

## The FreeAgent integration

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## 1. Goal of the integration

### 1.1 Simply manage your data

One of the many advantages of using the integration between Simple-Simon and FreeAgent is that you can control your data in one spot. Once the integration between Simple-Simon and FreeAgent is set, FreeAgent becomes the main ERP system. Price listing (products) should be added to FreeAgent. Simple-Simon automatically updates according to the mutations that are done in FreeAgent. Add your customers and products to FreeAgent. Simon will copy these and you can start creating and planning your work orders!

### 1.2 Less mistakes, quicker billing

Controlling your data in spot ensures you make less mistakes while billing to your customers. Create a work order in Simon, schedule the work order for yourself or your co-worker and register products and hours. Once the work order is reported finished and archived, it is sent to FreeAgent as an invoice within 5 minutes. Check, edit and confirm that the invoice is correct and send the bill to your customer. The integration between Simple-Simon and FreeAgent creates less mistakes and makes your billing quicker.

### 1.3 Advantages of the integration

The integration between FreeAgent and Simple-Simon comes with plenty of advantages, as you:

1. Can send your bill **quicker** and you make **less mistakes**.
2. Simon automatically acquires all **your customers and price listing** from FreeAgent and this is directly available in Simon.
3. Your work order is finished in Simple-Simon, the archived work order is sent back to **FreeAgent** as an **invoice with the status draft**.
4. Is your work order ready? Within **5 minutes** the bill can be send to your customer.
5. It makes processing work order effortless, directly save **time** and **money!**
6. The integration **can be easily created by yourself**, ready within 5 minutes.

## **2. Principles of the integration**

### **2.1 FreeAgent is the starting point for your customers, price listing**

Once the integration between Simple-Simon and FreeAgent is set, FreeAgent becomes the main ERP system for your price listing and customers. Adding customers or price listing (products in Simon) and editing them, should be done in FreeAgent. Adding/editing/removing customers and products should be done in FreeAgent and sending them to Simon is done automatically every night. Customers or products added to Simon cannot be forwarded to FreeAgent. In order to prevent incorrect billing, customers and products added to Simon will therefore be automatically removed from Simon. This is done a few times a week.

### **2.2 Create and schedule a work order and register hours**

You can start creating work orders once all your customer and products are transferred to Simple-Simon. Creating the work order is done in Simple-Simon. Create a work order, schedule the work order for yourself or your co-worker and register hours or products. You can also add own forms that ask specific questions about the job done.

### **2.3 Customer added to the work order should match the customer in FreeAgent**

Every customer that is added to a work order, should be a customer that is transferred from FreeAgent to Simple-Simon. When you archive the work order in Simon, an invoice with the status draft is created for that particular customer in FreeAgent. Your customer database is available for your office and in the field employees. They can select the correct customer. It is not possible to send the work order to FreeAgent if no customer is registered on the work order. The integration will send an error notification as it not possible to create an invoice in FreeAgent without selecting a customer.

### **2.4 Archiving the work order in Simon creates an invoice in FreeAgent**

You can send your work order to FreeAgent by archiving the work order in Simon. In order to do so, the work order needs to be reported as finished. Check the finished work order, edit if necessary and archive the work order. Within a few minutes the work order becomes an invoice with status draft in FreeAgent. The invoice is added to the selected customer. That way it is easy to control your work orders and invoices. The integration logging allows you to precisely follow this process. For example, if no customer is added to the work order then no invoice can be created in FreeAgent. The integration logging shows you what might be wrong and how you can fix this.

### **2.5 Removing customer should be done in FreeAgent, Simon updates automatically**

Removing or inactivating customers should be done in FreeAgent. FreeAgent is the main ERP system and Simon updates accordingly. A few times a week Simon checks and removes customers that are removed in FreeAgent as well. You do not need to remove these customers yourself; Simon does this automatically.

### 3. Exchanges in the integration

#### 3.1 Retrieving products from FreeAgent

Once the integration between Simple-Simon and FreeAgent is set, FreeAgent becomes the main ERP system for your price listing (products in Simon). Simple-Simon automatically updates once mutations are done in FreeAgent. This is done every night. The adding/editing/removing of products is updated in Simon during the night. Only products that are added to the price listing, can be added to Simon (not the stock products). Your product database is available for your office and in the field employees. They can select the correct product. Adding price listing (products) and editing them, should be done in FreeAgent. Products added to Simon cannot be forwarded to FreeAgent. In order to prevent incorrect billing, products added to Simon will therefore be automatically removed from Simon. This is done a few times a week.

#### 3.2 Retrieving customers from FreeAgent

Once the integration between Simple-Simon and FreeAgent is set, FreeAgent becomes the main ERP system for your customers. Simple-Simon automatically updates once mutations are done in FreeAgent. This is done every night. The adding/editing/removing of customers is updated in Simon during the night. Your customer database is available for your office and in the field employees. They can select the correct customer. Adding customers and editing them, should be done in FreeAgent. Customers added to Simon cannot be forwarded to FreeAgent. In order to prevent incorrect billing, customers added to Simon will therefore be automatically removed from Simon. This is done a few times a week.

#### 3.3 Work addresses are retrieved from FreeAgent, but may be added in Simon

The standard invoice address is automatically retrieved from FreeAgent and becomes the customer address in Simon. Additionally, a work address is created based on the invoice address. A work address is the location where the job should be done. Billing and/or shipping addresses created in FreeAgent are also added to Simon as work addresses. You are also allowed to add work addresses in Simon. Just make sure you match the work address to the correct customer (which is retrieved from FreeAgent). You can create as many work addresses in Simon as you wish, if they are matched to a customer.

#### 3.4 Archived work orders are sent to FreeAgent

Sending work orders to FreeAgent is done by archiving them in Simple-Simon. Only a work order that is marked as finished can be archived. Once you archive the work order, within minutes it is placed in FreeAgent as an invoice. You can archive the work order by selecting 'Archive' in the work order overview. This button is only available if the work order is **reported** as **finished**. The work order is sent to FreeAgent as an invoice with the status draft and placed at the correct customer. Your co-workers in the office can check the work order before sending it to FreeAgent. That is how you easily manage and control your work orders and bills.

### **3.4.1 How are the registered travel times in the work order sent to FreeAgent?**

The registered travel times in the work order can be sent to FreeAgent as an invoice line. You can determine which product should be used to book the times in FreeAgent. You can determine this by changing the settings of the integration. More information about the integration's settings can be found in chapter 5.2 "How do I make sure Simon sends my registered travel time to FreeAgent?". An example: let's say you registered 15 minutes of travel time on the work order in Simon. In FreeAgent the travel time is registered as 0,25 x "your chosen product". In FreeAgent you can edit the quantity, price or product before you send the bill to your customer. It is also possible to not register the travel time in FreeAgent. Do you want to know more about this option? Take a look at the settings in chapter 5.2.

### **3.4.2 How are the registered work times in the work order sent to FreeAgent?**

The registered work times in the work order can be sent to FreeAgent as an invoice line. You can determine which product should be used to book the times in FreeAgent. You can determine this by changing the settings of the integration. More information about the integration's settings can be found in chapter 5.3 "How do I make sure Simon sends my registered work time to FreeAgent?". An example let's say you registered 15 minutes of work time on the work order in Simon. In FreeAgent the work time is registered as 0,25 x "your chosen product". In FreeAgent you can edit the quantity, price or product before you send the bill to your customer. It is also possible to not register the work time in FreeAgent. Do you want to know more about this? Take a look at the settings in chapter 5.3.

### **3.4.3 How are the registered products transferred to FreeAgent's invoice?**

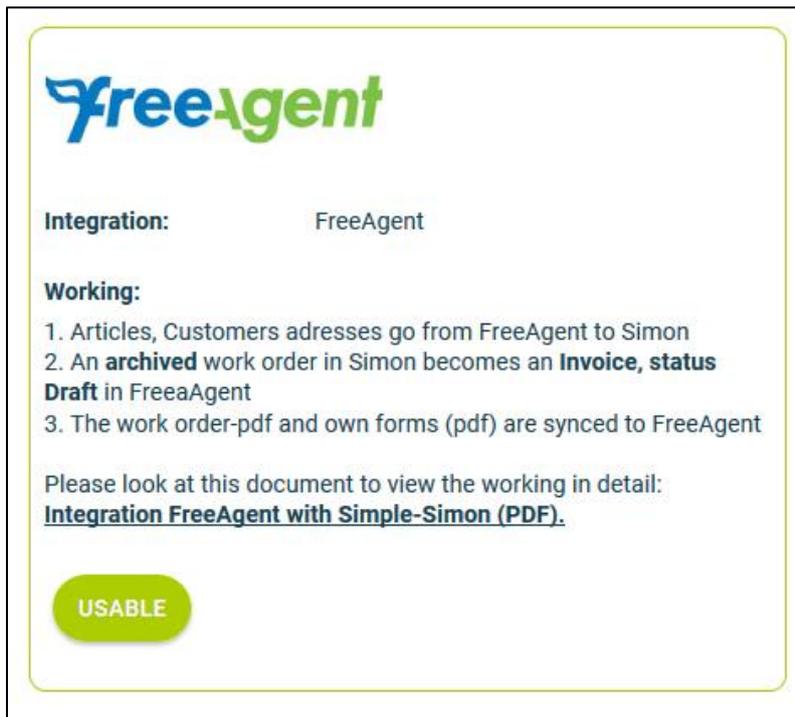
The registered products in the work order are transferred to FreeAgent as an invoice line. Here you can edit the price, quantity of product, before you send the bill to your customer. Simon automatically selects the correct product in FreeAgent, as the product database is based on FreeAgent's price listing.

## 4. Activating the integration

There are several options available to make sure the integration works as you wish. Change the settings so that the integration matches perfectly with your workflow. In order to activate the integration, FreeAgent and Simon should be connected. This chapter explains how creating the connection works.

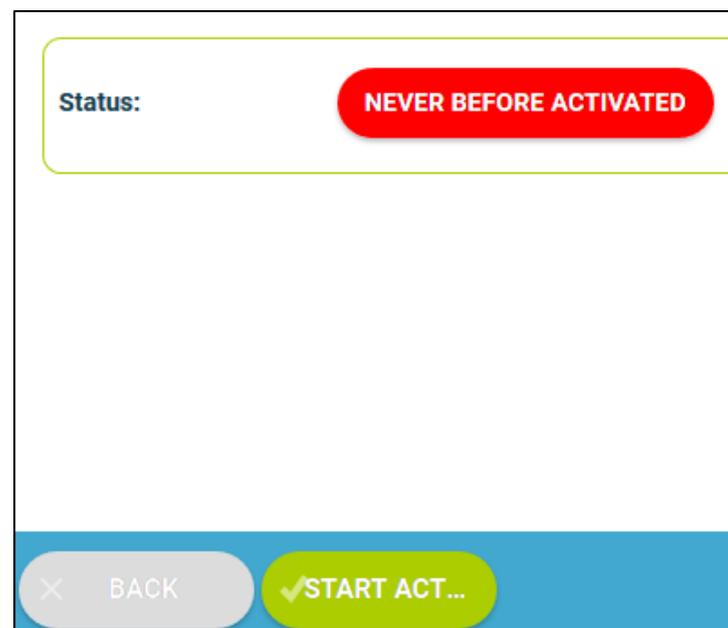
### 4.1 Where should I start when creating the integration?

Make sure you are logged into Simple-Simon and head over to 'Integrations'. Select 'Activate integration' and select 'Usable'.



### 4.2 How do I activate the integration?

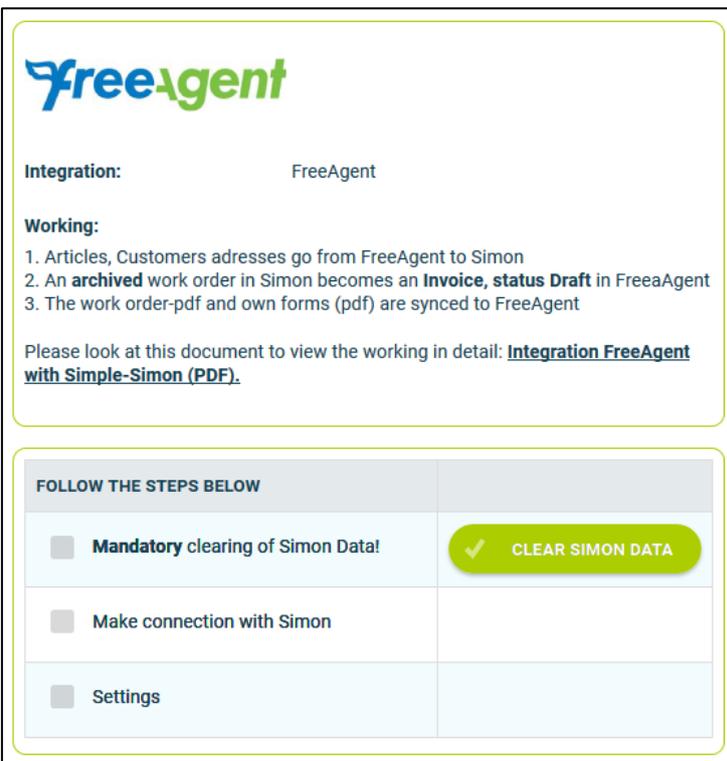
Select the green button 'Start activation'. We then shortly explain how the integration works. Creating the integration starts by erasing existing Simon data. Chapter 4.3 "Why should I erase my database before I can activate the integration?" explains why and how this can be done.



### 4.3 Why should I erase my database before I can activate the integration?

It is mandatory to erase your database in Simple-Simon if you want to start the integration with FreeAgent. Once the integration between Simple-Simon and FreeAgent is set, FreeAgent becomes the main ERP system. Customers and products should be added to FreeAgent. Simple-Simon automatically updates according to the mutations that are done in FreeAgent. Your database in Simon therefore should be emptied first, so that you can begin with a fresh start. Select 'Clear Simon data' to erase the data. Simon then shows you which parts should be erased.

If you are restarting the integration (after deactivating it), you can choose which parts of the database should be erased. Select which parts of the database you want to remove and which should remain.



**freeagent**

Integration: FreeAgent

**Working:**

- Articles, Customers addresses go from FreeAgent to Simon
- An **archived** work order in Simon becomes an **Invoice, status Draft** in FreeAgent
- The work order-pdf and own forms (pdf) are synced to FreeAgent

Please look at this document to view the working in detail: [Integration FreeAgent with Simple-Simon \(PDF\)](#).

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**FOLLOW THE STEPS BELOW**

<input type="checkbox"/> Mandatory clearing of Simon Data!	<input checked="" type="checkbox"/> CLEAR SIMON DATA
<input type="checkbox"/> Make connection with Simon	
<input type="checkbox"/> Settings	

Below the **Simon-tables** which will be emptied before starting the integration.

	Table	Number	Last Update
<input checked="" type="checkbox"/>	Article Group	3	2019-09-10 11:24 AM
<input checked="" type="checkbox"/>	Article	12	2019-09-10 11:24 AM
<input checked="" type="checkbox"/>	Work Order	31	2019-09-10 11:24 AM
<input checked="" type="checkbox"/>	Work Address	16	2019-09-10 11:24 AM
<input checked="" type="checkbox"/>	Customer	5	2019-09-10 11:24 AM
<input checked="" type="checkbox"/>	Equipment	0	-
<input checked="" type="checkbox"/>	Contact Persons	10	2019-09-10 11:24 AM

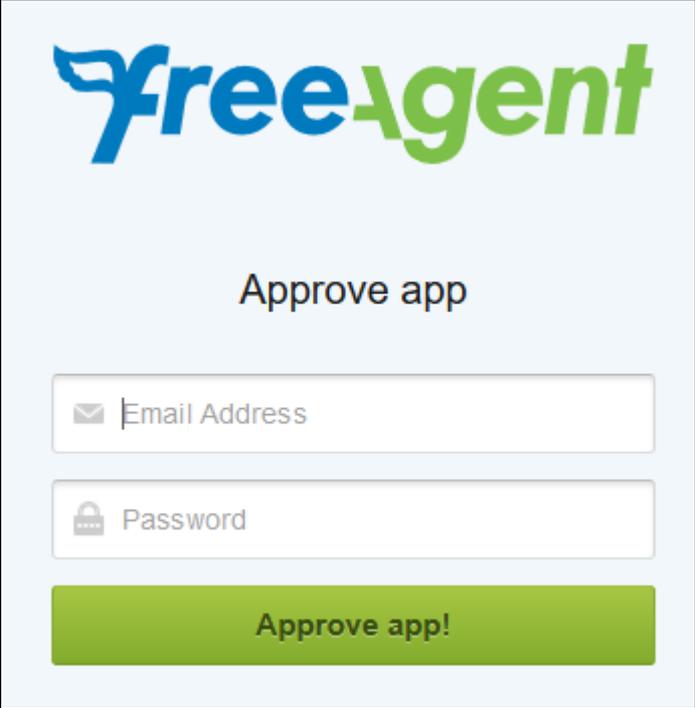
It is possible to start the integration as soon as you have erased the Simon database. You can do so by selecting 'Connect!'.



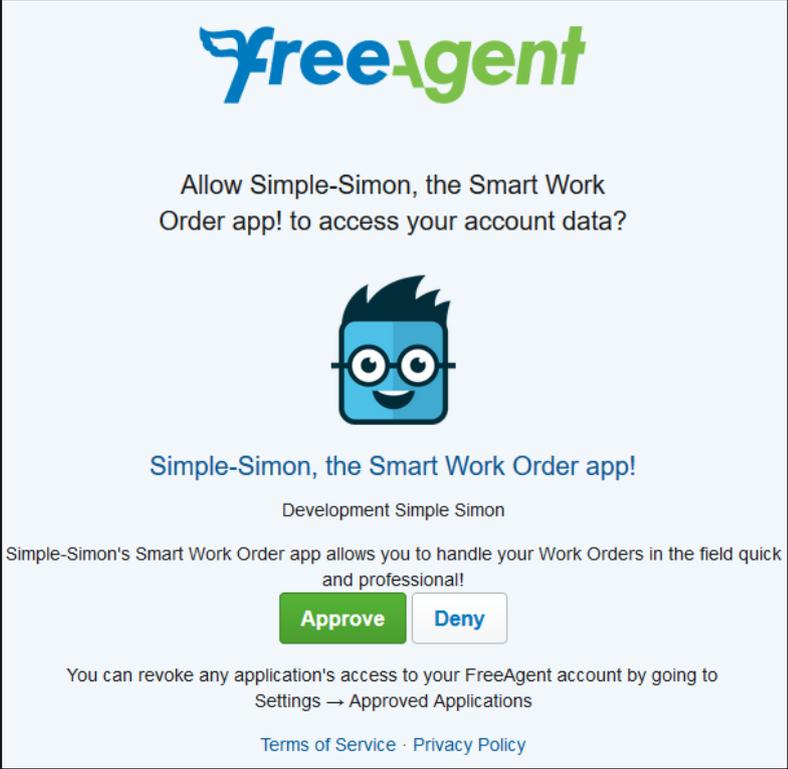
**FOLLOW THE STEPS BELOW**

<input checked="" type="checkbox"/> Mandatory clearing of Simon Data!	<input checked="" type="checkbox"/> CLEAR SIMON DATA
<input type="checkbox"/> Make Connection with Simon	<input checked="" type="checkbox"/> CONNECT!
<input type="checkbox"/> Settings	

The next step is to log into FreeAgent and accept the terms and conditions. If the credentials are correct, you are sent back to the 'Settings' page in Simon.



The image shows a login form for FreeAgent. At the top is the FreeAgent logo. Below it is the heading "Approve app". There are two input fields: "Email Address" with an envelope icon and "Password" with a lock icon. At the bottom is a green button labeled "Approve app!".



The image shows an app approval screen for FreeAgent. At the top is the FreeAgent logo. Below it is the question "Allow Simple-Simon, the Smart Work Order app! to access your account data?". There is a cartoon character icon for Simple-Simon. Below the icon is the text "Simple-Simon, the Smart Work Order app!" and "Development Simple Simon". There are two buttons: "Approve" (green) and "Deny" (white with blue border). Below the buttons is the text "Simple-Simon's Smart Work Order app allows you to handle your Work Orders in the field quick and professional!". At the bottom is the text "You can revoke any application's access to your FreeAgent account by going to Settings → Approved Applications" and links for "Terms of Service" and "Privacy Policy".

#### 4.4 Where can I deactivate my integration?

If wanted, you can immediately deactivate your integration. Once you deactivate the integration, it will stop automatically. You do not need to contact Simple-Simon to deactivate your integration. The moment you deactivate your integration, FreeAgent will no longer transfer customers and products to Simon and you cannot send work orders to FreeAgent either. Of course, you can restart the integration at any moment. The moment you restart the integration, Simon will start updating the customer and products again and it is possible to send work orders to FreeAgent as well.

## 5. Settings integration

### 5.1 What should I do with the settings of the integration?

You can use the settings to determine how the integration should work. The settings can be selected after you have erased the Simon data and created a connection between Simon and FreeAgent. Select 'Settings' to manage the settings. When using the integration you agree with the terms and conditions of the integration.

FOLLOW THE STEPS BELOW	
<input checked="" type="checkbox"/> <b>Mandatory</b> clearing of Simon Data!	<input checked="" type="checkbox"/> CLEAR SIMON DATA
<input checked="" type="checkbox"/> Make Connection with Simon	
<input type="checkbox"/> Settings	<input checked="" type="checkbox"/> SETTINGS

### TERMS OF USAGE

In order to use this integration, please agree to the corresponding terms.

**Please read the terms to use this integration (PDF).**

I agree to the terms to use this integration

BACK  PROCEED

### 5.2 How do I send my registered travel time to FreeAgent?

If wanted, you can send the, in Simon registered, travel time to FreeAgent. The product you choose here is the product which is selected in FreeAgent when sending the travel time to FreeAgent. For example, if you register two hours of travel time in Simon, two times the product is registered in FreeAgent. Select 'Check' to validate the product in FreeAgent.

**On which article in your accounting software you want to register Simons travel time?** ⓘ

Travel time 

Travel time

Travel time

### 5.3 How do I send my registered work time to FreeAgent?

If wanted, you can send the, in Simon registered, work time to FreeAgent. The product you choose here is the product which is selected in FreeAgent when sending the work time to FreeAgent. For example, if you register two hours of work time in Simon, two times the product is registered in FreeAgent. Select 'Check' to validate the product in FreeAgent.

**On which article in your accounting software you want to register Simons work time?** ⓘ

Work time 

Work time

Work time

#### 5.4 Can I add a default product to my invoice in FreeAgent?

If wanted, you can automatically add a default product to your invoice in FreeAgent. This product is automatically placed on your invoice once you send the work order from Simon to FreeAgent. An example of a default product is a 'Call-out fee'. If you want the call-out fee to be automatically added to your invoice, set it as a default product here. Select 'check' to verify the

**Automatically add a default article?** ⓘ

Yes ▾

**Article number in your accounting software** ⓘ

Call-out fee ✎

Call-out fee

Call-out fee  
product.

#### 5.5 Which products can I send from FreeAgent to Simon?

In this setting you can select which products you want to send from FreeAgent to Simon. Select which type of product should be transferred.

**Type of articles which are suppose to be synced to Simon**

- Hours
- Days
- Weeks
- Months
- Years

#### 5.6 How do I make sure that the description of the work done is placed in the invoice?

If you want the description of the work done to be placed in the invoice, you can select to do so here. This might be convenient as the invoice then shows which work has specifically been done during the job. The description of the work done is then placed on the first line of the invoice.

**Do you want to send as first line, Simons Work description to your accounting software?** ⓘ

Yes ▾

### 5.7 Can I prevent work orders from being send to FreeAgent?

When you archive the finished work order, it is sent to FreeAgent as an invoice with the status draft. If you do not want all work orders to be send to FreeAgent, you can prevent this by entering a filter word. For example, if you do not want the guarantee jobs to be billed, you can add 'Guarantee' as a filter word. All work orders which have 'Guarantee' in the description of the work order, will not be send to FreeAgent. If you leave this setting empty, all work orders will be send to FreeAgent.

**Provide an optional filter word, for work orders you do not want to send to your accounting software.**

### 5.8 Can I add information from Simon to the notes in FreeAgent?

If wanted, you can send the work address, description of the work done or both to the sales invoice notes in FreeAgent. The work address is the location where the job is done. If you have multiple locations where work needs to be done, you can add them to the correct customer in Simon. Regardless of the choice made, the information is shown in the notes of the sales invoice. That way you can quickly see where the job was done or what kind of job was done.

**What do you want to send to the memo field in your accounting software?**

- Simons work address
- Simons work address and Simons work description
- Simons work description
- Nothing

**Yearly maintenance!**

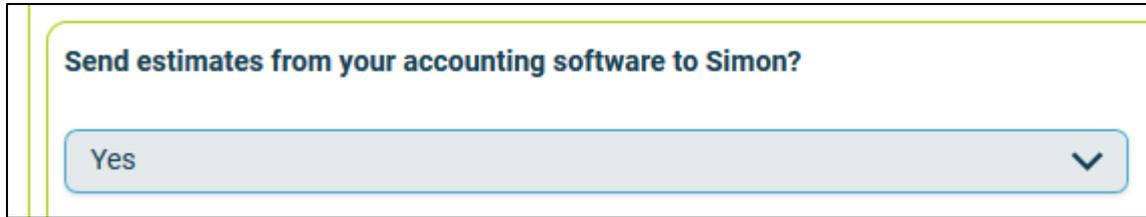
### 5.9 Can I decide what the payment term will be in FreeAgent?

In this setting you can decide what the payment term will be in FreeAgent. Enter the number of days that should be applicable.

**Payment Term in Days**

### 5.10 Can I send estimates from FreeAgent to Simon?

It is possible to send an estimate from FreeAgent to Simon. Once you send the estimate to Simon, a work order is created for that estimate. In order to do so, the estimate needs to be approved in FreeAgent. If you want to send estimates to Simon, select 'Yes' in this setting.

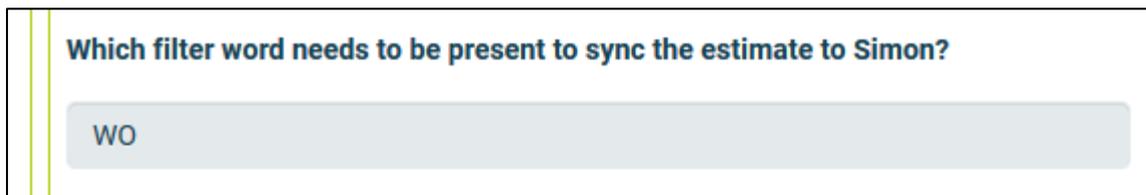


**Send estimates from your accounting software to Simon?**

Yes

#### 5.10.1 Can I determine which estimates I send from FreeAgent to Simon?

This setting allows you to only retrieve estimates containing a filter word in the estimate description. For example, you could use 'WO' (short for work order) to determine which estimates may be send to Simon. Any estimate description which contains 'WO' is send to Simon. If you leave this setting empty, all estimates will be sent to Simon.



**Which filter word needs to be present to sync the estimate to Simon?**

WO

#### 5.10.2 Can I add my products from the estimate to my work order in Simon?

If you want, you can automatically add products from your estimate to your work order in Simon. The products will be placed in the work order as used products. If you want to this to be done, select 'Yes' at this setting.

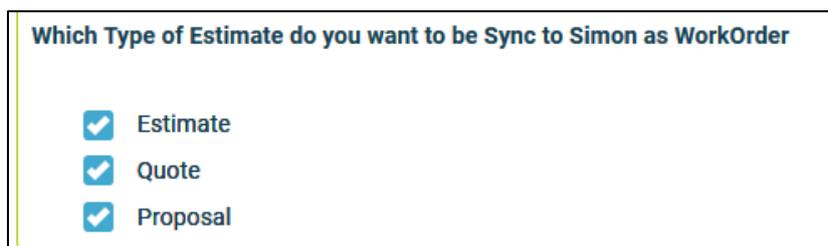


**Synchronize estimate lines as used Articles to Simon?**

Yes

#### 5.10.3 Can I determine which types of estimates I send from FreeAgent to Simon?

Besides the estimate itself, it is also possible to send quotes and proposals to Simon. Choose which types of estimates should be send to Simon. The previous settings also apply to these types of estimates.



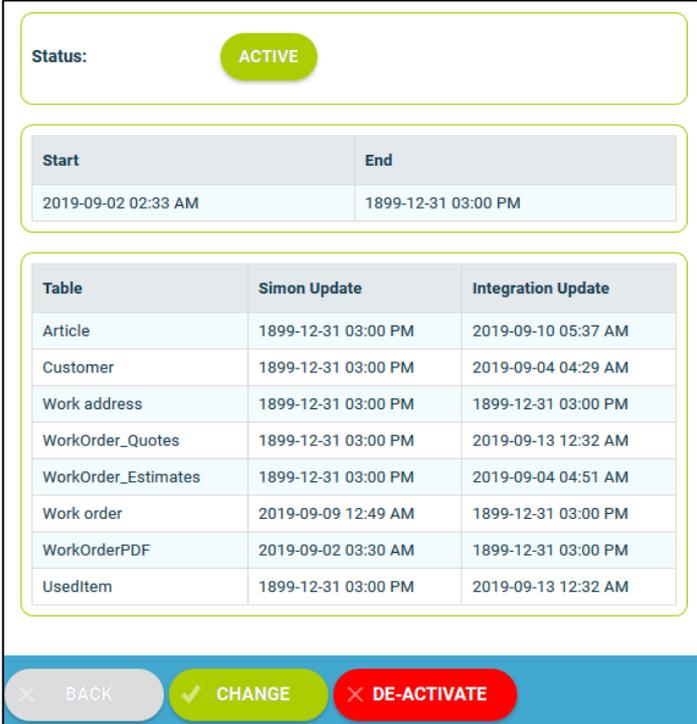
**Which Type of Estimate do you want to be Sync to Simon as WorkOrder**

- Estimate
- Quote
- Proposal

## 6. Edit settings integration

### 6.1 How can I edit the settings of my integration?

Once you have set the integration with FreeAgent, you can edit the settings of the integration. The status of the integration shows you whether it is active or not. By selecting 'Change' you can edit the settings of the integration. The next page will show you the settings button. Here you can edit the integration according to your own wishes. If you edit one setting, all other settings need to be checked as well. Press 'Check' to check each setting. Save the settings and the integration has been edited. The changes in the integration will be applicable from the moment you have edited the integration. This will not be done in retrospective.



The screenshot displays the integration settings interface. At the top, the status is 'ACTIVE' in a green pill. Below this, a table shows the start and end dates: Start is 2019-09-02 02:33 AM and End is 1899-12-31 03:00 PM. A larger table below lists various data points with their respective update times for Simon and the integration. At the bottom, there are three buttons: 'BACK' (grey), 'CHANGE' (green with a checkmark), and 'DE-ACTIVATE' (red with an X).

Table	Simon Update	Integration Update
Article	1899-12-31 03:00 PM	2019-09-10 05:37 AM
Customer	1899-12-31 03:00 PM	2019-09-04 04:29 AM
Work address	1899-12-31 03:00 PM	1899-12-31 03:00 PM
WorkOrder_Quotes	1899-12-31 03:00 PM	2019-09-13 12:32 AM
WorkOrder_Estimates	1899-12-31 03:00 PM	2019-09-04 04:51 AM
Work order	2019-09-09 12:49 AM	1899-12-31 03:00 PM
WorkOrderPDF	2019-09-02 03:30 AM	1899-12-31 03:00 PM
Useditem	1899-12-31 03:00 PM	2019-09-13 12:32 AM

### 6.2 Are there any consequences if I edit the interface?

The integration works according to the choices you make in the settings page. It is only possible to edit the integration's settings if this is in line with information from FreeAgent. For example, if a product does not exist in FreeAgent, Simon will send an error notification stating this. It is your own responsibility that the integration information is correct.

### 6.3 When are changes to the integration activated?

The moment you alter the integration, the changes are saved and activated. This will not be done in retrospective.

### 6.4 Can I undo my settings?

You can edit the settings of the integration at any given moment. The moment you alter the integration, the changes are saved and activated. This will not be done in retrospective. If needed, you can also completely deactivate the integration. The moment you stop the integration, it will be deactivated completely. You do not need to contact Simple-Simon to do so. The moment you deactivate the integration, FreeAgent will no longer send customer and products to Simon and it is also not possible to send a work order to FreeAgent. Of course, you can activate your integration again.

## **7. How does the integration work?**

### **7.1 Why should I empty my database before starting the integration?**

It is mandatory to erase your database in Simple-Simon if you want to start the integration with FreeAgent. Once the integration between Simple-Simon and FreeAgent is set, FreeAgent becomes the main ERP system. Customers and products should be added to FreeAgent. Simple-Simon automatically updates according to the mutations that are done in FreeAgent. Your database in Simon therefore should be emptied first, so that you can begin with a fresh start. Select 'Clear Simon data' to erase the data. Simon then shows you which parts should be erased.

If you are restarting the integration (after de-activating it), you can choose which parts of the database should be erased. Select which parts of the database you want to delete and which should remain.

### **7.2 How long does it take for FreeAgent and Simon to synchronize?**

The synchronization between FreeAgent and Simon is done around every 5 minutes. This might be a bit more or a bit less, depending on how many people are using the integration. You can also view the highest mutation date. This shows the latest mutation you did in FreeAgent (or Simon), that influences Simon (or vice versa). If you want to view the mutation date, go to 'Integrations', 'Logging' and look at the green icon.

### **7.3 How often is a clean-up done in Simon?**

Products or customers removed in FreeAgent, are automatically removed in Simon as well. Simon runs a clean-up, a few times a week, in which these customers and products are automatically removed. You do not need to remove customers or products yourself; Simon does this for you.

### **7.4 Why does it take a while (the first time) to retrieve the data from FreeAgent?**

It might take a while to set the integration between Simple-Simon and FreeAgent. The first time Simon must import all customers and products from FreeAgent. How long this takes exactly is depended on the size of your database in FreeAgent.

## 8. Logging – notifications integration

### 8.1 My integration with FreeAgent does not work, what should I do?

If (a part of) your integration does not work, a notification is created. You can view these notifications at 'Integrations' and then 'Logging'. Here you can find all notifications regarding your integration. Each column tells you a bit about the notification. For example, the 'Table' column tells you whether the notification is about a work order, customer, work address or product. Furthermore, the column 'Message' shows you the exact notification. If something needs to be done about the notification, you can view what you should do in 'Action to take'. An example of a notification is when no customer is attached to the customer. You cannot send a work order to FreeAgent without attaching a customer to the work order, as FreeAgent needs to know for which customer the invoice can be created.

TABLE		MESSAGE	ACTION TO TAKE
<input type="radio"/>			
<input checked="" type="radio"/>	135		
<input type="radio"/>	UsedItem	New UsedItem Inserted to Simon Successfully	No Action Needed
<input type="radio"/>	Work order	New WorkOrder Insered to Simon Successfully	No Action Needed
<input type="radio"/>	None		
<input type="radio"/>	Work address		
<input type="radio"/>	Customer		

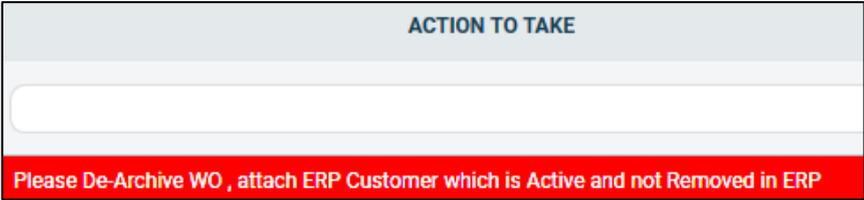
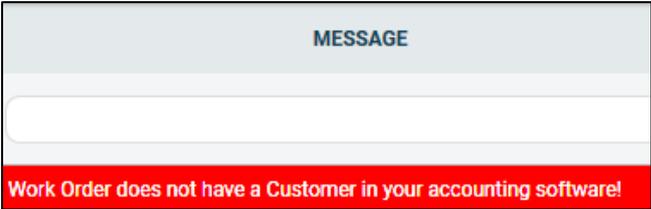
### 8.2 What is the meaning of the various notifications?

Depending on the type of notification, Simon will either show an info, warning or error message. Regardless of the type of notification, Simon will show the message in the "Message" column. You can choose to only show warning or errors. If you want to view all notifications that require a solution, select errors. If a solution is required, this is shown in the column 'Action to take'.

MESSAGE
New UsedItem Inserted to Simon Successfully
New WorkOrder Insered to Simon Successfully

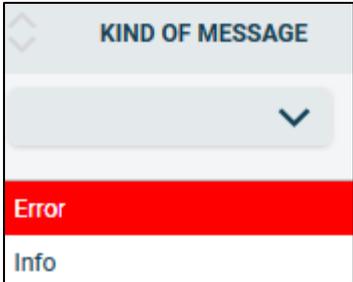
**8.3 Notification .... is shown in my FreeAgent integration, what should I do?**

If you receive a notification that requires a solution, this will be shown in the column 'Action to take'. This column also explains what the solution should be.



**8.4 What is the meaning of the various colours in the notifications?**

The colour changes depending on the type of the message. An 'info' notification is shown in white or blue. 'Warnings' are shown in yellow and 'errors' are shown in red. That way it is easy to view what is going on in the integration and if a solution is required.



## 9. Stop the integration

### 9.1 Where can I stop the integration with FreeAgent?

You can stop the integration with FreeAgent by going to 'Integrations' → 'Activate integration' → 'FreeAgent' → 'Active' → 'Deactivate'. Simon will then ask whether you really want to deactivate the integration. The integration can only be used later by reactivating it.

### 9.2 Are there any consequences if I stop my integration with FreeAgent?

No more customers and products will be transferred from FreeAgent and no work orders will be send to FreeAgent, from the moment you deactivate the integration. Of course, you can always reactivate the integration. The customers and products will be transferred to Simon and work orders will be send to FreeAgent from that moment on.

### 9.3 Should I contact Simon to stop my integration with FreeAgent?

You can deactivate the integration whenever you want. Once you deactivate the integration, it stops automatically. You do not need to contact Simon to do this.