

ELANCE CLIENT GUIDE TO UPWORK

This guide covers:

- What Upwork is and why Elance is moving
- How to move to Upwork and get set up
- Key differences between Elance and Upwork

UpworkTM

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What is Upwork, and why should I move to Upwork?

Upwork is a new platform where clients hire, work with, and pay freelancers online. It's the result of the Elance and oDesk teams joining forces to create a single freelance marketplace that combines the best of Elance and oDesk, plus new features like mobile apps and real-time collaboration. Upwork has already replaced oDesk, and the Elance community is in the process of moving to Upwork, with a plan to be fully transitioned in 2016.

We understand most Elance customers are happy with Elance and don't want to learn a new platform. However, we've built Upwork with Elance users in mind and believe you'll have as much success on Upwork once you give it a try. With top-rated professionals and state-of-the-art tools to help you find and work with them, clients are getting more done with Upwork. The goal of this guide is to get you up and running on Upwork so you can see what the world's largest online workplace can do for you.

How will the transition work, and what do I need to do?

Just like a physical move to a new house, there are some logistical steps before you can start enjoying your new home. Think about the move in three phases:

- 1. Bringing your Elance profile with you.** Like packing up your house, you'll take your profile information, work history, and reputation with you to Upwork.
- 2. Getting your new workspace in order.** When you first arrive at your new home, get the basics in place by rehiring your Elance freelancers and setting up your team.
- 3. Winding things down on Elance.** Complete your contracts and provide feedback so you can focus on thriving in your new home.

Let's walk you through these steps.

1. Bring your Elance profile with you

You’ve already built a great reputation and history on Elance, so take it with you to Upwork! Whether you already have an Upwork account or are creating one for the first time, we’ll make it easy to import your Elance profile information so you can attract the best talent with a complete and stellar reputation.

To accept your invitation to bring your Elance profile to Upwork, [log into Elance](#) and click on the invitation on your My Jobs page. You’ll be given the following options:

If you don’t already have an Upwork account

We’ll help you create a new one with your Elance info. You’ll have the same username as your Elance account, and your history and reputation will be automatically imported to your new Upwork profile.

If you already have an Upwork account

You can choose to either:

Combine your Elance history with your existing Upwork profile to create one stellar reputation. Your total hours worked, work history, and feedback will reflect all the work you’ve done on both Elance and Upwork, allowing you to attract the best freelancers with one complete profile. *(Recommended)*

- or -

Replace your current Upwork account with your Elance profile and history. Replacing your existing Upwork account will erase any pre-existing client info, work history, and reputation on Upwork. Only choose this option if you feel that your Elance profile is the only one worth keeping.

No matter what option you choose, the setup process takes just a few clicks. If you have any questions or issues, don’t hesitate to [contact Upwork support](#).

What profile information will get brought over to Upwork? What will it look like?

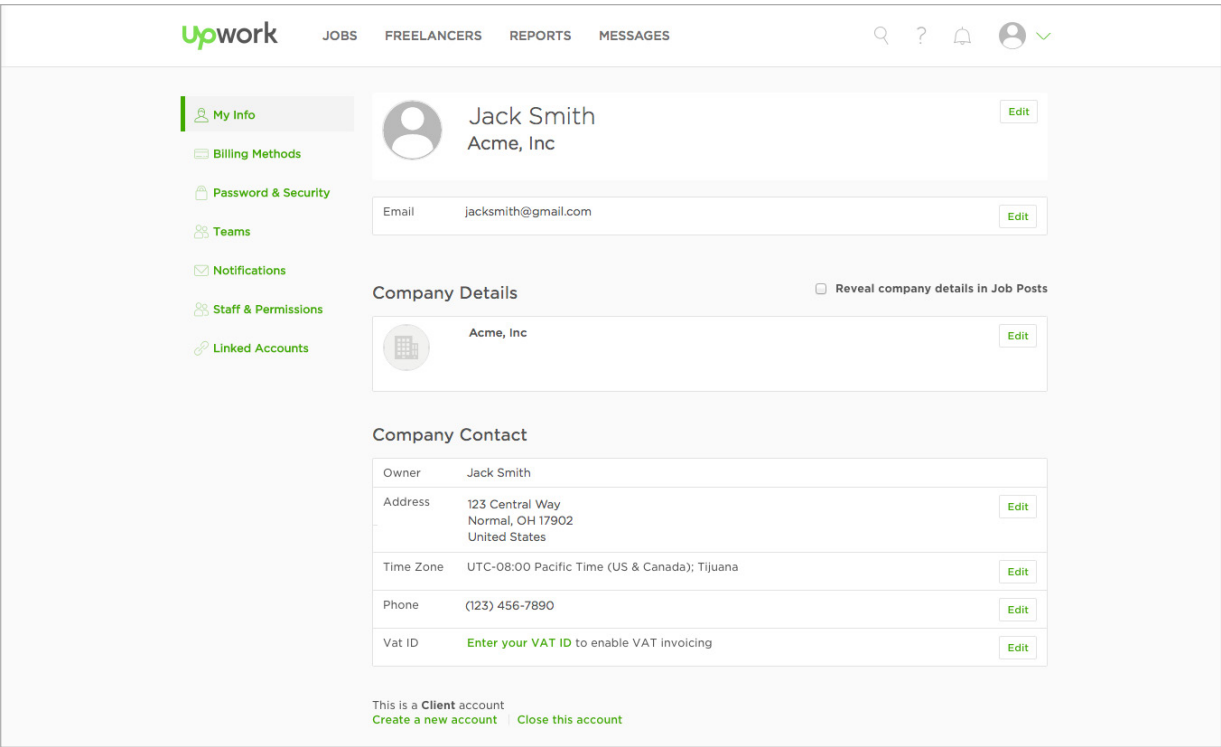
Your account information

If you’re creating a new Upwork account or replacing an existing one, the following information will appear in the My Info page of your Upwork account:

- Elance company name
- website
- tagline
- company description

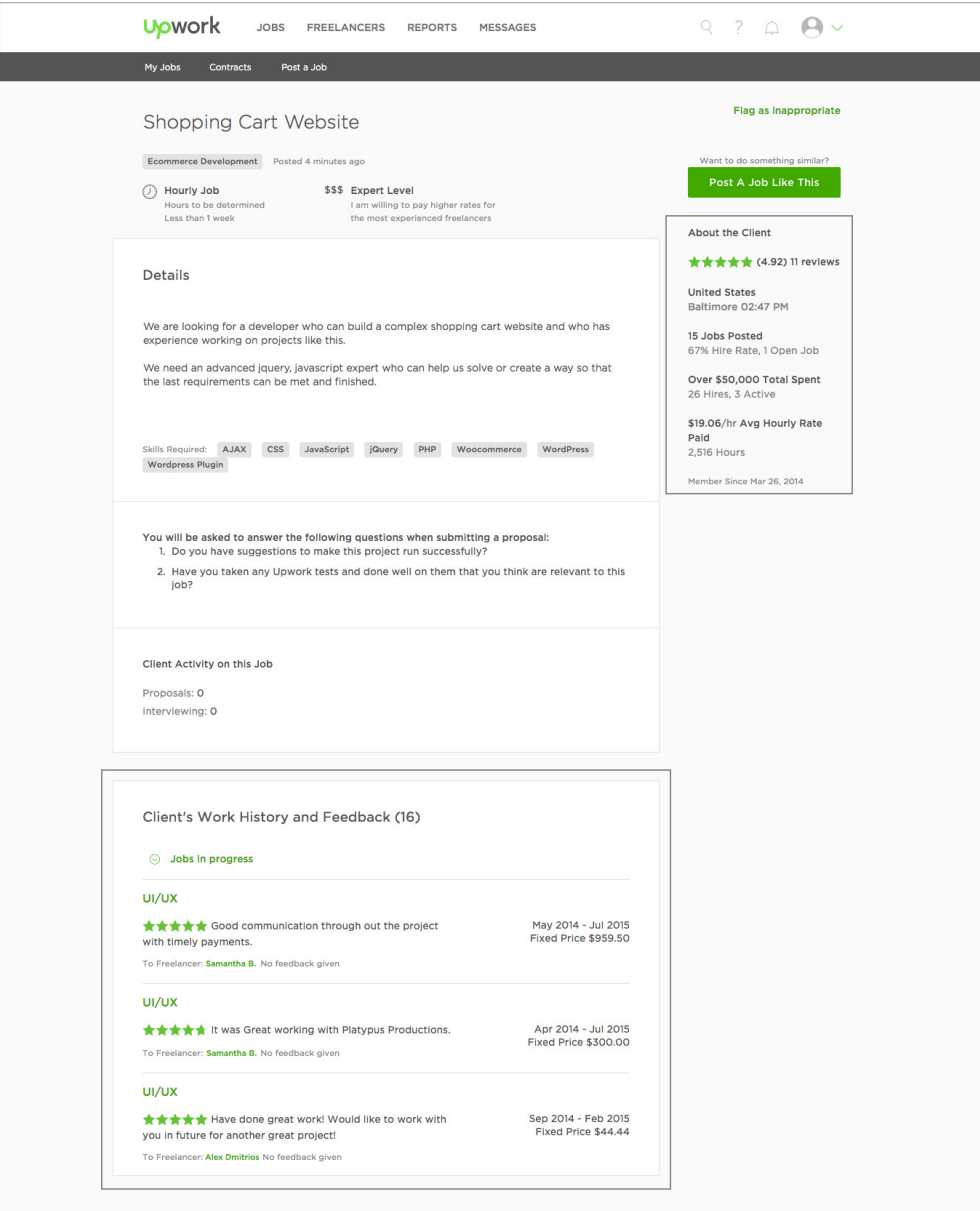
If you combine your Elance profile with your Upwork account, whatever client information you already had in your Upwork account will remain the same.

You can edit any of these items in your [company settings](#), as shown here:



Your job post information

Freelancers will see your client profile information, work history, and reputation on your job posts.



Tip: Upwork does not have the same client profile view as Elance. Most of your client profile information will only appear on your job posts, and will not be included in your Upwork account's other records or reports...so you'll only see it if you post a job.

About the Client

★★★★★ (4.92) 11 reviews

United States
Baltimore 02:47 PM

15 Jobs Posted
67% Hire Rate, 1 Open Job

Over \$50,000 Total Spent
26 Hires, 3 Active

\$19.06/hr Avg Hourly Rate
Paid
2,516 Hours

Member Since Mar 26, 2014

The “About the Client” section of your job posts will show:

- Your total feedback score
- Location
- Number of jobs posted
- Total amount spent
- Average hourly rate paid

The “Client Work History and Feedback” section of your job posts will show:

- A combined list of your Elance and Upwork job history, with most recent jobs at the top
- Title, details, and feedback you’ve received from freelancers for each job

Client's Work History and Feedback (16)

🕒 Jobs in progress

UI/UX

★★★★★ Good communication through out the project with timely payments. May 2014 - Jul 2015 Fixed Price \$959.50
To Freelancer: Samantha B. No feedback given

UI/UX

★★★★★ It was Great working with Platypus Productions. Apr 2014 - Jul 2015 Fixed Price \$300.00
To Freelancer: Samantha B. No feedback given

UI/UX

★★★★★ Have done great work! Would like to work with you in future for another great project! Sep 2014 - Feb 2015 Fixed Price \$44.44
To Freelancer: Alex Dmitrios No feedback given

Not carried over from Elance

Files, messages, funds in your account, payment methods, reports, skill tests, archived and ongoing jobs cannot be imported to Upwork. *You can still access these items while Elance remains open.*

What happens to my profile on Elance?

After you’ve brought your Elance history and reputation to Upwork, your profile on Elance will remain unchanged, and you’ll still have access to it while Elance remains open. If you continue to work on Elance, your completed jobs and feedback will be imported daily to your Upwork profile so you get credit for your activity on Elance. Any work you do on Upwork will not be reflected on your Elance profile.

2. Get your new workspace in order

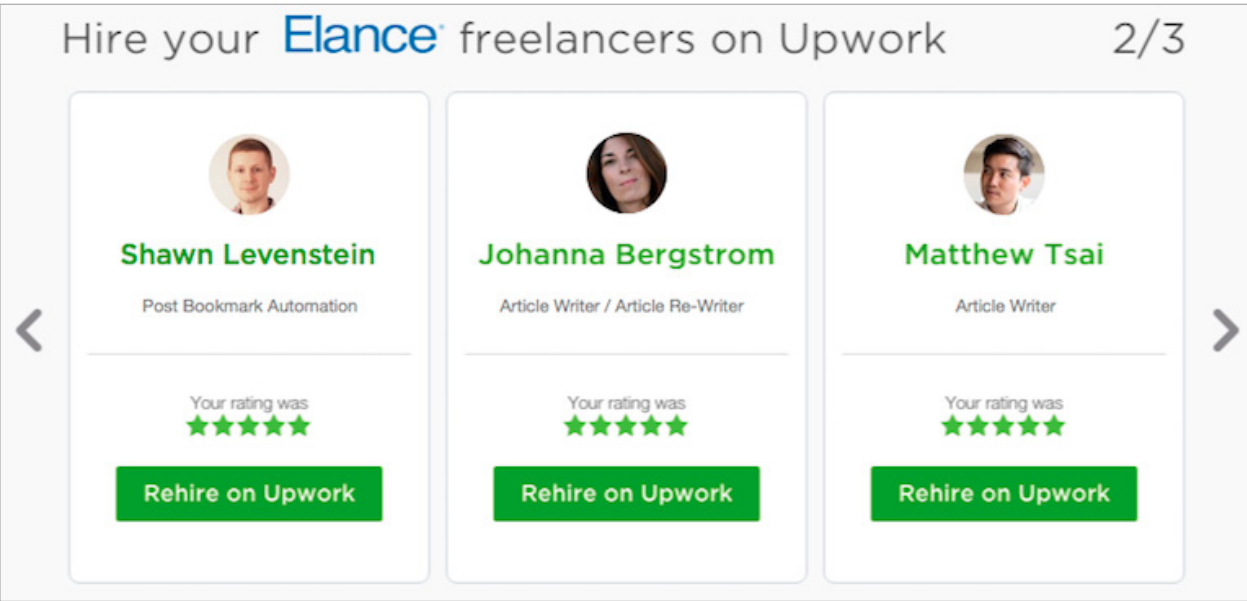
Now that you’ve brought your Elance profile to Upwork, it’s time to get your basics in place.

- 1. Rehire your Elance freelancers on Upwork
- 2. Set up your team permissions
- 3. Set up your communications

Rehire your freelancers

The easiest way to get started on Upwork is to work with the freelancers you’ve already had success with on Elance! Simply rehire them on Upwork and close any contracts you have with them on Elance. It’s easy:

- 1. [Log into Upwork](#) and find your Elance freelancers at the bottom of your My Jobs page. Select the freelancer you want to rehire, and we’ll send them an offer to work with you on Upwork. If the freelancer has not yet joined Upwork, we’ll send them an invitation and notify you once they’ve joined.



- 2. After the freelancer accepts your offer, close your active contract(s) with them on Elance. Don't forget to leave feedback—your ratings will be imported to their Upwork profile. You can still access all the files and history of your closed contracts on Elance.
- 3. Start working together on Upwork! Enjoy all the familiar time tracking and payment features of Elance, plus real-time communication and mobile apps. The bottom of this guide highlights key differences between Elance and Upwork and provides resources to get you started.

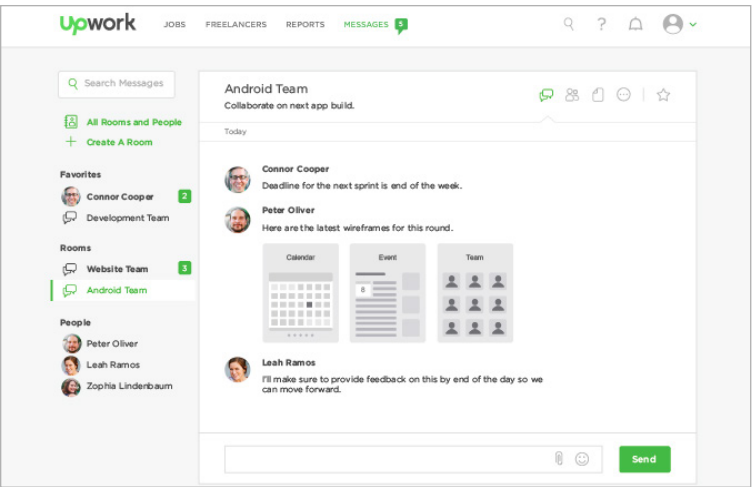
Set up your team permissions

If you want to assign roles and permissions to members of your client or freelance team, go to [Settings > Staff & Permissions](#). You can add new team members and specify permissions around hiring, viewing Work Diary info, and communicating with other team members.

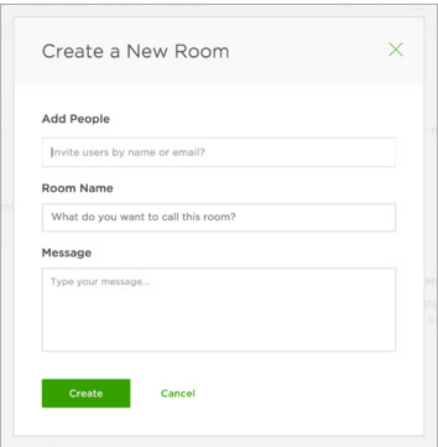
Note: *The Settings > Team page on Upwork works differently than on Elance. On Upwork, it's an advanced feature used by some clients to set up different accounting entities and organize jobs. Most of your team needs can be accomplished under Staff and Permissions, but if you need to access more advanced Team functionality, please [contact support](#).*

Set up your project rooms and messages

Instead of having contract-specific Workrooms like on Elance, Upwork has a single Messages area where you can find, chat, and share files with any of your team members, across projects.



If you wish to organize your conversations by team or project, create Project Rooms in your Message Center by inviting specific team members.



3. Wind things down on Elance

The final stage of moving to Upwork is to mark any open contracts as complete and leave feedback for your freelancers (which will be imported to their Upwork profile so they get credit for their great work).

If there are any important files or records you wish to keep from Elance, it's a good idea to download and save them to your own workspace.

What do I need to know to be successful on Upwork?

Here you'll find answers to many of the questions you might have about working on Upwork. Though there are many similarities between Elance and Upwork, we've outlined the main differences so you can start hiring today. We've also included additional resources at the end of this guide.

Hiring on Upwork

Elance and Upwork both have hourly and fixed-price contracts.

- On Upwork, hourly contracts are covered by [Upwork Hourly Protection](#). The Work Diary (similar to Work View on Elance) lets you track hourly work for each team member. Go [here](#) for a detailed tutorial on hourly hiring on Upwork and how it differs from Elance.
- Fixed-price contracts are protected by [Upwork Fixed-Price Protection](#). Go [here](#) for a detailed tutorial on fixed-pricing hiring on Upwork and how it differs from Elance.

Paying freelancers on Upwork

- When you make your first hire on Upwork, you'll be prompted to enter a [verified payment method](#) (credit card or PayPal). For security reasons, we cannot transfer your verified payment method from Elance.
- Payment cycles for hourly work differ between Elance and Upwork. On Upwork, clients are automatically billed on the Monday following the work week (versus Friday on Elance). You have 5 days to review and dispute, as needed.
- If you hire for a fixed-price job, you manually fund and approve each milestone through Upwork. Your payment method will be billed immediately when you create a milestone, but the funds won't be released to the freelancer until the work is approved.

Communicating with freelancers

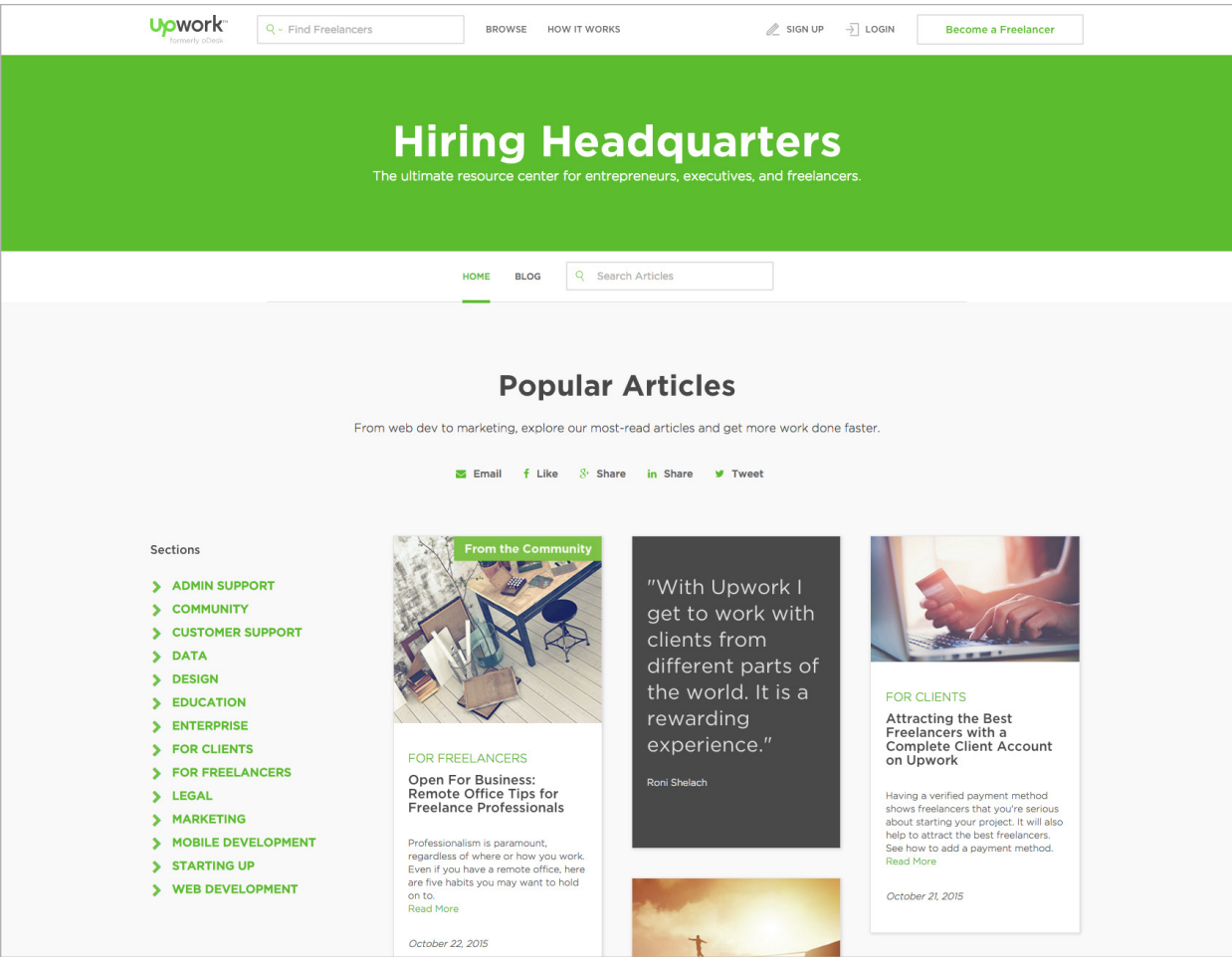
The Upwork Message Center is where clients and freelancers connect on Upwork. You can start group conversations, send files, and create project rooms organized by topic or project. Go [here](#) for a detailed tutorial on Upwork Messages and how it differs from Workrooms on Elance.

Instead of Workrooms, use your [Jobs](#) and [Freelancers](#) pages to:

- Access your posted jobs and active contracts
- Send a message or file to your freelancer (expanded features available in Upwork [Messages](#))
- View your Work Diary and payments
- Leave feedback

Other resources

Our [Hiring Headquarters](#) provides tips and best practices on how best to use Upwork. If you have any questions, please feel free to contact our [support team](#) or connect with our active [community](#).



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