

# MacFreelance™ Quick Reference

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# PRODUCT REGISTRATION

Registering MacFreelance™ is important. Registration provides you with timely access to the latest product updates, technical support, valuable information about new product releases, articles, tips and hints, and special offers on other products by Macware, Inc.

You can register MacFreelance online at:

[www.macXware.com/Register.asp](http://www.macXware.com/Register.asp)

## USING MACFREELANCE

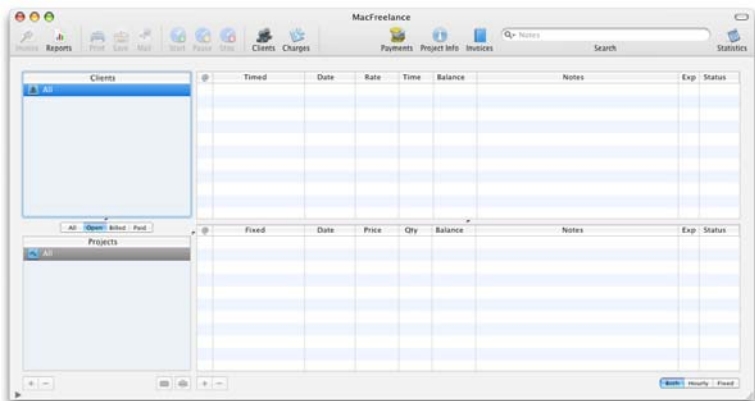
Thank you for purchasing MacFreelance.

*To get started with WebGhost, follow these steps:*

1. Drag the MacFreelance application into your computer's Applications folder
2. Double-click the MacFreelance application to launch it

### The Main Window

When MacFreelance opens the main window will appear.



One of the first steps you should take is to go to **MacFreelance | Preferences** in the menu bar and choose the “Me” icon (second from the left). MacFreelance automatically pulls your Me information from Address Book, so you might find these fields pre-populated with your information. If this information is incorrect, just uncheck the “Use AddressBook ‘me’ record for contact information” checkbox and the fields will now become editable. This information will be your “company” information that will be included on your quotes, invoices and other billing and financial records.

If you prefer to have your Company be based on the company name instead of your first and last name, simply uncheck the “Use AddressBook ‘me’ record for contact information” checkbox and check the “Company” checkbox to switch this.

Add your logo or other identifying graphic with a simple drag and drop into the Logo image well.

You can also add more companies by clicking the round plus (+) button next to your main Company name below the icons at the top of the Preferences window.

Once your company information is in place, you can then go through the rest of the Preferences options to set up:

- Interface style
- Project views
- Backup scheduling
- When to check for updates
- Billing details
- Invoice numbering
- Taxes (up to 4 different tax items)
- Email options
- Default settings
- Invoice customization
- Mileage customization
- Reports and invoice styles
- Workflow modes
- iCal integration

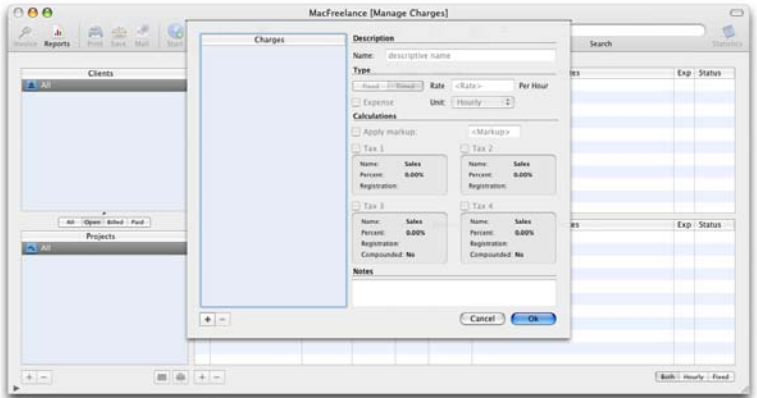
You can also check for new MacFreelance updates at any time by going to:

### **MacFreelance | Check for Update...**

Once you have customized MacFreelance to your personal preferences, you are ready to setup Charges you will bill clients.

## ***Charges***

To add, remove and update charges you will bill to clients for your services, click the Charges icon in the Main Window toolbar. A sheet will open allowing you to “Add a charge” by clicking the plus (+) button at the bottom left.



Once this is done, enter a Name for the charge and then determine if it will be fixed or timed.

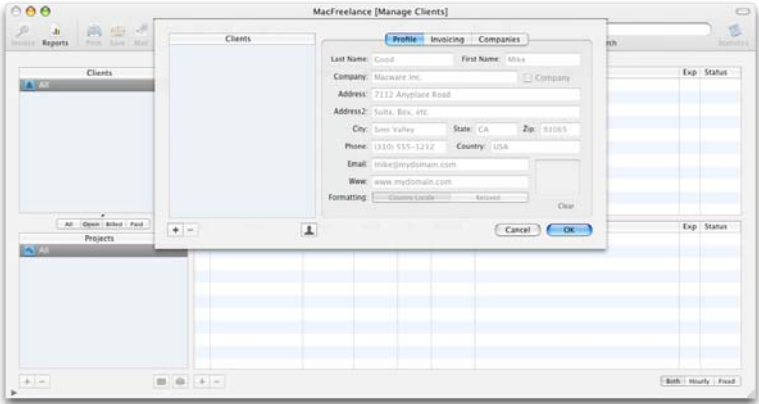
- **Fixed** = generally a flat cost. For example, if you are a graphic designer you might charge \$150.00 for a logo design, or \$500 for 100 graphic images you have created from scratch.
- **Timed** = generally based on hourly rates, but you can also set the rate by minutes, weeks, or months in MacFreelance. For example, as a graphic designer you might charge \$75/hour for website design.

From here, you can then determine if this charge can be added as an Expense (for example, mileage you drove related to the client project), and apply any related markups or taxes to this charge. Click Ok when finished.

Now that you have your charges in place, it's time to find clients to pay you for your services.

## *Clients*

To add, remove and update clients you will be charging for your services, click the Clients icon in the Main Window toolbar. A sheet will open allowing you to add a client by clicking the plus (+) button at the bottom left. You can also select the Address Book option to automatically import people in your Address Book as new clients in MacFreelance.



1. **Profile:** allows you to enter the main contact information of the client; determine if you want to save the client information based on the first/last name or company name; and add a logo or identifying graphic to the image well.
2. **Invoicing:** here you can choose the contact the client information should be addressed to (Attn); general invoice information; when payments are due; driving maps (if applicable); if they receive any discount or adjustment; and what currency the invoices for this client should be based on.
3. **Companies:** allows you to choose which company of yours the client's invoices will be billed from.

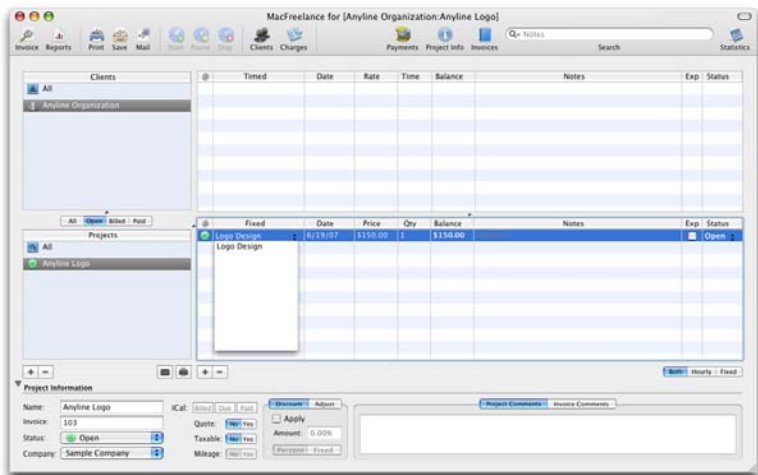
Once you have a company to bill from, clients to perform services for, and charges created for your services, you can then apply these charges to specific client based projects.

## Projects

To create a project, simply click on a client from your Clients list in the Main Window and then click the plus (+) button at the bottom left of the Projects list.

This will open the Projects splitter at the bottom of the Main Window.

Here you can enter the name of the Project, Invoice number, Status, which Company it will be billed from and other information. When you are ready to add a charge to this client project, click either the Timed Item Table or Fixed Item Table sections of the Main Window and then the plus (+) button below these two sections.



- **Timed Item Table:** adding a charge to this section allows you to then track the time you work on this project by using the Start, Pause and Stop icons in the Main Window toolbar (like a stopwatch for your project). This will give you accurate time reporting for how much time is spent on each project.
- **Fixed Item Table:** adding a charge to this section gives a flat cost for this project.

You can easily adjust the table fields by double clicking in most fields to flexibly change the date, rate, time, price, quantity and notes to explain the charge.

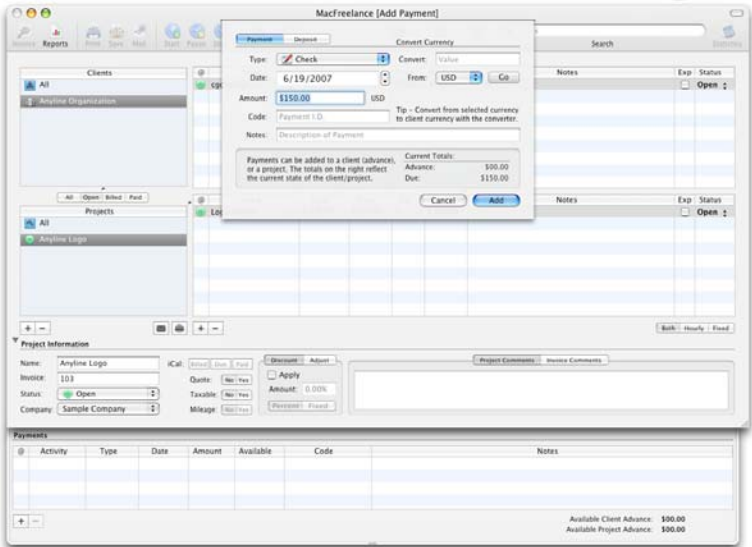
Once you begin managing projects, you can then move on to Payments or Reports, or any of the other features of MacFreelance.

## PAYMENTS

Everyone likes to get paid and MacFreelance makes it easy to manage payments.

To add a payment:

1. Select the client who has made the payment
2. If the payment being made is an outstanding payment (not a deposit) then select the project in the client's project list, otherwise skip this step.
3. Select 'Add' from the 'Payments' menu
4. Choose the payment type from the 'Type' drop down
5. Enter the amount they have paid in the 'Amount' box



Other options available in the Payments window include the ability to change the date the payment was received; enter a payment ID code to better identify the payment; convert the currency paid from a client; and enter notes for the payment.

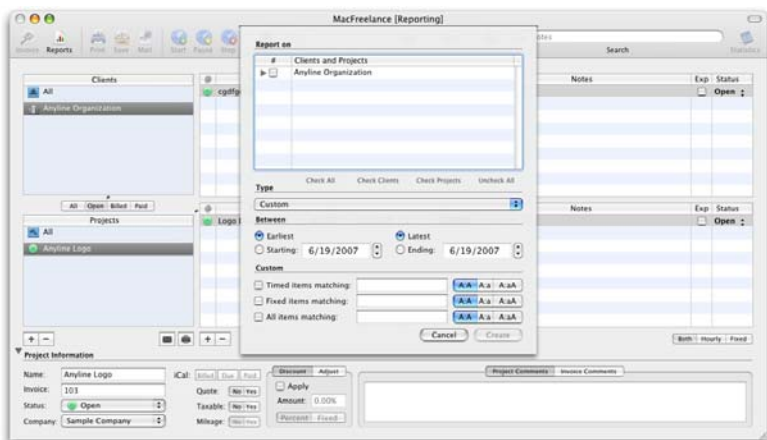
## REPORTS

You can access Reports by clicking the Reports icon in the Main Window toolbar. On the Reports sheet, you can select clients and/or projects to report on. Some helper select buttons are located below the "Report on" outline to simplify common selection actions (Check All, Check Clients, Check Projects, Uncheck All).

The following report types are currently supported in MacFreelance:

- Clients
- Open Projects
- Billed Projects
- Paid Projects
- Billed and Paid Projects
- Payments
- Advances
- Taxes Collected
- Discounts

- Adjustments
- Expenses by Projects
- Expenses by Clients
- Custom



“Custom” allows you to specify elements to report on. See the sheet for supported elements. The 'items matching' fields are particularly useful (for example, if you want to include UPS shipping as a fixed expense). You can use the items matching fields to specify unique items with meaning that MacFreelance will total up.

The 'Between' section is enabled for reports that are driven from a selection of projects. This allows you to specify a starting and ending date to include in the report.

## OTHER FEATURES

MacFreelance offers flexible support for almost anything you might need to keep your business running.

### *What to do with your Invoices*

When you are ready to send your client an invoice, you have a few different options:

1. **Print:** will print your invoice to save in your own records, or mail/fax to a client.

