

FreeAgent

Quick start guide



Welcome to FreeAgent! We've set everything up for you — your role is simple:

- Connect your bank feed
- Send us your receipts
- Keep your bank feed authorised

We take care of all bookkeeping, VAT, and categorisation.

1. Log In

1. Open the email invitation from us
2. Click Accept Invite
3. Create your password
4. Log in to FreeAgent

2. Connect Your Bank Feed (Web Only – First Time)

⚠️ You cannot do the first bank connection in the app. It must be done on a web browser (desktop/laptop).

Steps:

1. Log in to FreeAgent on a web browser
2. Go to Banking
3. Select the bank account we set up
4. Click Connect Bank Feed
5. Log in to online banking & approve

We handle all categorising and reconciling

3. Reconnect Every 90 Days (App or Web) Banks require reauthorisation every 90 days.

In the App:

- Open FreeAgent → Banking
- Tap account → Reconnection Required
- Follow prompts

On the Web:

- Go to Banking → select account
- Click Reconnect Bank Feed

4. Mettle Users – Snap Receipts in the Mettle App

If you bank with Mettle, you can attach receipts directly:

1. Open Mettle
2. Tap a transaction
3. Select Add Receipt
4. Snap or upload
5. Save

This syncs automatically into FreeAgent.

5. Smart Capture (10 Free Scans per Month)

Use Smart Capture in the FreeAgent app to snap receipts:

Expenses → Snap a Receipt → Smart Capture

6. When Smart Capture Runs Out

Upload receipts to the Files area:

Work → Files → Upload Files

Please don't create expenses or attach receipts to transactions — we do all bookkeeping for you.

7. Use the Expenses Section ONLY for Personal Spend

Only use Expenses for: **Things you personally paid for that you aren't being reimbursed for**

Do **not** use it for:

- ✗ Business bank card purchases
- ✗ Mettle receipts
- ✗ Smart Capture receipts
- ✗ General business spend

8. Multiple Bank Accounts

If you use more than one business account (PayPal, card, savings):

➡ Tell us and we will add them for you

You'll connect each one using the same steps as above.

9. Please Don't Change Settings

To keep your accounts accurate, avoid editing:

- VAT settings
- Categories
- Bank rules
- Bills/expenses (unless personal spend)
- Journals

We maintain all system settings for you

FreeAgent has a wealth of other recourses. Select a link to skip straight to that section:

- [Create invoices, bills and expenses](#)
- [Transaction categories](#)
- [Bank Feeds](#)
- [Give your accountant access](#)
- [Out of pocket expenses](#)

Need Help?

We're here to support you.

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