FreeAgent

Mobile

How to use the FreeAgent mobile app

2025

freeagent.com

Welcome!

In this manual, you will learn:

- how your clients can download the FreeAgent mobile app and log in
- how to set up push notifications and bank feeds
- how to use the app to add contacts, invoices, expenses, bank transactions and more
- how your clients can use Smart Capture to extract information from their receipts and bills

Contents

Introduction

In this module, you'll learn how your clients can use FreeAgent's award-winning mobile app to stay on top of their business admin from anywhere. The app enables Partners to work more efficiently with their clients by providing an easy way to share files, enable bank feeds and capture receipts and bills on the go. We've even found that practices encouraging clients to use the app see higher client satisfaction and retention.

While our Partner Dashboard isn't available on the mobile app, this module will give you the knowledge to discuss the benefits of using the app and demonstrate the core functionality to your clients.

Installing the FreeAgent mobile app

Downloading

The FreeAgent mobile app can be downloaded from the iOS App Store or Google Play Store. The minimum operating system requirement is iOS 16 for iOS devices and Pie (Android 9.0) for Android devices.

Logging in

To log in, clients will need to use the same username and password that they use to access the desktop version of FreeAgent. The same information that's visible in the desktop version of FreeAgent is also available in the mobile app.

Please note that the client's permission level will determine what functionality they can see, and permission levels for users will be the same in the desktop and mobile applications.

Setting up the FreeAgent mobile app

Push notifications

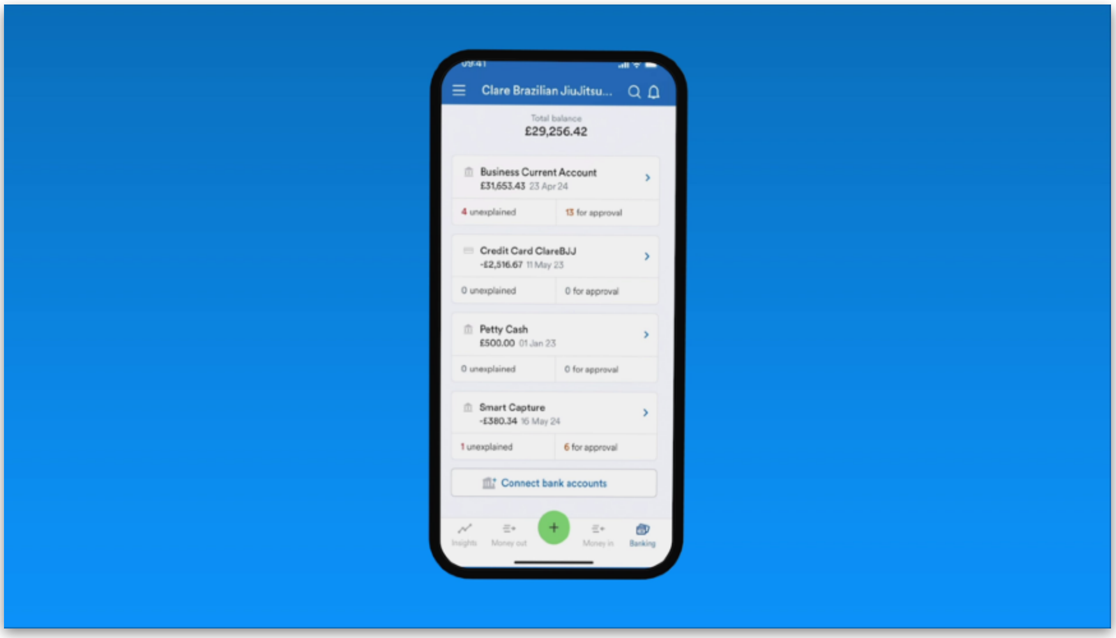
We advise that you encourage your clients to enable push notifications as this will help in the management of the account, especially around re-consenting bank feeds, where a push notification will be displayed on the phone 10 days prior to the bank feed's 90-day consent lapse. Please note that clients will need to have a user access level of 7 or higher to receive push notifications.

Notifications can be turned on by tapping the three-line icon in the top-left corner of the app. This will open the Settings menu. Navigate to 'App settings', then select 'Notification settings' under 'Push notifications'.

There are further options for notification styles in the phone's settings.

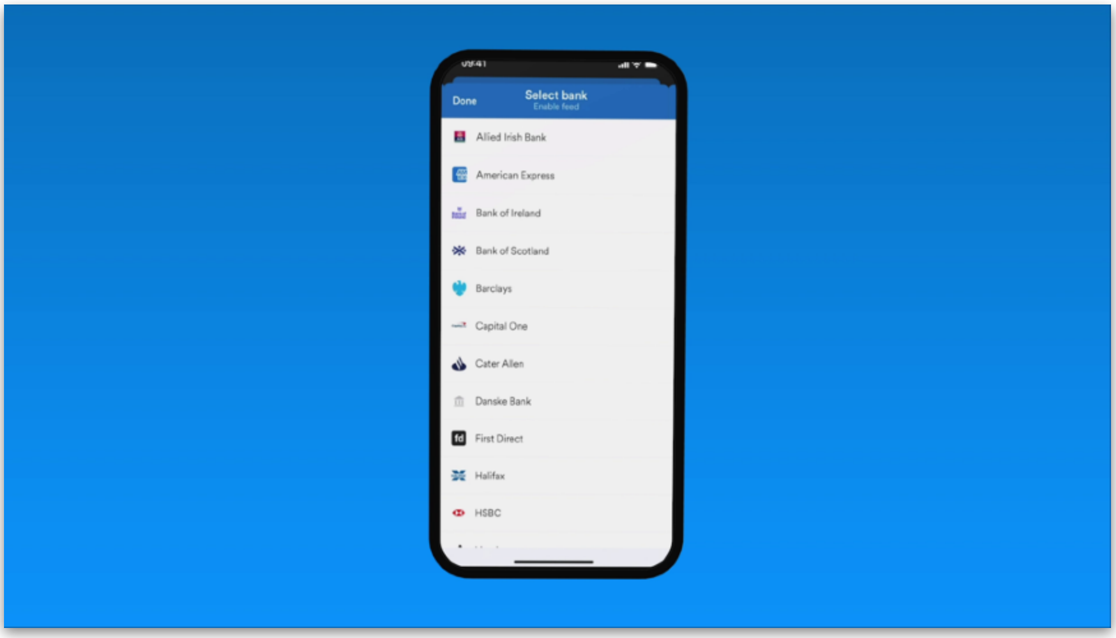
Bank feeds

If the FreeAgent account is a new one, your client will need to set up their bank feed in the Banking section of the app. At the bottom of the screen, there is the option to 'Connect bank accounts'.



Bank feeds can also be set up by tapping on 'Banking' at the bottom-right of the screen and then on the relevant bank account. Clients can then select the three-dot icon in the top-right on the blue header and select 'Enable bank feed'.

This will bring up an alphabetical list of all the bank accounts that FreeAgent currently supports with Open Banking bank feeds.



Your client will need to select their bank from the list, then select the appropriate service if necessary, before tapping ‘Connect bank account’.

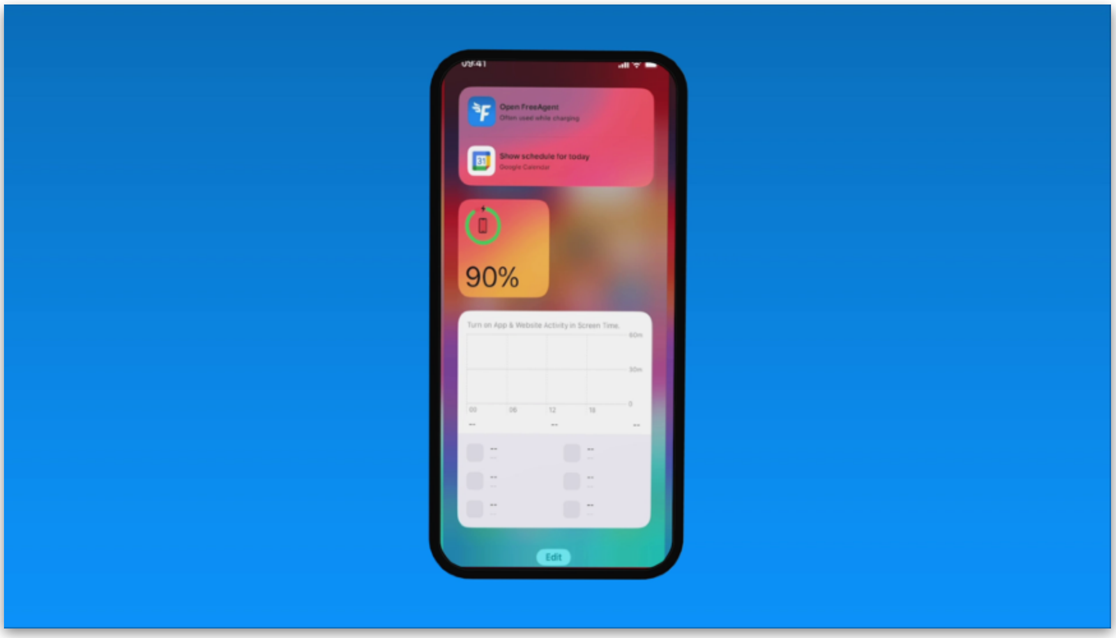
If your client has their banking app installed on the same phone, they will be able to use the security features built into their phone - like finger/thumbprint recognition or face ID - to log in to their banking app and finish setting up the feed.

If they don’t have their banking app installed, they will be taken through to the bank's website, where they will need to use their banking credentials to log in and set up the bank feed.

If your client has been using the desktop version of FreeAgent before using the app, their bank feed should have already been set up.

The mobile app widget

Widgets are available in iOS 15 and above and in Android 7.0 and above. The widget can be set up on an iOS device by swiping the home screen to the right. This will open the widget screen where there is an option to ‘Edit’ at the bottom.

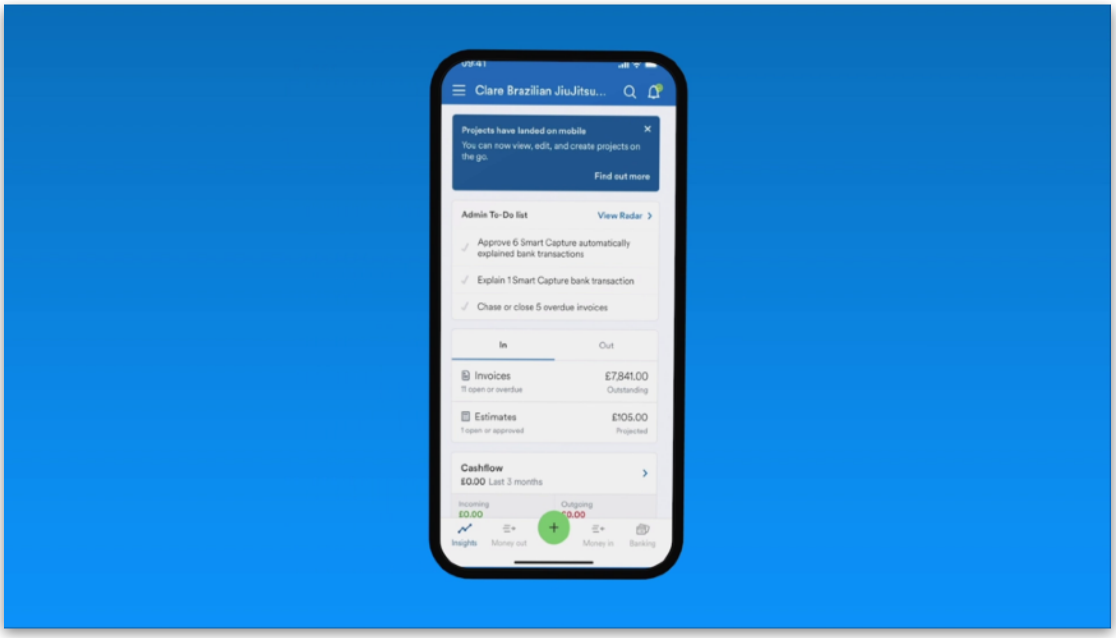


The FreeAgent widget can be added by tapping the ‘+’ icon in the top-left corner and then selecting ‘FreeAgent’. The widget shows a summary of the Admin To-Do list, and there are two views available which can be seen by swiping left and right between the two.

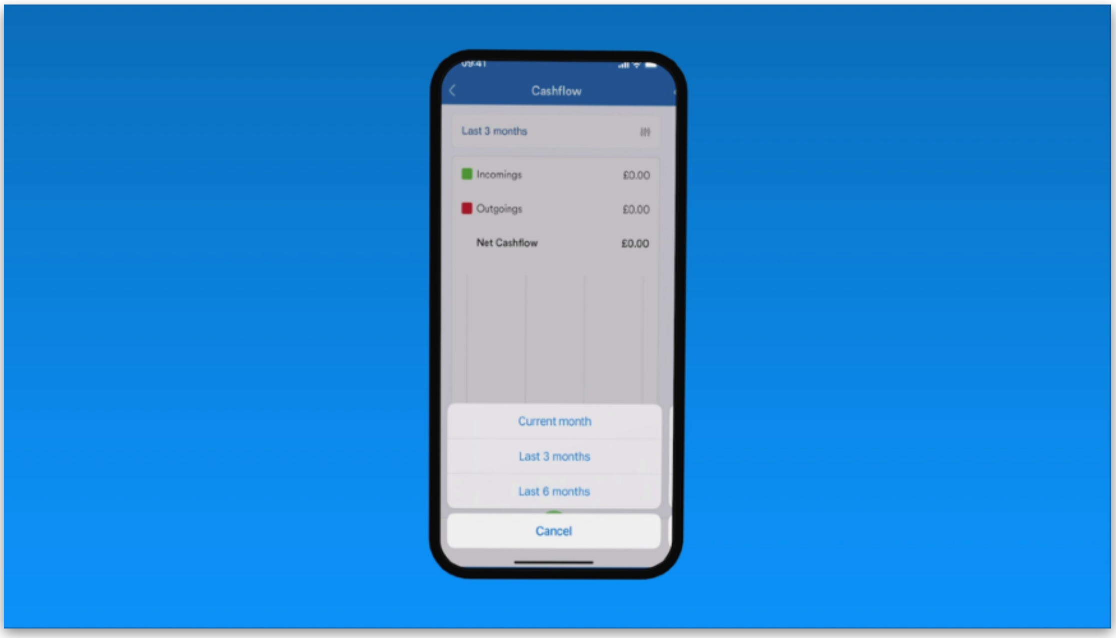
Using the FreeAgent mobile app

Insights

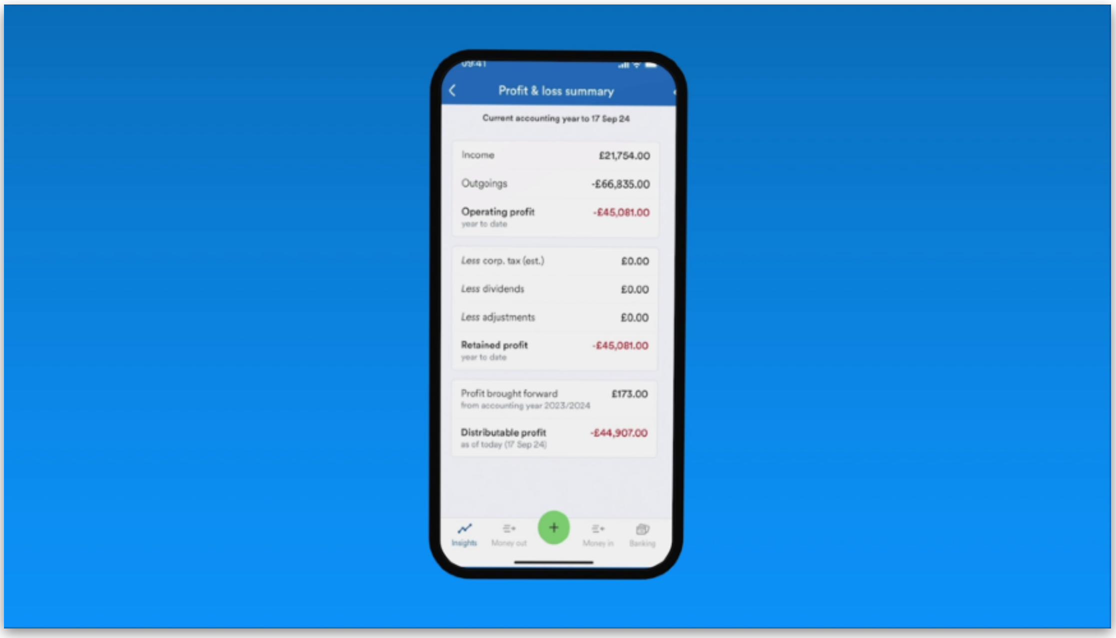
The default view after logging in to the app is the Insights screen.



Tapping on ‘Cashflow’ will display the business’s cashflow for the current month, last three months or last six months.

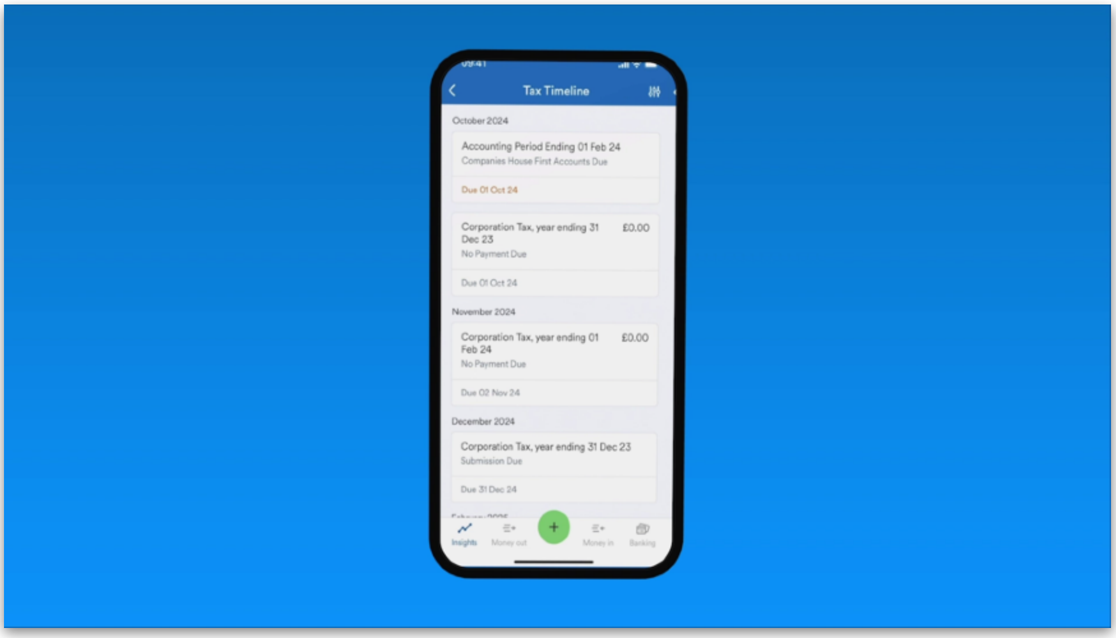


Tapping ‘Operating profit’ will show a profit and loss summary for the current accounting year.

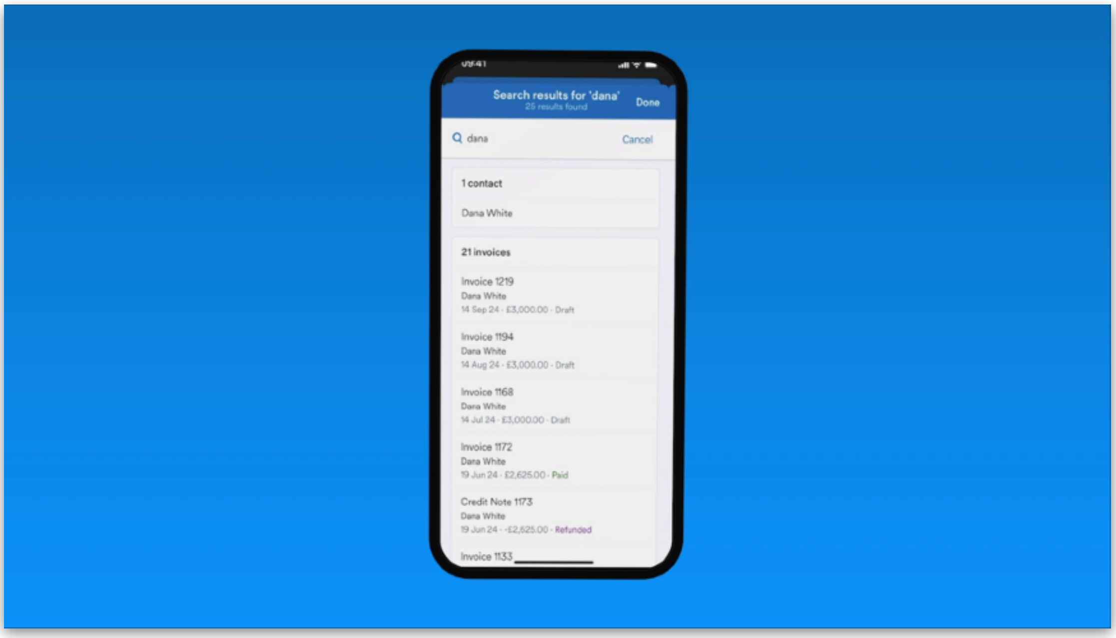


Tapping ‘Tax Timeline’ will show a list of liabilities in chronological date order. This is the same timeline that is found on the Overview page in the desktop version of FreeAgent.

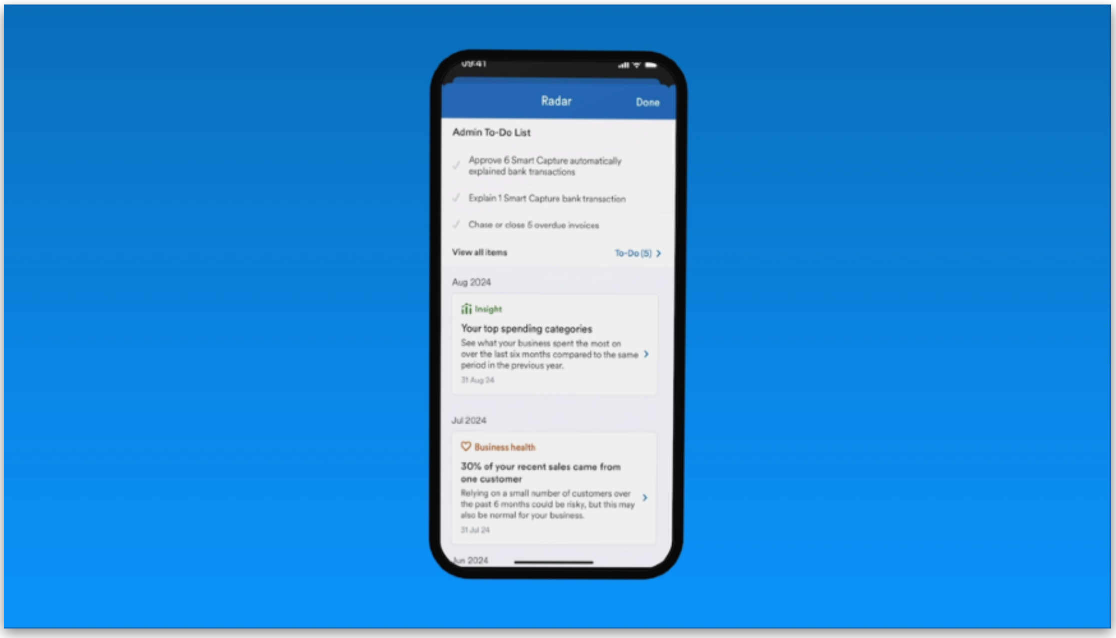
If your client has a permission level of 7 or above, they will be able to view the Tax Timeline by ‘All’, ‘Upcoming’ and ‘Paid/Filed’ from the control panel widget on the top right of the screen.



Tapping on the magnifying glass (which is located at the top-right of the screen on iOS or in the middle of the options at the bottom of the screen on Android) will open the search functionality. Entering the amount, contact name or keyword will search for a bank transaction, bill, invoice, estimate, expense or contact.



Clicking on the bell icon opens the Radar area where clients can see a personalised Admin-To-Do List. There will be a list of activities to complete, such as explaining bank transactions and chasing overdue invoices. Here, they'll also find insights about their account and useful information about FreeAgent updates as they are released.



Money out

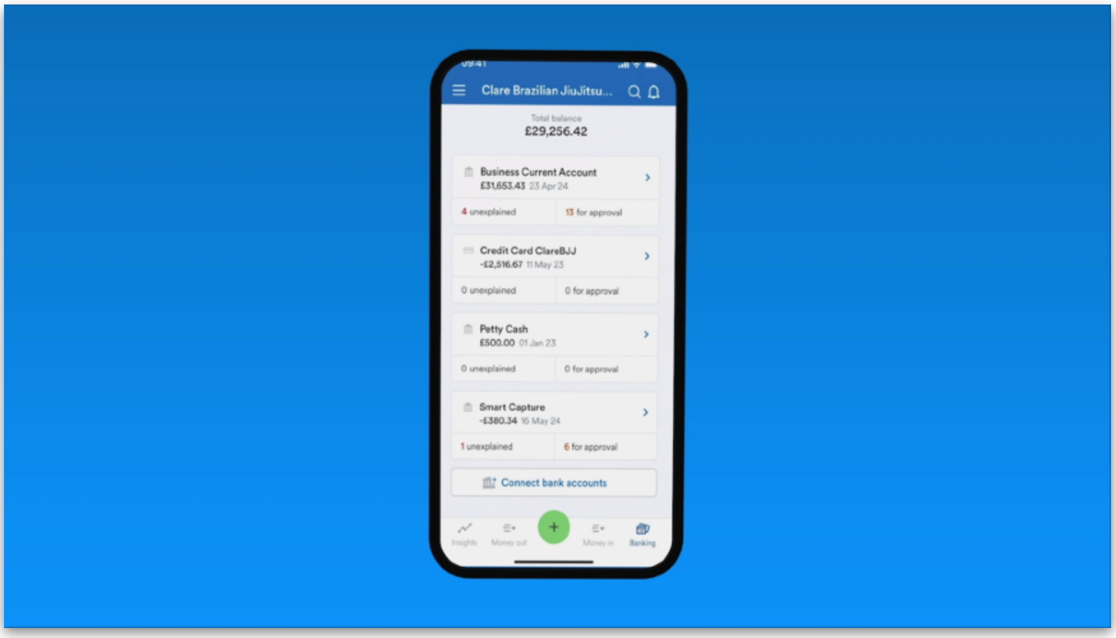
Tapping ‘Money out’ at the bottom of the screen brings up an overview of bills and out-of-pocket expenses. Tapping either of these will offer further options, which are covered in more detail below.

Money in

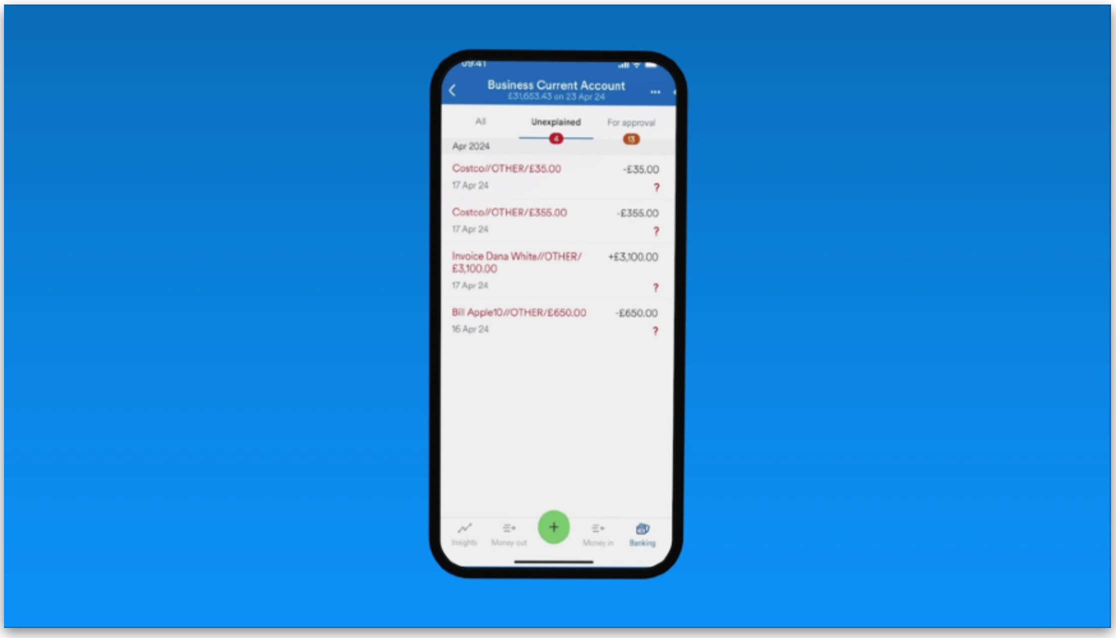
Tapping ‘Money in’ at the bottom of the screen brings up an overview of invoices, estimates, and timeslips. Tapping any of these will offer further options, which are covered in more detail below.

Banking

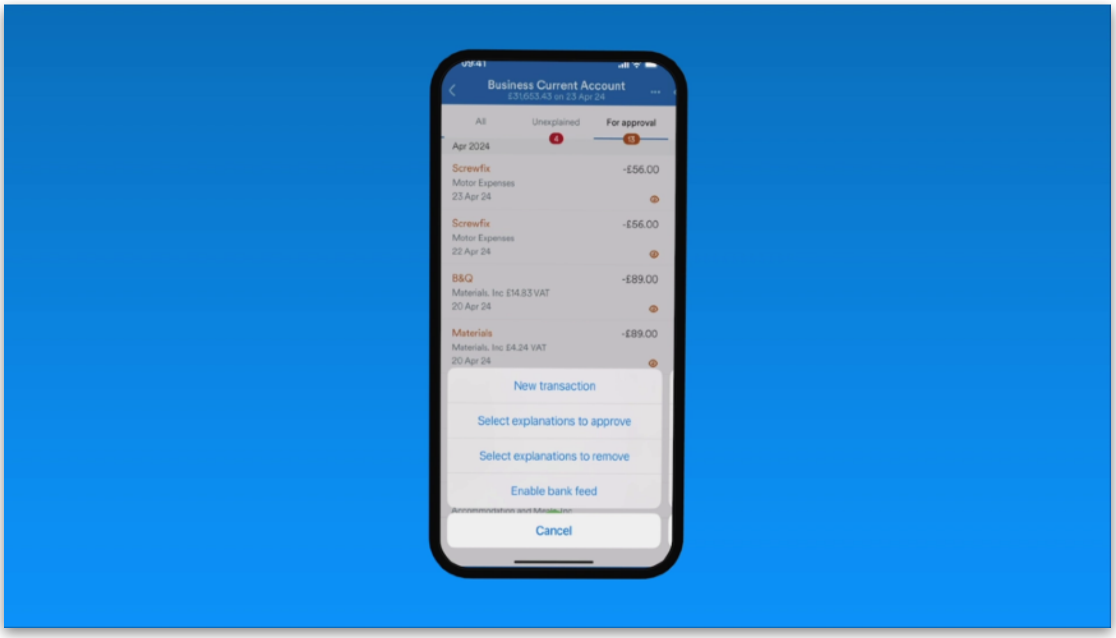
Tapping ‘Banking’ at the bottom of the screen brings up the banking overview page, which contains a list of all the accounts set up within FreeAgent. If a bank feed is set up for an account, it will show how many unexplained transactions there are, as well as how many are waiting for approval.



Tapping on an account will allow your client to navigate through all the transactions. Along the top, there are options to change the view so that you can see either all transactions, unexplained transactions or ‘for approval’ transactions.



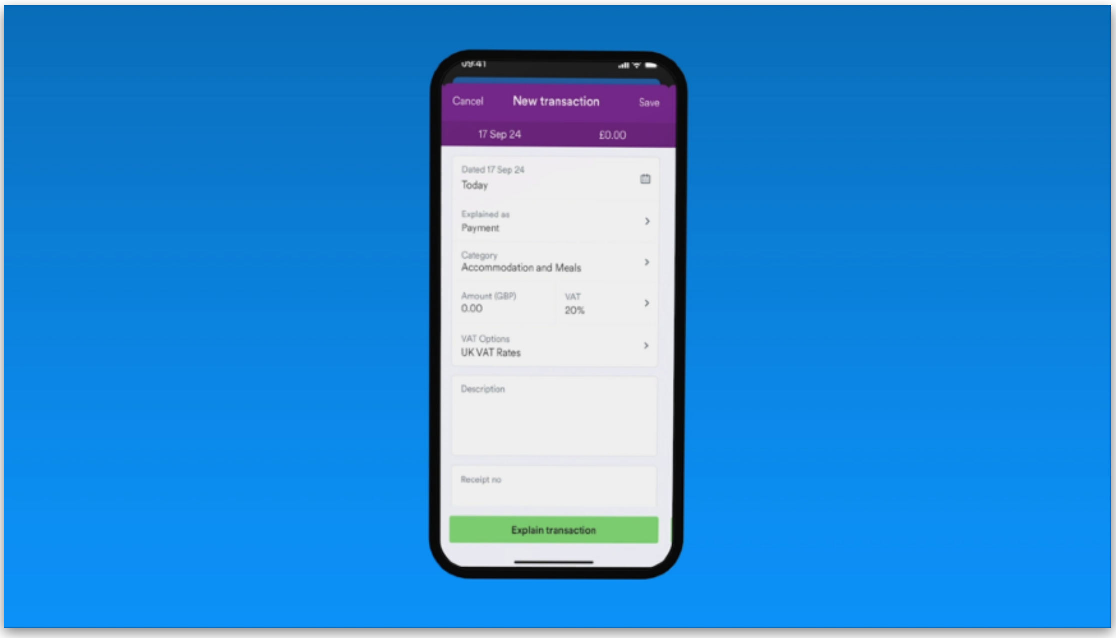
Tapping on the three dots brings up a menu where clients can set up a bank feed, as described above, or add a new manual bank transaction, bulk approve explanations and bulk remove explanations, as described below.



Adding a manual transaction

(In the Android version of the app, instead of tapping on the three dots in the top right, tap the green button with a white cross. This will then enable you to add a manual transaction just like you would in iOS.)

Manual transactions can be added by tapping ‘Add transaction’ and entering the date of the transaction and selecting the type of transaction using the ‘Explained as’ option.

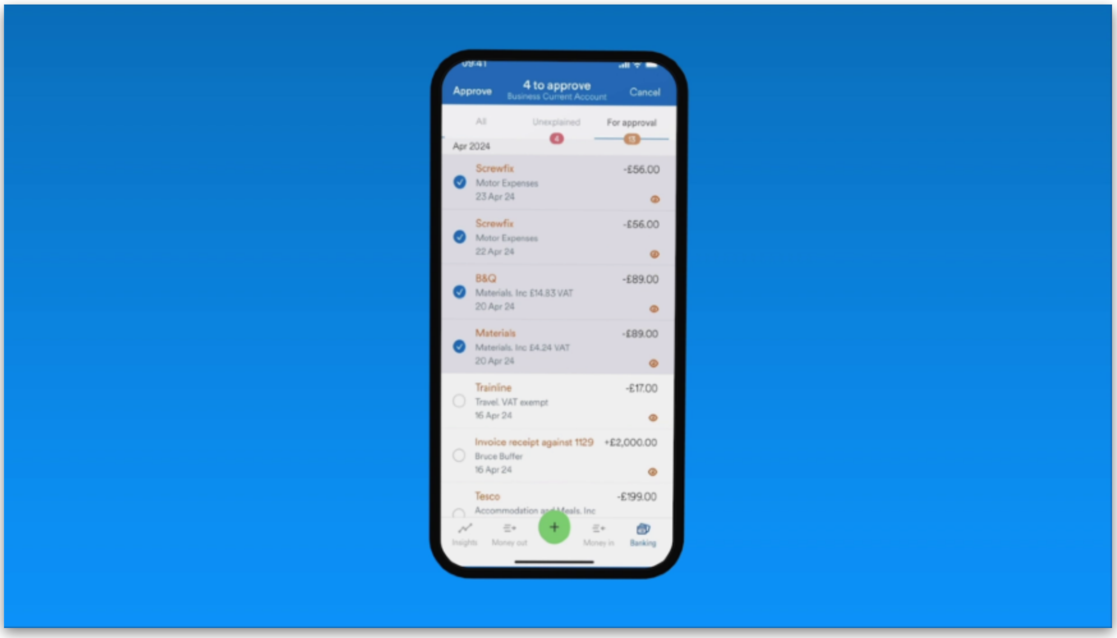


The fields will change depending on the type of transaction selected under ‘Explained as’. For instance, if ‘Payment’ is selected, a ‘Category’ field will appear so that the appropriate profit and loss account can be selected. If ‘Invoice receipt’ is selected, a list of the current overdue and open sales invoices will appear for clients to choose from.

Manually added transactions will show up as purple on the bank transaction screen.

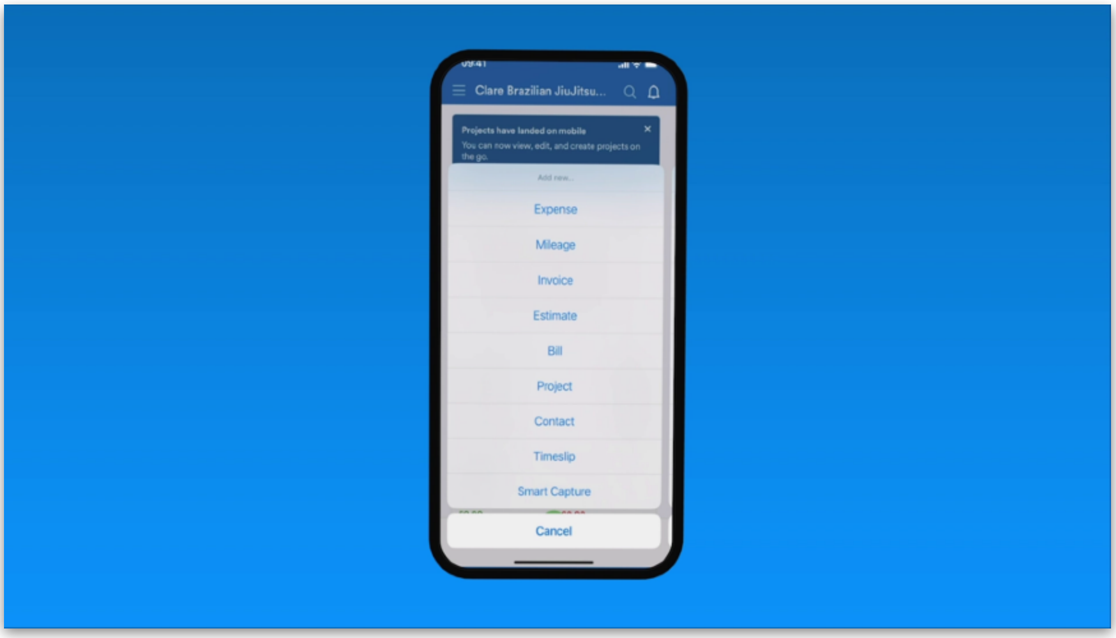
Bulk actions

The ‘Select explanations to approve’ option can be used to select multiple transactions to approve in bulk. For more information, see the Knowledge Base. Similarly, clients can select multiple transactions and add or remove explanations to them, or delete the transactions.



The ‘Add new...’ menu

Tapping on the green ‘+’ button at the bottom of the screen will open the ‘Add new...’ menu. Your client’s permission level will determine what functionality they are able to see.

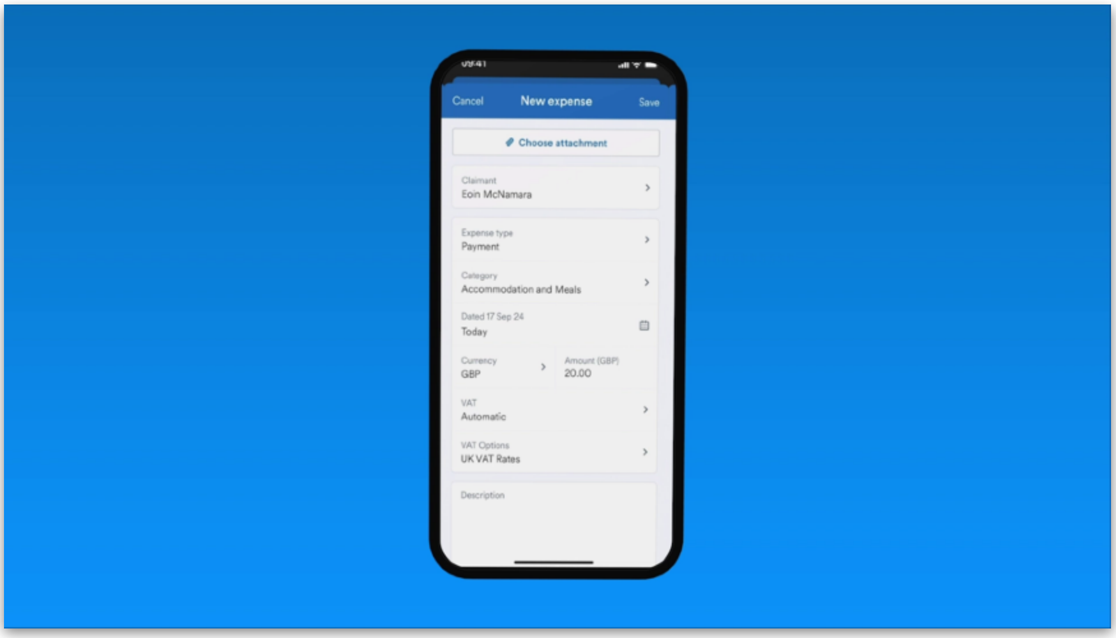


When adding items through the ‘Add new...’ menu, the mobile app uses the same options that are available on the desktop version of FreeAgent.

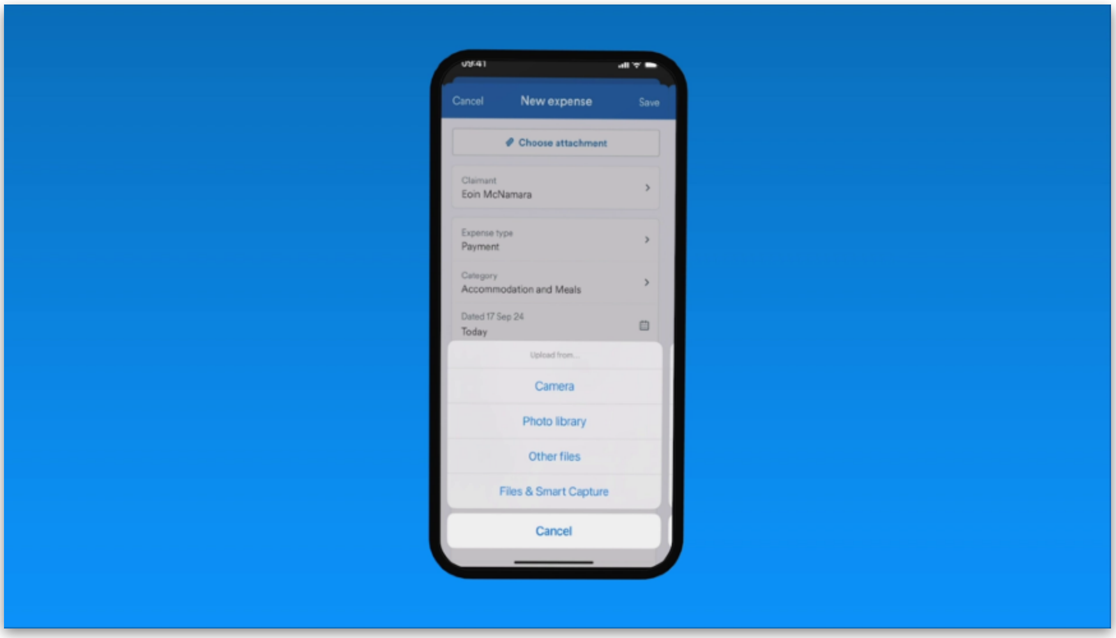
Expenses and mileage

Both expenses and mileage are for out-of-pocket expenditures in FreeAgent, i.e. things that have not gone through a bank account that's related to the business. To use these features in the FreeAgent mobile app, your client needs to have a minimum permission level of 2.

The 'Expense' or 'Mileage' option can be accessed from the 'Add new...' menu. When entering an expense on the mobile app, the first option at the top of the screen is to add an attachment.

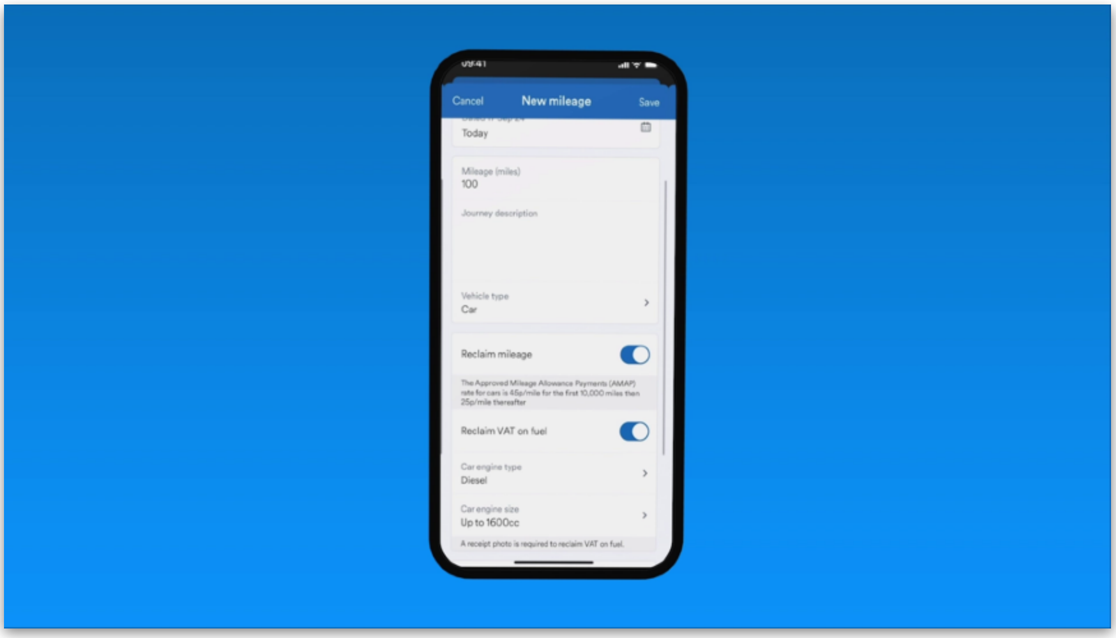


Tapping on this opens a sub-menu where clients can select either the camera, photo library, other files on their device or FreeAgent's Files & Smart Capture area.



If clients are not using an attachment created in the mobile app or using Smart Capture, then they will need to fill in all the required fields.

When filling in a mileage claim, the mobile app uses the same Government rates as the desktop version of FreeAgent, i.e. 45p for the first 10,000 miles and then 25p thereafter.



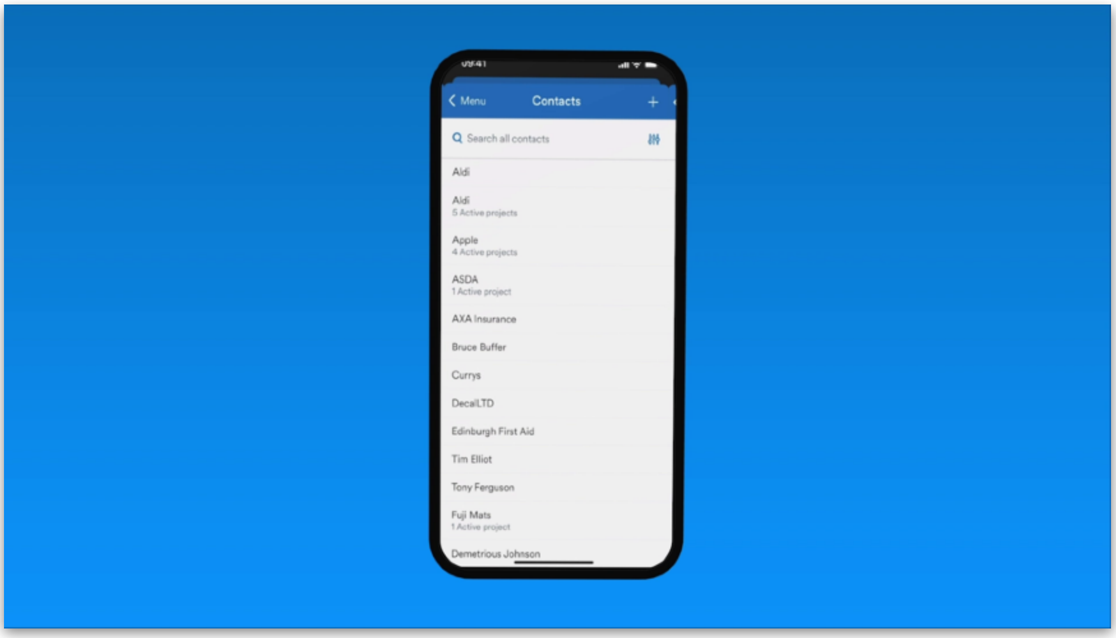
If your client does not use these rates, they will have to add the mileage claims as a normal out-of-pocket expense and allocate it to motor expenses.
If required, the expense or mileage claim can be linked to a project by clicking ‘Link to project’ and selecting the relevant project. If it recurs, the frequency and whether it’s indefinite or has a fixed end date can be selected.

Contacts

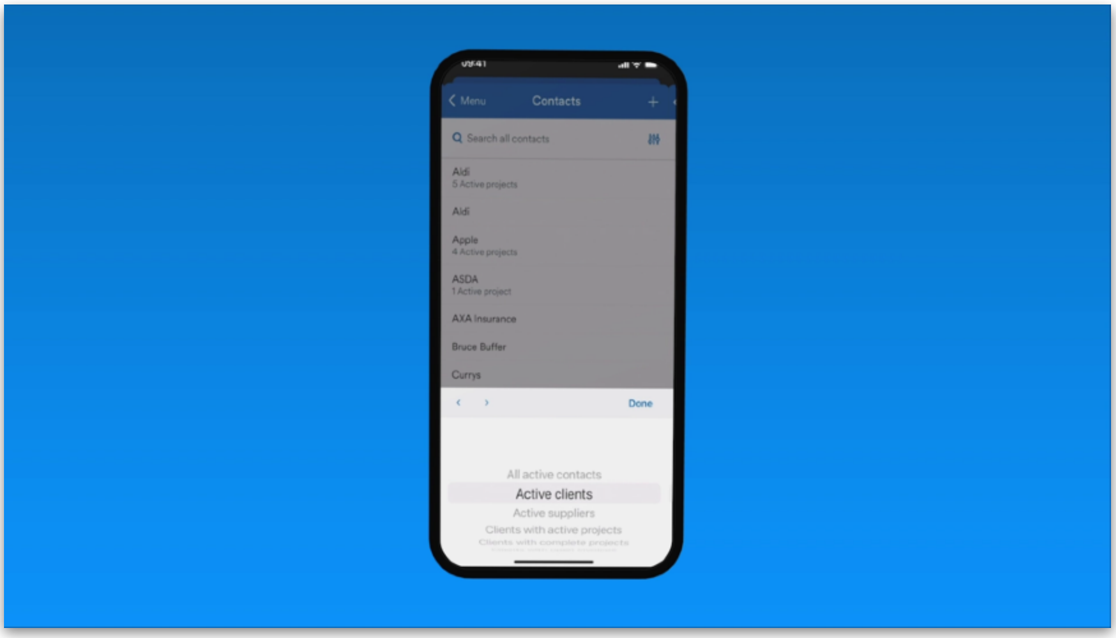
Contacts are a key part of the invoice and bill functionality in FreeAgent. To add a contact, clients can tap the green ‘+’ at the bottom of the screen to access the ‘Add new…’ menu and select ‘Contact’.

This will take them to the ‘Add contact’ screen, where they can enter all the details relating to a new contact.
In iOS, they can also tap on the ‘+’ symbol at the top-right of the screen to add a new contact. In Android, they can tap the round green button with the ‘+’ symbol at the bottom-right corner of the screen.

Once they have created their contact and tapped 'Save', they'll be taken to a list of all their current contacts.



There is a search function at the top of the screen, and they can restrict the search to various types of contact by tapping on the vertical 'sliders' icon.

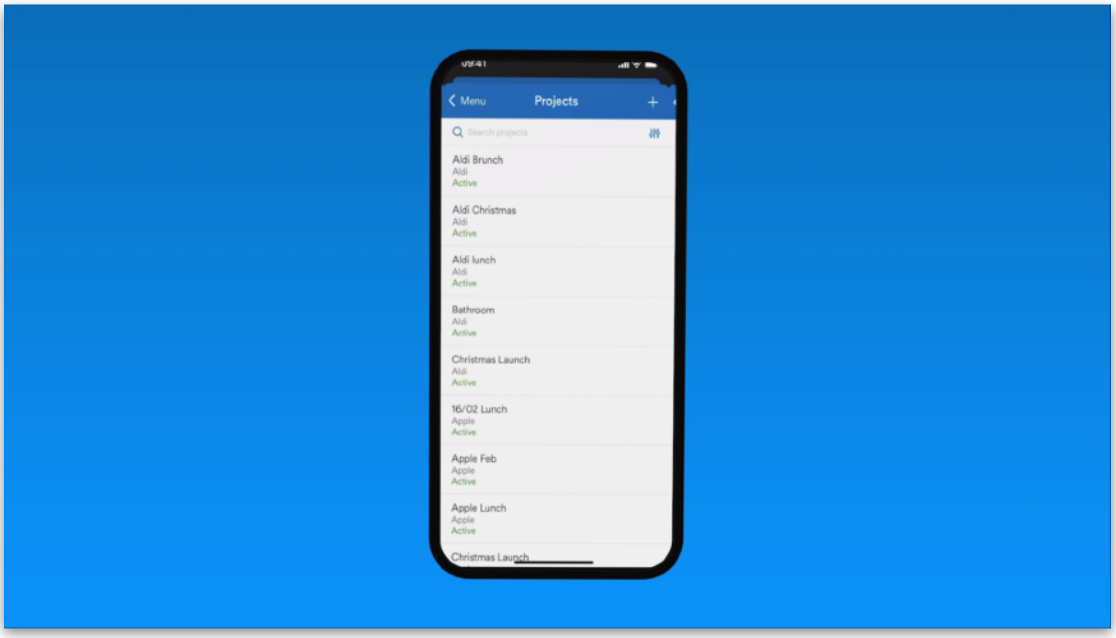


They can tap on a contact to see their details and activity.
For more information on adding contacts, see the <u>Knowledge Base</u>.

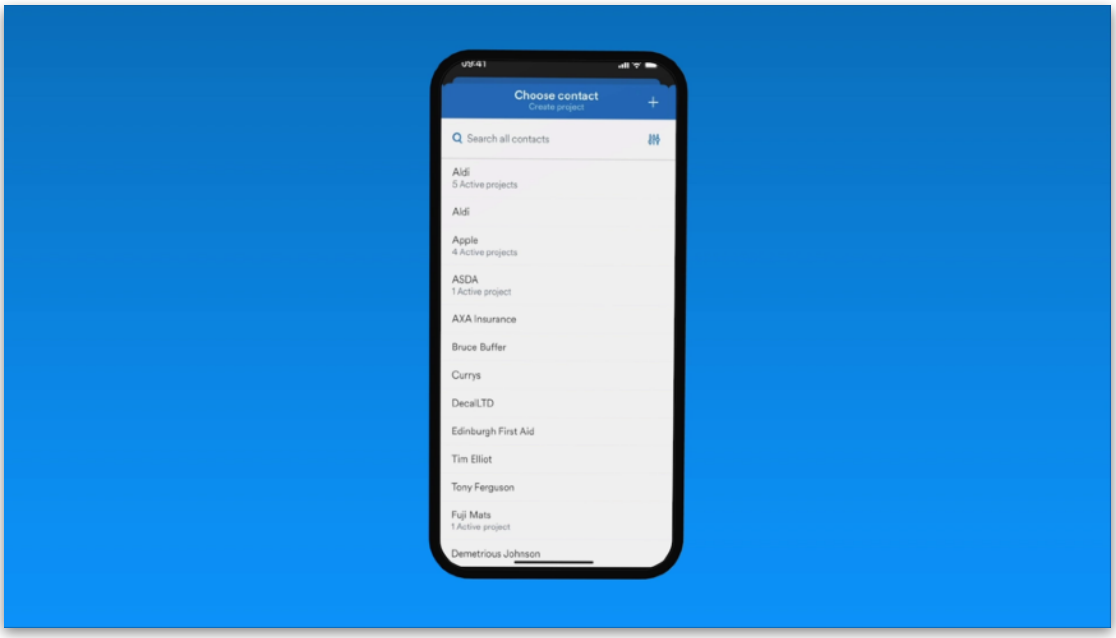
Projects

Your client will need a permission level of 3 or above to create a project on the mobile app. When creating a project, your client has all the same options as the desktop version of FreeAgent and follows the same workflow.

To view projects, your client can click the three-line menu at the top left of the screen and select ‘Projects’. They’ll be taken to a list of projects. Using the search bar, they can search for a specific project and sort by project status using the control widget.



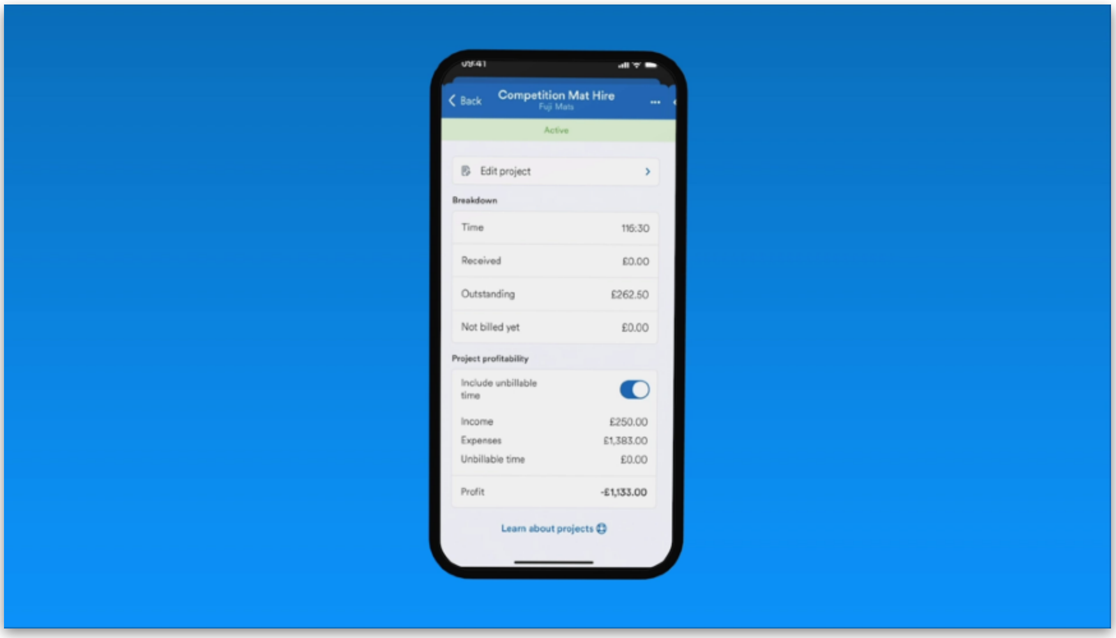
Tapping the ‘+’ icon at the top right of the screen will add a new project. Clients can select the contact to whom they want to assign the project, or they can add a new contact by tapping the ‘+’ icon at the top-right of the screen. This follows the same workflow as creating a new contact, as mentioned in the contacts section.



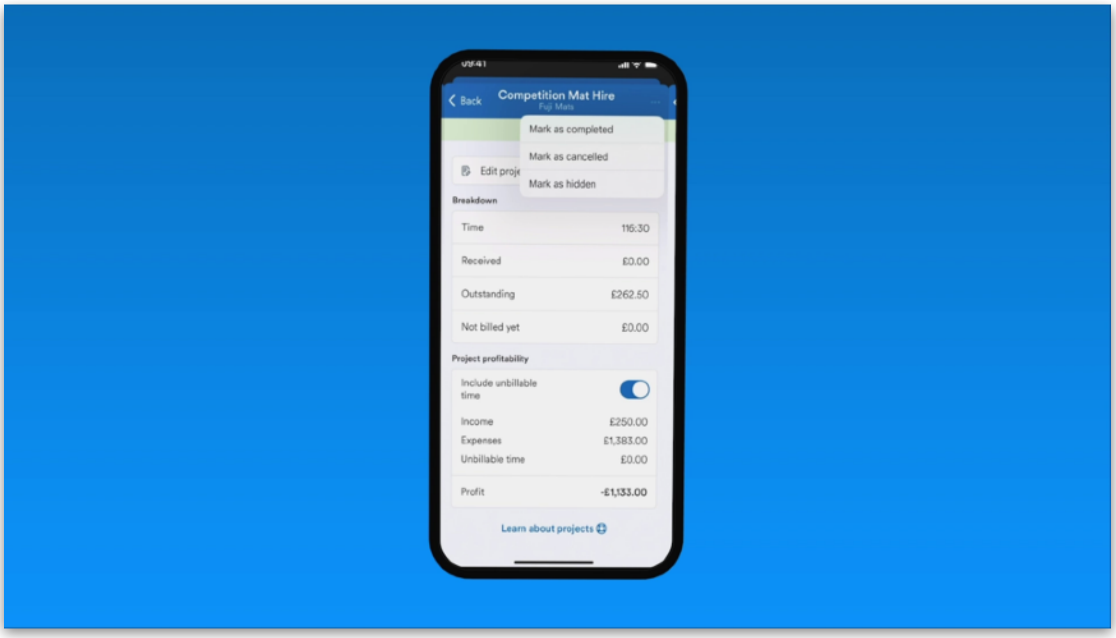
Once they have assigned a contact to the project, details of the project—such as the Project Name and Contract/PO number—can be added. By selecting the toggle, the project can follow project-level invoice sequencing.

If the project has time and money constraints, your clients can assign a budgeted number of hours with a billing rate per hour. If this isn't required, this section can be left blank to say the project has no budgeted hours. Once this has been completed, clients can select 'Create New Project'.

If your client wants to view a project, they can select it from the project page. Here, they can see a breakdown of the project, including Time spent, Income received, and Money out transactions that have been assigned to it.



If they click the three-dot icon at the top right of the screen, they can change the status of the project from ‘Open’ to ‘Completed’, ‘Cancelled’ or ‘Hidden’.



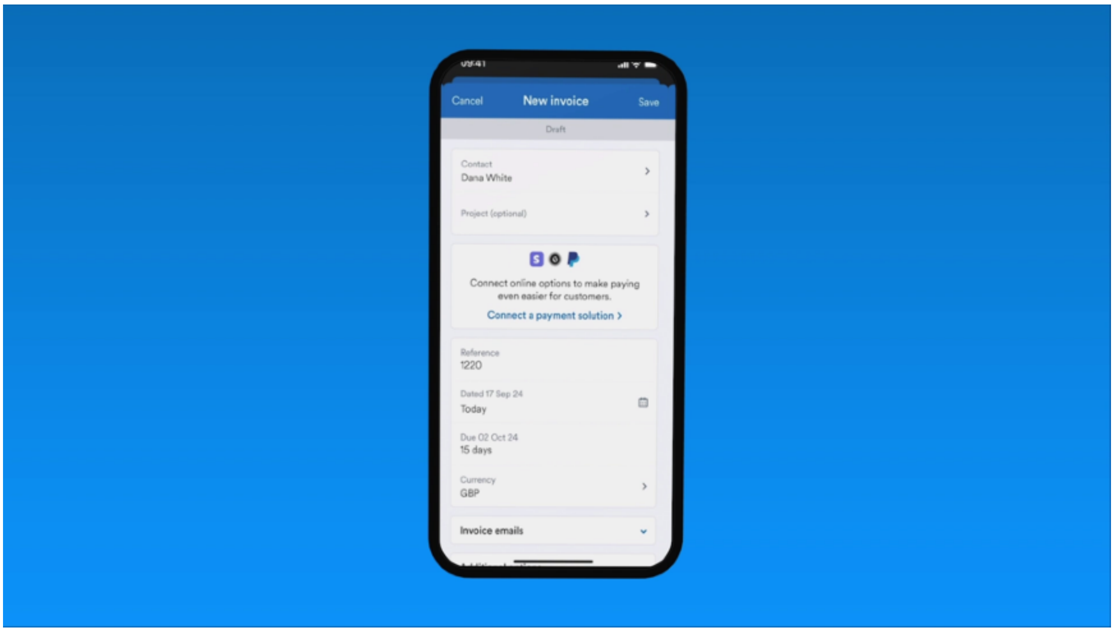
The banner at the top of the bar will change depending on the status of the project; green for ‘Active’ or ‘Complete’, red for ‘Cancelled’ and grey for ‘Hidden’.

Invoices

The ‘Invoice’ area can be found by tapping the green ‘+’ at the bottom of the screen.

Note that to create an invoice on the mobile app, your client needs to have a minimum permission level of 4. When creating an invoice, you have all the same options as the desktop version of FreeAgent, and it follows the same workflow.

First, your client needs to use the ‘Contact’ field to select which customer they would like to create the invoice for.



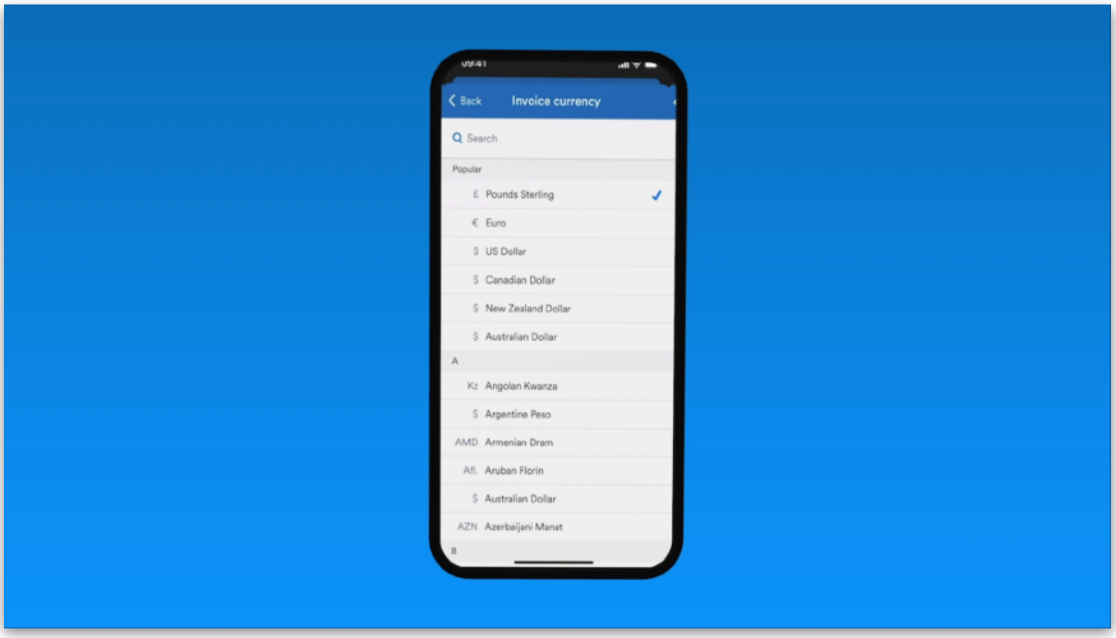
If the contact has a project assigned to them, they can select that project, or alternatively, they can hit the ‘+’ icon at the top right of the screen to create a new project for that contact.

FreeAgent will suggest the last contact that an invoice was created for, but your client can select a different contact by selecting the 'Contact' field and choosing the relevant contact.

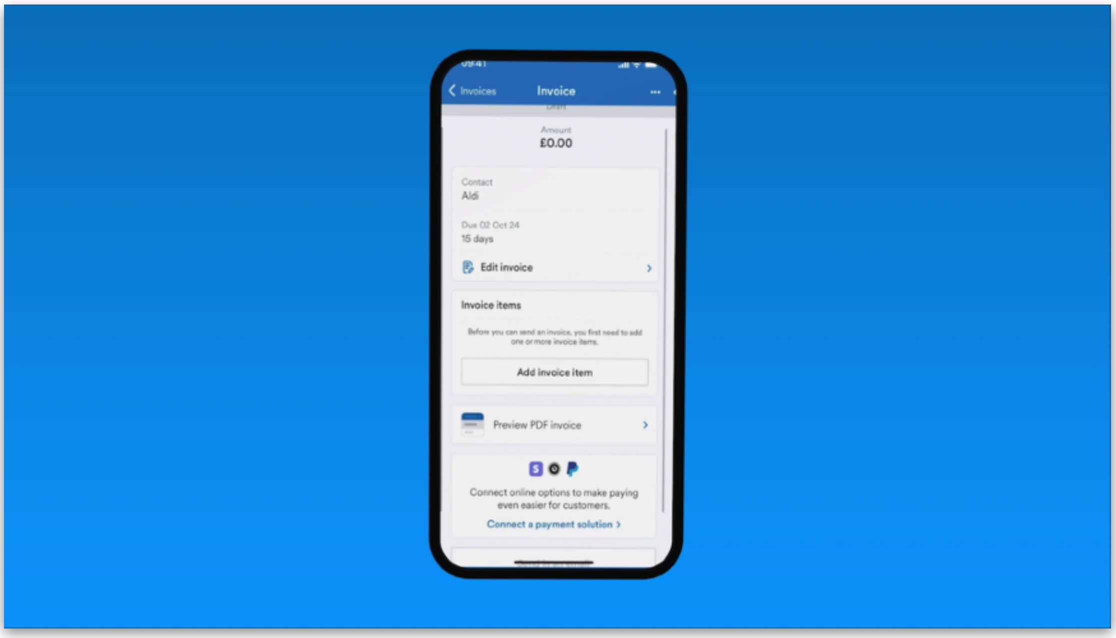
FreeAgent automatically gives the invoice a reference number, but your client can override the ‘Reference’ field if required. The default invoice sequencing in FreeAgent is global. For more information on how invoice numbering works in FreeAgent, see the Knowledge Base.

Your client can enter the invoice date and payment terms and select the currency for the invoice. If they’ve set specific payment terms for the contact, these will be applied to the invoice.

If the contact is not in the UK, clients can use an international currency. We use xe.com for exchange rates, and FreeAgent will automatically record any unrealised or realised gains or losses from currency conversion, starting when the invoice is posted and continuing until it is reconciled in the bank account.

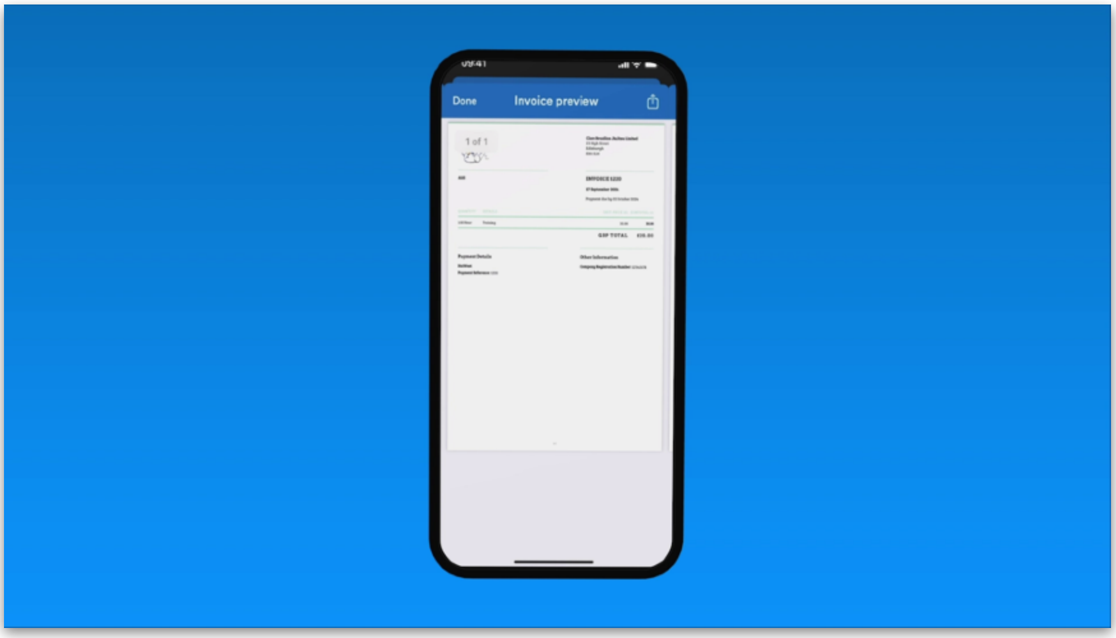


Once the relevant details have been entered, tapping ‘Create invoice & add line items’ or ‘Save’ in the top-right corner of the screen will complete the process.



Next, clients will need to add line items to the invoice. This can be done by selecting ‘Add invoice item’. This provides the same options as the desktop version of FreeAgent.

Once your client has selected from the price list or created a new line item, the item can be added to the invoice. Selecting “Preview PDF Invoice” will show how the invoice will appear to the contact.

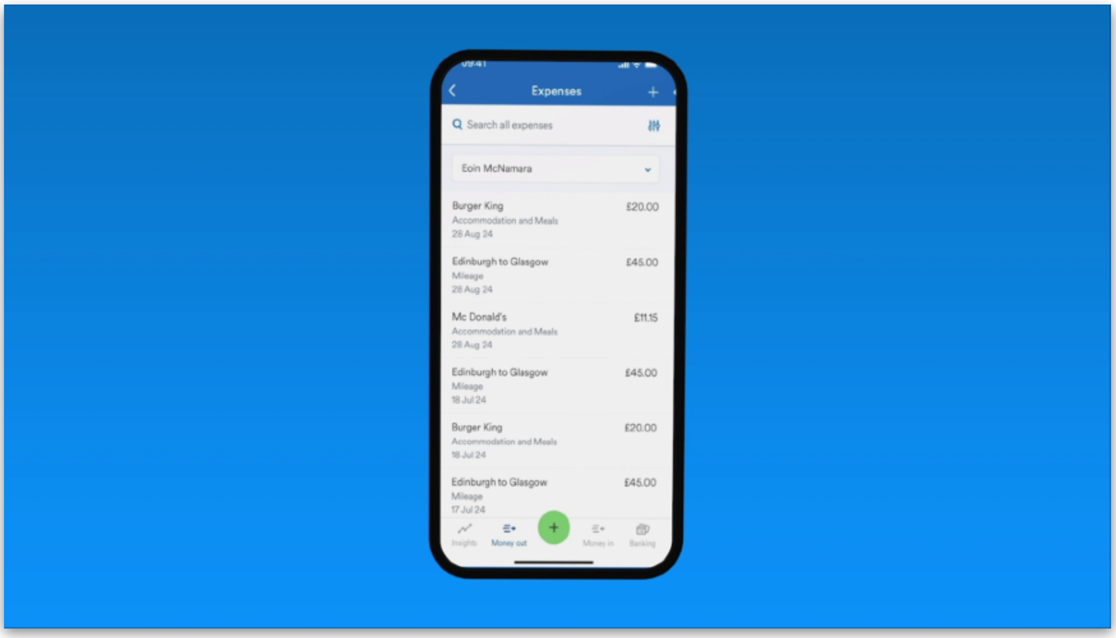


Once the invoice is complete, your client can tap the green ‘Send invoice’ button to send it to the customer or use the three-dot menu at the top right to mark the invoice as sent.

For more information on creating invoices in the FreeAgent mobile app, see the Knowledge Base.

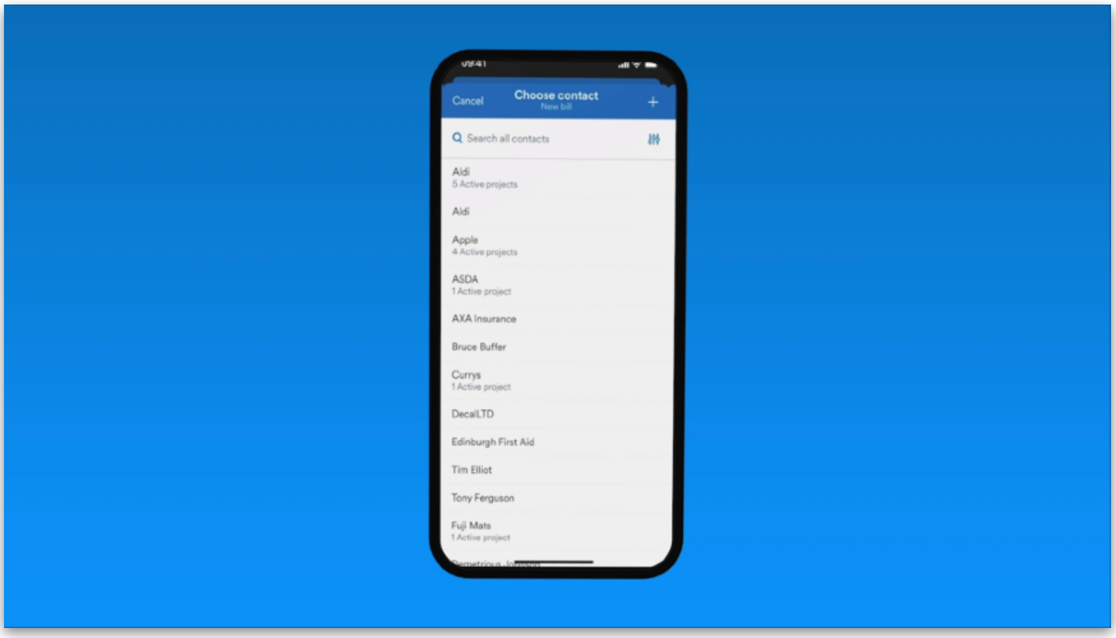
Bills

Tapping ‘Money Out’ or ‘Bills’ in the three-lined menu will open the Bills area of FreeAgent.



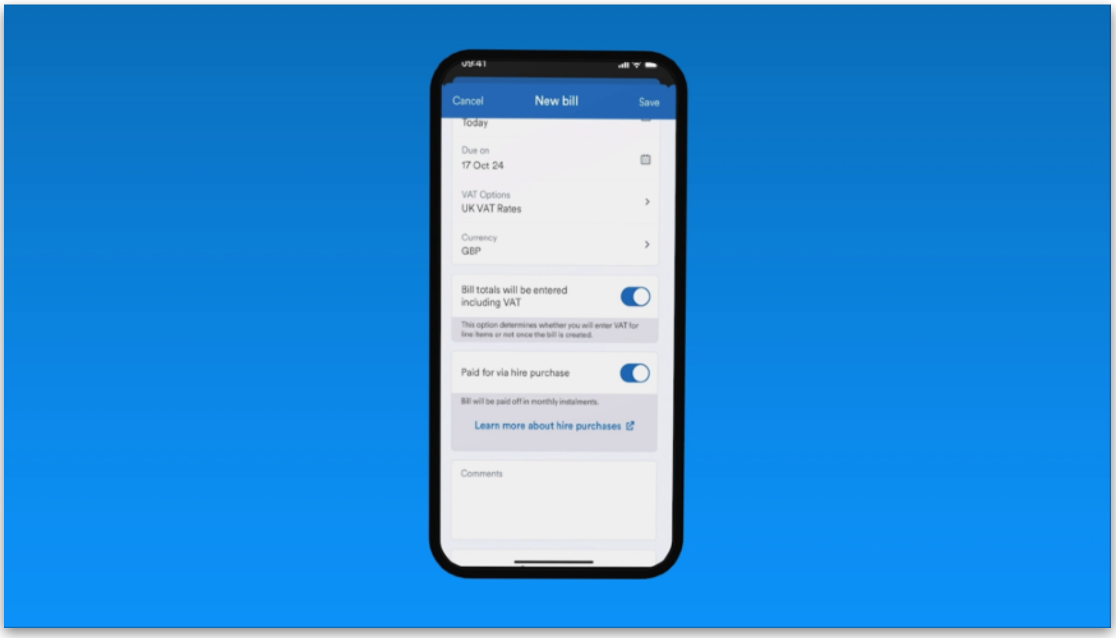
Bills can be added by tapping the white ‘+’ icon at the top-right of the screen or selecting ‘Bills’ from the ‘Add new…’ menu.

The first step is to select the contact that the bill relates to.

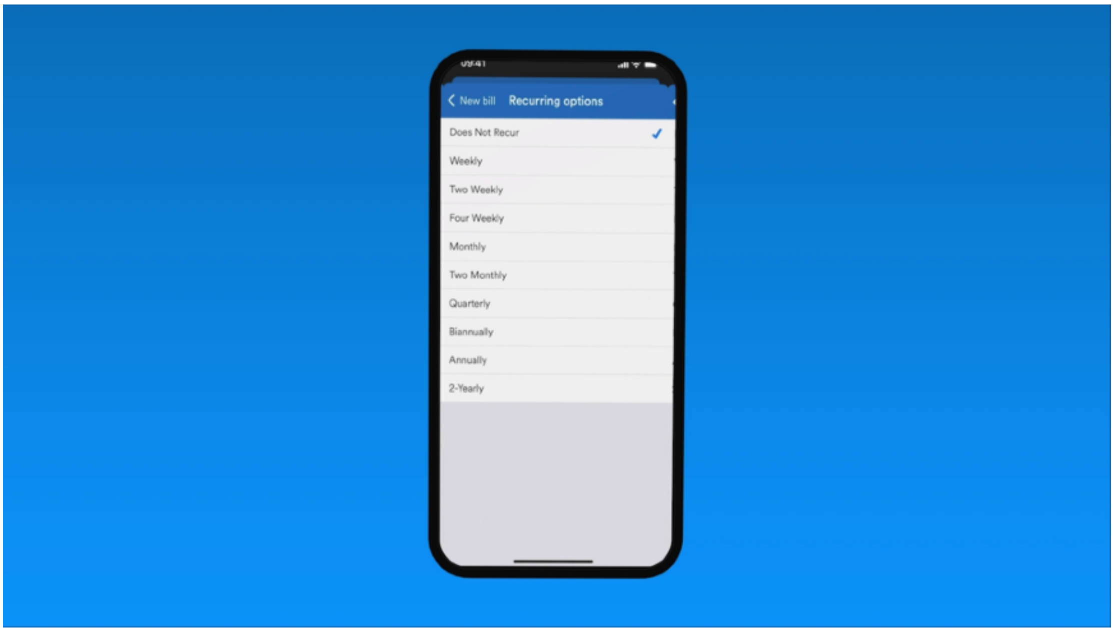


Clients will then need to enter some information, such as the reference number and dates, to set up the bill, most of which can be found on the bill itself. There’s the option to enter the figures, including VAT or excluding VAT.

The next field lets clients set the bill up as a hire purchase. This tells FreeAgent that numerous payments will be made against it. Clients must enter the date that the hire purchase agreement is due to end in the 'Due on' date box.
If their business is VAT-registered, the VAT will be accounted for on the date of the bill, regardless of whether they're preparing their accounts using accruals basis accounting or cash basis accounting.



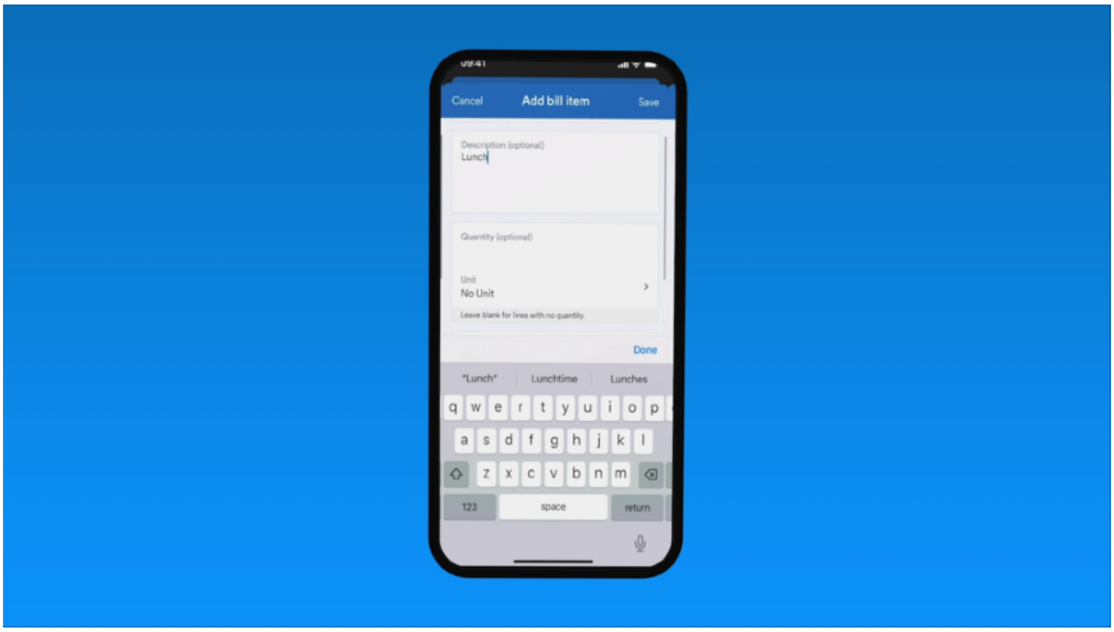
If this bill is linked to a project, clients can "Link to project" and select the relevant project. If it recurs, they can select the frequency as well as whether it's indefinite or has a fixed end date.



After the required information has been entered, clients can tap the green ‘Create bill and add line items’ button.

On the next screen, they’ll need to add the line items by tapping ‘Add bill item’.

They will then choose the accounting category that they want the line item to be explained against and enter the unit amount and cost of the line item - either including or excluding VAT, depending on the option they selected on the prior screen.



They can tap ‘Add item & add another’ to save and add another line item via the same process or tap ‘Add item to bill’ when they’ve finished entering all the line items.

To mark a bill as paid, clients need to explain the relevant transaction in the Banking area as a ‘Bill payment’ and then select the bill from the menu.
For more information on creating bills in the FreeAgent mobile app, see the Knowledge Base.

Smart Capture

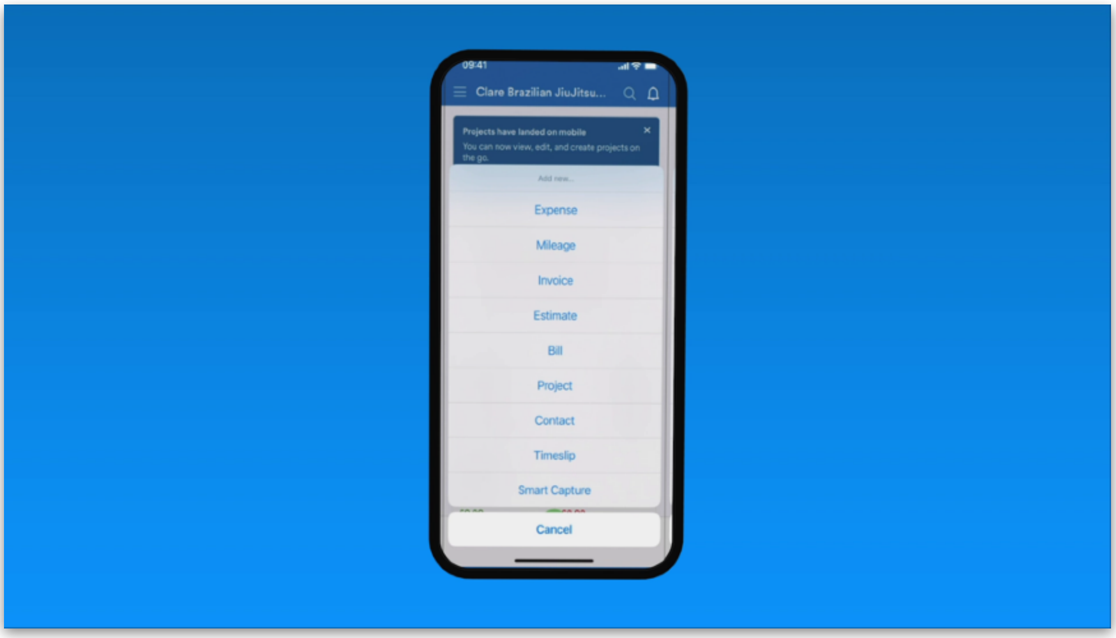
When clients capture and save a photo of a receipt or bill or upload a file to their FreeAgent account, FreeAgent's Smart Capture functionality will attempt to extract the date and amount automatically. If a 'Money Out' bank transaction marked 'For Approval' exists with a matching date and value, it will attach the file to it.

If no such transaction exists, FreeAgent will check every 24 hours for seven days. The bank transaction must be dated between the receipt date and two days later for the receipt to be matched to it. Your clients must have level 4 access or above to use Smart Capture.

Below are the steps clients will need to follow to use Smart Capture.

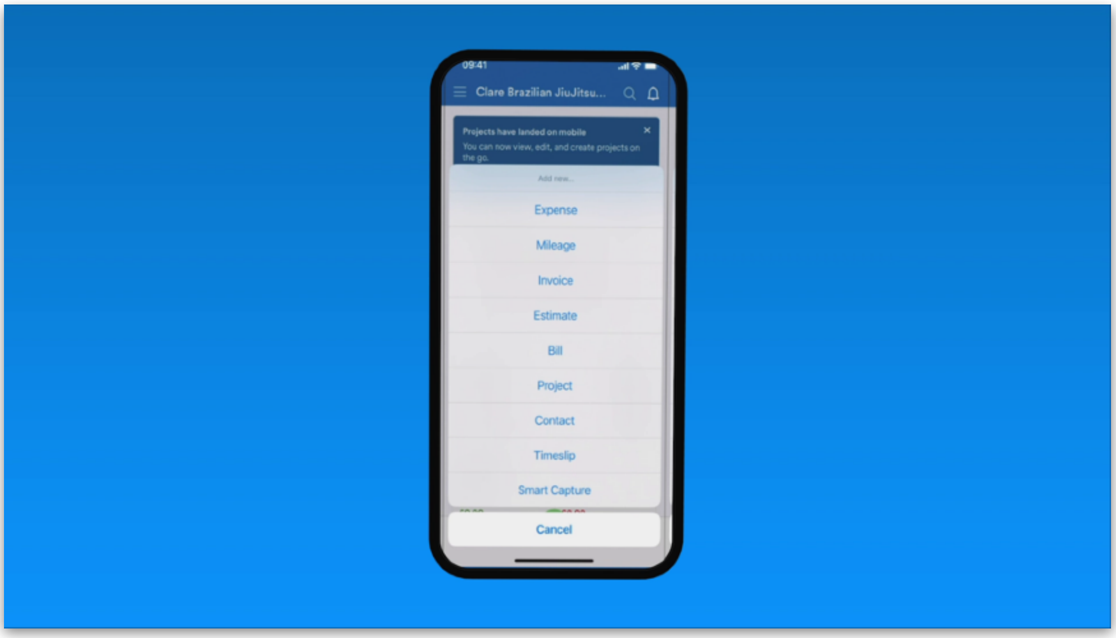
Adding Smart Capture files and images

The 'Smart Capture' option is in the 'Add new...' menu, which can be opened by tapping the green '+' icon at the bottom of the screen. When the FreeAgent mobile app is opened, the device's camera will open automatically.



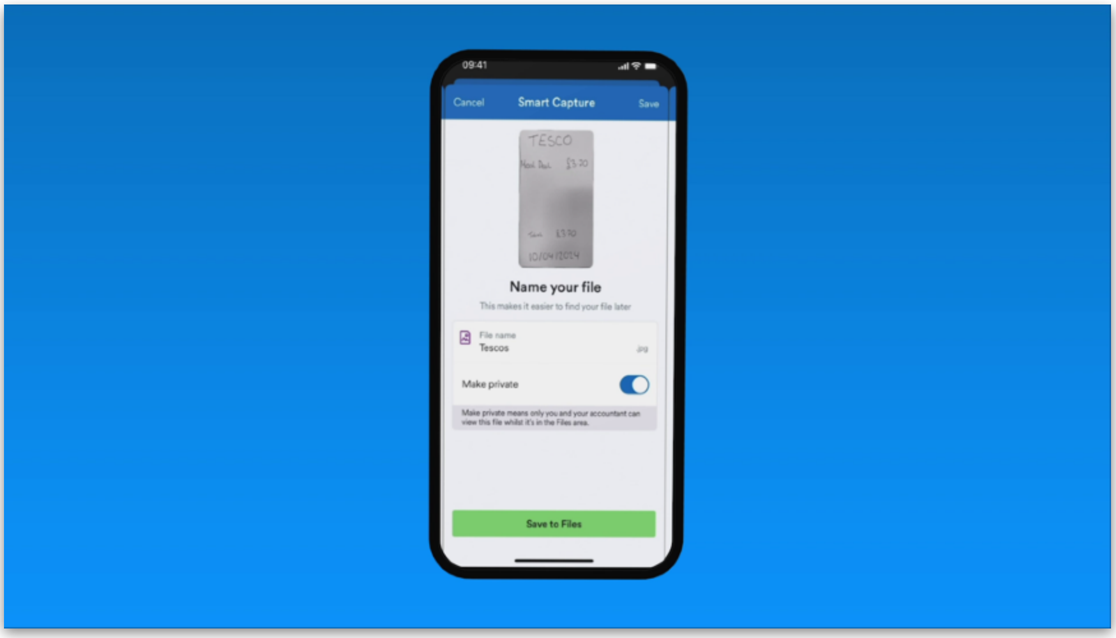
If your clients have not previously used FreeAgent to access the camera, they will be prompted to give FreeAgent permission to access their camera and photos.

Next, clients can take a photo of the receipt or bill they want to capture. On iOS devices, the text 'Looking for a receipt...' will show.



Clients can take photos of longer receipts or bills in sections by selecting the 'Long receipt' option in the bottom-right of the camera screen. FreeAgent will take two pictures and splice them together.

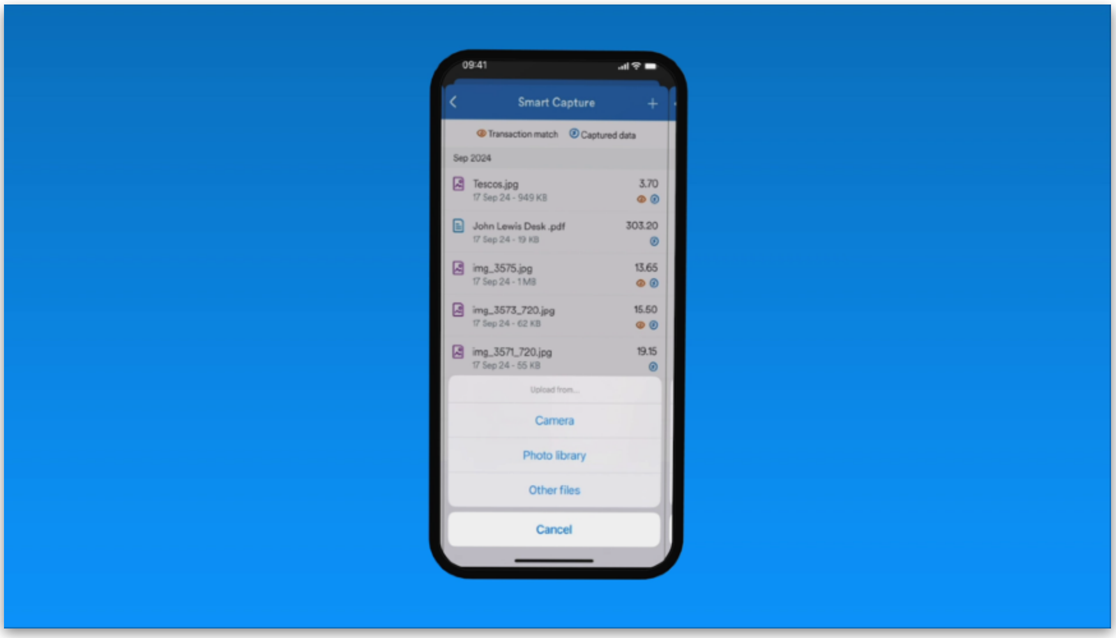
Once they have taken a picture, they will be asked to name the file. We recommend that they name it after the vendor and the date on the receipt. If they choose not to name the file, FreeAgent will automatically populate the name of the file on their device, which may make it hard to identify at a later date.



If your client has a permission level of 7 or above, they'll see the option to mark a file as private. This means that only you and your clients can view it while it's in the 'Files' area.

After tapping 'Save to Files' they'll be taken to the 'Files' area.

Clients can also upload files and pictures from the FreeAgent mobile app. This can be done by tapping the three-lined hamburger icon at the top-left of the screen and selecting 'Files & Smart Capture' and then 'Smart Capture'. Photos or files can be uploaded by tapping the '+' icon at the top-right of the screen.



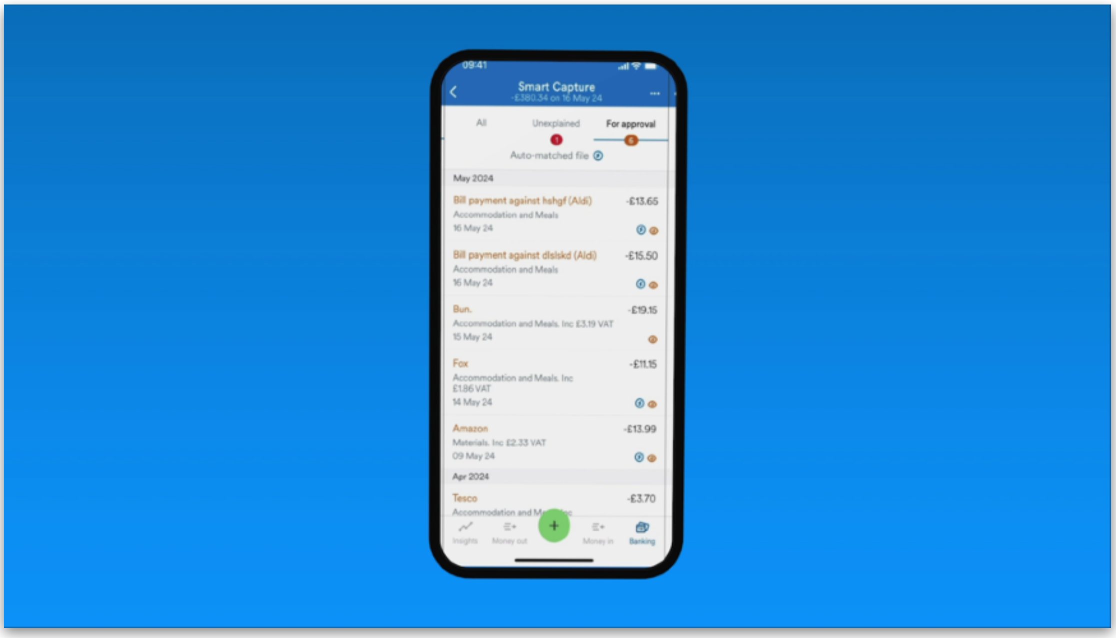
Matching Smart Capture files to bank transactions

Receipts and bills added using Smart Capture will be saved to the 'Smart Capture' tab in the Files area, with the date and amount automatically extracted. The Smart Capture lightning bolt symbol will be displayed below the 'Total value' column.

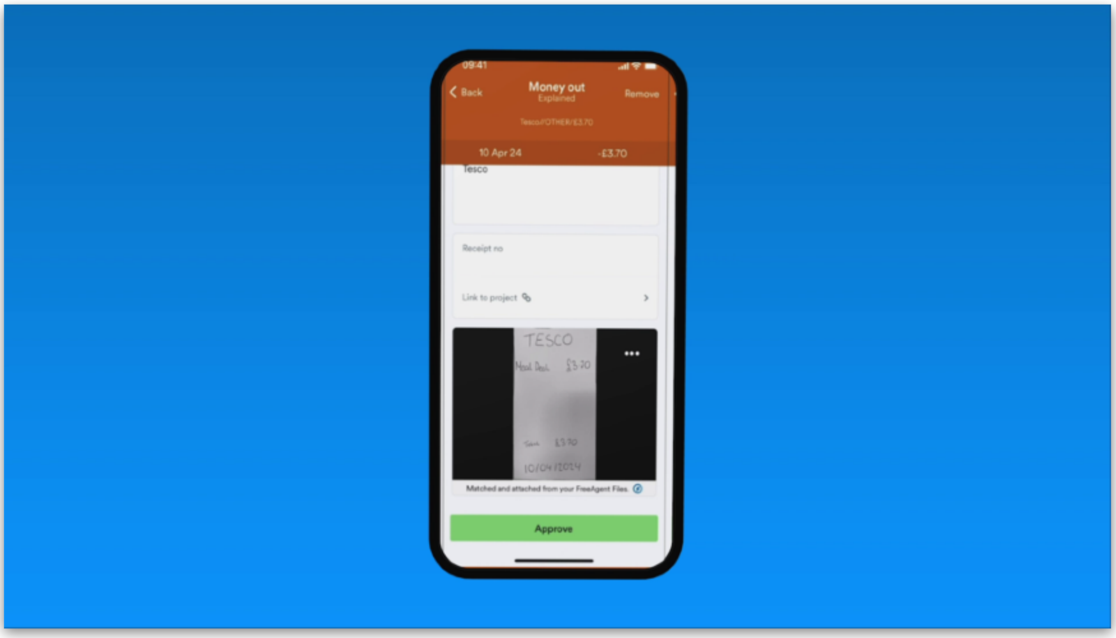
If there is a 'Money Out' bank transaction that is marked 'For Approval' with a matching date and value, the receipt will automatically be assigned to that transaction. The bank transaction must be dated between the receipt date and two days after in order for the receipt to be matched to it. If there is more than one possible matching bank transaction, FreeAgent will not assign the receipt to a transaction.

FreeAgent will automatically check once daily for up to seven days to find a bank transaction to match the receipt to. Please note that it can take up to 24 hours for FreeAgent to automatically match a receipt to a bank transaction if the receipt is uploaded before the bank transaction has been imported or uploaded into FreeAgent.

To approve a transaction, your client can go to the Banking area and select the relevant bank account. Bank transactions that are marked for approval are displayed in orange and can be viewed by tapping the ‘For approval’ tab. The number below the ‘For approval’ tab shows the total number of bank transactions that are marked for approval in that bank account.



Clients can select a bank transaction from the ‘For approval’ tab. If a transaction has a lightning bolt next to it, this means it has a matching Smart Capture file. By clicking on the transaction, clients can view the corresponding receipt or bill. Once they are happy with the information, they can click ‘Approve.’

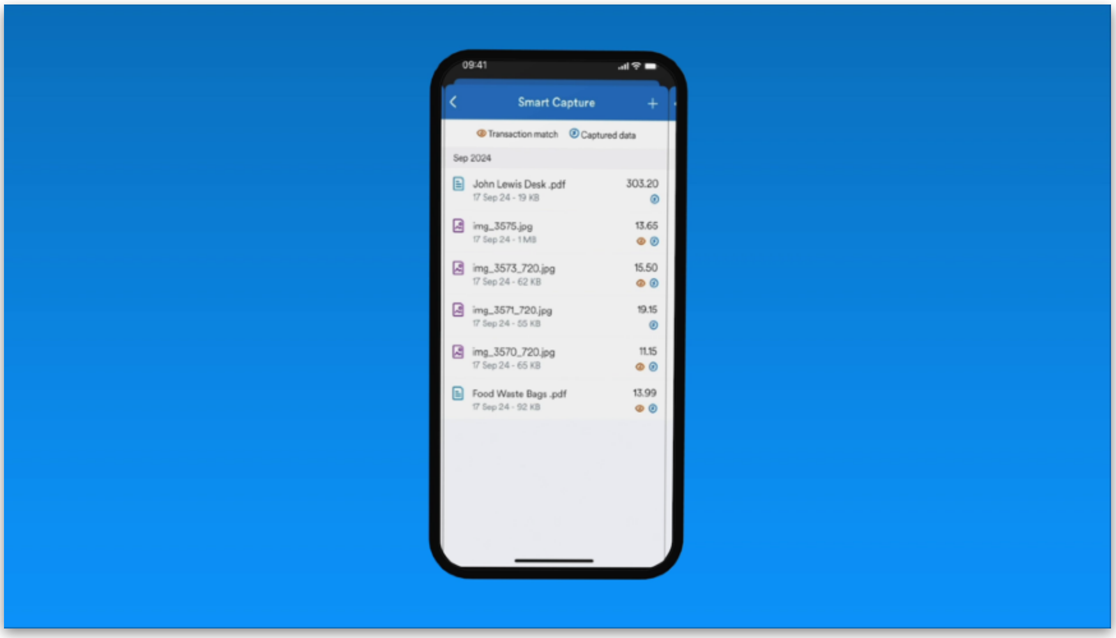


Once the matched bank transaction is approved, the receipt will be removed from the ‘Files’ area and exist only on the bank transaction. The blue circle logo will be removed from the transaction, and the attachment logo will appear instead.

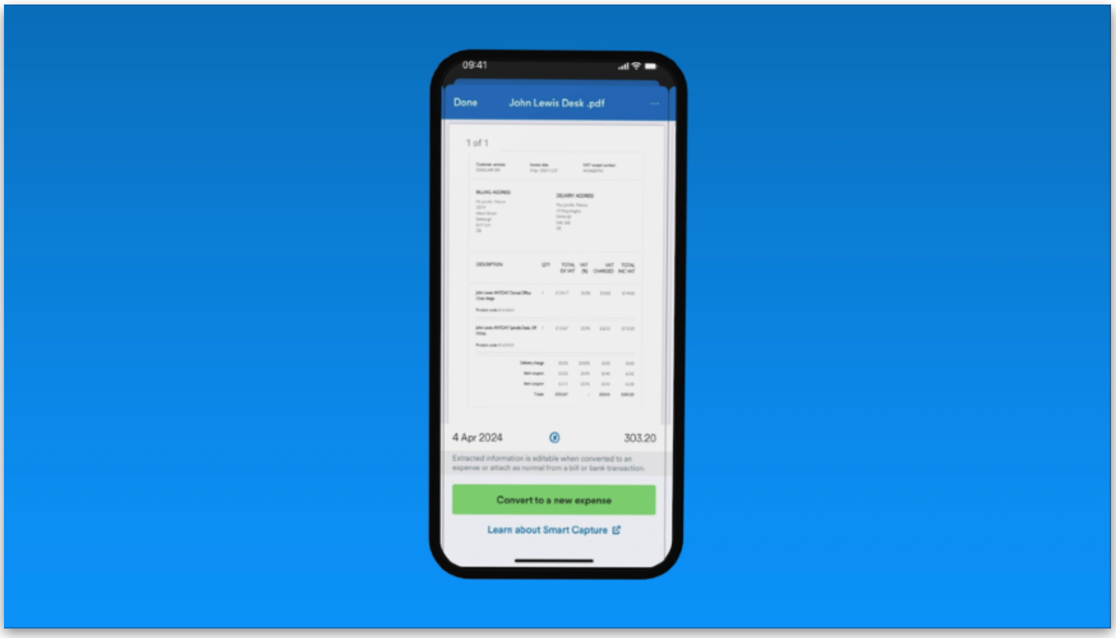
Converting a Smart Capture file to an out-of-pocket expense or bill

Clients can use the mobile app to convert a file into an out-of-pocket expense or bill.

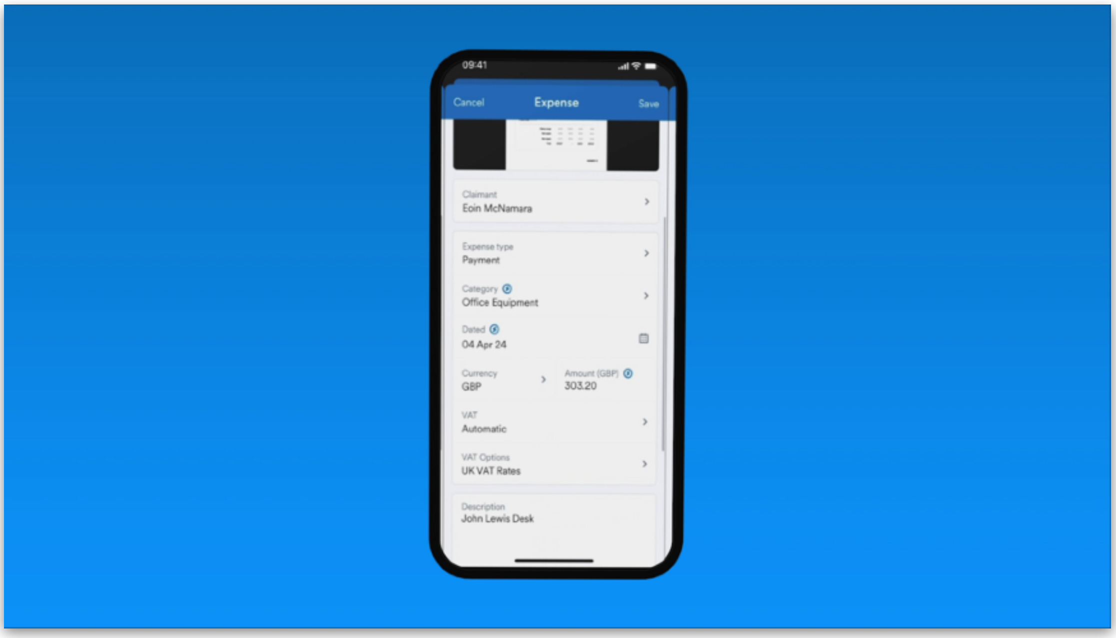
First, clients must navigate to the relevant file in the Files area by tapping the three-lined hamburger icon at the top left of the screen and selecting ‘Files & Smart Capture’. The Smart Capture page will contain files whose date and amount have been automatically extracted by FreeAgent’s Smart Capture functionality.



Clients can select the relevant file from the list, review the information and, once ready to proceed, select ‘Convert to a new expense’ or ‘Convert to a new bill’.



A new out-of-pocket expense or bill will be created with the file as an attachment. The date, total value and a suggested category may be added into the relevant fields automatically and highlighted in blue with a lightning bolt symbol.



Please note that if some of the data is unable to be extracted, the relevant fields will **not** be automatically populated and clients will need to enter the details manually.

Finally, clients can complete any additional relevant fields for the out-of-pocket expense or bill and select ‘Save’ in the top-right corner.

For more information on Smart Capture or any other aspect of the FreeAgent mobile app, please refer to the Knowledge Base.

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.