Welcome to FunctionFox! Questions or comments? Contact us at 1.866.369.8463 or email staycreative@functionfox.com. We are here to help!

FunctionFox Retainers

The Retainer feature is essential for projects that are based on a monthly budget, or set number of hours. Retainers allow you to track work done against an overall amount, and easily show whether or not you are over or under servicing your Retainer Clients.

To set up a Retainer, go to Projects > Retainers in the left menu. First, select the Client that the retainer belongs to. The Client drop-down menu is divided into two parts, Clients with Retainers, and Clients without. If you select a Client that already has a Retainer, the details of that Retainer will appear at the bottom of the page. Next, give your Retainer a name (2016 PR Retainer, for example). Choose the start date, and the duration of your Retainer. We recommend setting the start date to the first of the month, for easier reporting. In the Fees/Hours field, select either Fees or Hours, and then input the appropriate amount. This is the overall monthly amount that your Retainer projects will track against. Next, choose whether or not to include Project Costs, and choose which projects to link to this retainer from the Projects drop-down menu. Any time tracked against projects linked to a Retainer will be applied against the overall monthly Retainer amount. The Retainer Manager is the user who will receive any set Retainer Alerts.

Once the Retainer has been saved, it will appear at the bottom of the page. To edit details of the Retainer (name, start date, duration, etc.) click the edit (pencil) icon.

To edit the monthly amount for a specific month and not for the entire Retainer duration, click the arrow next to the Retainer name. This will expand the table to show each month for the duration of the Retainer, and the associated monthly amounts. Change this amount by clicking in the Fees/Hours column and inline editing.
Any monthly amount that has been changed to something other than the initial amount will appear in bold.

**Note:** You may also link new or existing projects to existing Retainers through the Projects > Manage page. Select a client with an active Retainer from the Client drop-down menu, edit the project you wish to include, and then select the Retainer name from the Retainer drop-down menu. Click Save Edit.

Once the Retainer has been set up, and work has begun on the attached projects, you can monitor your monthly progress in a couple of different ways.

**CEO Desktop**

Go to CEO Desktop > Retainers in the left menu. This page will show you all of your active Retainers, and is the perfect place to get an at-a-glance look at which ones are on track, and which ones are exceeding their set monthly amount. Next to the colored bar, you will see the total amount already tracked vs total amount available to date. Click the colored bar to drill down for more information.

![Retainer](image)

Clicking on the colored bar will reveal a monthly breakdown of your Retainer. Along with the overall amount, you can see how much actual time was tracked against each month vs the set monthly Retainer amount. In this view, click on a colored bar to generate a Retainer Report for that month.

**Note:** Once a Retainer has reached the end of its duration, it will no longer be visible on the CEO Desktop, and will be considered inactive.

**Retainer Report**

Go to Reports > Retainer in the left menu to produce a Retainer Report. Set the date range that you want to capture and whether or not you want to see all Clients and their associated Retainers, or a specific Client (click [+] to multi-select). This report will give you both the start date and end date of the Retainer, plus the total monthly amount, actual hours and fees, and the difference. This report can be saved in Excel format, as well as PDF, CSV, and HTML.

**Note:** To view a master list of all Retainers (active and inactive) set up in FunctionFox, go to Projects > Retainers, and click the Tips/Links box to access the Retainer List.

**Retainer Alert**

Like the Estimate Alert, you can set the system to warn you when your Retainer has reached up to three set percentages (50% of the monthly amount, 75%, and 90%, for example). To do this, go to Settings & Preferences, Account Preferences, Alerts. Select your desired percentages from the drop-down menu (double-click to remove).

Once your percentages have been set, click on the My Preferences tab at the top of the page, and scroll to Alerts. You will want all of your designated Retainer managers to have this alert checked off in order to receive it.