

# MacFreelance™ Guide

This guide is distributed with software that includes an end-user agreement, this guide, as well as the software described in it, is furnished under license and may be used or copied only in accordance with the terms of such license. Except as permitted by any such license, no part of this guide may be reproduced, stored in a retrieval system, or transmitted, in any form or by any other means, electronic, mechanical, recording, or otherwise, without the prior written permission of Macware, Inc. Please note that the content in this guide is protected under copyright law even if it is not distributed with the software that includes an end-user agreement. The content of this guide is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Macware, Inc. Macware, Inc. assumes no responsibility or liability for any errors or inaccuracies that may appear in the informational content contained in this guide.

©2007-2010 Macware, Inc. All rights reserved.

Macware, the Macware logo and MacFreelance are either trademarks or registered trademarks of Summitsoft Corporation or Macware, Inc. in the United States and/or other countries. Apple, Mac, the Mac logo, the Universal logo, the Made for Mac logo and Macintosh are trademarks or registered trademarks of Apple Inc. in the United States and/or other countries. Other product(s), font(s), and company names and logos may be trademarks or registered trademarks of their respective companies.

Macware, Inc.  
Omaha, Nebraska  
USA  
[www.macwareinc.com](http://www.macwareinc.com)



# TABLE OF CONTENTS

<b>TABLE OF CONTENTS</b> .....	2
<b>PRODUCT REGISTRATION</b> .....	3
<b>USING MACFREELANCE</b> .....	3
The Main Window .....	3
Charges.....	5
Clients .....	6
Projects .....	7
<b>PAYMENTS</b> .....	8
<b>OTHER FEATURES</b> .....	9
What to do with your Invoices .....	9
Statistics.....	9
<b>GETTING TECHNICAL SUPPORT</b> .....	10

# PRODUCT REGISTRATION

Registering MacFreelance™ is important. Registration provides you with timely access to the latest product updates, technical support, free software, special offers and more.

You can register MacFreelance online at:  
<http://www.macwareinc.com/register.asp>

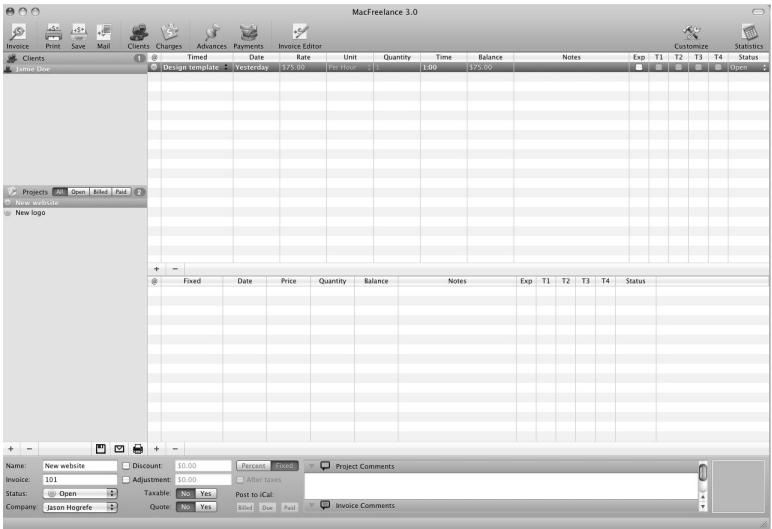
# USING MACFREELANCE

Thank you for purchasing MacFreelance. *To get started with MacFreelance, 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 “Companies” (second from the left). MacFreelance automatically pulls your contact information from Address Book, so you might find these fields pre-populated with your information. If this information is incorrect, just select the plus (+) button below the top dropdown and the fields in the Description section 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. You can add as many companies as you want.

If you prefer to have your Company be based on the company name instead of your first and last name, simply check the “Company” checkbox to switch this.

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

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
- When to check for updates
- Billing details
- Invoice numbering
- Taxes (up to 4 different tax items)
- Email options
- Default settings
- Workflow modes
- iCal integration

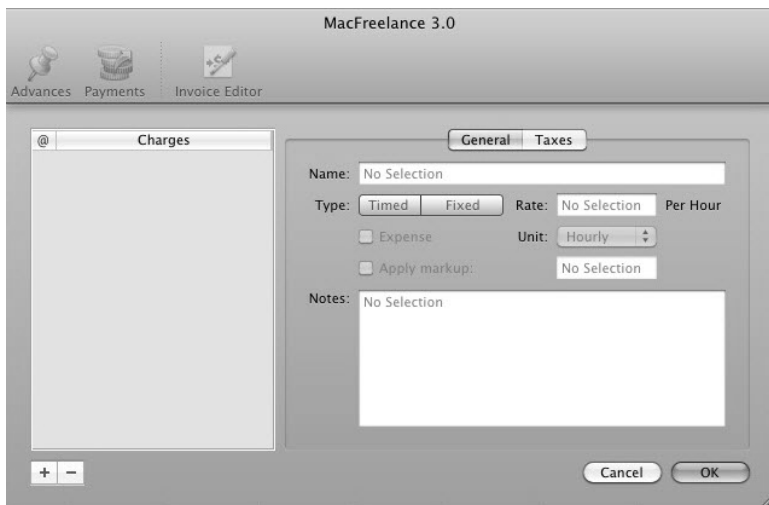
You can also check for new MacFreelance updates at any time by going to:

### **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.

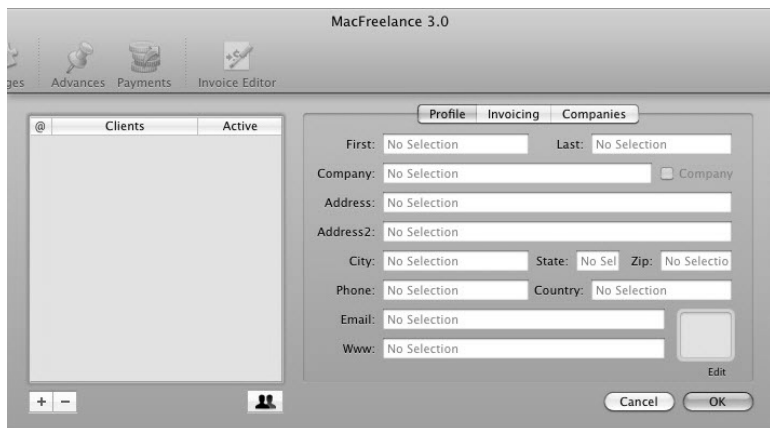
- **Fixed** = generally a flat cost. For example, if you are a graphic designer you might charge \$150.00 for a logo design, or \$500 for 100 graphic images you have created from scratch.
- **Timed** = generally based on hourly rates, but you can also set the rate by minutes, weeks, or months in MacFreelance.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

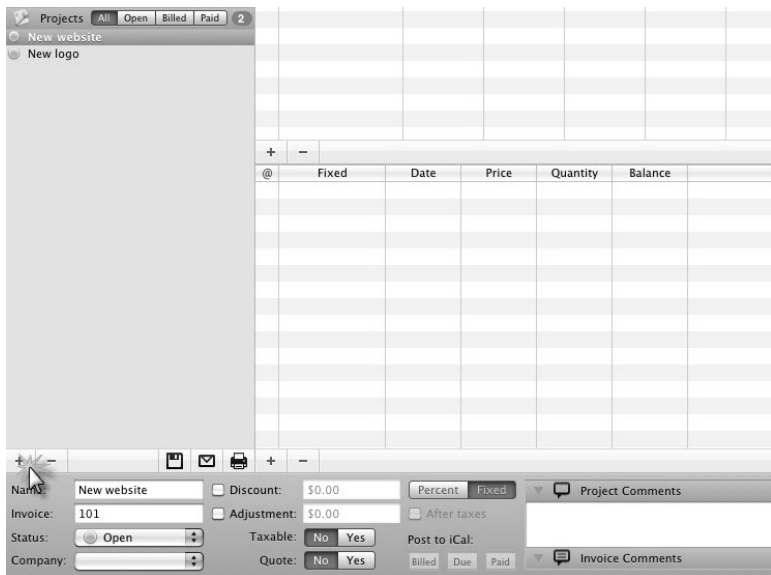


1. **Profile:** allows you to enter the main contact information of the client; determine if you want to save the client information based on the first/last name or company name; and add a logo or identifying graphic to the image well.
2. **Invoicing:** here you can choose the contact the client information 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 enable the Projects section 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 the plus (+) button at the bottom left of either the Timed or Fixed section in the Main Window.

- **Timed:** adding a charge to this section allows you to track the amount of time you work on this project.
- **Fixed:** 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.

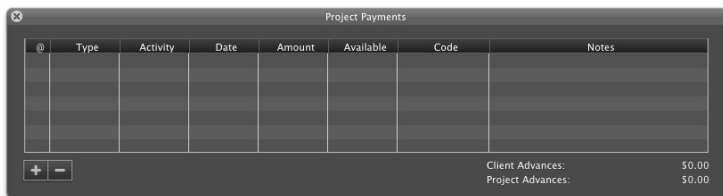
Once you begin managing projects, you can then move on to Payments or Reports, or any of the other features of MacFreelance.

# PAYMENTS

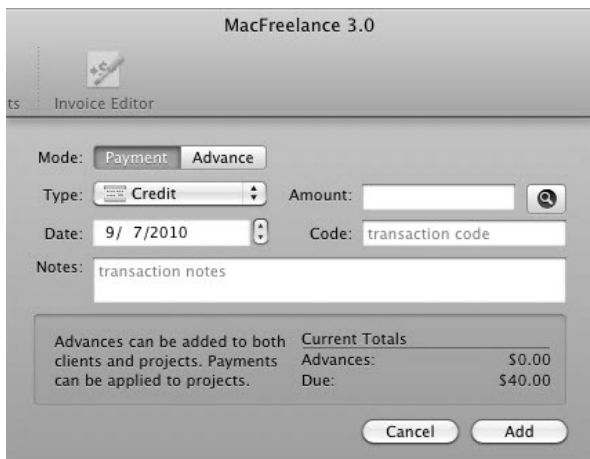
Everyone likes to get paid and MacFreelance makes it easy to manage payments.

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 the plus (+) button 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 “Code” to better identify the payment; and enter notes for the payment.

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*

To create an invoice for a client project, simply select the client from the **Clients** section of the Main Window and then the project you want to create an invoice for (below the Clients section). Now click the **Invoice** icon from the main toolbar (top left).

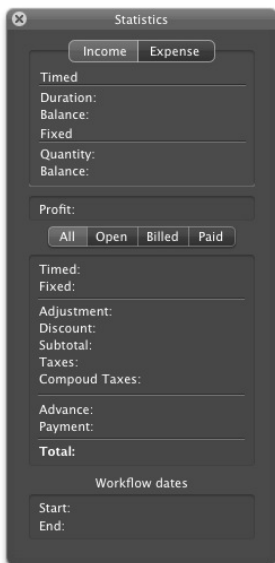
You can also change how your invoice looks using the **Invoice Editor**.

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.
2. **Save:** will save your invoice as a PDF to save as an electronic record, or attach to an email.
3. **Mail:** will email your client their invoice in PDF format.

### *Statistics*

The statistics for a specific project or client can be found by clicking the Statistics icon in the Main Window toolbar. You can then see detailed information on the selected client or project.



## GETTING TECHNICAL SUPPORT

Purchasing MacFreelance gives you free access to Macware's online technical support located at:

<http://www.macwareinc.com/support>

You can find additional help topics by going to **Help | MacFreelance Help** in the program menu.

[\*\*www.macwareinc.com\*\*](http://www.macwareinc.com)