

User Manual

Freelance Manager is powerful, yet simple, project and client management software application. It's a perfect solution for freelance designers and developers. It also works great for consultants, project managers, and service professionals.

Main Features

- Client Management
- Project Management
- Workflow Approval System
- File Upload Tool
- Project Submissions
- Task (To-Do) Feature
- Time-Billing Tool
- Invoicing Feature
- Payment Gateway Integration
- Support Ticket System
- Staff Management
- Powerful Reports
- Smart Event Calendar
- Database Backup/Restore
- Visual Form Builder
- Customization & Integration
- Easy Installation Tool

Client Management

Freelance Manager allows you to manage all aspects of your client base. You can easily add, edit, and manipulate client profile information as well as track all related projects, invoices, and workflow approval queues. Need to contact all your clients at one? Want to e-mail a specific type of client? Our client communication tools are abundant.

Project Management

As a comprehensive project management application, we didn't leave anything out in the project features. You can manage all aspects of the project, from progress, cost, parameters, completion timeline, project manager, etc. We've included some great reports to help you manage your projects.

Workflow Approval System

This unique feature helps set Freelance Manager apart from our competition. When a staff member or project manager has completed a task or revision for a client, the "submission" is sent to the client for review. The client is able to view the associated uploads and determine if the submission meets their standards. The client will approve or reject the submission before the comments are returned to the staff member. This automated solution saves everyone time and ensure efficient operations!

File Upload Tool and Project Submissions

A great feature included in Freelance Manager is the ability to upload files to the system. You can associate these uploads with a project submission. Project Submissions are also known as drafts, concepts, or revisions. The files can be viewed by clients, when appropriate, and by staff members, stored efficiently and securely. This tool integrates exceptionally with our Workflow Approval System.

Task (To-Do) Feature

We've developed a Task feature that enables you to streamline your work operations. Project Managers or Staff members can create tasks to complete based on a specific project, client, or from scratch. The tasks may be monitored for progress and can be assigned to any staff member.

Time-Billing Tool

This feature enables your team create records based on a client, a project, or a specific task.

Invoicing Feature

Invoicing is one of the most common tasks performed by Freelance Suite. Staff users can create invoices based on projects, time-billing data, or from scratch. The invoices are tracked easily and available to clients to pay online.

Payment Gateway Integration

We've made it simple for your clients to pay their invoices online. We currently support PayPal , alertPay, MoneyBookers , Authorize.Net (AIM) and offline payment method. You have the option of which gateways to enable for your clients.

Support Ticket System

Our support ticket system allows clients to request support, efficiently and effectively. Staff users can reply to clients' concerns by priority. The system features full priority management, ticket assignments, and results tracking. If you have your own external support system, you can easily disable our internal system and integrate your own!

Staff Management

Our system makes it easy to add staff members, or project managers. You have flexibility over the permissions of each staff member, for added security.

Powerful Reports

We have developed a powerful and comprehensive reporting solution.

Smart Event Calendar

Event calendar that shows outstanding invoices, projects and tasks based on current/selected month/year

Database Backup/Restore

Built in backup/restore feature for backing up and restoring entire database in case of a server failure

Visual Form Builder

Create beautiful forms using easy drag/drop form builder. Forms could be used for providing different quotes to your clients, contact or anything else you see it fit.

Customization & Integration

Freelance Manager can be easily customized to fit in with your website or design.

Easy Installation Wizard

We've made it easy for you! Just click a few steps to have the software up and running on your server!

Procedures

Logging in as admin

To log into your admin area go to the site where you installed free-lance manager for example: www.yourdomain.com/admin. You will be prompted with user name and password, enter those credentials previously assigned during installation process.

Once logged in, you will be redirected to your dash board. From the dash board you can view your project statistics and revenue statistics for current year / month.

Adding new staff

To add new staff click on **Staff** menu and you will be presented with add new staff page. Click on **Add Staff** button, and fill out all the required / optional fields.

If notified user is checked, an email will be dispatched to an account created along with user name / password, thus notifying a user that the account has been created.

To complete the process click on **Add Staff** button.

Adding new client

To add new client click on **Clients** menu and follow the same procedure as adding new staff.

Project Management

To add new project click on **Manage Projects** under **Project Management** menu. You will be presented with projects overview page. From this page you can do many other things, such as, viewing project details, client overview, creating invoices, adding project submissions, adding time billing, as well as adding and deleting.

To continue to add your projects click on **Add Project** button, from there enter project name, select client name, select project type, enter project price, click on calendar icon to select start date / end goal. Enter project description, select project manager, and you can also assign project completion status using project status slider.

To complete the process click on **Add Project** button.

Project Types

To add project type select **Project Types** from **Project Management** menu. From manage project type's page click on **Add Type** button and enter type name and short description.

To complete the process click on **Add Type** button. Now your project type will be available throughout the admin area.

Project Tasks

To add new project task click on **Project Tasks** under **Project Management** menu. Click on **Add Task** button, enter task name, select project related to this task, click on calendar icon to assign start / due date, assign it to one of your staff members.

If visible to client option is set to “**Yes**”, then this information will be available to be viewed by the client linked to this projects. You can also set the percentage of completion using task progress slider.

To complete the process click on **Add Task** button.

Project Files

To add new project file, click on **Project Files** under **Project Management** menu. Click on add file button from add project file page, select project from drop down list, enter file name, description and file version, then click on browse to select local file.

To complete the process click on **Add File** button.

Project Submissions

To add new project submission click on **Manage Projects** from **Project Management** menu.

In order to add submission you must have an existing project. Click on project submission icon for the project you want submission to be assigned to. Under manage project submission page, you can view existing submissions, if any, or click **Add Submission** button to assign new ones. Under add submission page, enter submission name, select project name, and submission type, and enter submission description. If sent for review is set to “**Yes**”, and email will be sent to notify the client. From this page, you can also view existing files assigned to the project and you can also upload new file if needed.

To complete the process click on **Add Submission** button.

Time Billing

To add time billing record click on **Time Billing** under **Billing Management** menu. On this page only the existing billing records will be available. Click on view icon related to the project to view time billing records entries. From time billing details page you have option to add new time billing, or new invoice.

To create very first time billing entry, go to **Manage Projects** and click on **Add Time Billing** icon.

Create Invoice

To add new invoice click on **Create Invoice** under **Billing Management** menu. From add invoice page, enter invoice title, select project and client, and choose payment method. Date created will be automatically set as current date. Click on calendar icon to set due date. You also must add initial

invoice entry. Enter entry title, amount, and short description. If entry is taxable, an automated tax amount will be calculated based on your tax configuration under system configuration.

To complete the process click on **Add Invoice** button.

Additional invoice entries can be created from **View Invoices** under **Billing Management** menu.

Transaction Records

To view your transaction records click on **View Transactions**, under **Billing Management** menu. Excel format report can also be created from this page, by clicking on **Create Report** button.

System Configuration

To enter system configuration, click on **System Configuration** under **System Setup** menu.

Payment Gateways

Click on **Payment Gateways** under **System Setup** menu. Each gateway has its own requirements. Click on **help** button in edit gateway page for instructions.

Database Backups

Click on **Database Backup** under **System Setup** menu to perform backup/restore operations.

New Announcements

Click on **System News** under **System Setup** menu. From this page you can create important news announcement which will be viewable in your clients control panel.

Email Manager

Click on **Email Manager** under **System Setup** menu. From this page you can send mass mail to all users, clients, or staff.

Enter email subject, and add content. Click on **Send Mail** to send out the emails.

Event Calendar

Click on Event Calendar menu to view important events, such as pending invoices, project and tasks due dates.

Support Desk

Click on **Support Desk** menu to access support desk page. All support tickets issued by your clients will be available on this page. Click on view icon to access ticket property. From this page you can reply, change the ticket status, ticket priority, as well as delete individual messages.

Visual Forms

Click on **Forms** menu to access form builder. First create new form, and then click on **Edit Fields** icon to start adding new fields. All published forms will be available in dropdown menu, frontend.

Notes: All email templates are stored in **/mailer/** folder