Freshbooks Team Member Instructions

Getting set up

1. Create Freshbooks account, please add "(Editor)" to the end of you first name when registering. (Ex: Martha (Editor) Klovstad).
2. Accept the project invitation from Science Editors Network. When registering, please click that you will be billing by the hourly TASK rate.
3. For projects, they should be automatically added by Freshbooks once you accept the invitation with SEN as the client and billing by the hourly task rate. Projects should show up in light tan as shared projects.
4. Edit the Tasks in your account. Go to Time Tracking → Tasks. Delete the default tasks and add the following tasks and the following task rates: "Writing/Consulting (academic rate)" ($68), "Writing/Consulting (pilot rate)" ($72) and "SEN internal" ($40). Your PMs may tell you to add additional Tasks for specific projects, but these are a good place to start.

Working on Projects

5. To log time for a project, go to Time Tracking → Timesheet. Choose Project and Task, add notes (ex: Part B CCI) if helpful and log time using the timesheet or timer.
6. Please keep your timesheet up to date, but most importantly, please make sure your timesheet is completed within 2 days after the project deadline, as your PM will be archiving/invoicing the project.

Getting paid

7. At the end of each month, the accountant (currently Allison) asks all Project Managers to identify projects to be billed. Non-pilot projects are billed when completed; ongoing pilot projects and Dolmetsch Lab projects are billed monthly in most circumstances. The accountant then sends an email to the group with a list of projects to be billed and exact titles for each invoice. Please send the accountant an email if you are going to be away and will not be able to send your invoices by the fifth of the month.

8. To send an invoice, go to Invoices → New Invoice. The first time you do this, please select to bill for both items and time. In the Invoice, select SEN as your client and, under Time and Expenses, chose items to add. Select the Projects that you are billing for. For non-pilot projects billed at project's end, do NOT select a date since it is the date the project closed that matters, not the day the work was actually done. For pilot projects select the date range, usually just the previous month (e.g. 3/1-3/31). Choose "Grouped" and "Only expenses for selected projects." Make sure you change the invoice number from the default to the name corresponding to the project (the accountant will provide a list of the specific project names you should use). Click send by email to send (this automatically loads the invoice in the admin account).

9. Billing non-pilot work: You should be billing the rate that you expect to receive (i.e., $68 for most non-pilot, academic writing projects, not the rate that SEN charges).

10. Billing pilot work: You should be billing the rate that you expect to receive (i.e., $72 for the pilot project, not the rate that SEN charges). Bill all pilot work for the month in a single pilot invoice (e.g. Pilot-Jan).

11. SEN internal ($40/hour) should be billed monthly to SEN unless otherwise specified by the accountant.

12. When you receive your check please log on and mark the invoice as paid. We have had some problems with checks getting lost in the mail and this helps us keep our accounting accurate and confirm that you actually got the check. To do this, go to Invoice and click on the Invoice and then the big green button, “Enter Payment.” Click the paid in full button and save. Thanks!