

Adding SSC as Your Accountant in FreeAgent

A quick guide to connecting your FreeAgent account with us.

Which method is right for you?

SSC is a registered **FreeAgent Partner**. There are two ways to connect your account with us.

Option A: Transfer to our Practice Dashboard	Option B: Add us as a user
We manage your FreeAgent subscription and have full access to help you. This is the simplest option for most clients and is what we recommend.	You keep full control of your own FreeAgent subscription and add us as an Accountant user. Best if you prefer to manage your own account.

Option A: Transfer to our Practice Dashboard

This is the quickest option. Just let us know and we will start the process from our end.

Please provide us with:

What:	Your FreeAgent login email address
And:	Your FreeAgent subdomain (the bit before .freeagent.com)
Send to:	sue@sscaccounting.co.uk

Once we send the transfer request, you'll receive an email from FreeAgent asking you to confirm. Just click **Confirm** and you're done.

Important: Only the FreeAgent account owner can confirm the transfer. If someone else manages your FreeAgent account, they will need to do this step.

NatWest, Royal Bank of Scotland, Ulster Bank or Mettle customers: If you have a business current account with one of these banks, you may be eligible for a free FreeAgent account. Ask us for details.

Option B: Add us as a user

If you prefer to keep managing your own FreeAgent subscription, you can add us as a user with Accountant access.

You'll need the following details:

Name:	Sue Cooke
Email:	sue@sscaccounting.co.uk
Role:	Accountant
Access:	Level 8 (Full Access)

- 1 Open Settings**
Log in to FreeAgent. Click the **drop-down menu** in the top right corner and select **Settings**, then **Users**.
- 2 Add a new user**
Click **New User** in the top right corner.
- 3 Set the role**
From the **Role** drop-down menu, select **Accountant**.
- 4 Enter our details**
Enter **sue@sscaccounting.co.uk** as the email address, **Sue** as the first name, and **Cooke** as the last name.
- 5 Set the access level**
Drag the permission slider all the way to the right to **Level 8 (Full Access)**. This allows us to manage your bookkeeping, VAT, payroll and year-end accounts without restrictions.
- 6 Send the invitation**
Click **Create new user & Send Invitation**. We will receive an email and set up access usually within a few hours.

That's it! Once we accept the invitation, we can start working on your books straight away. You don't need to do anything else.

Need help?

If you get stuck or anything doesn't look quite right, just give us a ring on **01244 564390** or email **hello@sscaccounting.co.uk** and we'll walk you through it.



SSC Accountants & Business Advisors

FreeAgent Partner

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