FolarraStudio

Editor and Proofreader Client Log

create · deliver · grow

PRINTABLE · CLIENTS, JOBS & MONEY

This Planner Belongs To

for freelance editors and proofreaders

BUSINESS NAME _____

OWNER _____

PHONE / EMAIL _____

SERVICE AREA _____

STARTED ON _____

How to use this planner

- Print the whole planner once, then print extra copies of the pages you use most, such as the Client Questionnaire and Client list pages.
- Print at 100% / Actual size on A4 or US Letter paper. The printable pages have a white background to save ink.
- Hole-punch the pages and keep them in a binder, so you can add pages any time.
- Every page is undated, so you can start in any month of any year.
- Fill in a client profile for each new client and log every job on the day.
- Digital planner: open the hyperlinked PDF in any PDF annotation app and tap the tabs to jump between sections.

My business word for this year

Why I love this work

Contents

tap a title in the digital planner to jump to it

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Client Questionnaire

details for every new client

CLIENT _____ PHONE _____

ADDRESS _____ EMAIL _____

DATE _____ REFERRED BY _____

Document type

Word count

Edit level

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Style guide

Client List

everyone you work with

CLIENT	PHONE	EMAIL	SINCE	NOTES

Client Profiles

the details that matter

CLIENT _____

EMAIL _____

PHONE _____

TYPE _____

STYLE GUIDE _____

RATE _____

NOTES _____

CLIENT _____

EMAIL _____

PHONE _____

TYPE _____

STYLE GUIDE _____

RATE _____

NOTES _____

CLIENT _____

EMAIL _____

PHONE _____

TYPE _____

STYLE GUIDE _____

RATE _____

NOTES _____

CLIENT _____

EMAIL _____

PHONE _____

TYPE _____

STYLE GUIDE _____

RATE _____

NOTES _____

Project Log

every job, recorded

DATE	CLIENT	PROJECT	HOURS	STATUS	BILLED
					☐
					☐
					☐
					☐
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					☐

Services & Prices

what you offer

SERVICE	PRICE	TIME	NOTES
Proofread per word			
Copy edit per word			
Developmental edit			
Sample edit			
Rush fee			

Project Brief

start every project clearly

CLIENT _____ PROJECT _____

DEADLINE _____ BUDGET _____

Goals

Deliverables

- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]

Style & references

Revisions agreed

Time Tracker

every billable hour

DATE	CLIENT	TASK	START	END	HOURS

TOTAL HOURS

Pitch & Leads Tracker

find the next client

DATE	LEAD	WHERE FOUND	PITCHED	WON
			☐	☐
			☐	☐
			☐	☐
			☐	☐
			☐	☐
			☐	☐
			☐	☐
			☐	☐
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			☐	☐
			☐	☐
			☐	☐
			☐	☐

Style Sheet

decisions to keep consistent

CLIENT _____ PROJECT _____

ITEM	CHOICE	NOTES

Manuscript Tracker

pages and passes

PROJECT	WORDS	PASS	PAGES DONE	DUE	DONE
					☐
					☐
					☐
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					☐
					☐

Query Log

questions for the author

PAGE	QUERY	ANSWER

Proofreading Checklist

final pass

Text

- [ ] Spelling
- [ ] Punctuation
- [ ] Consistent style
- [ ]
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Facts

- [ ] Names
- [ ] Dates
- [ ] Links
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Layout

- [ ] Headings
- [ ] Page numbers
- [ ] Widows & orphans
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Invoice Tracker

get paid on time

INVOICE NO.	CLIENT	DATE	AMOUNT	DUE	PAID
					☐
					☐
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					☐

Income & Expenses

money in, money out

MONTH _____ GOAL _____

DATE	DESCRIPTION	CATEGORY	IN	OUT

TOTALS _____

Yearly Overview

the business at a glance

YEAR _____ GOAL _____

MONTH	JOBS	INCOME	EXPENSES	PROFIT	NEW CLIENTS
Jan					
Feb					
Mar					
Apr					
May					
Jun					
Jul					
Aug					
Sep					
Oct					
Nov					
Dec					
Total					

Notes



FolarraStudio

Thank you!

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