FreeAgent
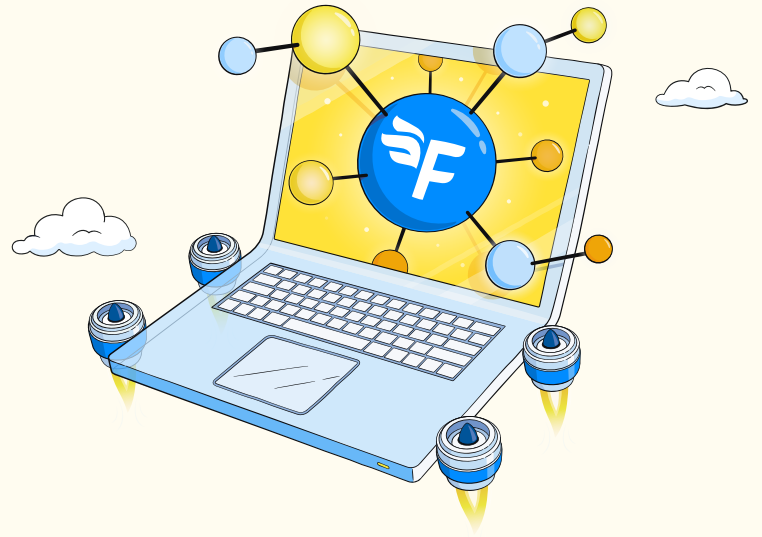
Here's your FreeAgent flying start checklist

☐ **Create an invoice**
Choose a template or create your own design, fill in the details, and send it to your client.

☐ **Automate invoices and reminders**
Set up automated invoices, reminders and thank you notes to save you time - and help avoid 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. Tyl, Stripe, GoCardless and PayPal all connect with FreeAgent and offer a range of payment solutions from card payments to Direct Debits.

☐ **Connect your bank account**
Simply set up an Open Banking bank feed 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 suggests explanations for 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**
Snap a photo of a receipt using your phone and upload it directly into FreeAgent. The Smart Capture tool will even extract the date and amount automatically.

☐ **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 work that you do. 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.