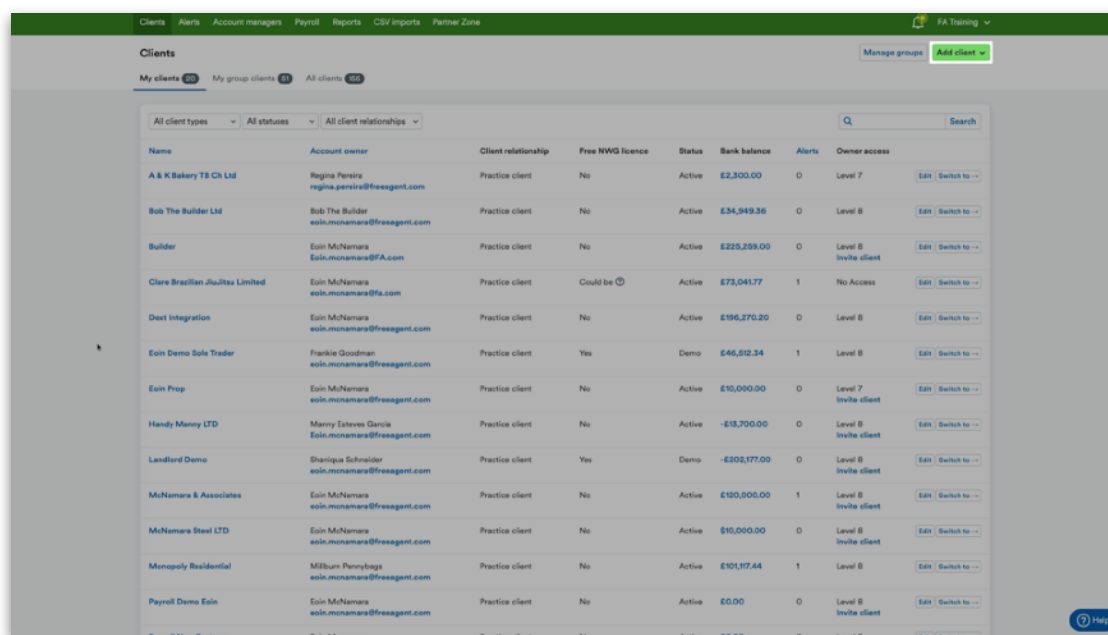
FreeAgent supports cash basis accounting for sole trader, partnership and unincorporated landlord accounts, as well as traditional accruals basis accounting.

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.

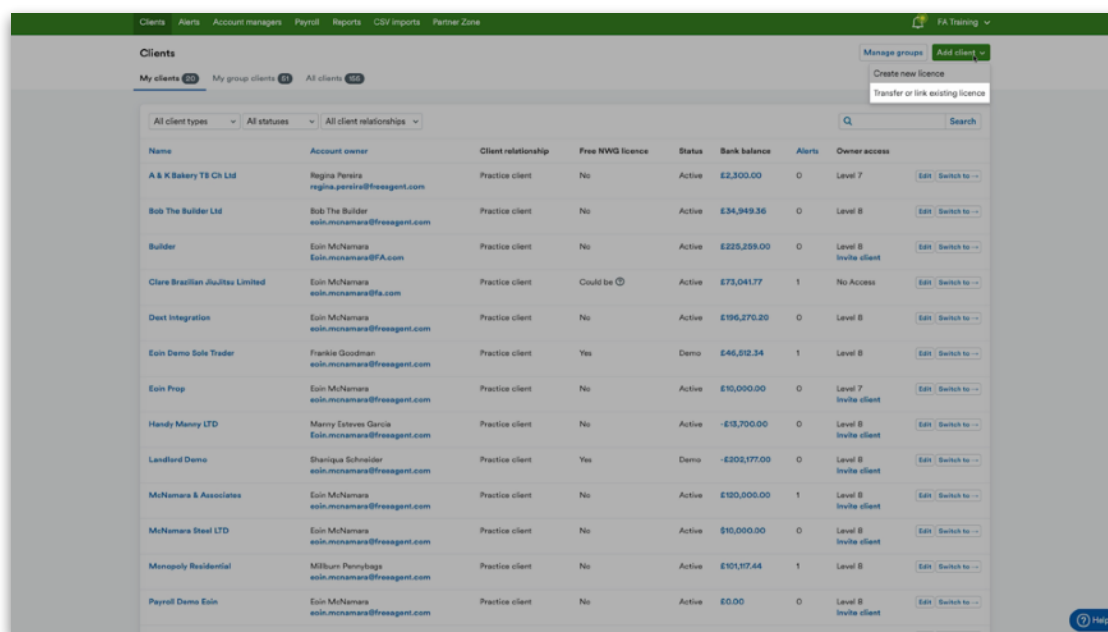
If a client already uses FreeAgent, you can add them to your dashboard. To do this, navigate to the 'Clients' tab in your dashboard and select 'Add client'.



The screenshot shows the 'Clients' tab in the FreeAgent dashboard. At the top, there are tabs for 'My clients' (60), 'My group clients' (18), and 'All clients' (60). A search bar is located at the top right. Below the tabs, there are filters for 'All client types', 'All statuses', and 'All client relationships'. The main table lists clients with columns: Name, Account owner, Client relationship, Free NWG licence, Status, Bank balance, Alerts, and Owner access. Each row has 'Edit' and 'Switch to' buttons.

Name	Account owner	Client relationship	Free NWG licence	Status	Bank balance	Alerts	Owner access
A & K Bakery TS Ch Ltd	Regina Pereira regina.pereira@freeagent.com	Practice client	No	Active	£2,300.00	0	Level 7
Bob The Builder Ltd	Bob The Builder eoin.mcnamara@freeagent.com	Practice client	No	Active	£34,949.36	0	Level 8
Builder	Eoin McNamara Eoin.mcnamara@FA.com	Practice client	No	Active	£225,259.00	0	Level 8
Claire Brazilian Juulitas Limited	Eoin McNamara eoin.mcnamara@fa.com	Practice client	Could be	Active	£73,041.77	1	No Access
Dext Integration	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£196,270.20	0	Level 8
Eoin Demo Sole Trader	Frankie Goodman eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	£46,812.34	1	Level 8
Eoin Prep	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 7
Handy Manny LTD	Manny Esteves Garcia Eoin.mcnamara@freeagent.com	Practice client	No	Active	-£13,790.00	0	Level 8
Landlord Demo	Shaniqua Schneider eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	-£305,177.09	0	Level 8
McNamara & Associates	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£100,000.00	1	Level 8
McNamara Steel LTD	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8
Monopoly Residential	Milburn Pennybags eoin.mcnamara@freeagent.com	Practice client	No	Active	£101,817.44	1	Level 8
Payroll Demo Eoin	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£0.00	0	Level 8

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.



This screenshot is identical to the previous one, but with the 'Add client' button in the top right corner clicked. A dropdown menu is visible with two options: 'Create new licence' and 'Transfer or link existing licence'.

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

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

The screenshot shows the 'Transfer or link existing licence' page in the FreeAgent dashboard. Under 'Client details', the 'Send this client an invite to' section has two radio buttons: 'Transfer their account (practice manages subscription)' (selected) and 'Link their account (client manages subscription)'. Below this, the 'Account owner email address' is 'robin.mcnamara@freeagent.com' and the 'Subdomain' is 'https:// clientg13253 .freeagent.com'. A note states: 'Your client can find their subdomain in the browser's address bar when they're logged in to FreeAgent. Send your client this 'How to find your FreeAgent subdomain' article, if they need help.' At the bottom are 'Send invite' and 'Cancel' buttons. On the right, a 'Transfer or link?' box explains that 'Transfer' gives full control to the practice, while 'Link' gives access to the client's account but keeps ownership with the client. A 'Manage client invites' link is at the top right.

Select **‘Send invite’** to complete the process.

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

By transferring a client with an existing FreeAgent licence onto your dashboard, your practice takes over commercial ownership of the licence and it will appear on your invoice from FreeAgent as either: a free licence, if they get FreeAgent for free with a NatWest, Royal Bank Scotland, Ulster Bank or

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

Link clients to your dashboard

You 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 licence**'.

The screenshot shows the 'Clients' section of the FreeAgent dashboard. At the top, there are tabs for 'My clients' (62), 'My group clients' (0), and 'All clients' (62). A dropdown menu for 'Add client' is open, showing options: 'Create new licence' and 'Transfer or link existing licence'. Below the tabs, there is a search bar and a table of clients.

Name	Account owner	Client relationship	Free NWG licence	Status	Bank balance	Alerts	Owner access
A & K Bakery TS Ch Ltd	Regina Persie regina.persie@freeagent.com	Practice client	No	Active	£2,300.00	0	Level 7 [Edit] [Switch to ...]
Bob The Builder Ltd	Bob The Builder eoin.mcnamara@freeagent.com	Practice client	No	Active	£34,949.36	0	Level 8 [Edit] [Switch to ...]
Builder	Eoin McNamara Eoin.mcnamara@fa.com	Practice client	No	Active	£225,259.00	0	Level 8 [Edit] [Switch to ...]
Clare Brazilian JiuJitsu Limited	Eoin McNamara eoin.mcnamara@fa.com	Practice client	Could be	Active	£73,041.77	1	No Access [Edit] [Switch to ...]
Dext Integration	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£196,270.20	0	Level 8 [Edit] [Switch to ...]
Eoin Demo Sole Trader	Frankie Goodman eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	£46,012.34	1	Level 8 [Edit] [Switch to ...]
Eoin Prop	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 7 [Edit] [Switch to ...]
Handy Manny LTD	Manny Tateves Garcia Eoin.mcnamara@freeagent.com	Practice client	No	Active	-£13,700.00	0	Level 8 [Edit] [Switch to ...]
Lendford Demo	Shanique Schneider eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	-£302,177.09	0	Level 8 [Edit] [Switch to ...]
McNamara & Associates	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£100,000.00	1	Level 8 [Edit] [Switch to ...]
McNamara Steel LTD	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8 [Edit] [Switch to ...]
Monopoly Residential	Milburn Pennybags eoin.mcnamara@freeagent.com	Practice client	No	Active	£101,117.44	1	Level 8 [Edit] [Switch to ...]
Payroll Demo Eoin	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£0.00	0	Level 8 [Edit] [Switch to ...]

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

Transfer or link existing licence

Manage client invites

Client details

Send this client an invite to:

☐ Transfer their account (practice manages subscription)

☒ Link their account (client manages subscription)

Account owner email address: eoin.mcnamara@freeagent.com

Subdomain: https://clarelg1323.freeagent.com

Transfer or link?

Transfer: gives you full control over the client's account and your practice becomes responsible for their licence costs.

Link: gives you access to the client's account but the client retains overall account ownership, including responsibility for any payments.

[Learn more](#)

Send invite **Cancel**

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’.

Name	Position	Email	Status	Last logged in
Eoin McNamara (Account Owner)	Director	eoin.mcnamara@freeagent.com	Disabled	06 Jun 25 at 11:52
Andrew Smith	Employee	Andrew@clarelg.com	Disabled	Never logged in
John Smith	Director	eoin.mcnamara@freeagent.com	Disabled	Never logged in
Tim Casey	Employee	Tim@clarelg.com	Disabled	Never logged in

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

The screenshot shows the 'Transfer or link existing licence' page in the FreeAgent dashboard. The page has a green header with navigation links: Clients, Alerts, Account managers, Payroll, Reports, CDR imports, and Partner Zone. A 'FA Training' dropdown is on the right. Below the header, the title 'Transfer or link existing licence' is centered. To the right is a 'Manage client invites' link. The main content area is divided into two panels. The left panel, titled 'Client details', contains a form with two radio buttons: 'Transfer their account (practice manages subscription)' and 'Link their account (client manages subscription)'. The 'Link' option is selected. Below the radio buttons is a text field for 'Account owner email address' containing 'sally.mcnamara@freeagent.com'. Below that is a text field for 'Subdomain' containing 'https:// clarelg1323 .freeagent.com'. A note below the subdomain field states: 'Your client can find their subdomain in the browser's address bar when they're logged in to FreeAgent. Send your client this [How to find your FreeAgent subdomain](#) article, if they need help.' At the bottom of the form are two buttons: 'Send invite' (green) and 'Cancel' (blue). The right panel, titled 'Transfer or link?', contains explanatory text: 'Transfer gives you full control over the client's account and your practice becomes responsible for their licence costs. Link gives you access to the client's account but the client retains overall account ownership, including responsibility for any payments.' Below this text is a 'Learn more' link with an external icon. The footer of the page includes the FreeAgent logo, links for Privacy Notice, Terms of Service, Account Knowledge Base, and Contact Us, a 'Practice Support' dropdown, and a 'Help' button with a question mark icon.

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**'.

The screenshot shows the 'Transfer or link existing licence' form in the FreeAgent interface. The form is titled 'Transfer or link existing licence' and has a 'Manage client invites' button in the top right corner. The form is divided into two main sections: 'Client details' and 'Transfer or link?'. In the 'Client details' section, there are two radio buttons for 'Send this client an invite to': 'Transfer their account (practice manages subscription)' and 'Link their account (client manages subscription)'. The 'Link their account' option is selected. Below this, there is a text input field for 'Account owner email address' containing 'sally.mcnamara@freeagent.com'. There is also a 'Subdomain' field with 'https:// clarelg1323 .freeagent.com'. A note below the subdomain field states: 'Your client can find their subdomain in the browser's address bar when they're logged in to FreeAgent. Send your client this [How to find your FreeAgent subdomain](#) article, if they need help.' At the bottom of the form, there are two buttons: 'Send invite' and 'Cancel'. The 'Transfer or link?' section on the right explains the difference between 'Transfer' (gives full control) and 'Link' (gives access but client retains ownership). A 'Learn more' link is provided at the bottom of this section. The FreeAgent logo and navigation links are visible at the bottom of the page.

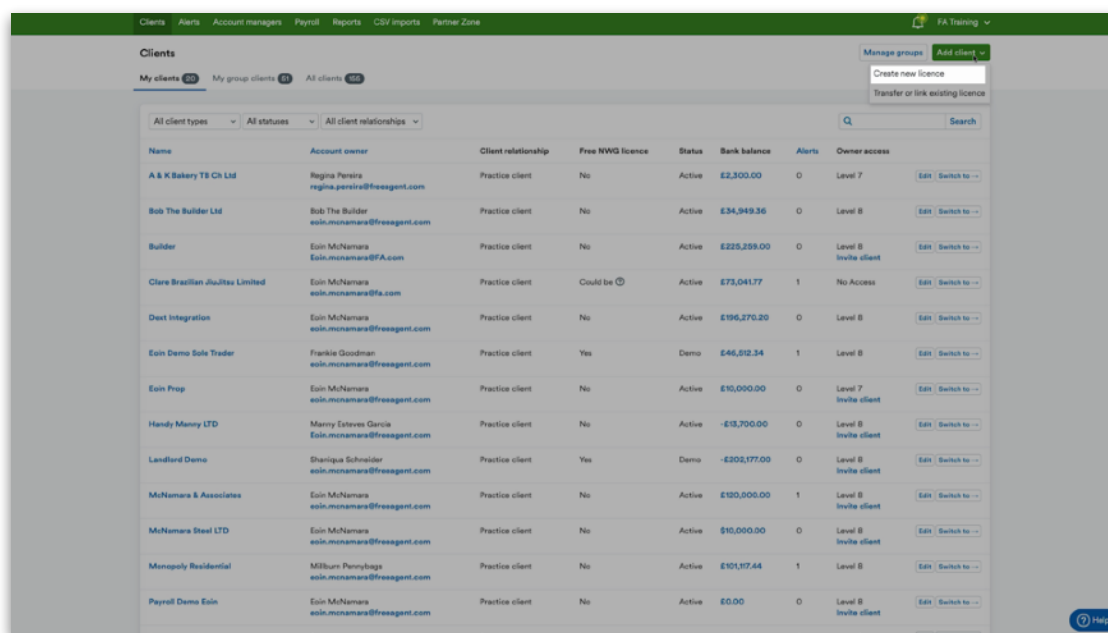
This will list all active linking requests. You have the option to resend and cancel the linking request. Once the client confirms the changes, they will appear on your dashboard.

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.

The screenshot shows the 'Create new licence' form. It has a green header bar with the same navigation as the previous screenshot. The main content area is titled 'Create new licence'. Under 'Client details', there are fields for 'Business name' (filled with 'Tams Butchers LTD'), 'Subdomain' (filled with 'https://tamsbutcher.freeagent.com'), 'Client type' (dropdown menu set to 'UK Limited Company'), and 'Client status' (dropdown menu set to 'Inactive Licence'). Below these fields, there's a note: 'Once a client has started their setup, the client type cannot be changed.' and 'Active clients have access to their FreeAgent accounts and can upload transactions. You will not be billed for inactive clients.' Under 'Get a free licence', there's a question: 'Does your client have an eligible account?' with radio buttons for 'Yes' and 'No' (selected). Under 'Additional features', there's a section for 'Exclude from bulk payroll' with a dropdown menu set to 'No'. At the bottom, under 'Account owner', there are fields for 'First name', 'Last name', and 'Email'.

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

The screenshot shows the 'Create new licence' form. The 'Client details' section has a dropdown menu open for 'Client type'. The menu lists options for 'For Everyone', 'For US Businesses', and 'For UK Businesses'. Under 'For UK Businesses', 'UK Limited Company' is highlighted. Other options include 'Universal', 'US Sole Proprietor', 'US Partnership', 'US Limited Liability Company', 'US C Corp', 'US S Corp', 'UK Partnership', 'UK Sole Trader', and 'UK Unincorporated Landlord'. The form also includes sections for 'Get a free licence', 'Additional features' (with 'Exclude from bulk payroll' set to 'No'), and 'Account owner' details.

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

The screenshot shows the 'Create new licence' form with the 'Client status' dropdown menu open. The menu has two options: 'Active Licence' (which is selected) and 'Inactive Licence'. The 'Active Licence' option includes a note: 'Active clients have access to their FreeAgent accounts and can upload transactions. You will not be billed for inactive clients.' The form also shows the 'Business name' as 'Toms Butchers LTD', the 'Subdomain' as 'https://tomsbutchersltd.freeagent.com', and the 'Client type' as 'UK Limited Company'. The 'Account owner' section is at the bottom with fields for first name, last name, and email.

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.

Create new licence

Client details

Business name*

Subdomain* This may be your client's reference number or something derived from the business's name, for example, a business called John Smith Ltd could be johnsmith.

Client type* Once a client has started their setup, the client type cannot readily be changed.

Client status Active clients have access to their FreeAgent accounts and can upload transactions. You will not be billed for inactive clients.

Get a free licence

If your client has a NatWest, Royal Bank of Scotland, or Ulster Bank business current account or a Mettle account, they can use FreeAgent for free, for as long as they retain their account.

Does your client have an eligible account? ☒ Yes ☐ No

Bank* ☒ NatWest ☐ Royal Bank of Scotland ☐ Mettle ☐ Ulster Bank

Account number*

Sort code* Once the client is created you will only be able to edit the account number and sort code by switching to the client and editing the bank account details after the setup stages are complete.

Additional features

Exclude from bulk payroll Bulk payroll filing allows account managers to prepare and file RTI payroll on behalf of multiple clients in a single payroll run.

Account owner

First name*

Last name*

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

Create new licence

Client details

Business name*

Subdomain* This may be your client's reference number or something derived from the business's name, for example, a business called John Smith Ltd could be johnsmith.

Client type* Once a client has started their setup, the client type cannot readily be changed.

Client status Active clients have access to their FreeAgent accounts and can upload transactions. You will not be billed for inactive clients.

Get a free licence

If your client has a NatWest, Royal Bank of Scotland, or Ulster Bank business current account or a Mettle account, they can use FreeAgent for free, for as long as they retain their account.

Does your client have an eligible account? ☒ Yes ☐ No

Bank* ☒ NatWest ☐ Royal Bank of Scotland ☐ Mettle ☐ Ulster Bank

Account number*

Sort code* Once the client is created you will only be able to edit the account number and sort code by switching to the client and editing the bank account details after the setup stages are complete.

Additional features

Exclude from bulk payroll Bulk payroll filing allows account managers to prepare and file RTI payroll on behalf of multiple clients in a single payroll run.

Account owner

First name*

Last name*

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.

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

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

The screenshot shows the 'Account owner' and 'Owner permissions' sections. The 'Account owner' section has the following details filled in: First name: Eoin, Last name: McNamara, Email: eoin.mcnamara@freeagent.com. The 'Owner access' section has a blue bar with the text: 'You will be able to send your client an invitation to set their password once you have set up their FreeAgent account.' Below this is a checkbox labeled 'Send this account owner an invitation to set their password'. The 'Owner permissions' section features a progress bar with 9 steps: 1. No Access, 2. Time, 3. My Money, 4. Contacts & Projects, 5. Invoices, Estimates and Files, 6. Bills, 7. Banking, 8. Tax, Accounting and Users, 9. Full Access. The progress bar is currently at step 7. Below the progress bar, there are two columns of permissions. The left column lists permissions that users can perform, and the right column lists permissions that users cannot perform.

Users can:	Users can't:
✓ View VAT returns, Corporation Tax (Limited Companies only) and Tax Timeline	✗ File Income Tax returns
✓ View Payroll (accrual basis only)	✗ File VAT returns
✓ View and edit Income Tax	✗ Post journals
✓ View accounting reports	
✓ View Radar	
✓ Create timeslip reports for all users	
✓ Create and edit users	
✓ Create and edit stock items	
✓ Edit account settings	
• all permissions from previous levels	

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

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

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

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

The screenshot shows the 'Owner permissions' and 'Owner access' settings in the FreeAgent interface. The 'Account owner' section at the top contains fields for 'First name' (Eoin), 'Last name' (McNamara), and 'Email' (eoin.mcnamara@freeagent.com). Below this is the 'Owner access' section, which includes a checkbox labeled 'Send this account owner an invitation to set their password' (checked). A preview of the invitation email is shown, with a placeholder for a personalised message. The 'Owner permissions' section features a horizontal slider with 8 levels. The slider is currently set to level 8, 'Full Access'. Below the slider, a list of permissions is shown, including 'Create and edit journal entries', 'Make corrections in bulk', 'Run and file Payroll (accrual basis only)', 'Manage and submit VAT returns', 'File income tax returns', 'Reset company data', and 'Permanently delete FreeAgent account'. A 'Help' button is visible in the bottom right corner.

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.

This screenshot shows the 'Client Setup' page in FreeAgent. At the top, there are input fields for 'Last name' (McNamara) and 'Email' (eoin.mcnamara@freeagent.com). Below this is the 'Owner access' section with a blue banner stating: 'You will be able to send your client an invitation to set their password once you have set up their FreeAgent account.' and a checkbox 'Send this account owner an invitation to set their password'. The 'Owner permissions' section features a horizontal slider with 8 levels: 0 (No Access), 1 (Time), 2 (My Money), 3 (Contacts & Projects), 4 (Invoices, Estimates and Files), 5 (Bills), 6 (Banking), 7 (Tax, Accounting and Users), and 8 (Full Access). The slider is currently set to level 6. Below the slider, a box lists permissions: 'Users can:' (Create and edit bank accounts, Import and explain bank statements, Set up bank feeds (if available), all permissions from previous levels) and 'Users can't:' (See accounting reports). The 'Practice access' section has a dropdown for 'Account manager' set to 'Eoin McNamara' and a checkbox 'Add client to group(s)'. At the bottom are buttons: 'Save & continue to client setup', 'Save & return to dashboard', and 'Cancel'. A 'Help' icon is in the bottom right.

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.

This screenshot shows the same 'Client Setup' page as above, but with the 'Account manager' dropdown menu expanded. The dropdown shows 'Eoin McNamara' as the selected option. Below the dropdown, there is a checkbox 'Add client to group(s)' and a note: 'Add this client to group(s) if you would like to allow their account to be accessed by multiple account managers.' The rest of the page, including the permissions slider and other sections, remains the same. The footer of the page includes 'FreeAgent', 'Privacy Notice', 'Terms of Service', 'Accountant Knowledge Base', 'Cookies Notice', 'Practice Support', and a 'Help' icon.

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 screenshot shows the 'Owner access' section with a checkbox for 'Send this account owner an invitation to set their password'. Below is the 'Owner permissions' section, which includes a progress bar with steps: 1. No Access, 2. Time, 3. My Money, 4. Contacts & Projects, 5. Invoices, Estimates and Files, 6. Bills, 7. Banking, 8. Tax, Accounting and Users, and 9. Full Access. Under 'Users can:', there is a list of permissions: 'Create and edit journal entries', 'Make corrections in bulk', 'Run and file Payroll (accrual basis only)', 'Manage and submit VAT returns', 'File Income Tax returns', 'Reset company data', and 'Permanently delete FreeAgent account', followed by a link to 'all permissions from previous levels'. The 'Practice access' section shows 'Account manager' set to 'Eoin McNamara'. A modal window is open with the title 'Add client to group(s)' and the text 'Add this client to group(s) if you would like to allow their account to be accessed by multiple account managers.' Below this, there is a list of groups with checkboxes: '1-FreeAgent Bookkeeping', 'Accounts client', 'All Clients', 'Amazing clients', 'Bookkeeping', 'Eoin Group', 'Essentials', and 'Essentials training'.

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 screenshot is identical to the previous one, but it includes the bottom navigation bar. At the bottom of the 'Practice access' section, there are three buttons: 'Save & continue to client setup' (highlighted in green), 'Save & return to dashboard', and 'Cancel'. The footer of the page includes the FreeAgent logo, links for 'Privacy Notice', 'Terms of Service', 'Accountant Knowledge Base', and 'Cookie Notice', a 'Practice Support' link, and a 'Help' icon.

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'**.

Owner permissions

Progress bar: 1 No Access, 2 Time, 3 My Money, 4 Contacts & Projects, 5 Invoices, Estimates and Files, 6 Bills, 7 Banking, 8 Tax, Accounting and Users, 9 Full Access

Users can:

- ✓ Create and edit journal entries
- ✓ Make corrections in bulk
- ✓ Run and file Payroll (accrual basis only)
- ✓ Manage and submit VAT returns
- ✓ File Income Tax returns
- ✓ Reset company data
- ✓ Permanently delete FreeAgent account
- all permissions from previous levels

Practice access

Account manager: Eoin McNamara

This will be the main contact which the client has with your practice.

☐ Add client to group(s)

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

Buttons: **Save, send invite & continue to client setup**, Save, send invite & return to dashboard, Cancel

FreeAgent | Privacy Notice | Terms of Service | Accountant Knowledge Base | Contact Us | Practice Support | Help

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.

The screenshot shows the 'Owner permissions' section of the FreeAgent client setup interface. At the top, there is a progress bar with 8 steps: 1. No Access, 2. Time, 3. My Money, 4. Contacts & Projects, 5. Invoices, Estimates and Files, 6. Bills, 7. Banking, 8. Tax, Accounting and Users, and 9. Full Access. The current step is 5, 'Invoices, Estimates and Files'. Below the progress bar, there is a section titled 'Users can:' with a list of permissions: 'Create and edit journal entries', 'Make corrections in bulk', 'Run and file Payroll (accrual basis only)', 'Manage and submit VAT returns', 'File Income Tax returns', 'Reset company data', 'Permanently delete FreeAgent account', and 'all permissions from previous levels'. Below this, there is a section titled 'Practice access' with a dropdown menu for 'Account manager' set to 'Eoin McNamara'. Below the dropdown, there is a checkbox for 'Add client to group(s)' and a note: 'Add this client to group(s) if you would like to allow their account to be accessed by multiple account managers.' At the bottom, there are three buttons: 'Save, send invite & continue to client setup' (highlighted in green), 'Save, send invite & return to dashboard' (highlighted in blue), and 'Cancel'. The footer of the page includes the FreeAgent logo, links to 'Privacy Notice', 'Terms of Service', 'Accountant Knowledge Base', and 'Contact Us', along with a 'Practice Support' link and a 'Help' icon.

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

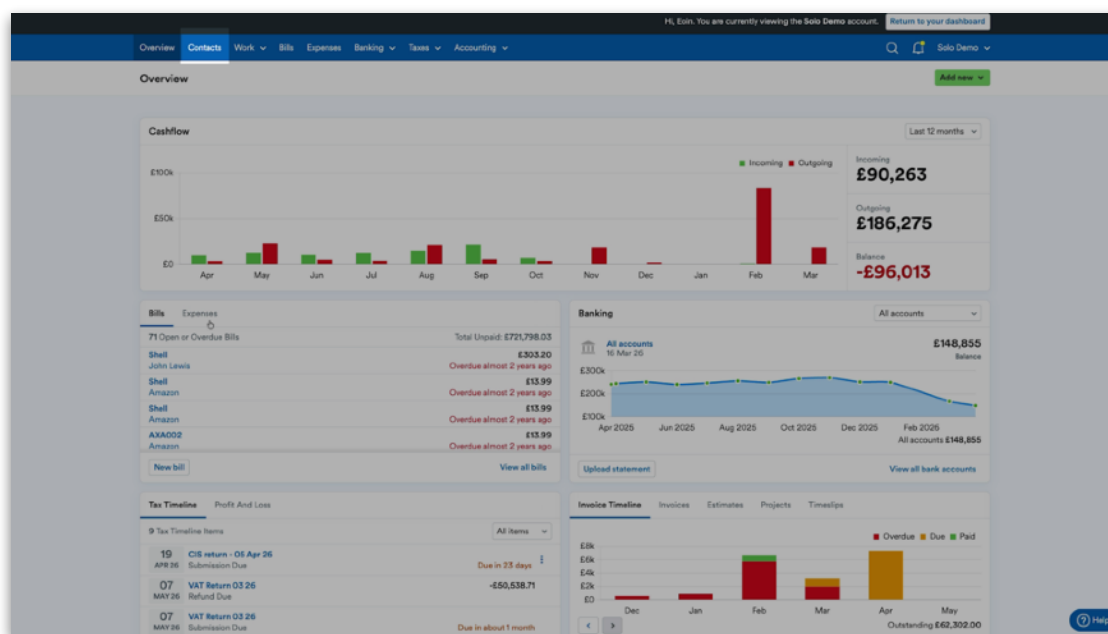
Contacts, invoicing and credit notes

Contacts

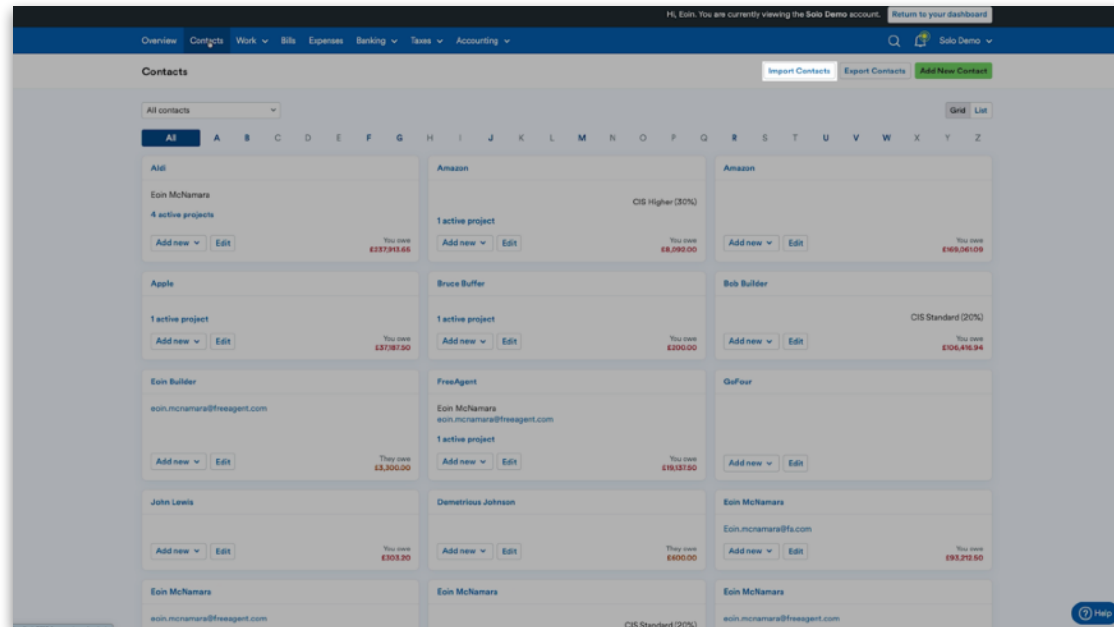
Contacts are your client's customers and suppliers in FreeAgent. To access this area, navigate to the relevant client on your Practice Dashboard and **'Switch to'** their account.

Name	Account owner	Client relationship	Free NWG licence	Status	Bank balance	Alerts	Owner access
A & K Bakery TS Ch Ltd	Regina Pereira regina.pereira@freeagent.com	Practice client	No	Active	£2,300.00	0	Level 7 Edit Switch to →
Bob The Builder Ltd	Bob The Builder eoin.mcnamara@freeagent.com	Practice client	No	Active	£34,949.36	0	Level 8 Edit Switch to →
Builder	Eoin McNamara Eoin.mcnamara@fa.com	Practice client	No	Active	£225,258.00	0	Level 8 Invite client Edit Switch to →
Clare Brazilian JiuJitsu Limited	Eoin McNamara eoin.mcnamara@fa.com	Practice client	Could be Ⓢ	Active	£73,041.77	1	No Access Edit Switch to →
Dext Integration	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£196,270.20	0	Level 8 Edit Switch to →
Eoin Demo Sole Trader	Frankie Goodman eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	£46,812.34	1	Level 8 Edit Switch to →
Eoin Prop	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 7 Invite client Edit Switch to →
Handy Manny LTD	Manny Esteves Garcia Eoin.mcnamara@freeagent.com	Practice client	No	Active	-£13,700.00	0	Level 8 Invite client Edit Switch to →
Landlord Demo	Shanique Schneider eoin.mcnamara@freeagent.com	Practice client	Yes	Demo	-£303,177.00	0	Level 8 Invite client Edit Switch to →
McNamara & Associates	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£180,000.00	1	Level 8 Invite client Edit Switch to →
McNamara Steel LTD	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8 Invite client Edit Switch to →
Monopoly Residential	Milburn Pennybags eoin.mcnamara@freeagent.com	Practice client	No	Active	£101,117.44	1	Level 8 Edit Switch to →
Payroll Demo Eoin	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£0.00	0	Level 8 Invite client Edit Switch to →

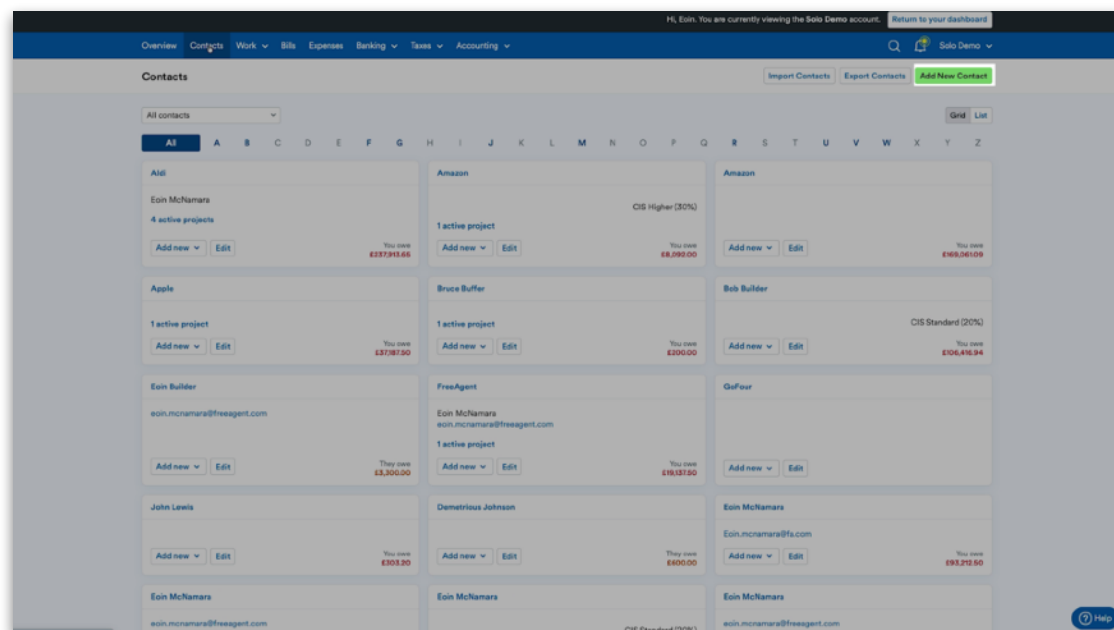
Click on the **'Contacts'** tab at the top of the screen to access your client's Contacts area.



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



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



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

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

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

The screenshot shows the 'Create new contact' form in FreeAgent. The form is organized into three main sections:

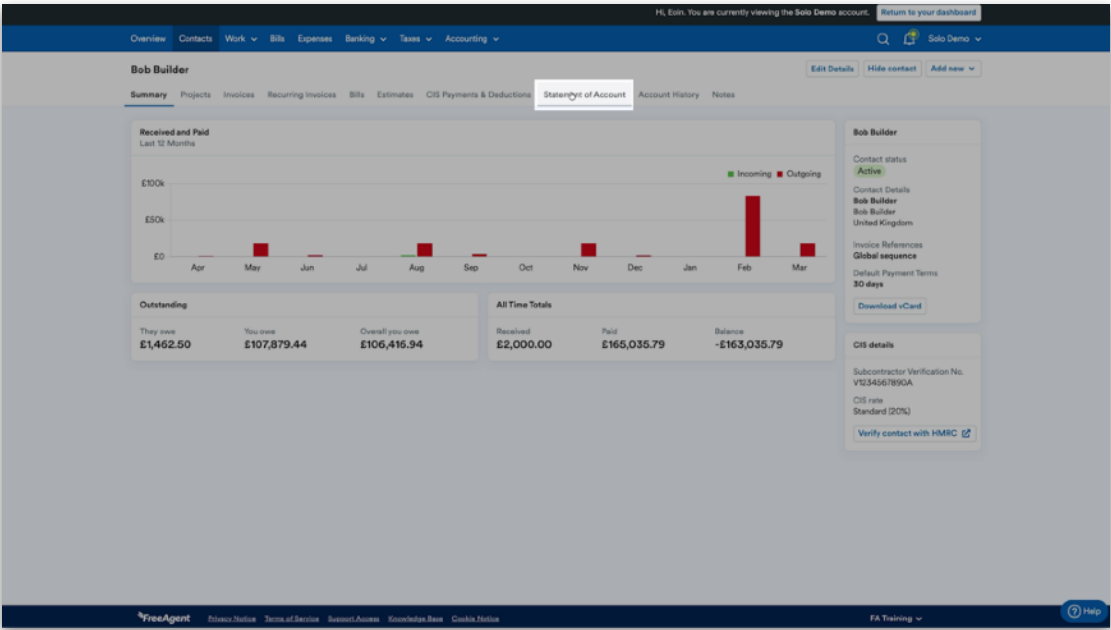
- Address:** Includes fields for Town, Region or State, Post/Zip code, and a dropdown for Country (currently set to United Kingdom).
- Invoicing Options:** Contains several settings:
 - Default Payment Terms:** A dropdown set to 'days'.
 - Use contact level email settings?:** An unchecked checkbox.
 - Contact level Invoice Sequence?:** An unchecked checkbox.
 - Can be overridden by project level sequences:** A checkbox.
 - Display Contact Name:** A checked checkbox.
 - Charge VAT:** A dropdown set to 'Only if contact is also based in the United Kingdom VAT area'.
 - VAT Registration Number:** An empty text field.
 - Invoice/Estimate Language:** A dropdown set to 'English'.
- CIS Options:** Includes a question 'Is this contact a CIS subcontractor?' with radio buttons for 'No' (selected) and 'Yes'.

At the bottom of the form are three buttons: 'Create new contact', 'Create and add another', and 'Cancel'. A 'Help' icon is located in the bottom right corner.

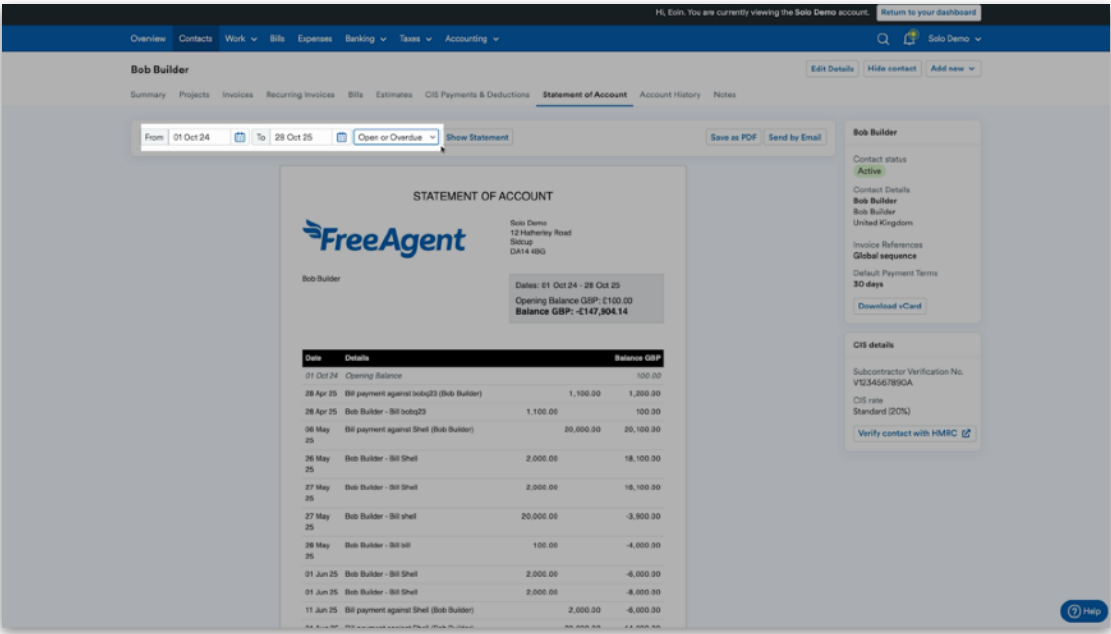
Once you've created a contact, you can click on their name in the 'Contacts' area and you'll be able to view all of the relevant transactions and data associated with them in FreeAgent.

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

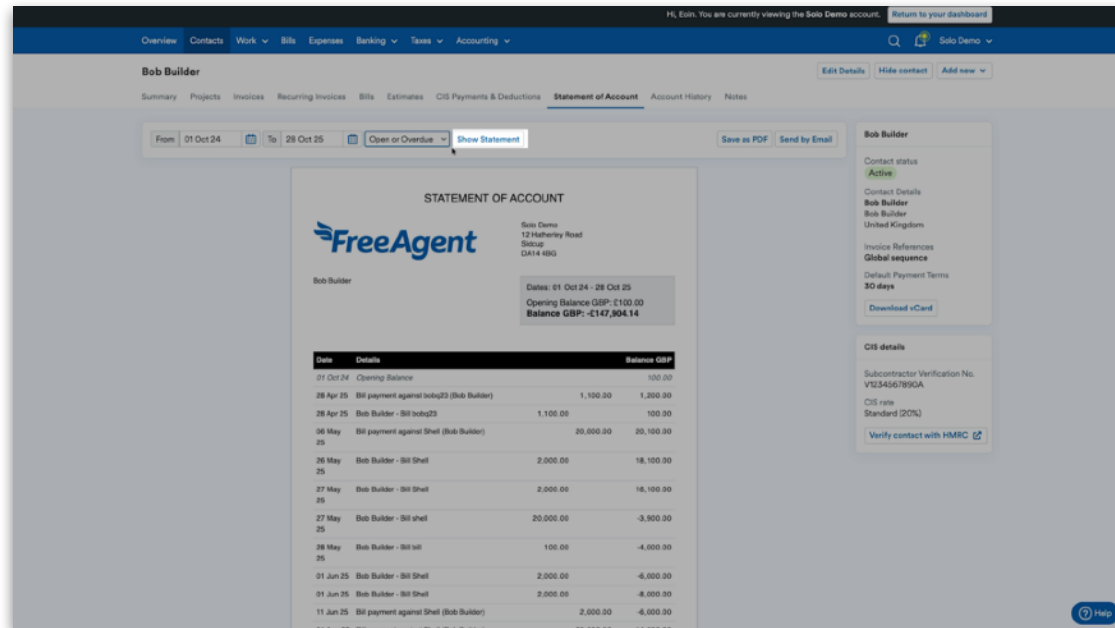
To do this, navigate to the ‘Statement of Account’ tab.



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



Select **'Show Statement'** to generate the statement.



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

Overview Contacts Work Bills Expenses Banking Taxes Accounting

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

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

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



Bob Builder

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

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

Bob Builder

Contact status: Active

Contact Details: Bob Builder, Bob Builder, United Kingdom

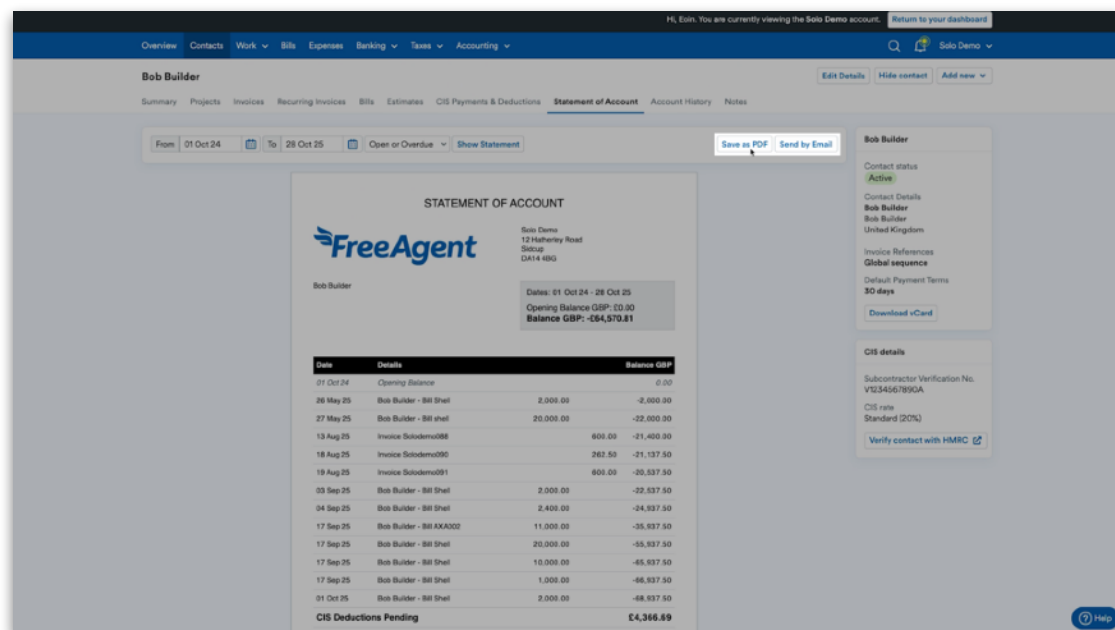
Invoice References: Global sequence

Default Payment Terms: 30 days

CIS details: Subcontractor Verification No. V1234567890A, CIS rate Standard (20%)

[Verify contact with HMRC](#)

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



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

Overview Contacts Work Bills Expenses Banking Taxes Accounting

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

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

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



Bob Builder

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

Date	Details	Balance GBP
01 Oct 24	Opening Balance	0.00
26 May 25	Bob Builder - Bill Shell	2,000.00
27 May 25	Bob Builder - Bill shell	20,000.00
13 Aug 25	Invoice Solodemo088	600.00
18 Aug 25	Invoice Solodemo090	267.50
19 Aug 25	Invoice Solodemo091	600.00
03 Sep 25	Bob Builder - Bill Shell	2,000.00
04 Sep 25	Bob Builder - Bill Shell	2,400.00
17 Sep 25	Bob Builder - Bill XXX002	11,000.00
17 Sep 25	Bob Builder - Bill Shell	20,000.00
17 Sep 25	Bob Builder - Bill Shell	10,000.00
17 Sep 25	Bob Builder - Bill Shell	1,000.00
01 Oct 25	Bob Builder - Bill Shell	2,000.00

CIS Deductions Pending £4,366.89

Bob Builder

Contact status: Active

Contact Details: Bob Builder, Bob Builder, United Kingdom

Invoice References: Global sequence

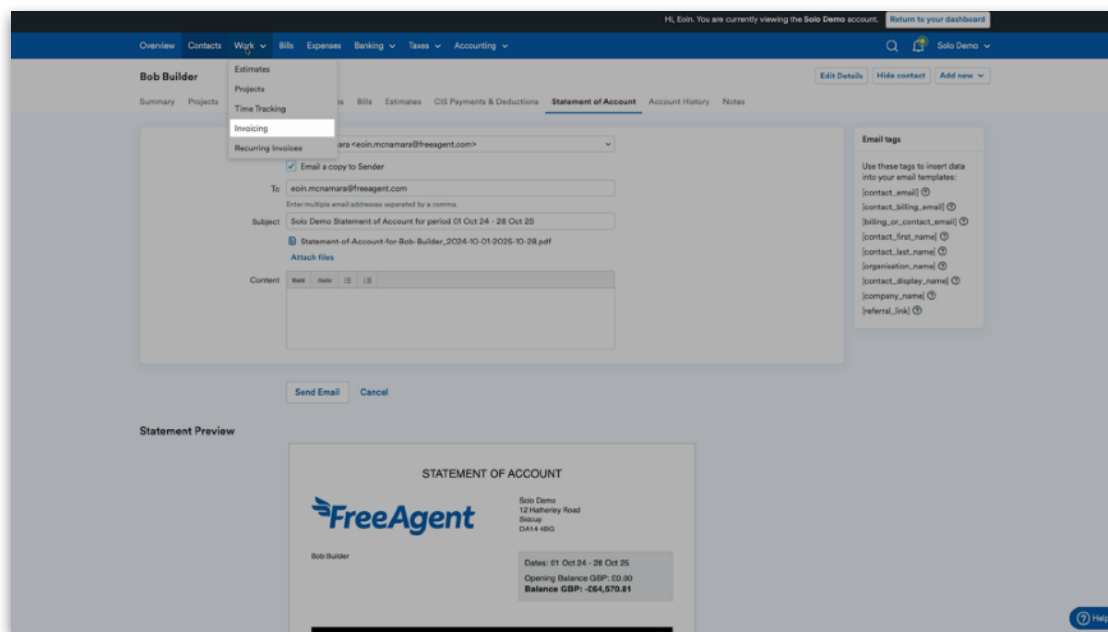
Default Payment Terms: 30 days

CIS details: Subcontractor Verification No. V1234567890A, CIS rate Standard (20%)

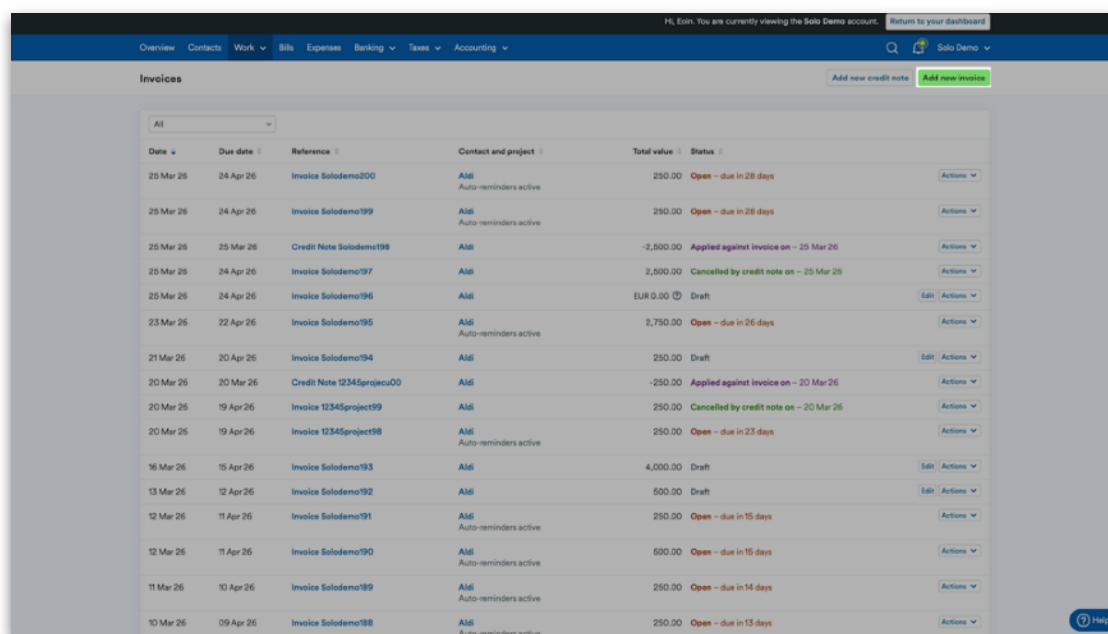
[Verify contact with HMRC](#)

Invoicing

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



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



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

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

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.

Invoice was successfully created.

Hi, Eoin. You are currently viewing the Solo Demo account.

Return to your dashboard

Overview

Contacts

Work

Bills

Expenses

Banking

Taxes

Accounting

Search

Help

Solo Demo

Invoice Solodemo201 (Draft)

Save as PDF

Edit

Delete

More

1

Add an invoice item

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

Draft

Sent

Paid

FreeAgent

Solo Demo

12 Waterloo Road

Sligo

DO6A 4D9

UK21 12345678

Bob Builder

INVOICE SOLODEMO201

27 March 2018

Payment due by 11 April 2018

QUANTITY	DESCRIPTION	UNIT PRICE (£)	QTY	NET SUBTOTAL (£)
			Ttd Total	0.00
			UKIT	0.00
			GBP Total	£0.00

Add invoice item

Payment Details

Can You Remove

Bank Sort Code: 602140

Account Number: 12345678

Payment Reference: Solodemo201

Total value

£0.00

Created

27 Mar 26

Due

Not yet sent

Contact

Bob Builder →

Online payments

Let your customers pay quickly and securely online.

Set up online payments

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

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

Overview
Contacts
Work
Bills
Expenses
Banking
Taxes
Accounting

Q
Solo Demo

Invoice Solodemo201 (Draft)

Save as PDF
Edit
Delete
More

Add an invoice item

This invoice has been configured to send automated emails. You may wish to edit these emails are sent.

Draft
Save

Bob Builder

QUANTITY
DETAILS

Add invoice item

Payment Details

Coa 7767000000

Bank Sort Code: 102450

Account Number: 10245078

Payment Reference: Solodemo201

New invoice item

Autofill from your price list

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

Quantity
Units

1.00
Hours

One and a half hours can be entered as either 1.33 or 1.5

Details

1 hour of essential training

Unit price

£ 250.00

Enter discounts and credits as negative.

VAT

Standard (20.0%)

☒ Add this to your price list

Price List Item Name/Code

Essentials 2028

Create and finish
Create and add another
Cancel

Total value
£0.00

Created
27 Mar 26

Due
Not yet sent

Contact
Bob Builder

Online payments

Let your customers pay quickly and securely online.

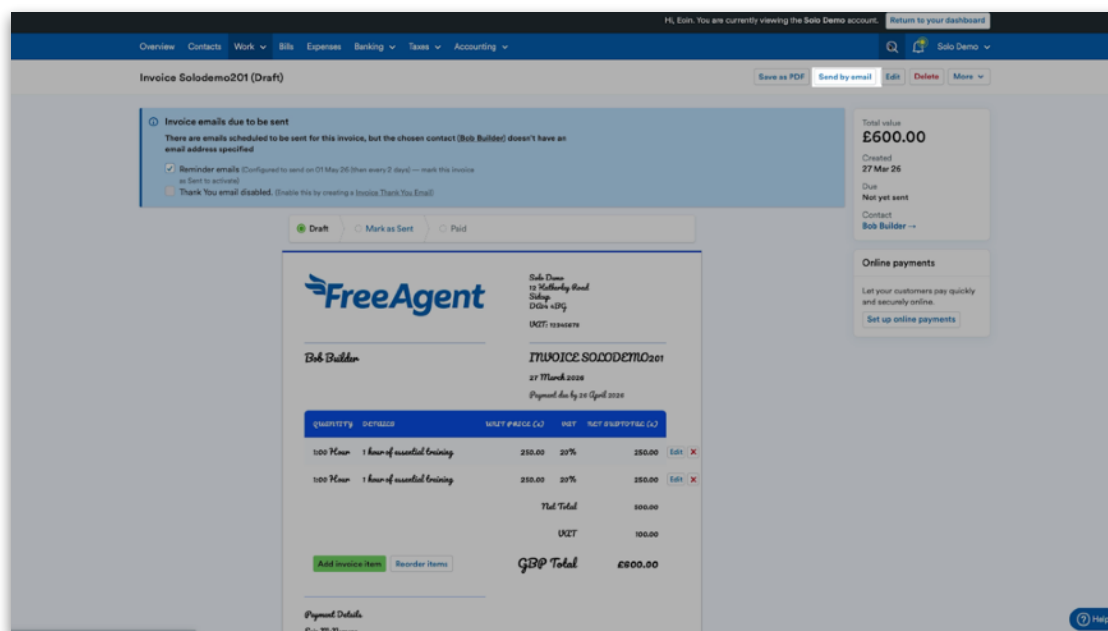
[Set up online payments](#)

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.

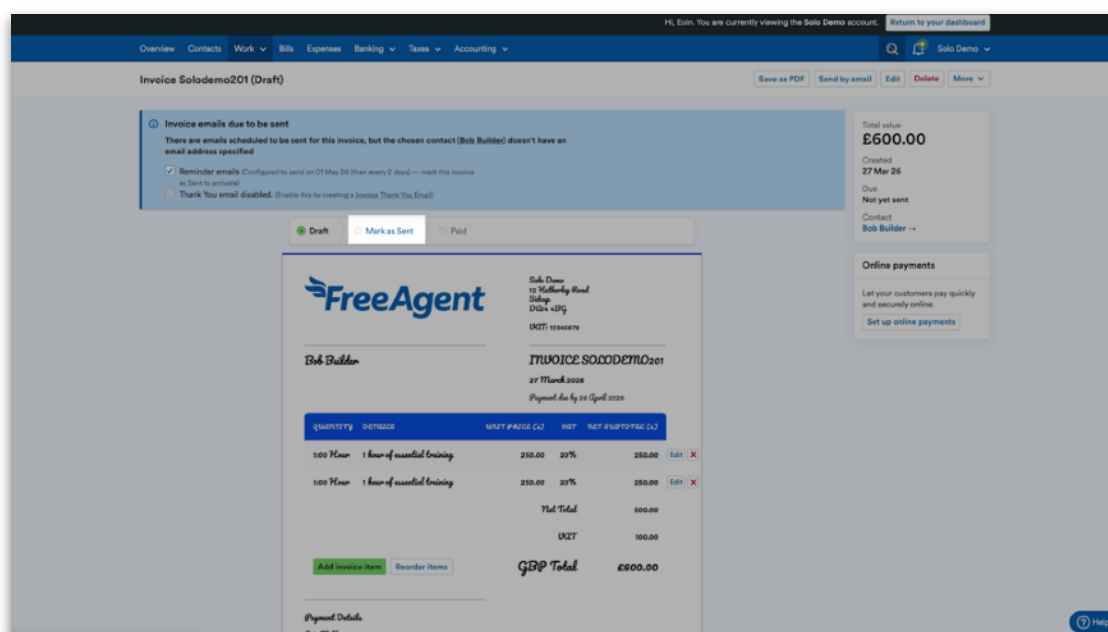
Once you're happy with the details for the invoice item, you have two options: you can either create it and another item or click '**Create and finish**' to complete the process.

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.

The screenshot displays the FreeAgent software interface. At the top, a navigation bar includes links for Overview, Contacts, Work, Bills, Expenses, Banking, Taxes, and Accounting. A status bar at the top right indicates 'Hi, Sam. You are currently viewing the Solo Demo account.' and provides a 'Return to your dashboard' link. Below the navigation bar, the main header shows 'Invoice Solodemo201 (Open - due in about 1 month)' with buttons for 'Save as PDF', 'Send by email', and 'More'.

A notification box on the left states: 'Invoice emails due to be sent. There are emails scheduled to be sent for this invoice, but the chosen contact (Bob Builder) doesn't have an email address specified.' It includes two options: 'Reminder emails (to be sent on 10 May 26 (in every 2 days))' and 'Thank You email disabled. (Create this by creating a Invoice Thank You Email)'.

Below the notification, there are three buttons: 'Make Draft' (selected), 'Sent', and 'Paid', along with an 'Actions' dropdown menu.

The invoice details are shown in a table format. The 'FreeAgent' logo is on the left. The contact information for 'Bob Builder' is listed: '10 Mollusk Road, Sidup, SO24 4JG, UK, 12345678'. The invoice number is 'INVOICE:SOLODEMO201', dated '27 March 2026', with a payment due by '08 April 2026'.

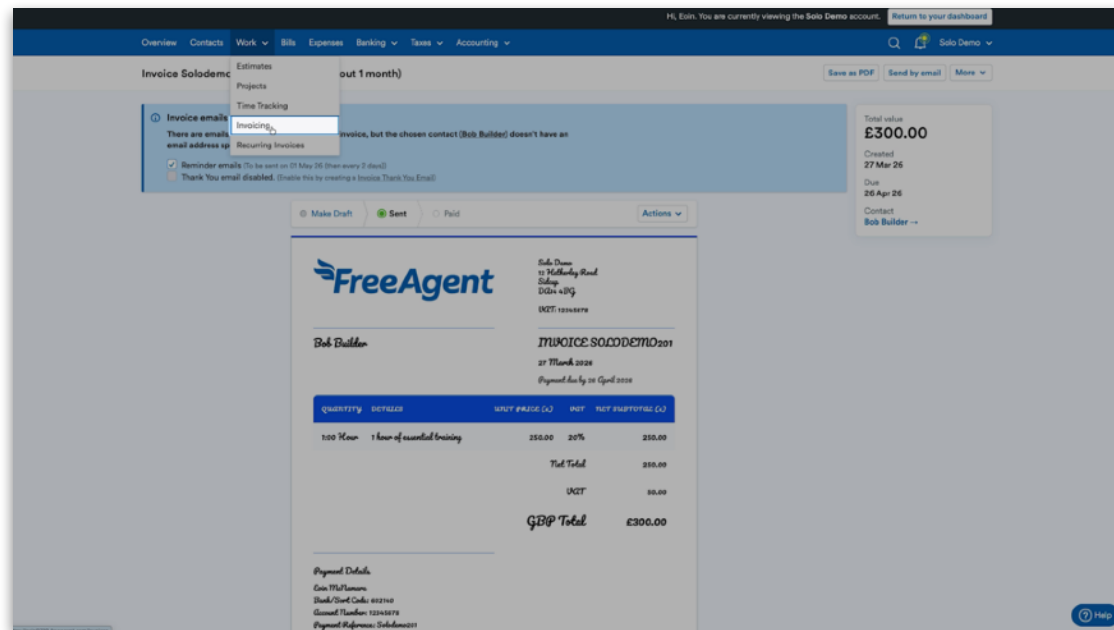
QUANTITY	DETAILS	UNIT PRICE (£)	TAX	NET AMOUNT (£)
100 Hour	1 hour of essential training	250.00	20%	250.00
100 Hour	1 hour of essential training	250.00	20%	250.00
Tax Total				500.00
NET				100.00
GBP Total				£600.00

Payment Details: Core 1111/123456, Bank Sort Code: 123456

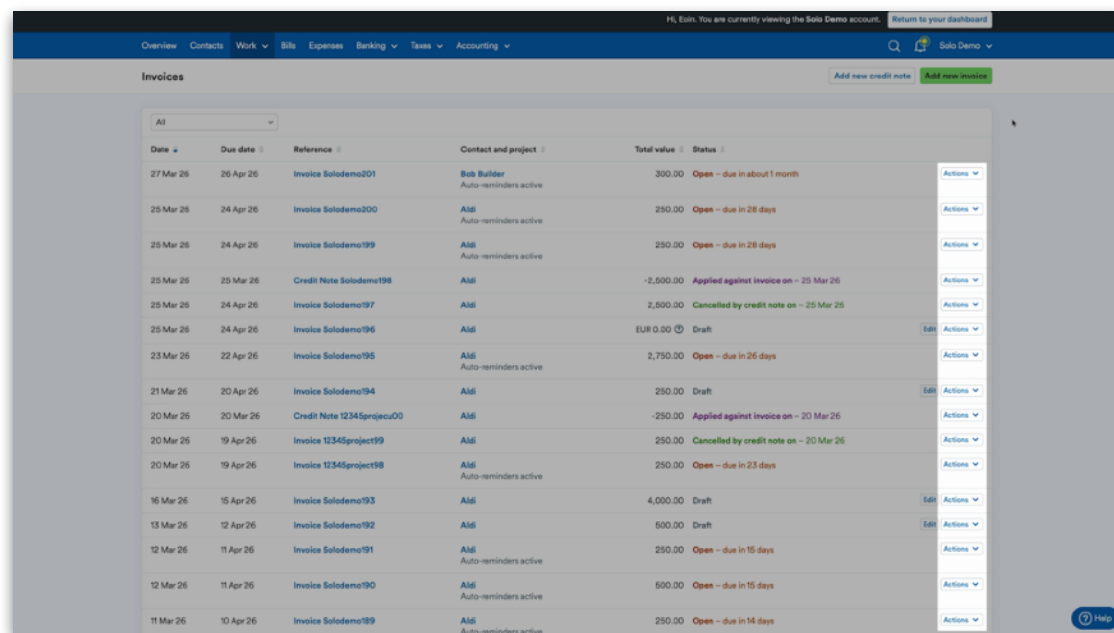
Please note that you can only do this if no payment has been marked against it. If one has, you can't make any changes until the payment has been removed. Your clients can also create and send invoices using the FreeAgent mobile app. To find out more about this, visit the Mobile module in the 'Learning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

Invoice Quick Actions

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



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



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

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

The screenshot shows the 'Invoices' section of a software interface. The top navigation bar includes 'Overview', 'Contacts', 'Work', 'Bills', 'My Money', 'Banking', 'Taxes', and 'Accounting'. The 'Invoices' table has columns: Date, Due date, Reference, Contact and project, Total value, and Status. A dropdown menu is open for the 'Draft' status of Invoice FezC81, showing options: View, Send by email, Mark as sent, Duplicate invoice, Create recurring profile, Download PDF, and Delete.

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

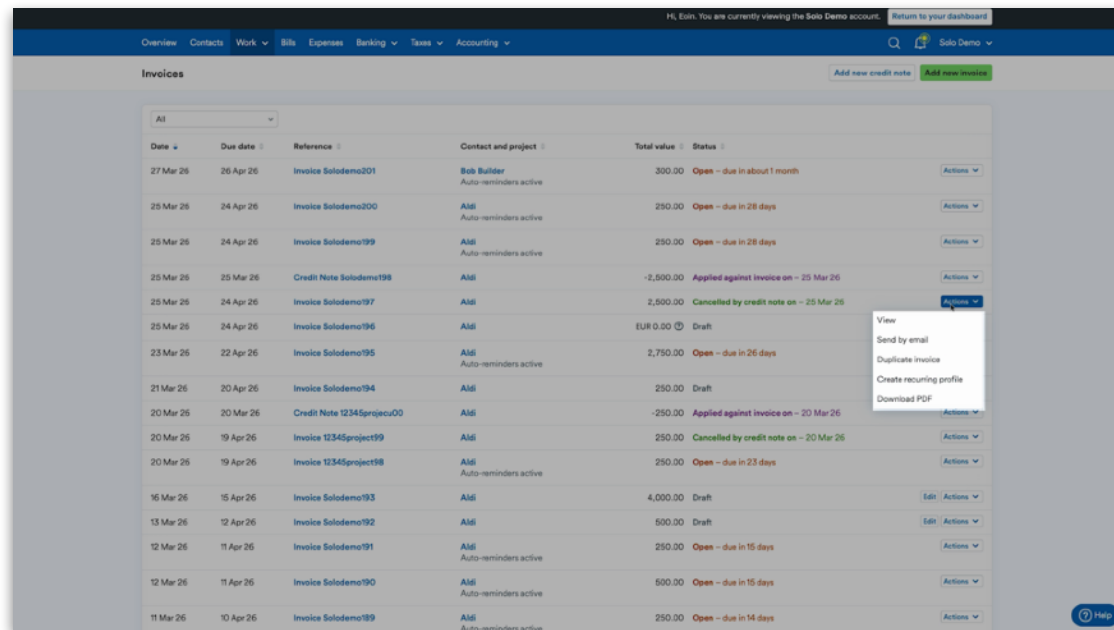
For invoices that are 'Open' or 'Overdue', you can **'View'** the invoice, **'Send by email'** or **'Resend by email'**, **'Mark as draft'**, **'Duplicate invoice'**, **'Create recurring profile'** from the invoice, or **'Download PDF'**.

The screenshot shows the 'Invoices' section of a software interface. The top navigation bar includes 'Overview', 'Contacts', 'Work', 'Bills', 'Expenses', 'Banking', 'Taxes', and 'Accounting'. The 'Invoices' table has columns: Date, Due date, Reference, Contact and project, Total value, and Status. A dropdown menu is open for the 'Open' status of Invoice Solodemo195, showing options: View, Send by email, Mark as draft, Duplicate invoice, Create recurring profile, and Download PDF.

Date	Due date	Reference	Contact and project	Total value	Status
27 Mar 26	26 Apr 26	Invoice Solodemo201	Bob Builder Auto-reminders active	300.00	Open - due in about 1 month
25 Mar 26	24 Apr 26	Invoice Solodemo200	Alti Auto-reminders active	250.00	Open - due in 28 days
25 Mar 26	24 Apr 26	Invoice Solodemo199	Alti Auto-reminders active	250.00	Open - due in 28 days
25 Mar 26	25 Mar 26	Credit Note Solodemo198	Alti	-2,500.00	Applied against invoice on - 25 Mar 26
25 Mar 26	24 Apr 26	Invoice Solodemo197	Alti	2,500.00	Cancelled by credit note on - 25 Mar 26
25 Mar 26	24 Apr 26	Invoice Solodemo196	Alti	EUR 0.00	Draft
23 Mar 26	22 Apr 26	Invoice Solodemo195	Alti Auto-reminders active	2,750.00	Open - due in 26 days
21 Mar 26	20 Apr 26	Invoice Solodemo194	Alti	250.00	Draft
20 Mar 26	20 Mar 26	Credit Note 12345project00	Alti	-250.00	Applied against invoice on - 20 Mar 26
20 Mar 26	19 Apr 26	Invoice 12345project19	Alti	250.00	Cancelled by credit note on - 20 Mar 26
20 Mar 26	19 Apr 26	Invoice 12345project18	Alti Auto-reminders active	250.00	Open - due in 23 days
16 Mar 26	15 Apr 26	Invoice Solodemo193	Alti	4,000.00	Draft
13 Mar 26	12 Apr 26	Invoice Solodemo192	Alti	500.00	Draft
12 Mar 26	11 Apr 26	Invoice Solodemo191	Alti Auto-reminders active	250.00	Open - due in 15 days
12 Mar 26	11 Apr 26	Invoice Solodemo190	Alti Auto-reminders active	500.00	Open - due in 15 days
11 Mar 26	10 Apr 26	Invoice Solodemo189	Alti Auto-reminders active	250.00	Open - due in 14 days

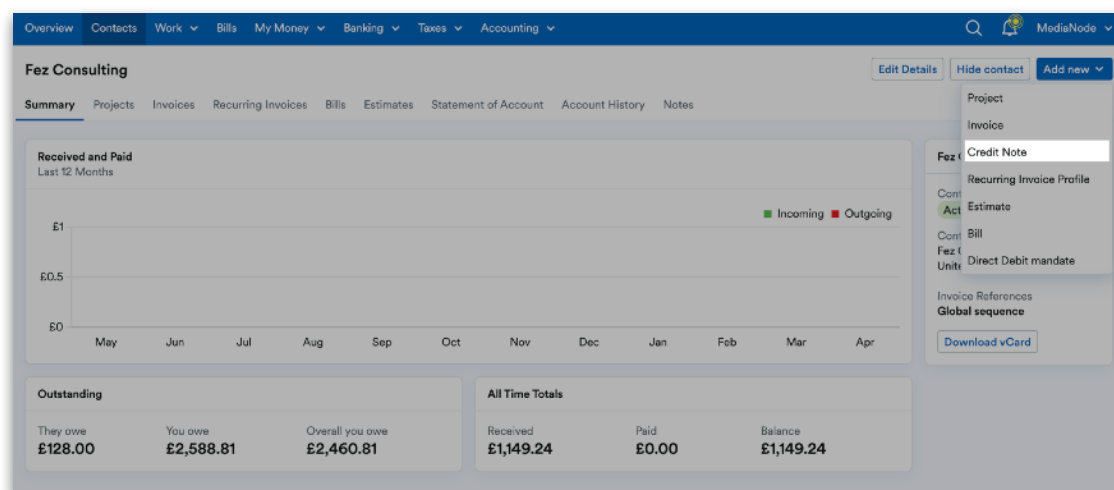
You also have the option to **'Send reminder'** emails for overdue invoices.

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



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.

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

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.

Contact and project Required fields*

Contact: Alti [Add a new contact](#)

Project: -- No Project --

Details Required fields*

Credit Note Reference: Solodemo202
Using Contact level invoice sequencing

Credit Note Date: 27 Mar 26

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

Currency: Pounds Sterling

CIS Category: N/A

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

More options

Discount: %
The discount applied across the whole credit note.

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

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

PO Reference:
This PO reference will override any PO set for the project.

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

☐ Use Letterheaded Paper?

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

Using Contact level invoice sequencing

Credit Note Date: 27 Mar 26

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

Currency: Pounds Sterling

CIS Category: N/A

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

More options

Discount: %
The discount applied across the whole credit note.

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

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

PO Reference:
This PO reference will override any PO set for the project.

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

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

☐ Display the project name in the Other information section.

VAT options: ☒ UK VAT Rates
☐ Reverse Charge
☐ EC VAT MOSS

Save Changes **Cancel**

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

FreeAgent

Overview Contacts Work Bills Expenses Banking Taxes Accounting

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

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

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

New credit note item

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

Quantity: 1.00 Units: Hours

Details: training

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

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

FreeAgent
Eoin McNamara
Q&A
Mettle

Payment Details
Eoin McNamara
Bank/Sort Code: 092160
Account Number: 12345678
Payment Reference: Solodemo202

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

FreeAgent [Privacy Notice](#) [Terms of Service](#) [Support Access](#) [Knowledge Base](#) [Cookie Notice](#) [FA Training](#)

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

FreeAgent

Eoin McNamee
Gill
Upwards

CREDIT NOTE
SOLODEMO202
27 March 2026
Payment Terms: Due on receipt

QUANTITY	DETAILS	UNIT PRICE (£)	NET	GROSS (£)
100 Hour	Training	-260.00	-260.00	

GBP Total -£260.00

Payment Details
Eoin McNamee
Bank/Sort Code: 022140
Account Number: 12345678
Payment Reference: Solodemo202

Total value
-£260.00
Created
27 Mar 26
Due
Not yet sent
Contact
Add

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'**.

FreeAgent

Bob Builder

INVOICE SOLODEMO201
27 March 2026
Payment due by 26 April 2026

QUANTITY	DETAILS	UNIT PRICE (£)	NET	GROSS (£)
100 Hour	1 hour of essential training	250.00	20%	250.00
		Trial Total		250.00
		VAT		50.00
		GBP Total		£300.00

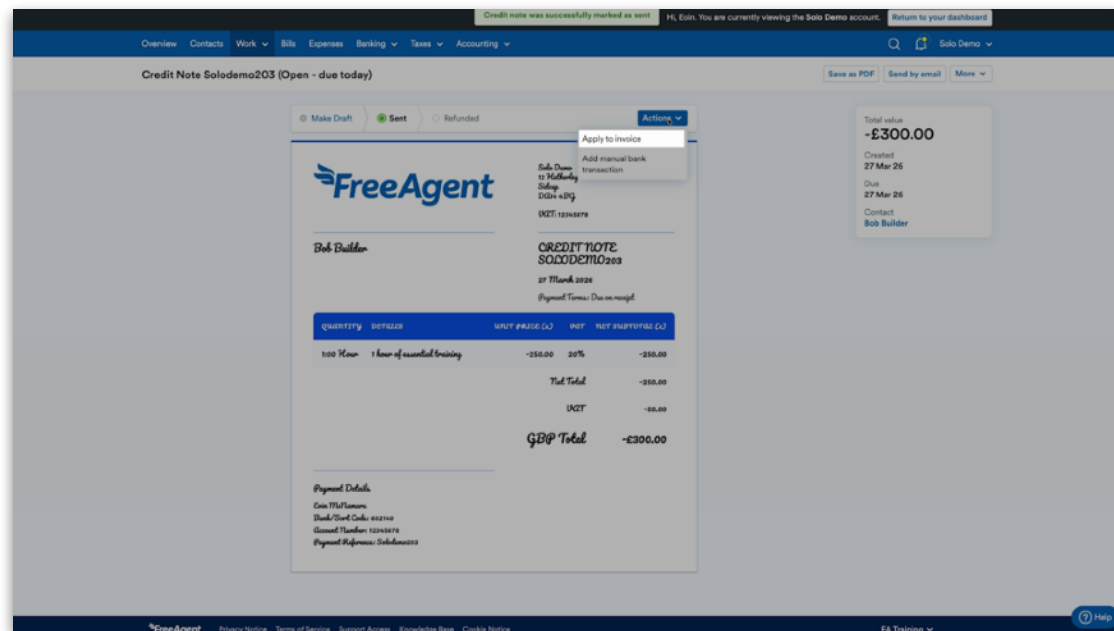
Payment Details
Eoin McNamee
Bank/Sort Code: 022140
Account Number: 12345678
Payment Reference: Solodemo201

Total value
£300.00
Created
27 Mar 26
Due
26 Apr 26
Contact
Bob Builder

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.

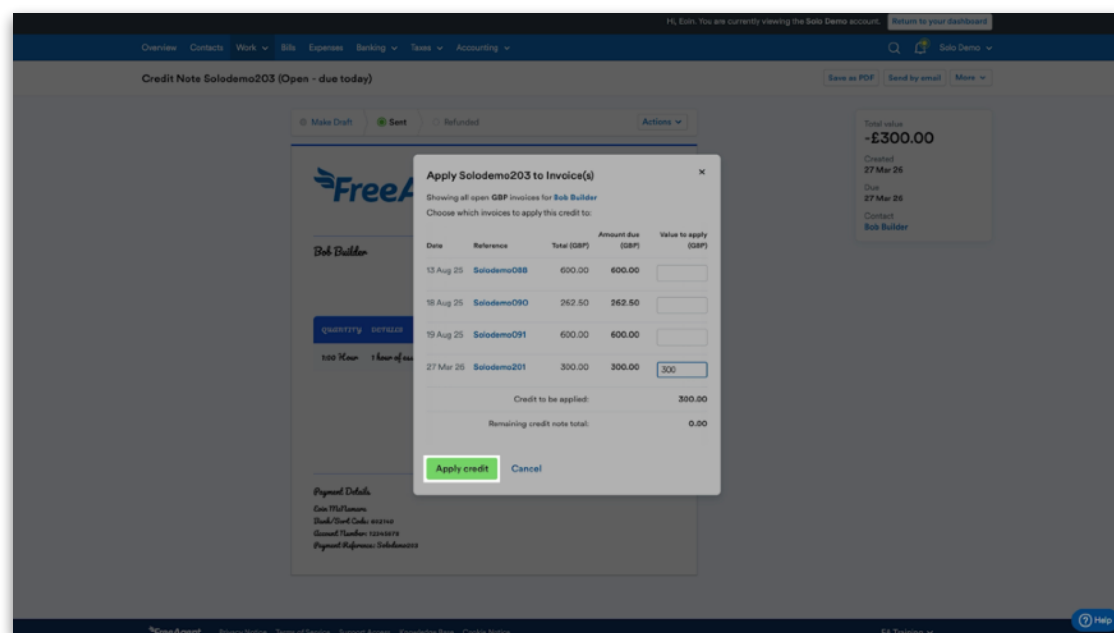
In the drop-down menu you'll have two options to mark the credit note as paid.

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'**.

The screenshot displays the MediaNode software interface. At the top, a navigation bar includes links for Overview, Contacts, Work, Bills, My Money, Banking, Taxes, and Accounting. The main header shows 'Invoice FezC78 (Open - due today)' with buttons for 'Save as PDF', 'Send by email', and 'More'. Below the header, there are status buttons: 'Make Draft', 'Sent' (active), and 'Paid'. An 'Actions' dropdown menu is open, showing options: 'Apply existing credit note' (highlighted), 'Create new credit note', and 'Add manual bank transaction'. A checkbox for 'Show Income Categories (will not appear on sent invoices)' is present. The invoice details for 'Invoice FezC78' are shown, including the date '03 March 2025', the amount '£1,800.00', and the payment due date '02 April 2026'. The invoice is issued by 'MediaNode' to 'Dan Ashcroft'. The company address is '50 Textile Street, 133 Fountainbridge, Belfast, EH3 9QG'. The website 'www.medianode.com' and VAT number '432792248' are also listed. On the right, a summary box shows the 'Total value' as '£1,800.00', the 'Created' date as '03 Mar 26', the 'Due' date as '02 Apr 26', and the 'Contact' as 'Dan Ashcroft'. Below this, an 'Online payments' section states: 'To enable online payments for this invoice first set it back to draft.'

Support for your clients

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

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

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

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

[Knowledge Base](#)

[Accountants' Knowledge Base](#)

Practice Support team

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

Email: practicesupport@freeagent.com

Telephone: 0800 025 3800

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