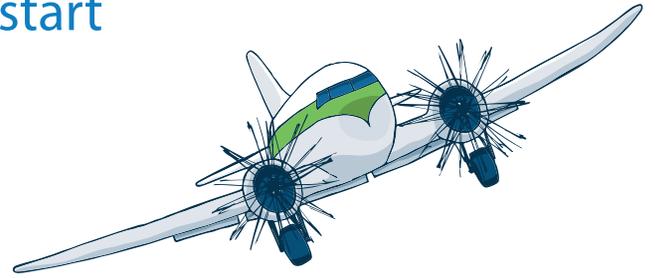




Here's your FreeAgent flying start checklist



Create an invoice

Choose a template design, fill in the details, and send it to your client.

Automate invoices and reminders

Set up automated invoices, reminder and thank you notes to save you time. This can also save you from those awkward conversations with late payers!

Get paid online

Make it easy for your clients to pay you by including an online payment link on your invoices. They can pay you by PayPal or credit/debit card by just clicking a link on your invoice email.

Connect your bank account

You can upload your electronic statements to FreeAgent. Or simply connect to your online bank account and we'll automatically import your transactions every day.

Explain your transactions

Explain your bank transactions as either 'money in' (like an invoice payment) or 'money out' (like an expense), and FreeAgent will build up real-time accounts for your company. Over time, FreeAgent automatically categorises new transactions based on your previous descriptions to save even more time.

Record an expense

Whether it's a regular business payment or you're just grabbing a coffee on the go, you can use FreeAgent to record all the expenses you incur running your business.

Attach a receipt

Simply scan your receipt and attach it to the expense entry or just snap a photo of the receipt on your mobile and upload it directly into FreeAgent - never lose a receipt again!

Start a project

Create a project and build a to do list of your tasks. Mark tasks as complete as you make progress, and move on to the next one.

Track your time and costs

Tracking your time on a project can help ensure you get paid for all the time that you work. You can add costs, such as out-of-pocket expenses or mileage travelled, to a project making it easy to rebill them to your client.

Check project profitability

By tracking everything on a project you can keep an eye on income and expenses so you know which projects are making (or losing!) you money.