



# MTD for Income Tax Submissions – Part 1

A step-by-step guide to submitting MTD-compatible tax returns in FreeAgent

2026



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

# Welcome!

In this manual, you will:

- get to grips with MTD for Income Tax within the FreeAgent mobile app
- learn how to use Practice Dashboard functionality for MTD for Income Tax such as setting alerts and controls for your clients

## Contents

Practice Dashboard Controls .....	4
Create alerts.....	4
Reconsent clients' bank feeds in bulk.....	6
Manage clients' Tax Submission and Access Controls.....	8
Income tax settings .....	11
Tax timeline settings .....	16
Individual client settings .....	18
MTD for Income Tax client overview .....	21
HMRC Agent Services connection for MTD for Income Tax.....	26
MTD for Income Tax on mobile.....	28
Banking.....	28
Smart Capture .....	35
Adding Smart Capture files and images.....	35
Matching Smart Capture files to bank transactions .....	42
Converting a Smart Capture file to an out-of-pocket expense.....	47
Converting a Smart Capture file to a Bill .....	51
Switching Licences on the Mobile .....	52

## Practice Dashboard Controls

Some of the Practice Dashboard's features will help your practice with Making Tax Digital (MTD) for Income Tax. We'll show you how to create alerts for your MTD for Income Tax clients, how to reconsent bank feeds in bulk, manage tax permissions and access controls, manage MTD for Income Tax returns in bulk, and connect your HMRC Agent Services Account for MTD for Income Tax to FreeAgent.

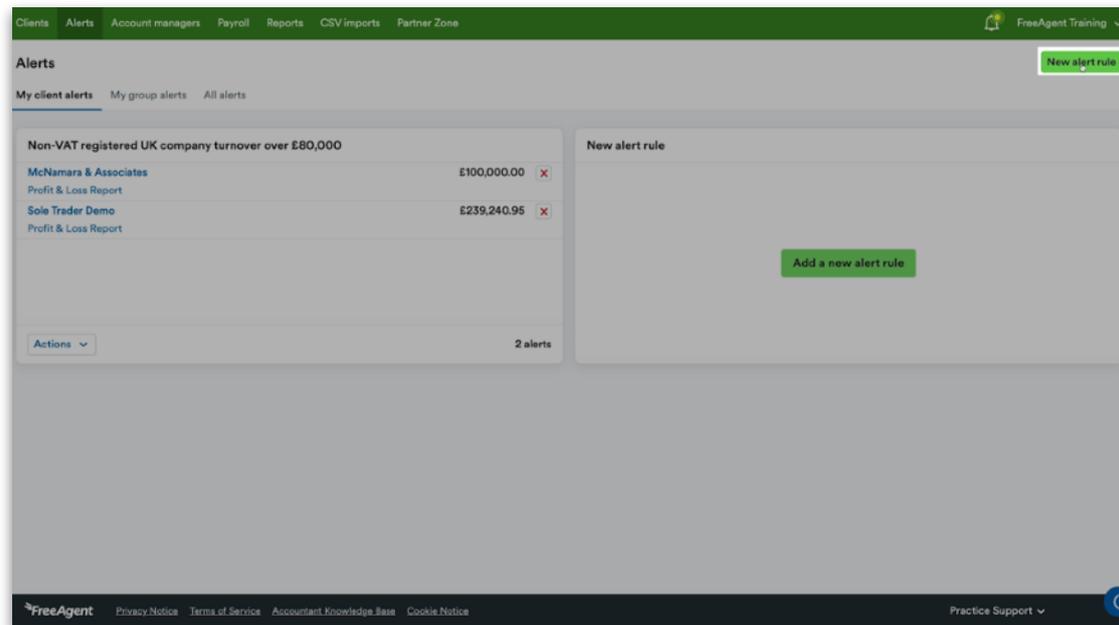
### Create alerts

As an account manager, you can set up a variety of alert rules for your clients. When an alert is triggered, FreeAgent will notify you. You can set up alert rules to notify you of important events and client activities.

To do this, log in to your Practice Dashboard and navigate to the '**Alerts**' tab at the top of the screen.

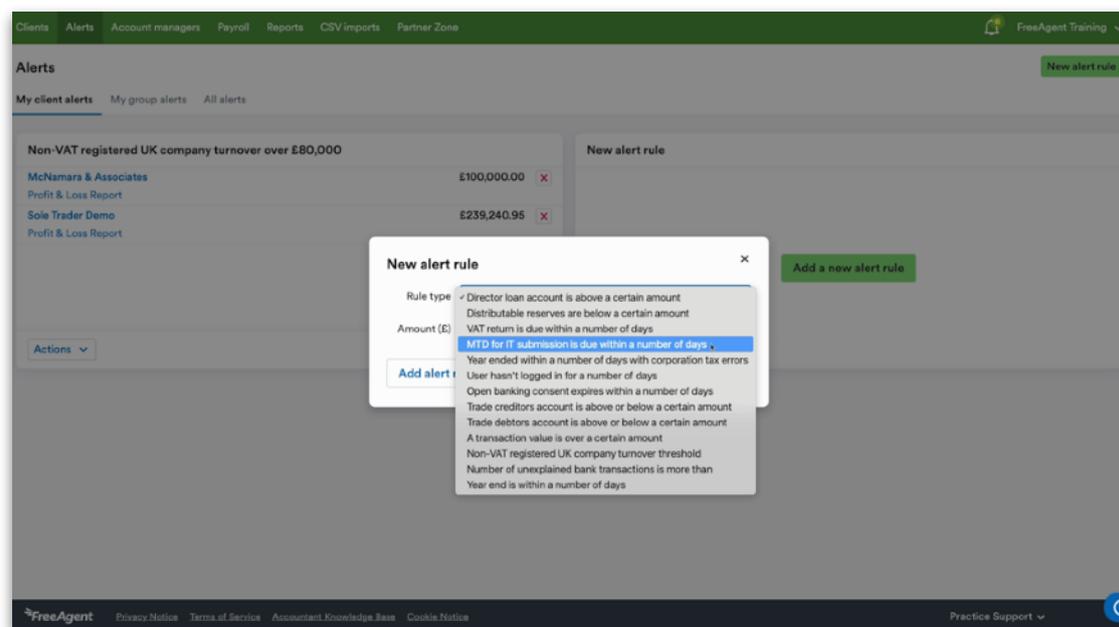
Name	Account owner	Client relationship	Free NWG licence	Status	Bank balance	Alerts	Owner access
A & K Bakery TB Ch Ltd	Regina Pereira regina.pereira@freeagent.com	Practice client	No	Active	£2,300.00	0	Level 7 Edit Switch to →
Bob The Builder Ltd	Bob The Builder eoin.mcnamara@freeagent.com	Practice client	No	Active	£34,949.36	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	£92,041.77	0	No Access Edit Switch to →
Dext Integration	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8 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	£120,000.00	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 →

Then, select **'New alert rule'** in the top-right.

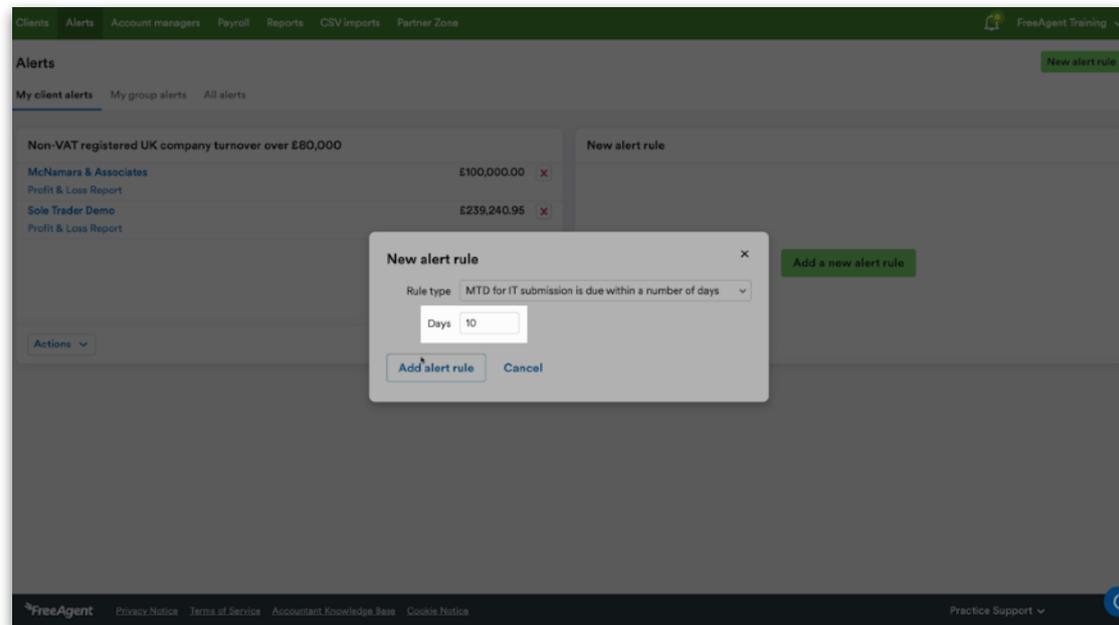


This will bring up a 'New alert rule' pop-up where there's a list of alert rules to choose from.

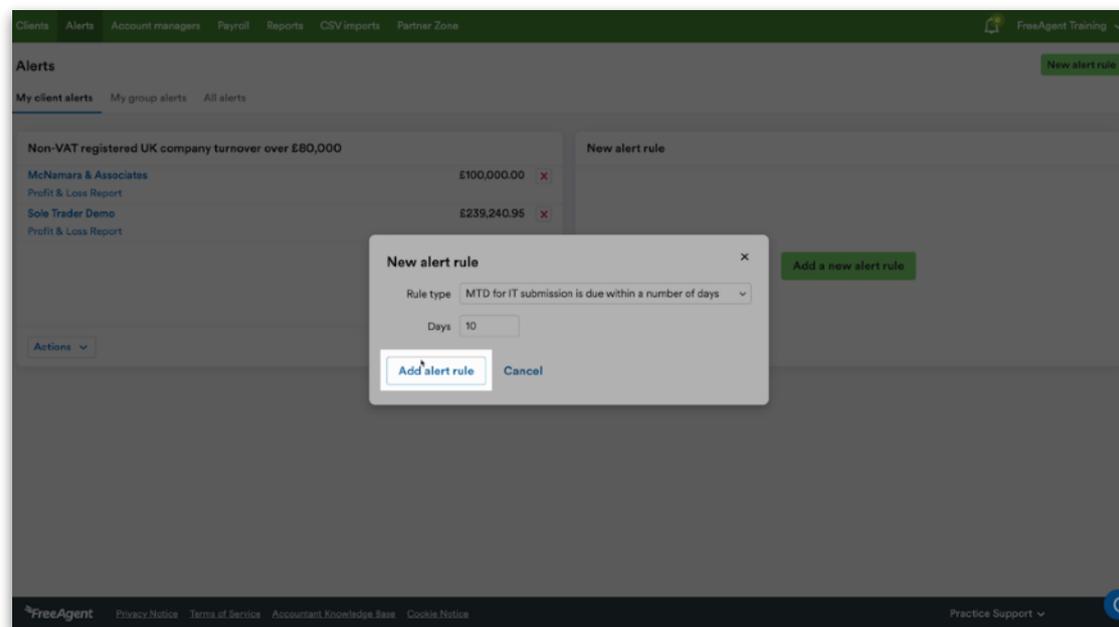
Select the alert rule that you want to create from the **'Rule type'** drop-down menu. For the MTD for Income Tax alert rule, select **'MTD for IT submission is due within a number of days'**.



Next, enter how many days before the client's MTD for Income Tax submission is due that you want to be alerted in the '**Days**' field.



Select '**Add alert rule**' to complete the process.

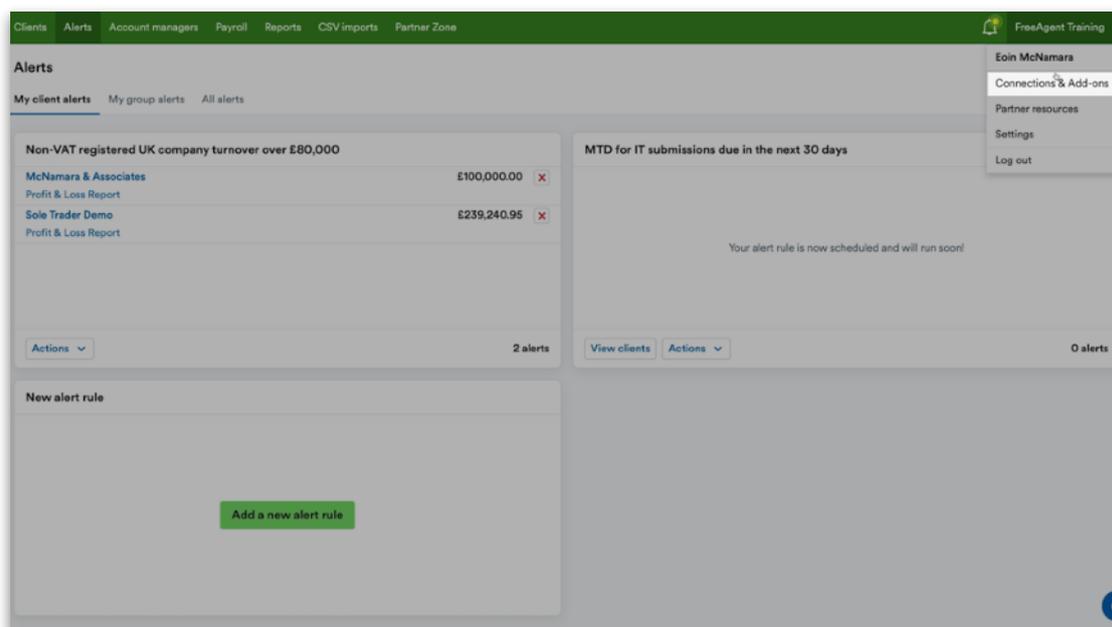


## Reconsent clients' bank feeds in bulk

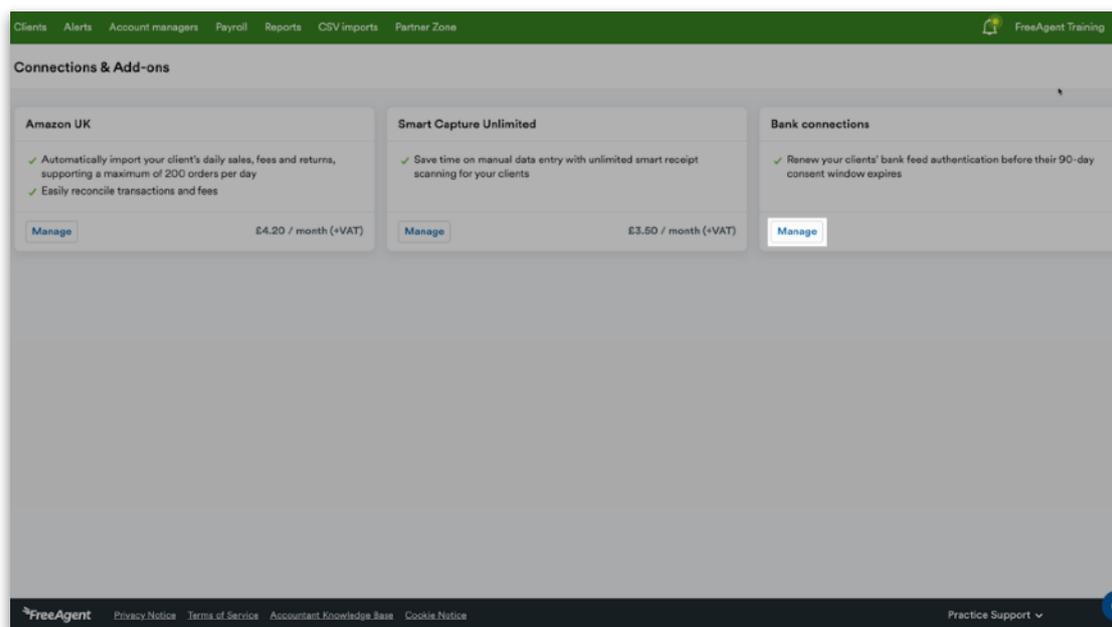
To make sure your client's bank feeds are kept active, fresh consent will need to be provided every 90 days for each separate bank feed. You can now reconsent your clients' bank feeds (for supported banks) in bulk within the Practice Dashboard.

It's important to provide this consent every 90 days and keep your clients' bank feeds active to ensure that their accounts are secure, up to date and accurate for MTD for Income Tax submissions.

To reauthorize your client's bank feeds, log in to the practice dashboard and select '**Connections & Add-ons**' from the drop-down menu below **your practice name**.



Select '**Manage**' within the 'Bank connections' panel.

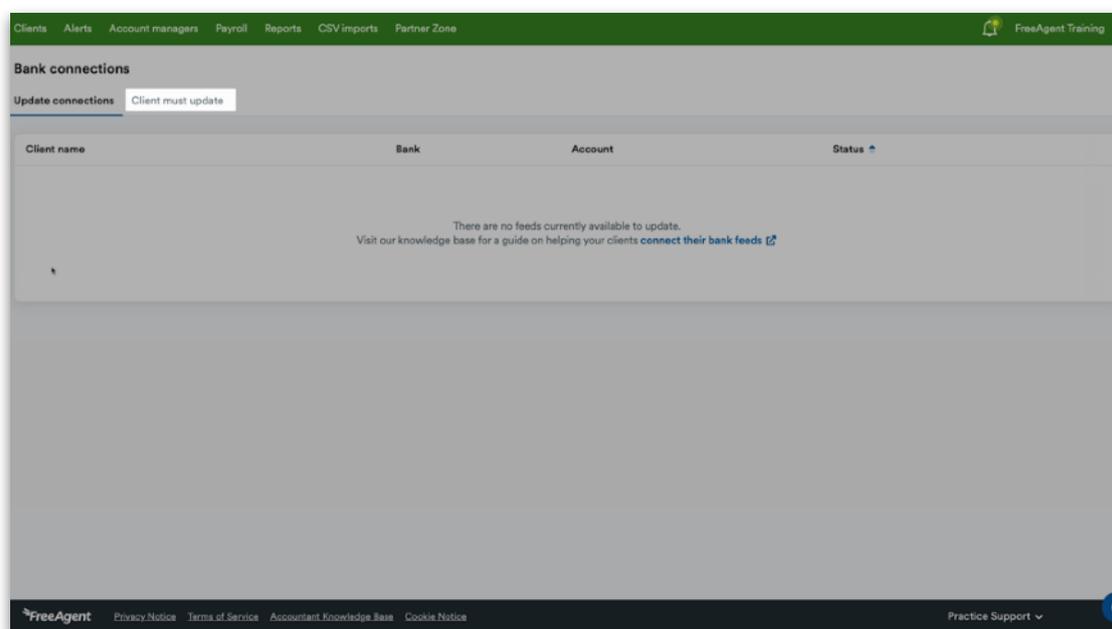


The 'Update connections' tab will display all the clients who have a bank feed enabled with a supported bank that can be updated by you within FreeAgent. It will also display the status of each bank feed.

To update bank feeds in bulk, select '**Update all connections**'. This will complete the process for all clients who have enabled a bank feed with a supported bank.

The clients' bank feeds will function as normal for the next 90 days, after which you'll need to update again before they expire.

To view bank feeds that you're unable to update on behalf of clients, select the '**Client must update**' tab.



The 'Client must update' tab will display all the clients who have a bank feed that can't be updated by you within FreeAgent. It will also display the status of each bank feed.

You'll have to ask your clients to update the bank feeds listed in this tab every 90 days themselves in order to keep their bank feeds active.

## Manage clients' Tax Submission and Access Controls

You can control your clients' access and controls for Tax within the Practice Dashboard. You can control both global and individual client access and controls.

To access this area in FreeAgent, select **your practice name** on the top right then select **'Settings'**.

Name	Account owner	Client relationship	Free NWG licence	Status	Bank balance	Alerts	Owner access
A & K Bakery TB Ch Ltd	Ragina Pereira ragina.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	£92,041.77	0	No Access Edit Switch to →
Dext Integration	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8 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	£120,000.00	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 →

Then, in the 'My practice' section, select **'Tax submission and access control'**.

**Settings**

**My practice**

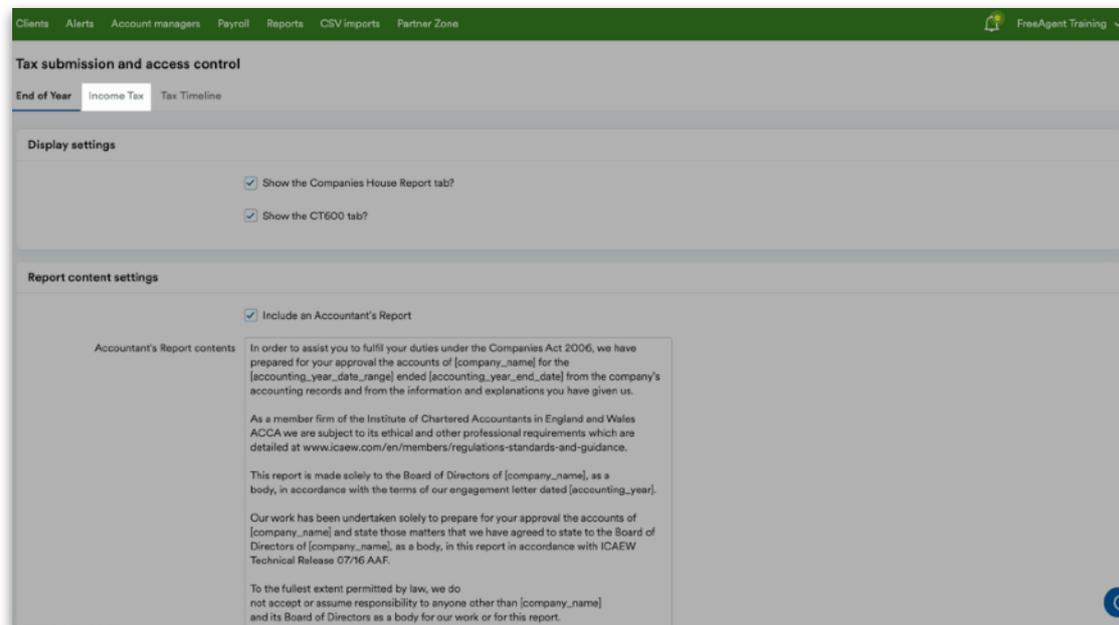
- Practice details**  
Edit address details, contact details and other practice information.  
**Tax submission and access control**  
Manage global settings for Income Tax and End of Year report preparation and the Tax Timeline.
- My details**  
Update your personal details.  
**Client communication preferences**  
Manage how FreeAgent communicates with your clients, including marketing emails and messages about partner products.
- HMRC connections**  
Manage, refresh or disconnect your authorised connections.  
**Groups**  
Create a group of account managers and clients to allow colleagues to collaborate on a group of clients.

**Account Security**

- Sign-in and Security**  
Make your account more secure by adding an extra step to the login process, like 2FA.  
**Known devices**  
View all known devices you have used for logging in.
- Active sessions**  
View all of your current logged in sessions. You can logout from any session.
- Login attempts**  
View all of your login attempts in the last 4 weeks.

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Then select the **'Income Tax'** tab. In this area you can change your clients' access to MTD for Income Tax and the Self Assessment return. You can also switch on approvals for MTD for Income Tax for all your clients.



The screenshot shows a software interface with a green navigation bar at the top containing links for 'Clients', 'Alerts', 'Account managers', 'Payroll', 'Reports', 'CSV imports', and 'Partner Zone'. On the right of the navigation bar, there is a 'FreeAgent Training' link with a dropdown arrow. Below the navigation bar, the main heading is 'Tax submission and access control'. Underneath this heading, there are three tabs: 'End of Year', 'Income Tax' (which is selected), and 'Tax Timeline'. The page is divided into two main sections: 'Display settings' and 'Report content settings'. In the 'Display settings' section, there are two checkboxes, both of which are checked: 'Show the Companies House Report tab?' and 'Show the CT600 tab?'. In the 'Report content settings' section, there is one checked checkbox: 'Include an Accountant's Report'. Below this checkbox, there is a text area containing the following text: 'Accountant's Report contents In order to assist you to fulfill your duties under the Companies Act 2006, we have prepared for your approval the accounts of [company\_name] for the [accounting\_year\_date\_range] ended [accounting\_year\_end\_date] from the company's accounting records and from the information and explanations you have given us. As a member firm of the Institute of Chartered Accountants in England and Wales ACCA we are subject to its ethical and other professional requirements which are detailed at [www.icaew.com/en/members/regulations-standards-and-guidance](http://www.icaew.com/en/members/regulations-standards-and-guidance). This report is made solely to the Board of Directors of [company\_name], as a body, in accordance with the terms of our engagement letter dated [accounting\_year]. Our work has been undertaken solely to prepare for your approval the accounts of [company\_name] and state those matters that we have agreed to state to the Board of Directors of [company\_name], as a body, in this report in accordance with ICAEW Technical Release 07/16 AAF. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than [company\_name] and its Board of Directors as a body for our work or for this report.' A small blue question mark icon is visible in the bottom right corner of the text area.

## Income tax settings

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

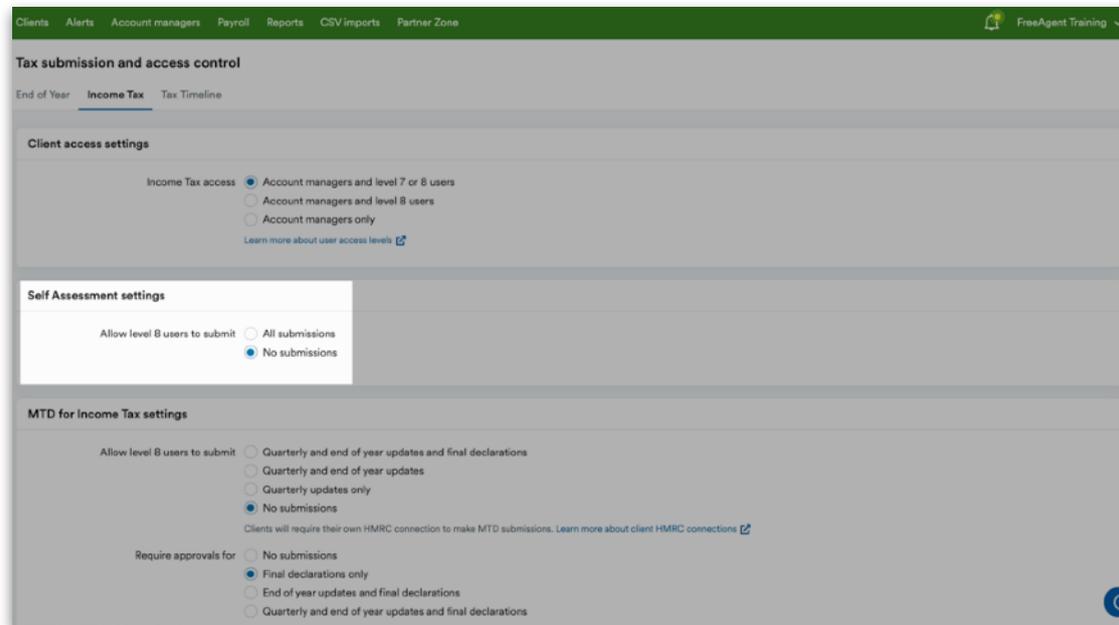
You can choose to give access to:

- 'Account managers only'
- 'Account managers and level 8 users'
- 'Account managers and level 7 or 8 users'

The screenshot shows the 'Tax submission and access control' settings page in the FreeAgent interface. The page is divided into three main sections: 'Client access settings', 'Self Assessment settings', and 'MTD for Income Tax settings'. The 'Client access settings' section is highlighted with a white background and contains three radio button options for 'Income Tax access': 'Account managers and level 7 or 8 users' (selected), 'Account managers and level 8 users', and 'Account managers only'. Below these options is a link to 'Learn more about user access levels'. The 'Self Assessment settings' section has two radio button options for 'Allow level 8 users to submit': 'All submissions' and 'No submissions' (selected). The 'MTD for Income Tax settings' section has two radio button options for 'Allow level 8 users to submit': 'Quarterly and end of year updates and final declarations', 'Quarterly and end of year updates', 'Quarterly updates only', and 'No submissions' (selected). Below these options is a note: 'Clients will require their own HMRC connection to make MTD submissions. Learn more about client HMRC connections'. There is also a 'Require approvals for' section with four radio button options: 'No submissions', 'Final declarations only' (selected), 'End of year updates and final declarations', and 'Quarterly and end of year updates and final declarations'. The top navigation bar includes 'Clients', 'Alerts', 'Account managers', 'Payroll', 'Reports', 'CSV imports', and 'Partner Zone'. The top right corner shows 'FreeAgent Training' with a dropdown arrow.

In the 'Self Assessment settings' section, you can choose whether or not level 8 users can submit their Self Assessment return in FreeAgent.

This option will only be available if you have given Self Assessment access to 'Account managers and level 7 or 8 users'.



The screenshot shows the 'Tax submission and access control' settings page in FreeAgent. The page is divided into three main sections: 'Client access settings', 'Self Assessment settings', and 'MTD for Income Tax settings'. The 'Self Assessment settings' section is highlighted with a white background.

**Client access settings**

Income Tax access

- Account managers and level 7 or 8 users
- Account managers and level 8 users
- Account managers only

[Learn more about user access levels](#)

**Self Assessment settings**

Allow level 8 users to submit

- All submissions
- No submissions

**MTD for Income Tax settings**

Allow level 8 users to submit

- Quarterly and end of year updates and final declarations
- Quarterly and end of year updates
- Quarterly updates only
- No submissions

Clients will require their own HMRC connection to make MTD submissions. [Learn more about client HMRC connections](#)

Require approvals for

- No submissions
- Final declarations only
- End of year updates and final declarations
- Quarterly and end of year updates and final declarations

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

In the 'Allow Level 8 users to submit' section, you can select the types of submissions they can do.

You can choose from:

- 'Quarterly and end of year updates and final declarations'
- 'Quarterly and end of year updates'
- 'Quarterly updates only'
- 'No submissions'

The screenshot displays the 'Client access settings' interface, which is organized into several sections:

- Client access settings:** Under 'Income Tax access', there are three radio button options: 'Account managers and level 7 or 8 users' (selected), 'Account managers and level 8 users', and 'Account managers only'. A link 'Learn more about user access levels' is provided.
- Self Assessment settings:** Under 'Allow level 8 users to submit', there are two radio button options: 'All submissions' (selected) and 'No submissions'.
- MTD for Income Tax settings:** Under 'Allow level 8 users to submit', there are four radio button options: 'Quarterly and end of year updates and final declarations', 'Quarterly and end of year updates', 'Quarterly updates only', and 'No submissions' (selected). A note below states: 'Clients will require their own HMRC connection to make MTD submissions. Learn more about client HMRC connections'. Under 'Require approvals for', there are four radio button options: 'No submissions', 'Final declarations only' (selected), 'End of year updates and final declarations', and 'Quarterly and end of year updates and final declarations'.
- Email settings:** Under 'Default email contents', there is a text input field containing 'Hi [user\_first\_name],'. Below the input field, a preview of the email content is shown: 'Your [submission\_type] for [company\_name] in [tax\_year] is ready for your review. Please log in to your account to approve and sign the update.'

In the 'Require approvals for' section, you can choose which MTD for Income Tax submissions you would like to switch on client approvals for.

You can choose from:

- 'No submissions'
- 'Final declarations only'
- 'End of year updates and final declarations'
- 'Quarterly and end of year updates and final declarations'

The screenshot shows the 'Client access settings' interface. It is divided into four main sections: 'Income Tax access', 'Self Assessment settings', 'MTD for Income Tax settings', and 'Email settings'.  
1. **Income Tax access:** Three radio buttons are present: 'Account managers and level 7 or 8 users' (selected), 'Account managers and level 8 users', and 'Account managers only'. A link 'Learn more about user access levels' is below.  
2. **Self Assessment settings:** Two radio buttons: 'All submissions' (selected) and 'No submissions'.  
3. **MTD for Income Tax settings:** Two sections. The first has four radio buttons: 'Quarterly and end of year updates and final declarations', 'Quarterly and end of year updates', 'Quarterly updates only', and 'No submissions' (selected). Below is a note: 'Clients will require their own HMRC connection to make MTD submissions. Learn more about client HMRC connections'. The second section, 'Require approvals for', has four radio buttons: 'No submissions', 'Final declarations only' (selected), 'End of year updates and final declarations', and 'Quarterly and end of year updates and final declarations'.  
4. **Email settings:** A text field for 'Default email contents' contains 'Hi [user\_first\_name],  
Your [submission\_type] for [company\_name] in [tax\_year] is ready for your review.  
Please log in to your account to approve and sign the update.'

The 'Email settings' section controls the contents of the email that will be sent to the client when you ask for approvals. You can add email tags to this box from the list of available tags below the content box to make it pull in that specific client's relevant information.

The screenshot shows the 'Email settings' section of the 'MTD for Income Tax settings' interface. The 'Default email contents' field contains the following text:

```
Hi [user_first_name],

Your [submission_type] for [company_name] in [tax_year] is ready for your review.
Please log in to your account to approve and sign the update.

Yours sincerely,
[account_manager_name]
```

Below the text, the 'Available tags' are listed: [account\_manager\_name], [company\_name], [submission\_type], [tax\_year], [user\_first\_name], [user\_full\_name]. A note states: 'Default email contents can be overridden on a case-by-case basis, prior to sending an update for review.'

At the bottom of the section, there are two buttons: 'Save changes' and 'Cancel'.

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

This screenshot is identical to the one above, showing the 'Email settings' section. The 'Save changes' button is now highlighted with a white border, indicating it has been selected.

## Tax timeline settings

In the 'Tax submission and access control' page, select the 'Tax Timeline' tab.

The screenshot shows the 'Tax submission and access control' page with the 'Tax Timeline' tab selected. The page is divided into three main sections:

- Client access settings:**
  - Income Tax access:
    - Account managers and level 7 or 8 users
    - Account managers and level 8 users
    - Account managers only
  - [Learn more about user access levels](#)
- Self Assessment settings:**
  - Allow level 8 users to submit:
    - All submissions
    - No submissions
- MTD for Income Tax settings<sup>h</sup>:**
  - Allow level 8 users to submit:
    - Quarterly and end of year updates and final declarations
    - Quarterly and end of year updates
    - Quarterly updates only
    - No submissions
  - Clients will require their own HMRC connection to make MTD submissions. [Learn more about client HMRC connections](#)
  - Require approvals for:
    - No submissions
    - Final declarations only
    - End of year updates and final declarations
    - Quarterly and end of year updates and final declarations

The tax timeline is one of the tiles on the Overview screen in the desktop and mobile app.

In the 'Tax Timeline' area of the 'Tax submission and access control' page, you can select what all of your clients can see in the tile.

The screenshot shows the 'Tax submission and access control' page with the 'Tax Timeline' tab selected. The 'Visibility settings' section is visible, allowing users to control what is shown in the tile:

- CIS:
- Corporation Tax:
- Final Accounts:
- PAYE/NI:
- Income Tax:
- VAT / Sales Tax:

At the bottom of the settings section, there are two buttons: **Save changes** and **Cancel**.

The options are:

- 'Hide' - this will remove that piece of information from the tax timeline
- 'Show' - this will only show the date when that particular item of tax is due
- 'Show with tax amounts' - this will show the amount of tax due and the due date.
- 'Show without tax amounts' - this will show the due date of a particular tax item, but not the amount of tax due.

The screenshot shows the 'Tax submission and access control' interface. Under the 'Tax Timeline' tab, the 'Visibility settings' section is open. It contains a list of tax items with dropdown menus for their visibility:

Item	Visibility
CIS	Show
Corporation Tax	Show with tax amounts
Final Accounts	Show
PAYE/NI	Show with tax amounts
Income Tax	Hide
VAT / Sales Tax	Show with tax amounts

At the bottom of the settings panel, there are two buttons: 'Save changes' and 'Cancel'.

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

This screenshot shows the same 'Tax submission and access control' interface, but the 'Income Tax' dropdown menu has been changed to 'Show with tax amounts'. The 'Save changes' button is now highlighted with a white border, indicating it is the next step to be taken.

Item	Visibility
CIS	Show
Corporation Tax	Show with tax amounts
Final Accounts	Show
PAYE/NI	Show with tax amounts
Income Tax	Show with tax amounts
VAT / Sales Tax	Show with tax amounts

## Individual client settings

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

The screenshot shows the 'Tax submission and access control' settings page. The 'Tax Timeline' tab is selected. Under 'Visibility settings', the following options are visible:

- CIS: Show
- Corporation Tax: Show with tax amounts
- Final Accounts: Show
- PAYE/NI: Show with tax amounts
- Income Tax: Show with tax amounts
- VAT / Sales Tax: Show with tax amounts

Buttons for 'Save changes' and 'Cancel' are located at the bottom of the settings area.

Select the relevant **client**.

The screenshot shows the 'Clients' list page. The table below contains the following data:

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	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	£92,041.77	0	No Access Edit Switch to --
Dext Integration	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8 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	£120,000.00	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 --

Then select the 'Tax permissions' tab.

The screenshot shows the 'Solo Demo' client page with the 'Tax permissions' tab selected. The 'Add-ons' section lists two items: Amazon UK (Inactive) and Smart Capture Unlimited (Active). Below this is a green notification: "This company has been switched to MTD VAT on 11 Feb 25". The 'Profit and Loss for 2025/26' table shows income of £64,630, expenses of £100,122, and an operating profit of -£35,492. The retained profit for 2025/26 so far is -£35,492, which is added to the carried forward profit of £216,619 from 2024/25, resulting in a total of £181,127. The 'Client details' sidebar shows contact information for Eoin McNamara, a UK Sole Trader, with an address in Sidcup, DA14 4BG. A note indicates the client is eligible for a free licence.

Income	Expenses	Operating profit	Less
£64,630	£100,122	-£35,492	£0 Drawings £0 Adjustments
Retained profit			
2025/26 so far			
-£35,492	From 2024/25	Carried forward / distributable	
	£216,619	£181,127	

This will show the client's 'Income Tax' and 'Tax timeline' settings.

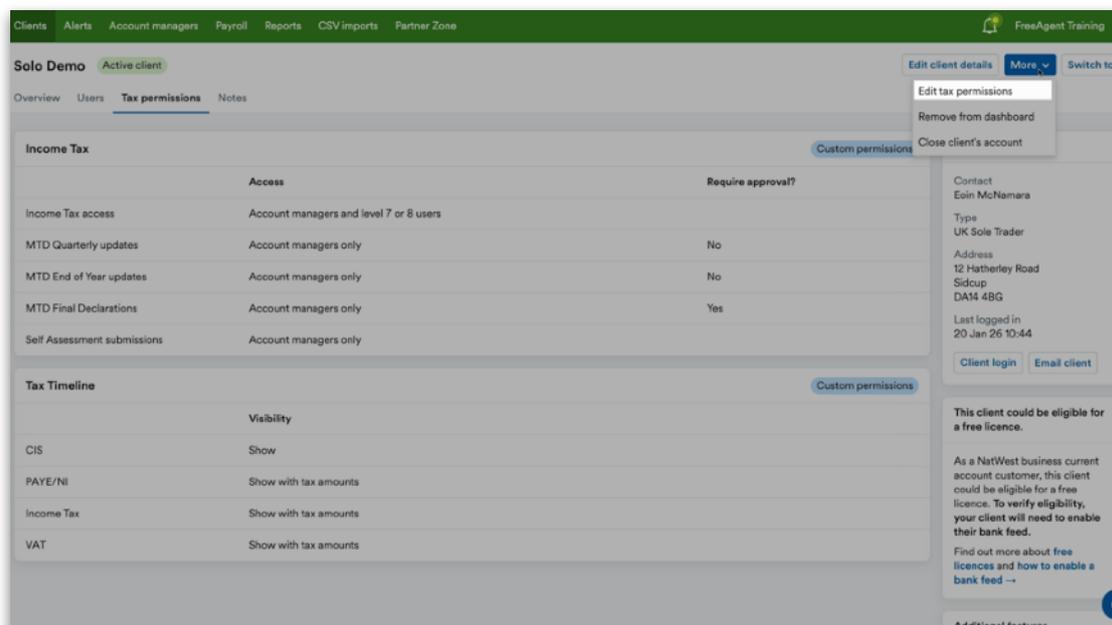
The screenshot shows the 'Solo Demo' client page with the 'Tax permissions' tab selected. The 'Income Tax' section has a 'Custom permissions' button and a table with columns for 'Access' and 'Require approval?'. The 'Tax Timeline' section also has a 'Custom permissions' button and a table with columns for 'Visibility'. The 'Client details' sidebar is visible on the right.

	Access	Require approval?
Income Tax access	Account managers and level 7 or 8 users	
MTD Quarterly updates	Account managers only	No
MTD End of Year updates	Account managers only	No
MTD Final Declarations	Account managers only	Yes
Self Assessment submissions	Account managers only	

	Visibility
CIS	Show
PAYE/NI	Show with tax amounts
Income Tax	Show with tax amounts
VAT	Show with tax amounts

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

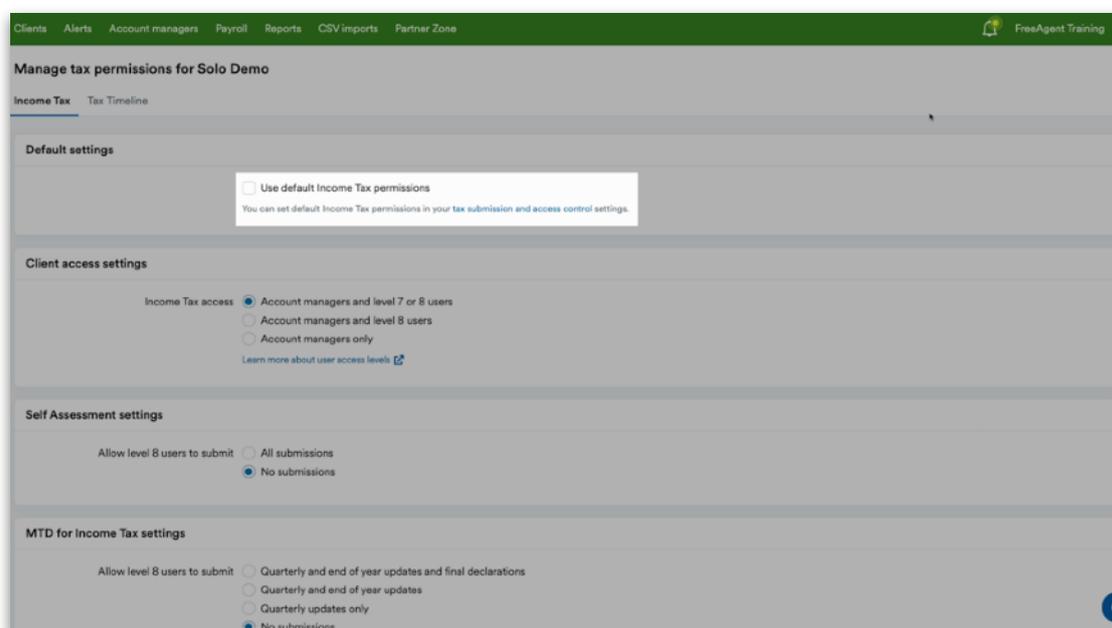


The screenshot shows the 'Solo Demo' client page in the FreeAgent Training system. The 'More' dropdown menu is open, and 'Edit tax permissions' is selected. The page displays the 'Income Tax' and 'Tax Timeline' sections. The 'Income Tax' section has a table with columns for 'Access' and 'Require approval?'. The 'Tax Timeline' section has a table with columns for 'Visibility'.

Income Tax	Access	Require approval?
Income Tax access	Account managers and level 7 or 8 users	
MTD Quarterly updates	Account managers only	No
MTD End of Year updates	Account managers only	No
MTD Final Declarations	Account managers only	Yes
Self Assessment submissions	Account managers only	

Tax Timeline	Visibility
CIS	Show
PAYE/NI	Show with tax amounts
Income Tax	Show with tax amounts
VAT	Show with tax amounts

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



The screenshot shows the 'Manage tax permissions for Solo Demo' page. The 'Default settings' section has the 'Use default Income Tax permissions' checkbox deselected. The 'Client access settings' section has the 'Income Tax access' radio button set to 'Account managers and level 7 or 8 users'. The 'Self Assessment settings' section has the 'Allow level 8 users to submit' radio button set to 'No submissions'. The 'MTD for Income Tax settings' section has the 'Allow level 8 users to submit' radio button set to 'No submissions'.

Make any changes you would like and select **'Save changes'** to complete the process.

Income Tax access  Account managers and level 7 or 8 users  
 Account managers and level 8 users  
 Account managers only  
[Learn more about user access levels](#)

**Self Assessment settings**

Allow level 8 users to submit  All submissions  
 No submissions

**MTD for Income Tax settings**

Allow level 8 users to submit  Quarterly and end of year updates and final declarations  
 Quarterly and end of year updates  
 Quarterly updates only  
 No submissions  
Clients will require their own HMRC connection to make MTD submissions. [Learn more about client HMRC connections](#)

Require approvals for  No submissions  
 Final declarations only  
 End of year updates and final declarations  
 Quarterly and end of year updates and final declarations

[Save changes](#) [Cancel](#)

FreeAgent [Privacy Notice](#) [Terms of Service](#) [Accountant Knowledge Base](#) [Cookie Notice](#) [Practice Support](#)

## MTD for Income Tax client overview

You can see all of your clients' filed and unfiled MTD for Income Tax submissions from your practice dashboard.

Select **'Reports'**.

Clients Alerts Account managers Payroll **Reports** CSV imports Partner Zone FreeAgent MTD Demo

Clients [Manage groups](#) [Add client](#)

My clients 1 My group clients 2 All clients 30

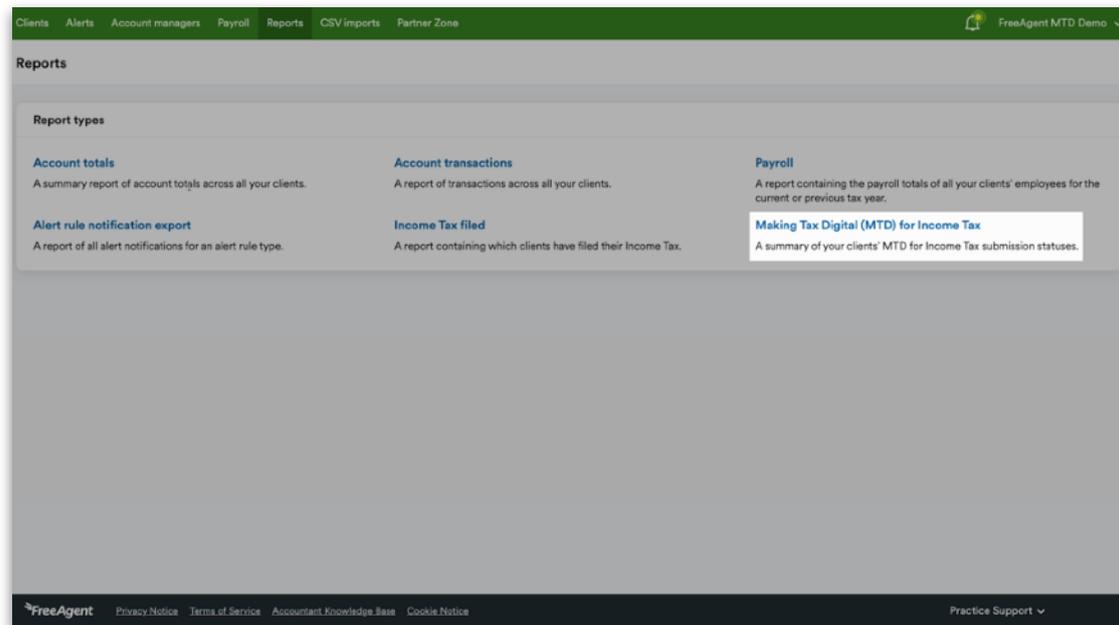
All client types All statuses All client relationships Search

Name	Account owner	Client relationship	Status	Bank balance	Alerts	Owner access
Eoin Demo Sole Trader	Eoin McNamara <a href="mailto:eoin.mcnamara@freeagent.com">eoin.mcnamara@freeagent.com</a>	Practice client	Active	£295,822.00	0	Level 8 <a href="#">Edit</a> <a href="#">Switch to --</a>
Eoin Demo ST	Eoin McNamara <a href="mailto:eoin.mcnamara@freeagent.com">eoin.mcnamara@freeagent.com</a>	Practice client	Active	£10,000.00	0	Level 8 <a href="#">Invite client</a> <a href="#">Edit</a> <a href="#">Switch to --</a>
Menopoly LL	Eoin McNamara <a href="mailto:eoin.mcnamara@freeagent.com">eoin.mcnamara@freeagent.com</a>	Practice client	Active	£355,869.02	0	Level 8 <a href="#">Edit</a> <a href="#">Switch to --</a>

25 per page

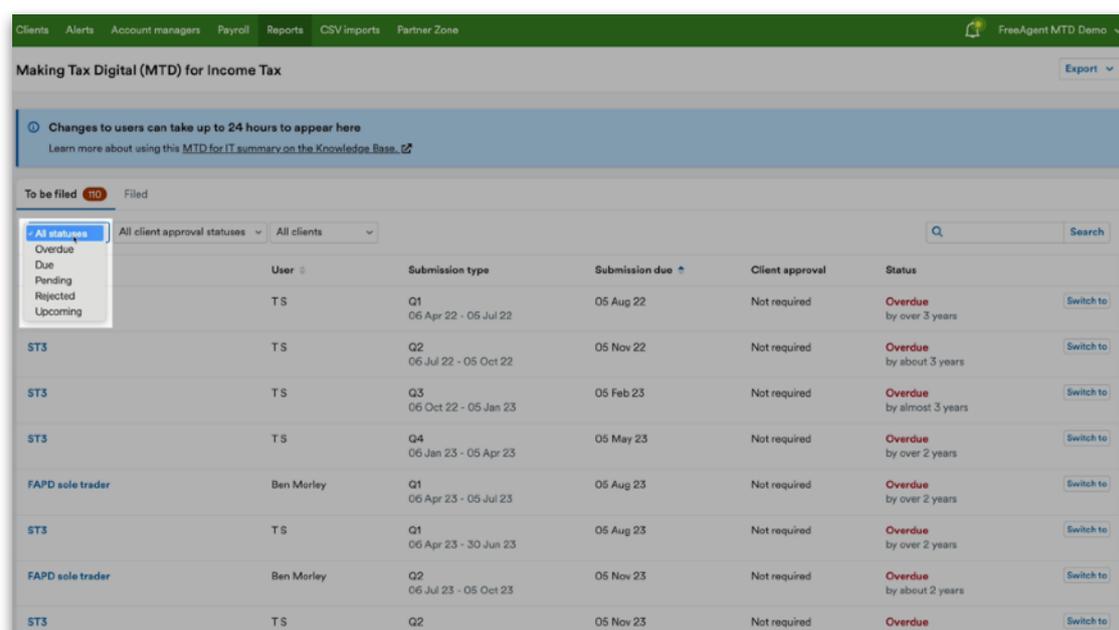
FreeAgent [Privacy Notice](#) [Terms of Service](#) [Accountant Knowledge Base](#) [Cookie Notice](#) [Practice Support](#)

Then, select ‘**Making Tax Digital (MTD) for Income Tax**’.



In the ‘To be filed’ tab, you can filter by status:

- ‘All statuses’
- ‘Overdue’
- ‘Due’
- ‘Pending’
- ‘Rejected’
- ‘Upcoming’



You can filter your clients by:

- 'All clients'
- 'My clients'
- 'My group clients'

The screenshot shows the 'Making Tax Digital (MTD) for Income Tax' interface. At the top, there are navigation tabs: Clients, Alerts, Account managers, Payroll, Reports, CSV imports, and Partner Zone. A notification banner states: 'Changes to users can take up to 24 hours to appear here. Learn more about using this MTD for IT summary on the Knowledge Base.' Below this, there are filters for 'To be filed' (110) and 'Filed'. A dropdown menu for 'All client approval statuses' is open, showing options: 'All clients', 'My clients', and 'My group clients'. The main table lists client submissions with columns: Client name, Submission type, Submission due, Client approval, and Status. Each row includes a 'Switch to' button.

Client name	Submission type	Submission due	Client approval	Status
ST3	TS	Q1 06 Apr 22 - 05 Jul 22	05 Aug 22	Not required Overdue by over 3 years
ST3	TS	Q2 06 Jul 22 - 05 Oct 22	05 Nov 22	Not required Overdue by about 3 years
ST3	TS	Q3 06 Oct 22 - 05 Jan 23	05 Feb 23	Not required Overdue by almost 3 years
ST3	TS	Q4 06 Jan 23 - 05 Apr 23	05 May 23	Not required Overdue by over 2 years
FAPD sole trader	Ben Morley	Q1 06 Apr 23 - 05 Jul 23	05 Aug 23	Not required Overdue by over 2 years
ST3	TS	Q1 06 Apr 23 - 30 Jun 23	05 Aug 23	Not required Overdue by over 2 years
FAPD sole trader	Ben Morley	Q2 06 Jul 23 - 05 Oct 23	05 Nov 23	Not required Overdue by about 2 years
ST3	TS	Q2 06 Jul 23 - 05 Oct 23	05 Nov 23	Not required Overdue by about 2 years

You can also filter by client approval statuses:

- 'All client approval statuses'
- 'Required'
- 'Request sent'
- 'Approved'
- 'Not required'.

Changes to users can take up to 24 hours to appear here  
Learn more about using this MTD for IT summary on the Knowledge Base.

To be filed **110** Filed

All statuses **All client approval statuses** All clients

Client name	User	Submission type	Submission due	Client approval	Status
ST3	T S	Q1 06 Apr 22 - 05 Jul 22	05 Aug 22	Not required	Overdue by over 3 years
ST3	T S	Q2 06 Jul 22 - 05 Oct 22	05 Nov 22	Not required	Overdue by about 3 years
ST3	T S	Q3 06 Oct 22 - 05 Jan 23	05 Feb 23	Not required	Overdue by almost 3 years
ST3	T S	Q4 06 Jan 23 - 05 Apr 23	05 May 23	Not required	Overdue by over 2 years
FAPD sole trader	Ben Morley	Q1 06 Apr 23 - 05 Jul 23	05 Aug 23	Not required	Overdue by over 2 years
ST3	T S	Q1 06 Apr 23 - 30 Jun 23	05 Aug 23	Not required	Overdue by over 2 years
FAPD sole trader	Ben Morley	Q2 06 Jul 23 - 05 Oct 23	05 Nov 23	Not required	Overdue by about 2 years
ST3	T S	Q2 06 Jul 23 - 05 Oct 23	05 Nov 23	Not required	Overdue by about 2 years

If you are a senior Account Manager, you can see all clients on the dashboard.

You can sort the submissions by

- 'Client name'
- 'User'
- 'Submission due'

The table will show the client's name, the user in the account who has MTD for Income Tax switched on, the submission type, the submission due date, and the status of that submission.

Making Tax Digital (MTD) for Income Tax Export

Changes to users can take up to 24 hours to appear here  
Learn more about using this [MTD for IT summary on the Knowledge Base](#)

To be filed 10 Filed

All statuses All client approval statuses All clients Search

Client name	User	Submission type	Submission due	Client approval	Status	
ST3	T S	Q1 06 Apr 22 - 05 Jul 22	05 Aug 22	Not required	Overdue by over 3 years	Switch to
ST3	T S	Q2 06 Jul 22 - 05 Oct 22	05 Nov 22	Not required	Overdue by about 3 years	Switch to
ST3	T S	Q3 06 Oct 22 - 05 Jan 23	05 Feb 23	Not required	Overdue by almost 3 years	Switch to
ST3	T S	Q4 06 Jan 23 - 05 Apr 23	05 May 23	Not required	Overdue by over 2 years	Switch to
FAPD sole trader	Ben Morley	Q1 06 Apr 23 - 05 Jul 23	05 Aug 23	Not required	Overdue by over 2 years	Switch to
ST3	T S	Q1 06 Apr 23 - 30 Jun 23	05 Aug 23	Not required	Overdue by over 2 years	Switch to
FAPD sole trader	Ben Morley	Q2 06 Jul 23 - 05 Oct 23	05 Nov 23	Not required	Overdue by about 2 years	Switch to
ST3	T S	Q2 01 Jul 23 - 30 Sep 23	05 Nov 23	Not required	Overdue by about 2 years	Switch to

If you want to access the client's individual MTD for Income Tax screen, click **'Switch to'**.

Making Tax Digital (MTD) for Income Tax Export

Changes to users can take up to 24 hours to appear here  
Learn more about using this [MTD for IT summary on the Knowledge Base](#)

To be filed 10 Filed

All statuses All client approval statuses All clients Search

Client name	User	Submission type	Submission due	Client approval	Status	
ST3	T S	Q1 06 Apr 22 - 05 Jul 22	05 Aug 22	Not required	Overdue by over 3 years	Switch to
ST3	T S	Q2 06 Jul 22 - 05 Oct 22	05 Nov 22	Not required	Overdue by about 3 years	Switch to
ST3	T S	Q3 06 Oct 22 - 05 Jan 23	05 Feb 23	Not required	Overdue by almost 3 years	Switch to
ST3	T S	Q4 06 Jan 23 - 05 Apr 23	05 May 23	Not required	Overdue by over 2 years	Switch to
FAPD sole trader	Ben Morley	Q1 06 Apr 23 - 05 Jul 23	05 Aug 23	Not required	Overdue by over 2 years	Switch to
ST3	T S	Q1 06 Apr 23 - 30 Jun 23	05 Aug 23	Not required	Overdue by over 2 years	Switch to
FAPD sole trader	Ben Morley	Q2 06 Jul 23 - 05 Oct 23	05 Nov 23	Not required	Overdue by about 2 years	Switch to
ST3	T S	Q2 01 Jul 23 - 30 Sep 23	05 Nov 23	Not required	Overdue by about 2 years	Switch to

If you would like to find out more information on MTD for Income Tax in FreeAgent, please review the 'MTD for Income Tax Submissions' module from the 'Learning and Accreditation' area of the practice portal.

## HMRC Agent Services connection for MTD for Income Tax

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

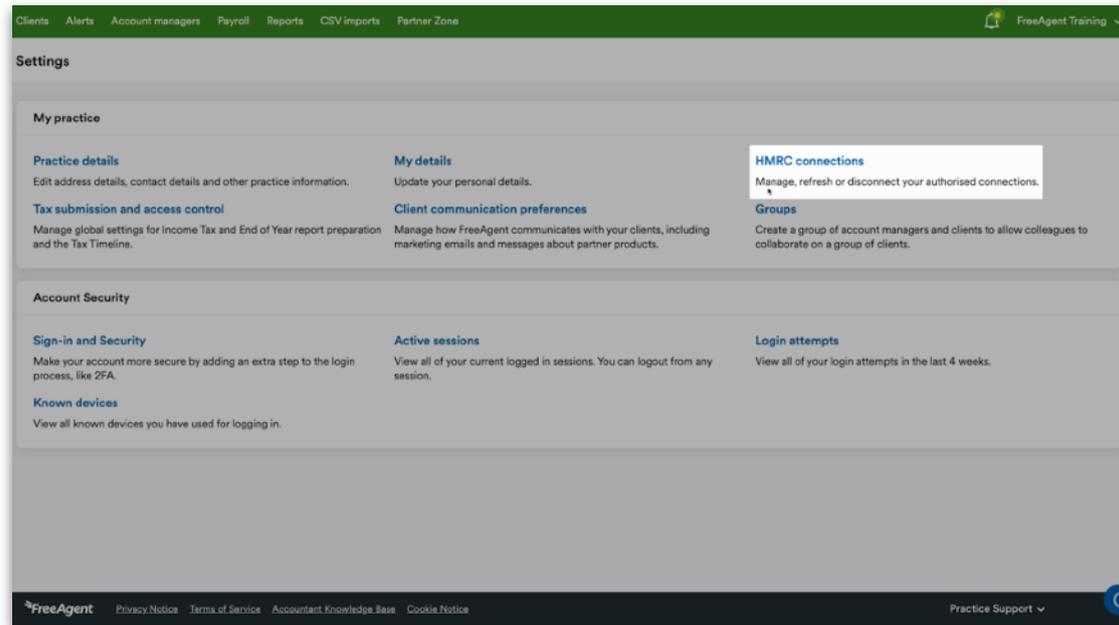
Once you've successfully created your agent services account and any new clients have authorised your new agent relationship, you'll need to use your agent services account credentials to connect FreeAgent to HMRC.

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

The screenshot shows the 'Clients' page in the FreeAgent Practice Dashboard. The top navigation bar includes 'Clients', 'Alerts', 'Account managers', 'Payroll', 'Reports', 'CSV imports', and 'Partner Zone'. The user 'Eoin McNamara' is logged in, and a dropdown menu is open showing options: 'Manage', 'Connections & Add-ons', 'Partner resources', 'Settings', and 'Log out'. The main content area shows a table of clients with the following data:

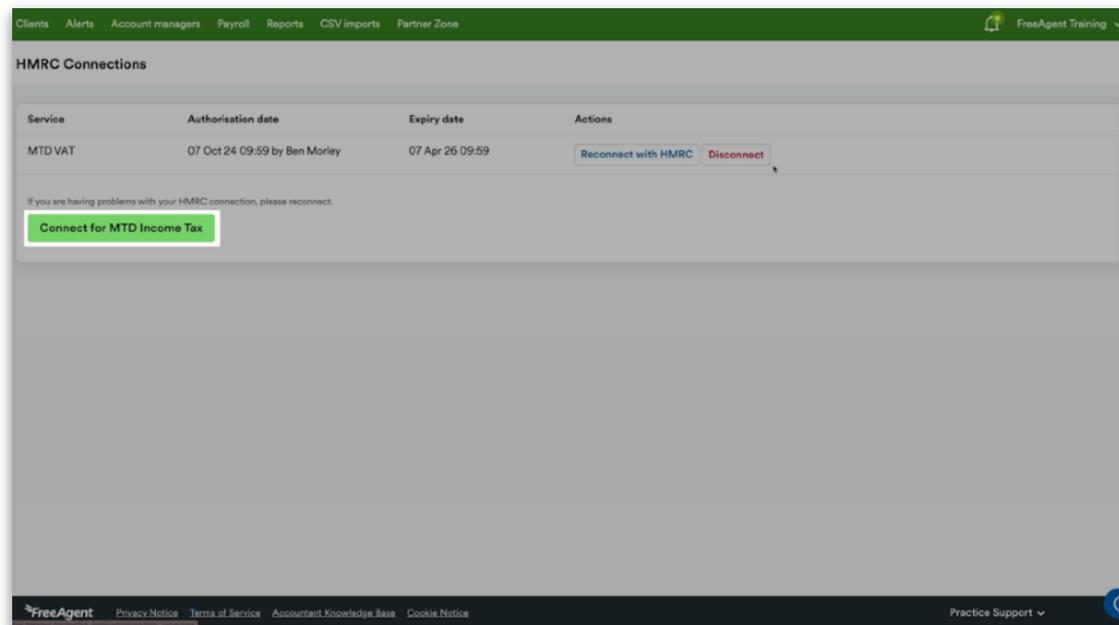
Name	Account owner	Client relationship	Free NWG licence	Status	Bank balance	Alerts	Owner access	
A & K Bakery TB Ch Ltd	Regina Pereira regina.pereira@freeagent.com	Practice client	No	Active	£2,300.00	0	Level 7	Edit Switch to →
Bob The Builder Ltd	Bob The Builder eoin.mcnamara@freeagent.com	Practice client	No	Active	£34,949.36	0	Level 8	Edit Switch to →
Builder	Eoin McNamara Eoin.mcnamara@FA.com	Practice client	No	Active	£226,259.00	0	Level 8	Invite client Edit Switch to →
Clare Brazilian JiuJitsu Limited	Eoin McNamara eoin.mcnamara@fa.com	Practice client	Could be Ⓞ	Active	£92,041.77	0	No Access	Edit Switch to →
Dext Integration	Eoin McNamara eoin.mcnamara@freeagent.com	Practice client	No	Active	£10,000.00	0	Level 8	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	£120,000.00	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 →

Then, choose 'HMRC connections'.



The screenshot shows the 'Settings' page in the FreeAgent interface. The top navigation bar includes 'Clients', 'Alerts', 'Account managers', 'Payroll', 'Reports', 'CSV imports', and 'Partner Zone'. The 'Settings' page is divided into two main sections: 'My practice' and 'Account Security'. In the 'My practice' section, three options are visible: 'Practice details', 'My details', and 'HMRC connections'. The 'HMRC connections' option is highlighted with a white box and a mouse cursor. Below it, the text reads: 'Manage, refresh or disconnect your authorised connections.' Other options in this section include 'Tax submission and access control', 'Client communication preferences', and 'Groups'. The 'Account Security' section includes 'Sign-in and Security', 'Active sessions', and 'Login attempts'. The footer contains the FreeAgent logo, links for 'Privacy Notice', 'Terms of Service', 'Accountant Knowledge Base', and 'Cookie Notice', along with 'Practice Support'.

Select 'Connect for MTD Income Tax'.

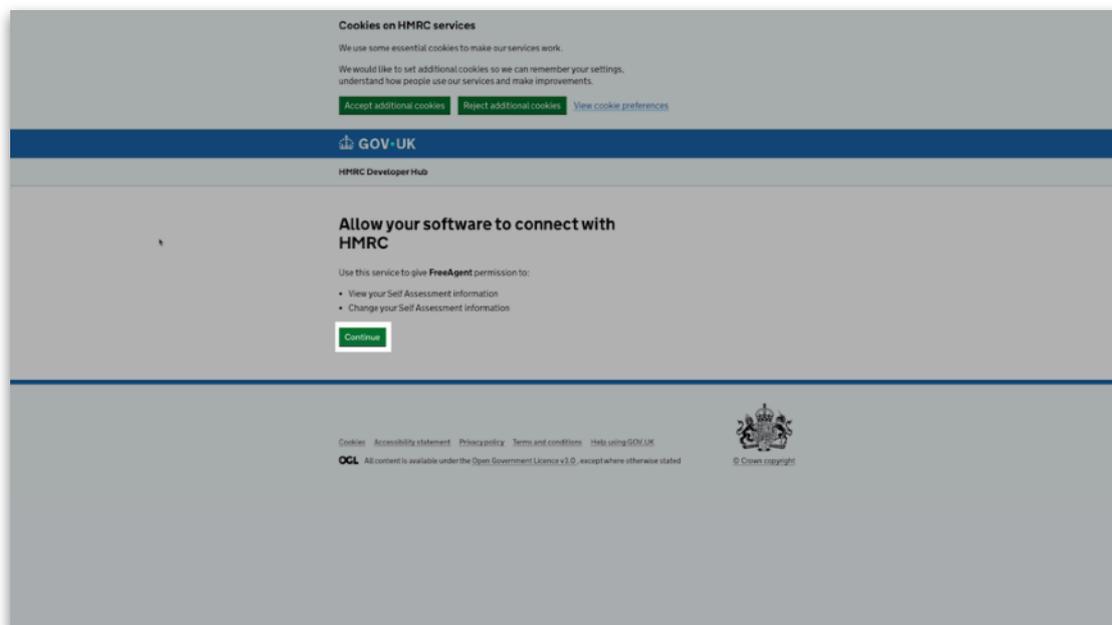


The screenshot shows the 'HMRC Connections' page in the FreeAgent interface. The top navigation bar is the same as in the previous screenshot. The page title is 'HMRC Connections'. Below the title is a table with the following data:

Service	Authorisation date	Expiry date	Actions
MTD VAT	07 Oct 24 09:59 by Ben Morley	07 Apr 26 09:59	<a href="#">Reconnect with HMRC</a> <a href="#">Disconnect</a>

Below the table, there is a message: 'If you are having problems with your HMRC connection, please reconnect.' A green button labeled 'Connect for MTD Income Tax' is highlighted with a white box and a mouse cursor. The footer is the same as in the previous screenshot.

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.

## MTD for Income Tax on mobile

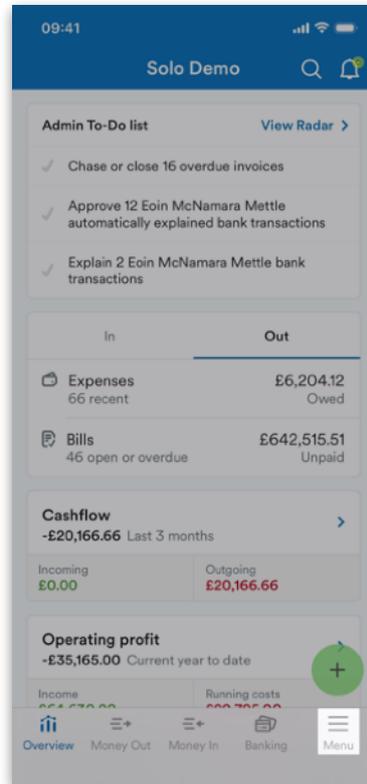
The FreeAgent mobile app is available on iOS and Android. It's designed only for your clients as the practice dashboard **isn't** available on mobile. Your clients can log into the mobile app using the same Username and Password they use to login into the desktop version. They can use the mobile app for tasks related to MTD for Income Tax like banking, Smart Capture and quarterly updates. If you would like to find out more about creating invoices, bills, out-of-pocket expenses and other mobile functionality please visit the 'Mobile' learning module in the "Accreditation & Learning" area of the practice portal.

### Banking

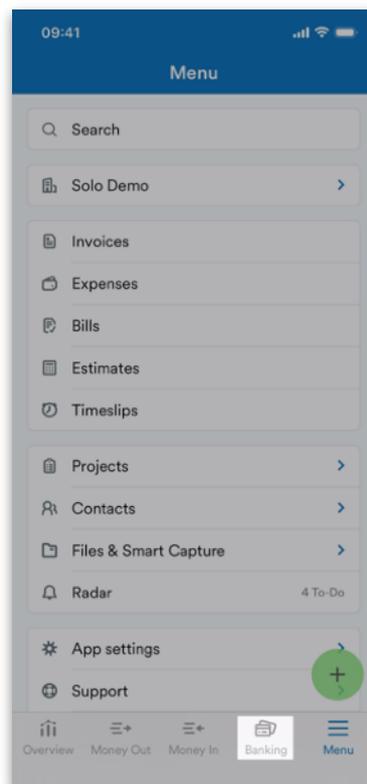
We recommend that your client sets up their bank feed. The benefit of this on mobile is that if their banking app is on the same phone that they use to access the FreeAgent mobile app, it will recognise this. Instead of needing all of your clients' banking information and security codes like setting up the bank feed via desktop, the mobile app will ask your client to log into the banking app using their security login, which could be touch ID, face ID or a

password. For clients to access the banking area on the mobile app their account must be set to user level permissions level 6 or above.

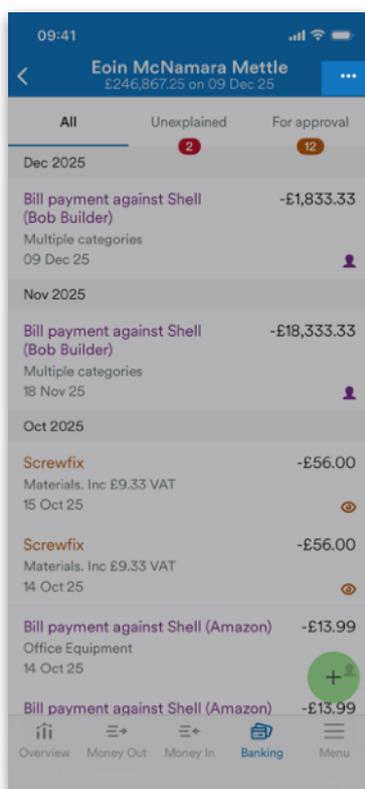
To enable a bank feed, your client will need to tap the **mobile app navigation menu button** (≡).



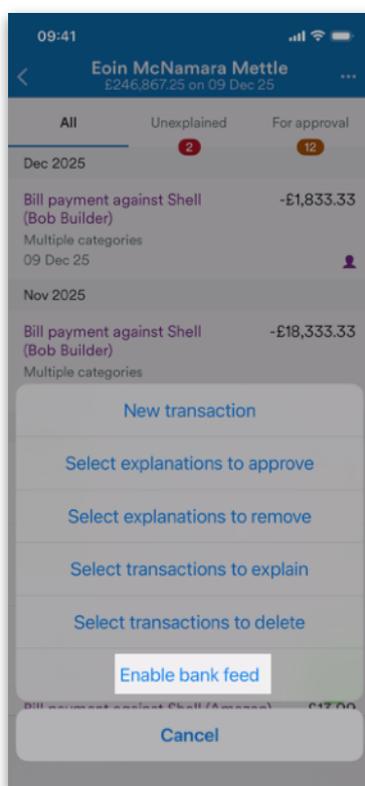
Then, they'll need to select the '**Banking**' icon



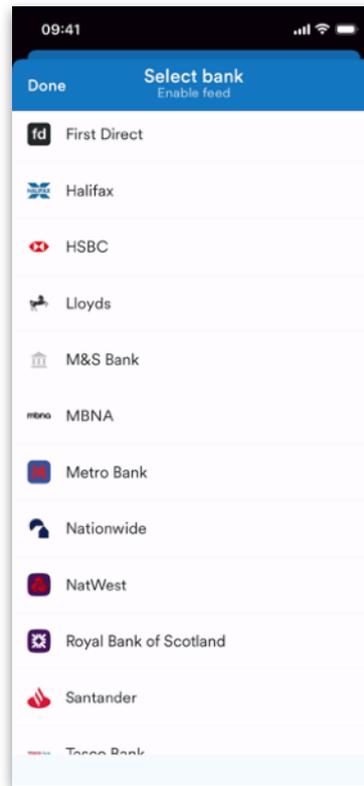
They'll then need to tap the **three-dots menu button (...)**.



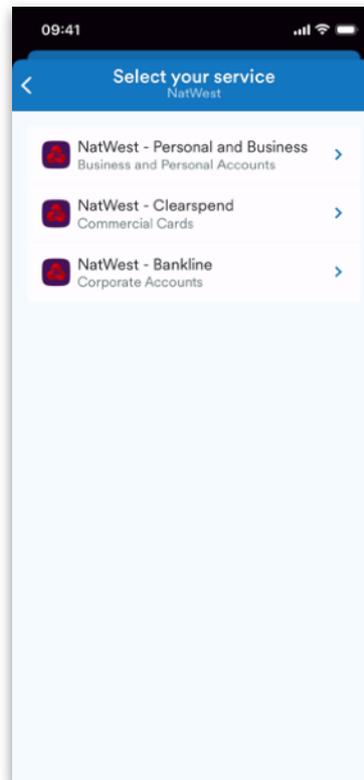
Then, they'll tap the **'Enable bank feed'** button.



They should scroll down the list until they find **their bank**.

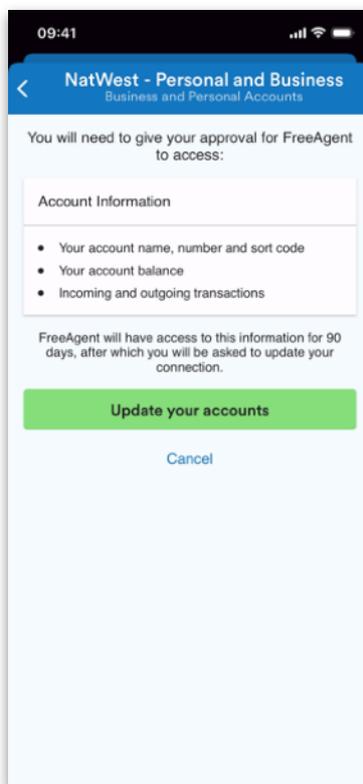


Some banks provide separate bank services for business and personal accounts. If this is the case for your client's bank, they'll be asked to choose **which bank service** they'd like to connect to.



If your client's bank doesn't have multiple services, they won't see this step.

As part of the Open Banking Standard, we need your client to give their explicit consent every 90 days to connect their bank account to FreeAgent.



For some supported banks, this can be done by you in bulk via your Practice Dashboard.

The Unexplained and Guess Rules Explanations in the mobile app follow the same rules as the desktop version of FreeAgent.

The Guess Rules Explanation transactions will be highlighted in orange in the 'For approval' tab.

All	Unexplained	For approval
Materials, Inc £9.33 VAT	2	12
14 Oct 25		
<b>B&amp;Q</b>		-£89.00
Materials, Inc £14.83 VAT		
12 Oct 25		
<b>Materials</b>		-£89.00
Cost of Sales, Inc £14.83 VAT		
12 Oct 25		
<b>Sales</b>		+£3,100.00
Sales, Inc £516.67 VAT		
09 Oct 25		
<b>Trainline</b>		-£17.00
Travel		
08 Oct 25		
<b>Bill payment against AXA002 (Amazon)</b>		-£650.00
Cost of Sales		
08 Oct 25		
<b>Invoice receipt against Solodemo125 Aldi</b>		+£2,000.00
08 Oct 25		

If it's a Guess Rule it will have a piece of bookkeeping attached to it like a bill or an Invoice.

09:41

Back Money out

Marked for approval

Amount  
**-£650.00**

08 Oct 25  
Bill Apple10//OTHER/£650.00

Explained as  
**Bill payment**

Amazon  
AXA002  
Paid on 08 Oct 25

Amount (GBP)  
-650.00

Choose attachment

Approve

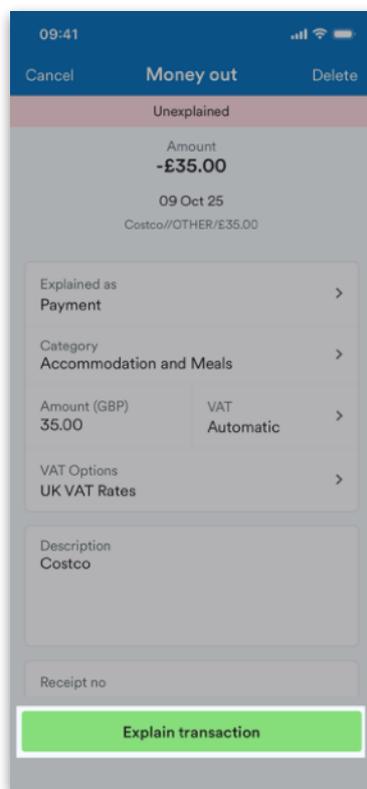
A Guess Explanation is a transaction without bookkeeping. This means that FreeAgent will look first at the most common category assigned from the description on the imported transaction and suggest this category for the transaction.

However, if you or your client overrides this suggestion then FreeAgent will remember this, and the next suggestion will change to reflect the way you would like to categorise this item.

In the 'Unexplained' tab your client must explain the transaction by selecting it and categorising it to the correct transaction type and Accounting Category from the drop down list.

The screenshot shows the 'Money out' screen in the FreeAgent mobile app. At the top, the status bar shows the time 09:41 and signal strength. The app header has 'Cancel', 'Money out', and 'Delete' buttons. Below this is a red bar labeled 'Unexplained'. The transaction details are: Amount -£35.00, Date 09 Oct 25, and Description Costco//OTHER/£35.00. A white dropdown menu is open, showing 'Explained as Payment' and 'Category Accommodation and Meals'. Below the dropdown, there are fields for 'Amount (GBP) 35.00', 'VAT Automatic', and 'VAT Options UK VAT Rates'. The 'Description' field contains 'Costco'. At the bottom, there is a 'Receipt no' field and a green 'Explain transaction' button.

Once happy with the explanation FreeAgent suggested or you or your client have explained, they'll need to select '**Explain transaction**' to complete the process.



## Smart Capture

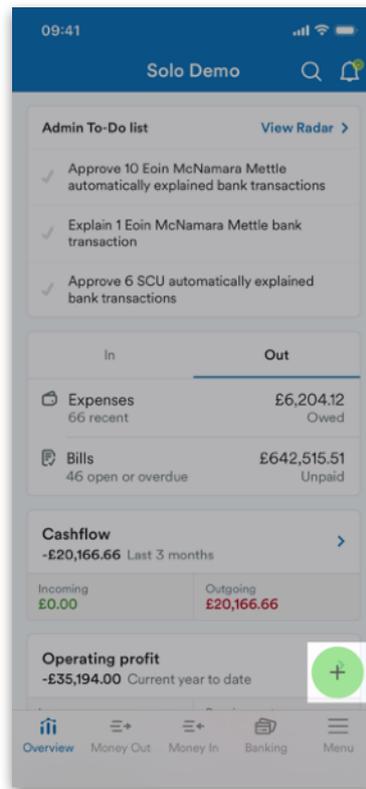
Smart Capture is a FreeAgent add-on. You get 10 free Smart Captures a calendar month, and after the 10, you and your client can choose to pay for the unlimited version of the add-on.

When your client captures and saves a photo of a receipt or shares a receipt to FreeAgent, FreeAgent's Smart Capture functionality will attempt to automatically extract the date and amount and suggest a category. It will then attach the file to a Money Out bank transaction, or you or your client can convert a file to an Out of Pocket Expense or a Bill in FreeAgent.

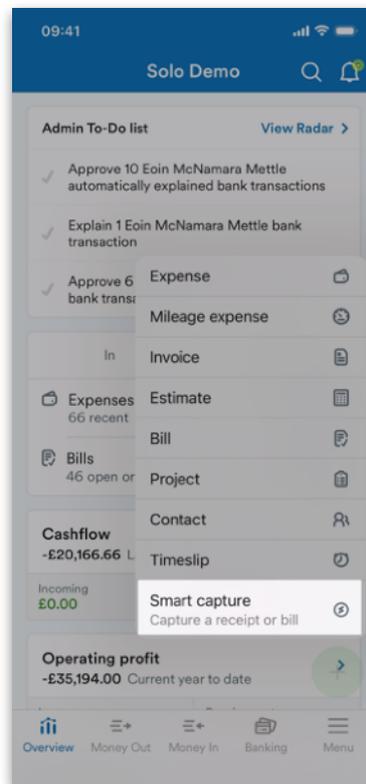
## Adding Smart Capture files and images

Clients can use the mobile app to capture a receipt and upload it directly to FreeAgent.

From the home screen, they can press the **green plus (+) icon**.



Then, they'll need to select '**Smart capture**'.



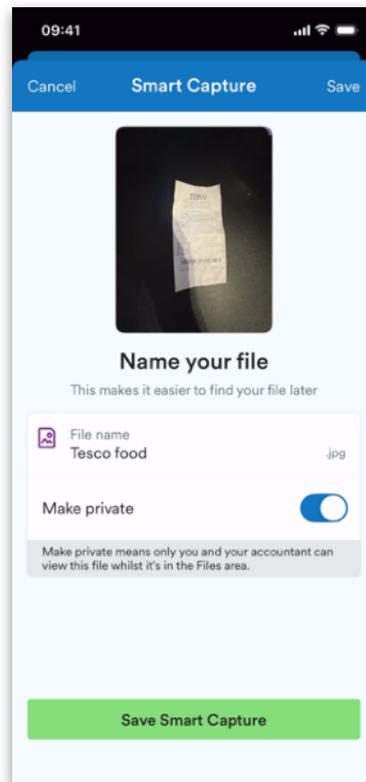
This will open the camera on their phone, where a receipt image can be captured.



The app will find the receipt border and once it's been fully captured, your client can review the image and select '**Done**' if they are happy with it.

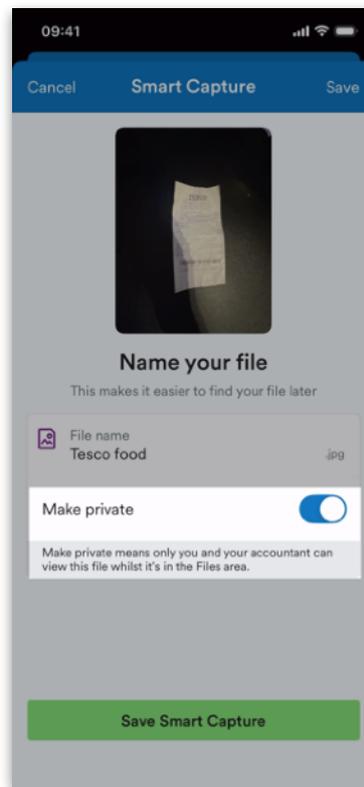


Next, they will be prompted to **add a file name** and they should choose something that will make the file easy to identify.

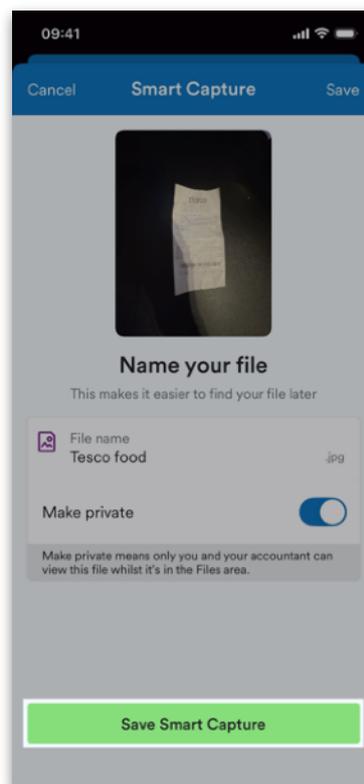


If they choose not to name the file, FreeAgent will automatically populate the name of the file on their device, which may make it hard to identify at a later date.

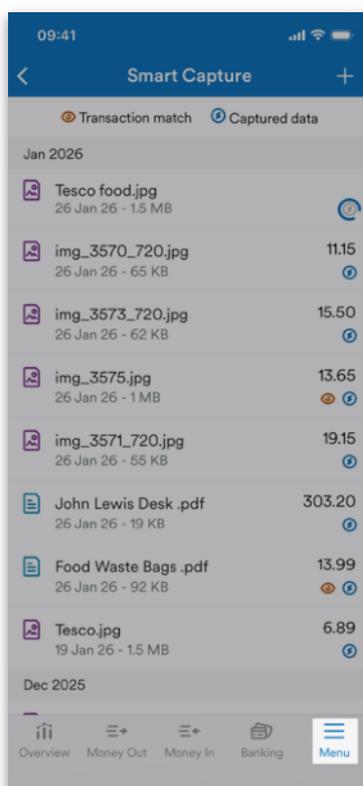
If your client is a level 7 or 8 user, they'll see the option to mark a file as private by selecting the **'Make private'** toggle. This means that only your client and you will be able to see or edit that image in their Files area.



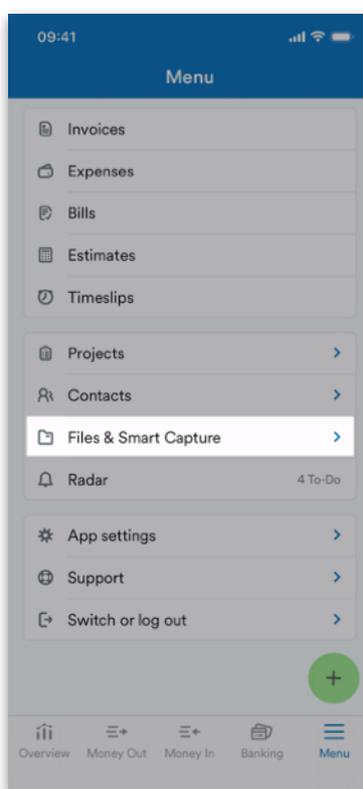
Once they've added a file name, they can select **'Save Smart Capture'** to complete the process.



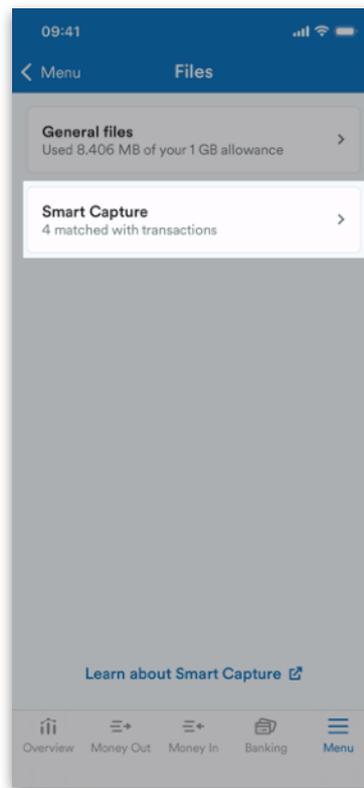
Clients can also upload files and pictures from the FreeAgent mobile app. To do this, they need to tap the **mobile app navigation menu button (=)**.



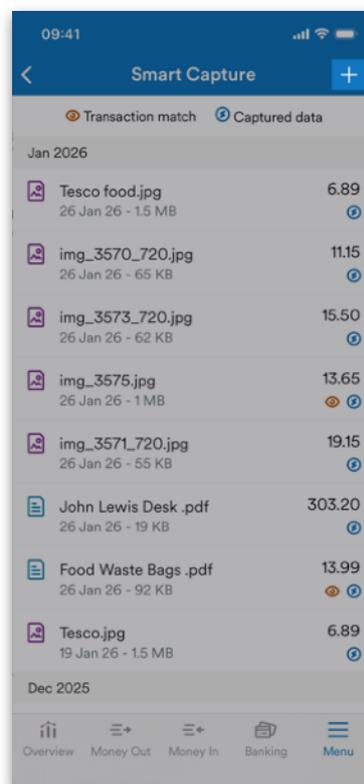
Then, they'll need to select '**Files & Smart Capture**'.



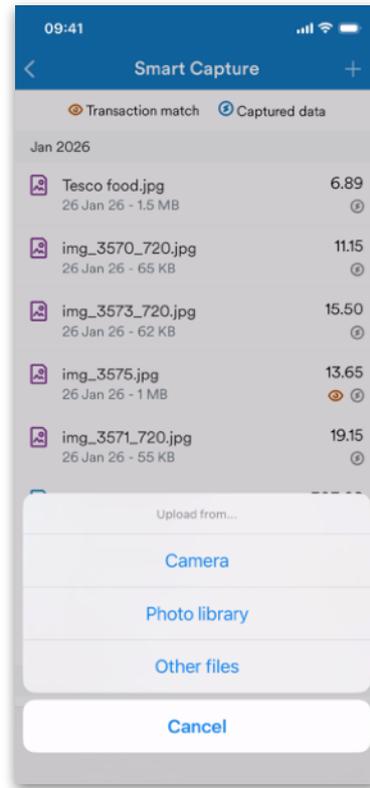
They'll need to choose 'Smart Capture'.



Then, they need to select the **plus icon (+)**.



Here, they can **choose either a photo or a file** on their device to upload, or **take a picture** of a receipt.



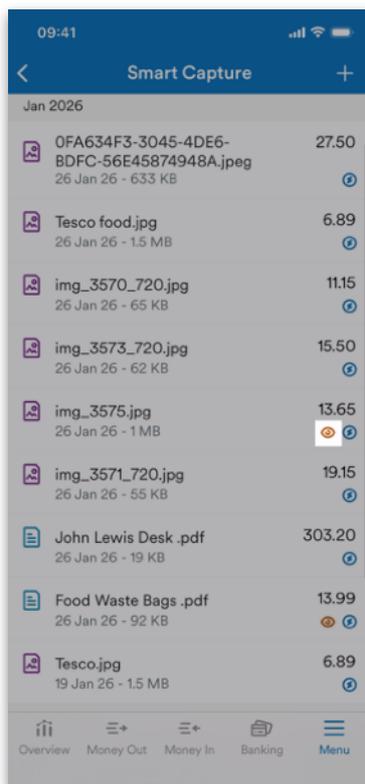
## Matching Smart Capture files to bank transactions

Receipts added using Smart Capture will be saved to the 'Smart Capture' tab in the Files area, and FreeAgent will attempt to automatically extract the date and amount and suggest a category. The Smart Capture lightning bolt symbol will be displayed by the extracted value.

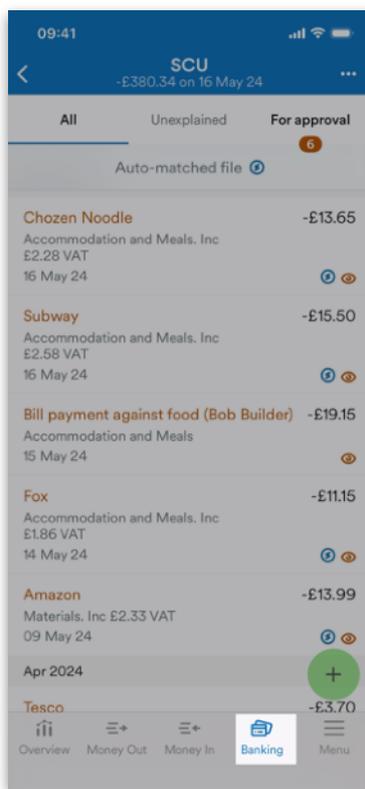


If there is a 'Money Out' bank transaction that is marked 'For approval' with a matching date and value, the receipt will also automatically be assigned to that transaction. The bank transaction must be dated between the receipt date and two business days later in order for the receipt to be matched to it. If there is more than one possible matching bank transaction, FreeAgent will assign the receipt to the transaction with the closest matching date.

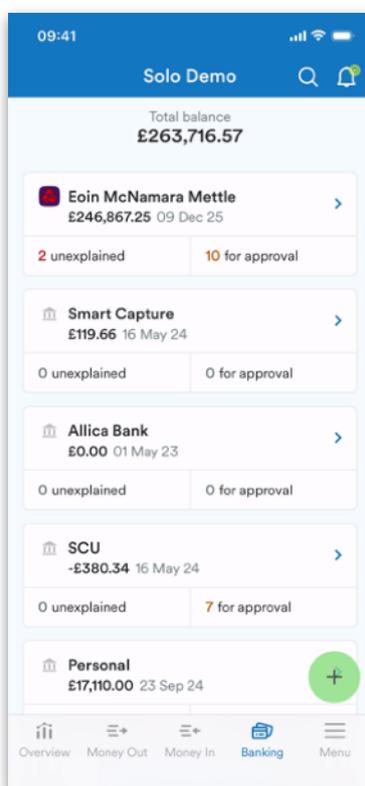
In the Smart Capture Files area, an eye icon will appear beside a capture that has a 'Transaction match' in the banking area.



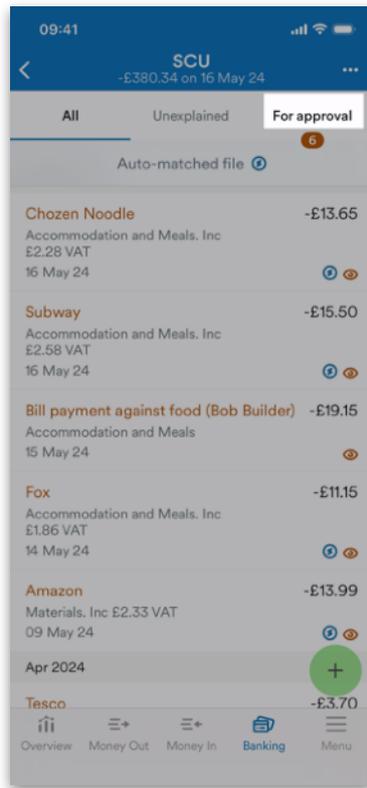
To approve a matching transaction, your client will need to navigate to the **'Banking'** area.



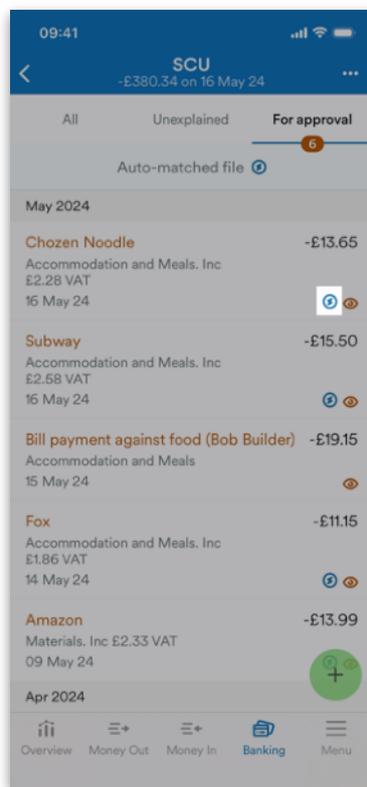
They'll then need to select the **relevant bank account**.



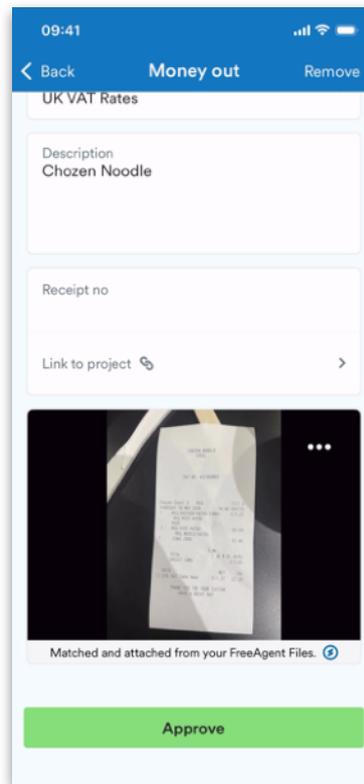
Next, they'll need to select the 'For approval' tab.



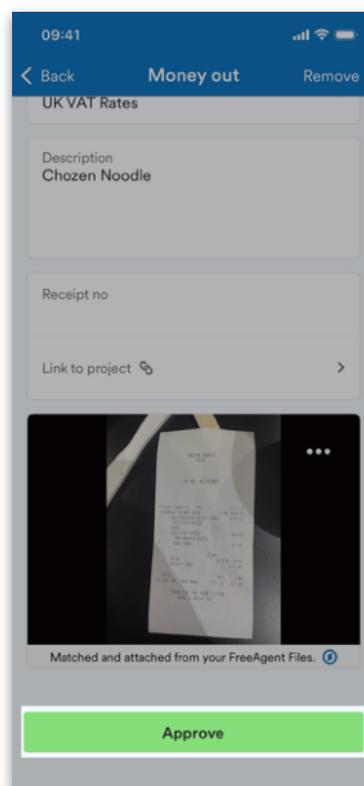
If the transaction has a lightning bolt with a blue circle around it, this denotes it is a transaction that has a matching Smart Capture file.



If they click on **the transaction**, they can see which Smart Capture file has been attached.

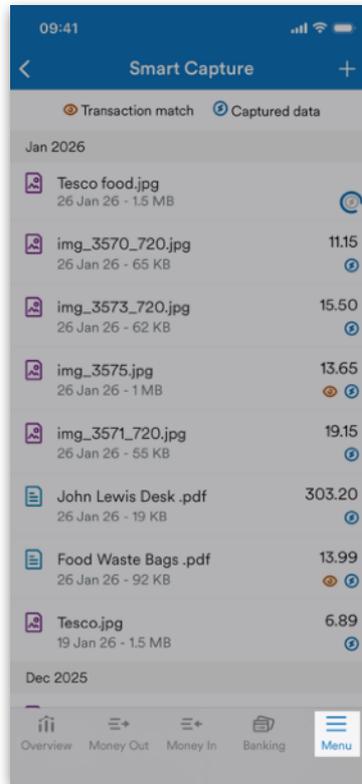


Once finished, they can click '**Approve**'.

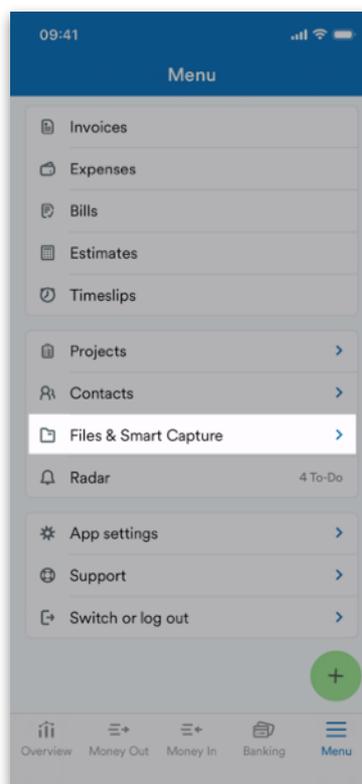


## Converting a Smart Capture file to an out-of-pocket expense

In the mobile app, clients can convert a file into an out-of-pocket expense. To do this they first need to tap the **mobile app navigation menu button** (≡).



Then, they'll need to select '**Files & Smart Capture**'.



They should then select **'Smart Capture'** to see the Smart Capture area, which contains files that have had the date and amount automatically extracted by FreeAgent's Smart Capture functionality.



They should then **select the relevant file** from the list, review the information and, once they're ready to proceed, select **'Convert to a new expense'**.



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

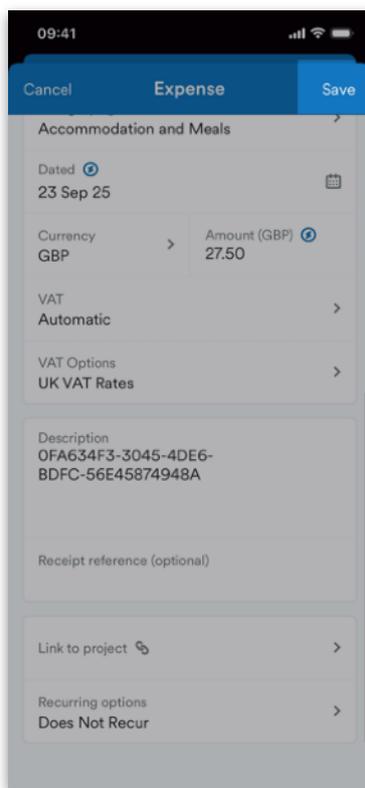
The screenshot shows a mobile application interface for creating an expense. The top bar is blue with 'Cancel', 'Expense', and 'Save' buttons. Below the bar is a photo of a receipt. The form fields are as follows:

- Claimant: Eoin McNamara
- Expense type: Payment
- Category: Accommodation and Meals
- Dated: 23 Sep 25
- Currency: GBP
- Amount (GBP): 27.50
- VAT: Automatic
- VAT Options: UK VAT Rates
- Description: OFA634F3-3045-4DE6-BDFC-56E45874948A
- Receipt reference (optional):

Your client can **choose the user** that they want to assign as claimant of the expense.

This screenshot is identical to the one above, showing the same 'Expense' form with the same data entries.

Once completed, click **Save**.



The image shows a mobile application interface for an 'Expense' form. At the top, there is a blue header with 'Cancel', 'Expense', and 'Save' buttons. Below the header, the form is organized into several sections:

- Accommodation and Meals**: A section header with a right-pointing arrow.
- Dated**: A field containing '23 Sep 25' with a calendar icon to its right.
- Currency**: A field containing 'GBP' with a right-pointing arrow.
- Amount (GBP)**: A field containing '27.50' with a currency icon to its right.
- VAT**: A field containing 'Automatic' with a right-pointing arrow.
- VAT Options**: A field containing 'UK VAT Rates' with a right-pointing arrow.
- Description**: A text area containing the alphanumeric string 'OFA634F3-3045-4DE6-BDFC-56E45874948A'.
- Receipt reference (optional)**: A text area that is currently empty.
- Link to project**: A field with a right-pointing arrow and a small icon.
- Recurring options**: A field containing 'Does Not Recur' with a right-pointing arrow.

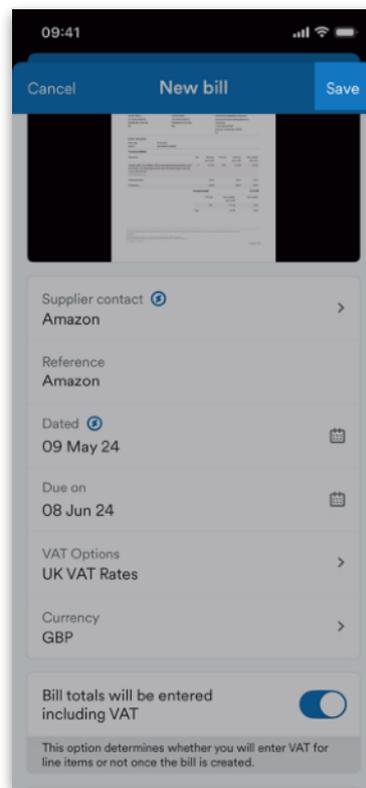
Please note that if some of the data is unable to be extracted, the relevant fields will not be automatically populated and your client will need to manually enter the details.



If you have previously assigned the contact to a previous extracted bill from this supplier, Smart Capture may recognise the contact from previous assignment and fill it in automatically. Smart capture will also attempt to populate the date and amount, and suggest a spending category for your client.

Your client should check the information that has been autofilled by Smart Capture and **add the reference number and VAT rate.**

To complete the process, select '**Save**'.

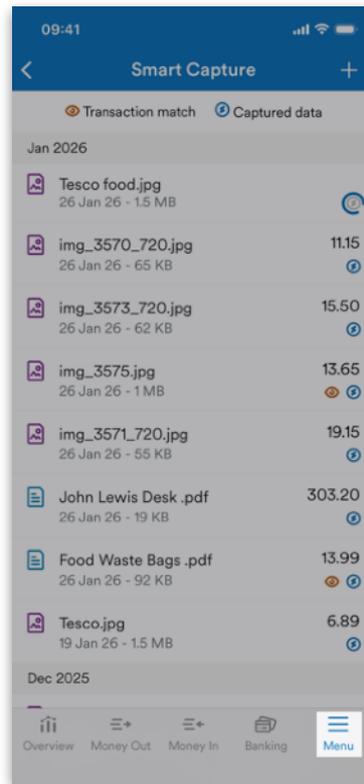


## Switching Licences on the Mobile

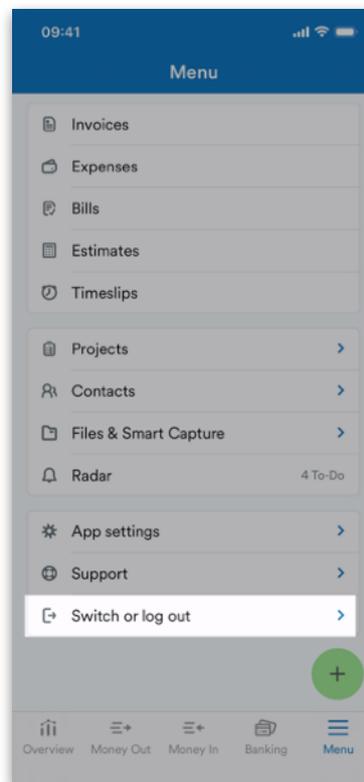
If your client requires multiple FreeAgent accounts they can access these all from the FreeAgent Mobile app.

Once they're logged in, they can add another account to the FreeAgent mobile app.

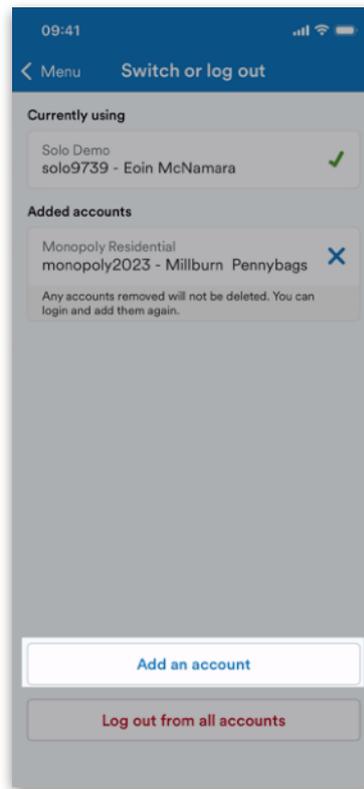
They'll need to tap the **mobile app navigation menu button** (≡).



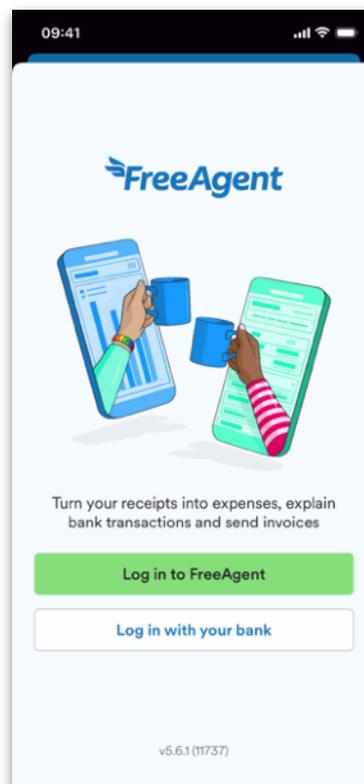
Then, they should select '**Switch or log out**'.



Next, they can tap **'Add an account'**.

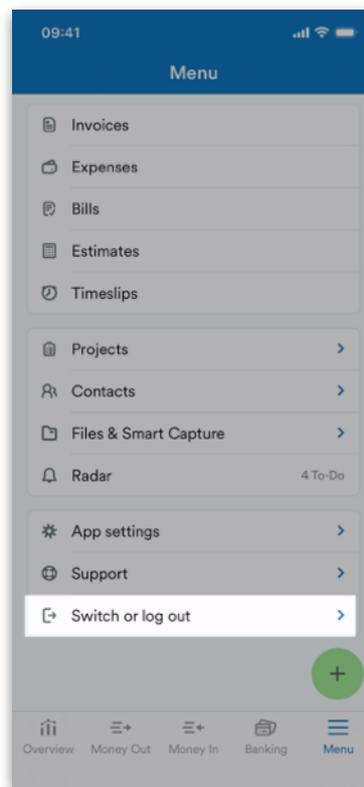


They'll then be prompted to log in using their email address and password, or they can log in with their bank credentials if applicable.



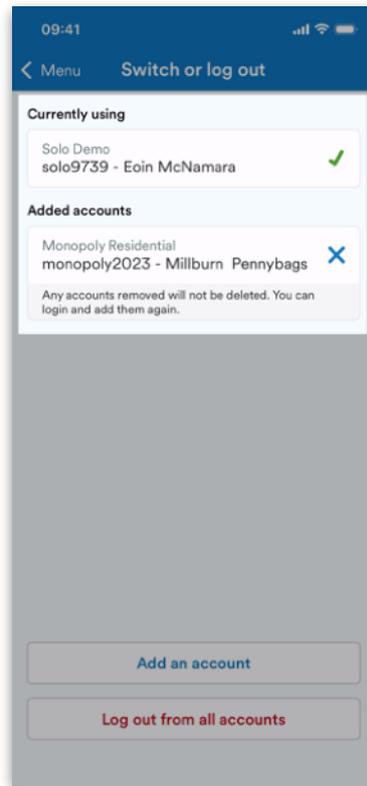
If they have multiple FreeAgent accounts associated with the email address they entered, they'll be prompted to **select an account to add**.

Please note that your client can only add one account at a time. If they'd like to switch from one FreeAgent account to another account that they've added to their FreeAgent mobile app, they can tap the **mobile app navigation menu (≡) button** and select **'Switch or log out'**.



They'll see a list of FreeAgent accounts that have been added to their device. The account at the top of the list will be the account they're currently logged in to, followed by the additional accounts.

Your client can switch to any account on the list by tapping on the **business name**.



# Support for your clients

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

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

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

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

[Knowledge Base](#)

[Accountants’ Knowledge Base](#)

## Practice Support team

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

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

**Telephone:** 0800 025 3800

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