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**Mary Girsch-Bock** • Mar. 20, 2017

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**Free Agent – [www.freeagent.com](http://www.freeagent.com)**

**From the March 2017 [review of Invoice Management systems](#).**

Free Agent is an online accounting software application designed for freelancers and small business owners. Free Agent offers invoice and expense management capability, as well as project management and sales tax management.

During the initial setup, users will enter their company information, including company type. Once this is complete, users can choose to send an invoice, record an expense, link a bank account or start a project.

Choosing the invoice option will bring users to the New Invoice screen, where

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Users can also create estimates in Free Agent, with users able to add product or service details on the fly. Once an estimate has been sent, it can be marked as sent. Once an estimate is approved, it can be invoiced, or if rejected, another adjusted estimate can be sent, if needed.

Users will have to set up the New Recurring Profile information in order to use the recurring invoice feature. This can be set up by contact or by project, with users able to choose from a variety of invoice frequencies, including weekly, monthly, quarterly, biannually, or annually. Users can choose the same additional functions that can be added to regular invoicing, so automatic reminders can be sent, and invoicing can be done via email, if desired. Discounts can be entered using a percentage rate when entering invoice details.

Time and Expense tracking is available in Free Agent, with users able to create both expense claims and mileage claims, indicating whether the time is linked to a specific project. Users can also upload supporting documentation such as receipts and mileage logs to the time and expense tracking screen. Users can also snap a photo of a receipt and upload it into Free Agent.

There is no option to create an automatic late fee, but users can add a late fee to an unpaid invoice if desired by editing the existing invoice. Users can also add credit memo to an invoice as well. Free Agent offers multi-currency capability, so users can invoice and accept payments in a variety of currencies. The product can handle basic sales tax tracking, or users can choose to not

Free Agent offers integration with a variety of apps including PayPal, Stripe, GoCardless, and Dwolla that provide a variety of methods for customers to make payments online. Free Agent also offers decent accounting functionality, with all features working together well.

Freelancers and small business owners can try out Free Agent for free for 30 days.

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