Invoicing in Freshbooks

1. Go to Invoices → New invoice, select client, set date to the date you expect to actually send the client the invoice
2. Under time and expenses → select "choose items to add", select the appropriate project, and grouped format (project and task name), and no expenses.
3. Enter PO number (absolutely required for all Stanford projects!)
4. Confirm hours, address, and other details and save as a draft.
5. For pilot projects only: The following must be put in the Notes to Client section:
"Total amount previously invoiced: $0.00
This invoice amount: $1,064.00
All outstanding balances: $1,064.00"
You can look up the current amounts in Freshbooks.
6. Go to Invoices and click on the new invoice, click on pdf and save a pdf version to email to the client's billing contact.
7. For pilot projects only, you need timesheet data. Go to Reports→ Timesheet data, select appropriate date range (this range prints, so choose useful dates), change from All active to the projects that you just invoiced, click print report, and save as a pdf. Double check that hours match the invoice! Remove header and footer in adobe acrobat (or photoshop) by cropping and if desired combine with invoice into a single pdf.
8. Once you send the invoice, mark as sent by hovering over the invoice number link and click "mark as sent."
9. Optional: archive project to keep our account uncluttered by going to Time Tracking → projects, checking the invoiced projects and selecting archive (don't delete).
10. Make sure that the PM and team members know that the project is closed out if there is any question. Technically they can still log hours to the project, but these of course will never be billed.