Freshbooks Project Manager Instructions

Setting up the Project

1. Gather client name and address (email is fine), billing rate, PO number (if available), and team member names.
2. Log into the SEN admin account. https://scienceeditorsnetwork.freshbooks.com username: senmanage. Password: senpenpower
3. Create new project. For the Stanford pilot please use the PI's last name hyphen project name hyphen date (ex: Clandinin-R01-1012). Go to Time Tracking →Projects and "New Project." Add name, select Client; select Stanford University SOM – ABCC Pilot Project. Non-pilot clients and their info must be collected on a project-by-project basis; some are repeat clients, so they may be entered as clients already. Ideally, a new client entry include contact name, email address or mailing address, and PO number under Internal Notes. Select "Hourly Task Rate" for rate, and add the appropriate Tasks. Add team members.
4. Client info should also be stored in our client spreadsheet: Dropbox > SEN Accounts > 0 Invoicing Information.
5. Tell your team members what Tasks they will need to be billing under and their rate. For the Stanford Pilot, this will usually be Writing/Consulting at $72/hour. You can also specify if you would like them to add notes such as what sections they worked on during each time entry. The tasks and notes WILL show up on the client invoices for the pilot project so please use these thoughtfully. A project can have multiple tasks with different rates, BUT each contractor can only work under one task.

Working on Projects

5. If needed, you can log into the admin account to see the hours your team has billed so far.

Closing out the Project

6. For Stanford Pilot projects, hours will be billed monthly unless you notify SEN's CFO (Debbie) and SEN's bookkeeper (Christine) otherwise. For other projects, most of which are billed at project's end, please notify Debbie and Christine that the project is completed and remind your team to send their invoices to SEN.
7. Projects often resume unexpectedly, so there's no hurry to archive the project. If you need to actively prevent more time from being logged you can unassign team members. To do so, go to Time Tracking → Projects, Click on the edit button for the project. On the project page, scroll to the bottom and remove team members. Once the project is clearly over, archive the project (do NOT delete, please!). Go to Time Tracking → Projects, click the square to the left of your project, and then the archive button. Contractors will need to archive the project on their individual Freshbooks pages if they wish to reduce clutter.
8. Send an email to the accountant (currently Debbie) that your project has been closed out and include the deadline date and the team members I should be expecting invoices from, as well as the billing rate, and client name and address if it is not a pilot project.