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

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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

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