

Cushon x FreeAgent Integration Instructions

Pilot launch

764CMT0726

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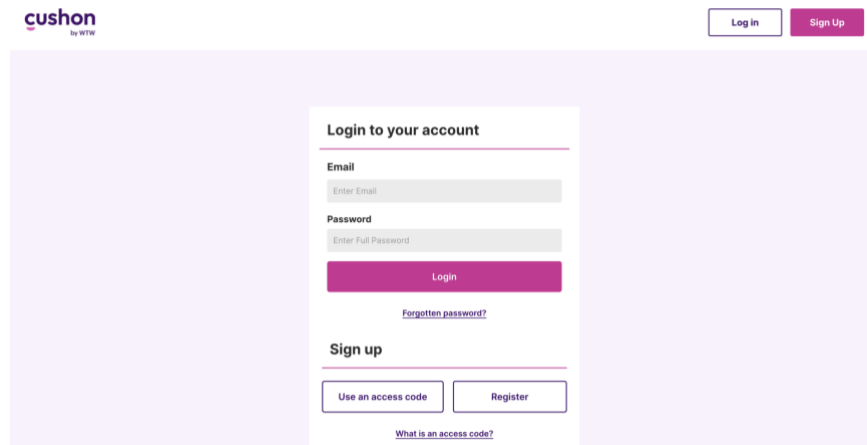
Cushon x FreeAgent Integration Setup

Seamlessly connect your payroll and pension systems with the Cushon x FreeAgent integration.

Getting started

Step 1: Log into your Employer Portal

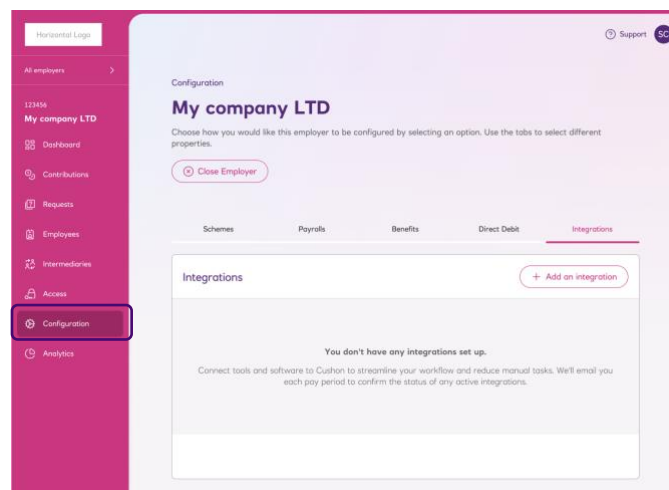
- Go to the [Cushon Employer Portal](#) and sign in with your credentials.
- Note: If your account manages multiple employers, select the employer you wish to set up.



The screenshot shows the Cushon Employer Portal login page. At the top left is the 'cushon by WTS' logo. At the top right are 'Log in' and 'Sign Up' buttons. The main content area is titled 'Login to your account'. It contains two input fields: 'Email' with the placeholder 'Enter Email' and 'Password' with the placeholder 'Enter Full Password'. Below these is a purple 'Login' button. A link for 'Forgotten password?' is located below the login button. Underneath the login section is a 'Sign up' section with two buttons: 'Use an access code' and 'Register'. At the bottom of the sign up section is a link 'What is an access code?'.

Step 2: Go to configuration

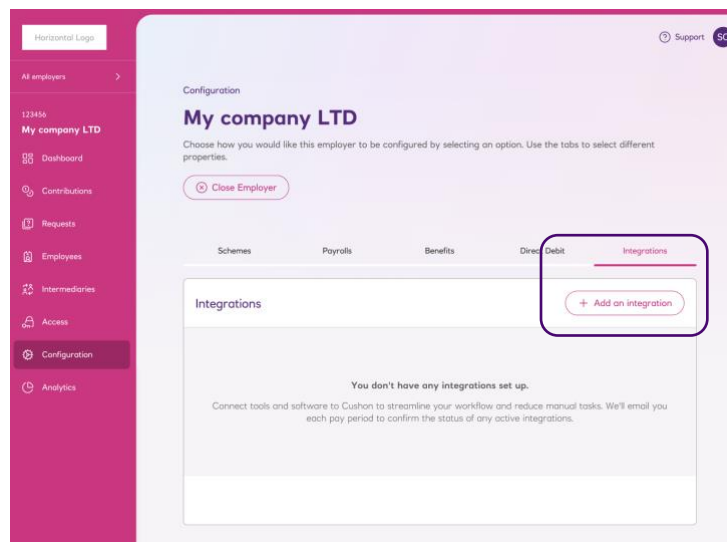
- From the left-hand sidebar, click Settings.



The screenshot shows the 'Configuration' page for 'My company LTD'. On the left is a sidebar with various menu items: 'Horizontal Logo', 'All employers', 'LTD LTD', 'My company LTD', 'Dashboard', 'Contributions', 'Requests', 'Employees', 'Intermediaries', 'Access', 'Configuration' (which is highlighted with a red box), and 'Analytics'. The main content area is titled 'Configuration' and 'My company LTD'. It includes a sub-header 'Choose how you would like this employer to be configured by selecting an option. Use the tabs to select different properties.' and a 'Close Employer' button. Below this are five tabs: 'Schemes', 'Payroll', 'Benefits', 'Direct Debit', and 'Integrations' (which is selected). The 'Integrations' tab shows a section titled 'Integrations' with a '+ Add an integration' button. Below this, a message states: 'You don't have any integrations set up. Connect tools and software to Cushon to streamline your workflow and reduce manual tasks. We'll email you each pay period to confirm the status of any active integrations.'

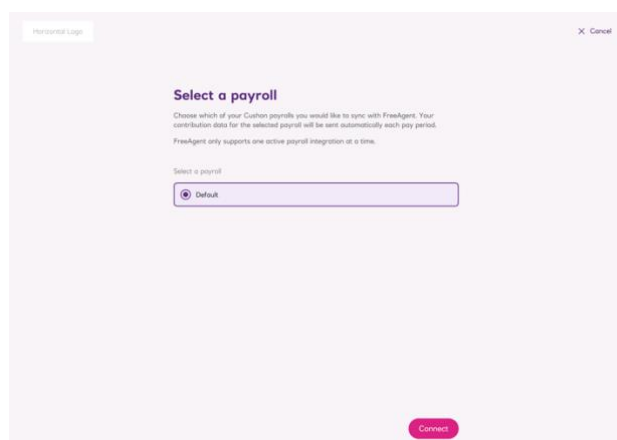
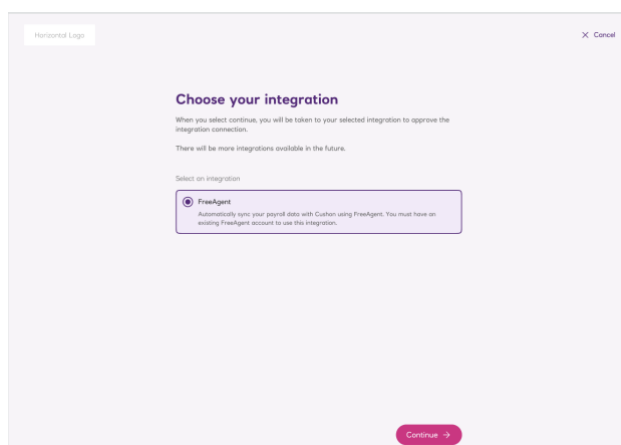
Step 3: Open integrations

- In the top navigation bar, select 'Integrations'.
- Click 'Add an Integration'.



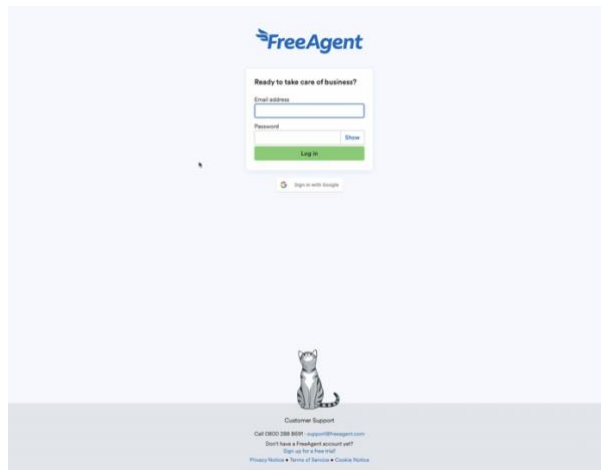
Step 4: Add the FreeAgent integration

- Choose 'FreeAgent' from the list and press 'Continue'.
- Select the payroll you want to integrate.
- Click 'Connect'.



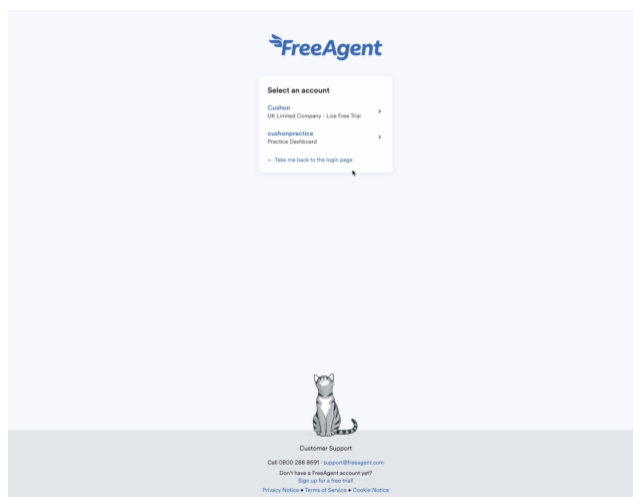
Step 5: Sign in to FreeAgent

- You'll be redirected to FreeAgent's login screen. Enter your FreeAgent credentials.



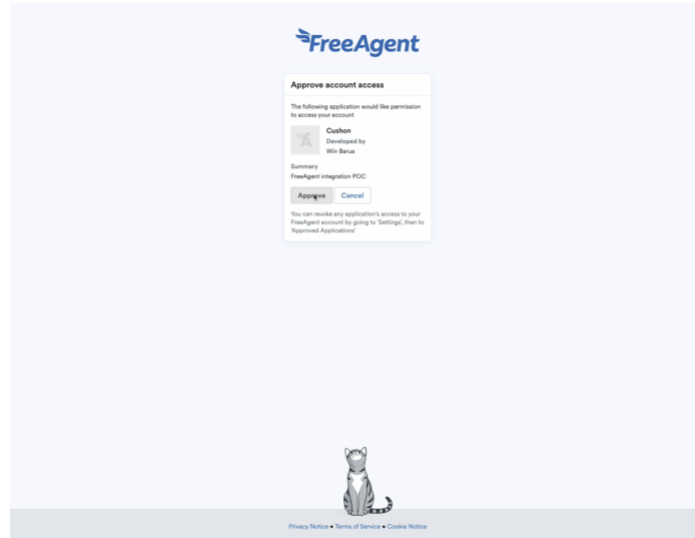
Step 6: Select your FreeAgent account

- Choose which FreeAgent account to activate for this integration.



Step 7: Authorise connection

- Approve Cushon's access to your FreeAgent account.



Step 8: Setup complete!

- You're now connected! Cushon x FreeAgent will automatically sync payroll data, saving you manual uploads every pay period.

If you need any help getting set up, just reply directly to the Zendesk ticket you received from your Cushon representative. We're here to make sure everything runs smoothly and get you up and running in no time.

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