freeAgent

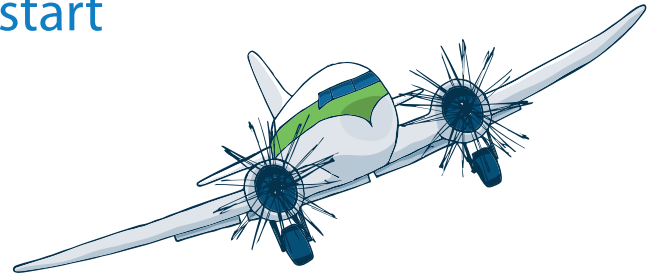# Here's your FreeAgent flying start checklist

☐ **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.