



NOTION TEMPLATE

The Freelance Client Manager

Premium Digital Product - v1.0.0

\$24.0

One-time payment - Lifetime access

 July 17, 2026

 ShopZario.com

 PDF



SECTIONS
**Product
content**



ITEMS
**Full
content**



VALUE
\$24.0



FORMAT
**Digital
Download**



LICENSE
standard



UPDATES
Lifetime



The Freelance Client Manager A complete client management system for freelancers....



This premium Notion template consolidates your entire freelance workflow into on....



From first contact to final payment, every interaction, deliverable, and dollar



WHO IT'S FOR: Freelance designers and creatives managing multiple client project....



Content Quality	98%
Value for Money	95%
Ease of Use	92%
Customer Support	96%



PRODUCT The Freelance Client Manager	TYPE	VERSION v1.0.0
PRICE \$24.0	LICENSE standard	DELIVERY Instant Download





A complete client management system for freelancers to track proposals, projects, invoices, and contracts. This premium Notion template consolidates your entire freelance workflow into one organized workspace, eliminating the chaos of scattered spreadsheets and lost emails. From first contact to final payment, every interaction, deliverable, and dollar is tracked seamlessly.

WHO IT'S FOR: Freelance designers and creatives managing multiple client projects simultaneously | Independent consultants who need to track proposals and maintain client relationships | Freelance writers and content creators juggling various assignments and deadlines | Solopreneurs and small agency owners wanting to professionalize their operations

BENEFITS: Never lose track of a client conversation or project detail again with centralized record-keeping | Get paid faster by monitoring invoice statuses and automatically flagging overdue payments | Win more proposals by analyzing your success rate and identifying patterns in what works | Save hours each month on admin tasks with automated calculations and status tracking | Impress clients with professional organization that sets you apart from competitors

WHAT'S INCLUDED: 5 fully linked relational databases with pre-built properties and formulas, Executive dashboard with real-time business metrics and quick-access views, Proposal tracking with win/loss analysis and conversion rate calculations, Project management with timeline views and deliverable checklists, Invoice system with automatic total calculations and payment status tracking, Expense logger with category tagging and tax-ready summaries, Client CRM with communication history and relationship scoring, 4 bonus templates for onboarding, contracts, meeting notes, and weekly reviews

 **Clients:** [{ 'name': 'All Clients', 'type': 'Gallery', 'description': 'Card-based view with client photo, company, and quick status indicator' }, { 'name': 'Active Clients', 'type': 'Table', 'description': 'Filtered table showing only clients with active projects or recent activity' }, { 'name': 'By Status', 'type': 'Kanban', 'description': 'Board view organizing clients by status: Active, Inactive, Prospect, Churned' }, { 'name': 'Client Timeline', 'type': 'Timeline', 'description': 'Chronological view of client relationships based on first contact date' }]

 **Proposals:** [{ 'name': 'Proposal Pipeline', 'type': 'Kanban', 'description': 'Visual pipeline: Draft, Sent, Follow-up, Won, Lost, Expired' }, { 'name': 'All Proposals', 'type': 'Table', 'description': 'Comprehensive table with all proposal details, values, and outcomes' }, { 'name': 'Won Proposals', 'type': 'Table', 'description': 'Filtered view of successful proposals for reference and pattern analysis' }, { 'name': 'By Value', 'type': 'Board', 'description': 'Grouped by proposal value ranges to identify your most lucrative opportunities' }]

 **Projects:** [{ 'name': 'Active Projects', 'type': 'Table', 'description': 'Current projects with progress bars, deadlines, and linked client info' }, { 'name': 'Project Board', 'type': 'Kanban', 'description': 'Status-based board: Not Started, In Progress, In Review, Completed, On Hold' }, { 'name': 'Project Timeline', 'type': 'Timeline', 'description': 'Gantt-style view of project schedules and milestone dates' }, { 'name': 'By Client', 'type': 'Gallery', 'description': 'Projects grouped and displayed by client for easy per-client navigation' }]

 **Invoices:** [{ 'name': 'Invoice Tracker', 'type': 'Table', 'description': 'Master table with all invoice details, amounts, and payment statuses' }, { 'name': 'Overdue Invoices', 'type': 'Table', 'description': 'Urgent filtered view showing only past-due invoices requiring action' }, { 'name': 'Payment Status Board', 'type': 'Kanban', 'description': 'Visual board: Draft, Sent, Partially Paid, Paid, Overdue, Void' }, { 'name': 'Monthly Summary', 'type': 'Calendar', 'description': 'Calendar view of invoices by due date for monthly cash flow planning' }]

 Expenses: [{ 'name': 'All Expenses', 'type': 'Table', 'description': 'Complete expense log with dates, amounts, categories, and project links'}, { 'name': 'By Category', 'type': 'Board', 'description': 'Expenses grouped by type: Software, Equipment, Travel, Marketing, Office, Other'}, { 'name': 'Tax Deductions', 'type': 'Table', 'description': 'Filtered view of tax-deductible expenses with running total'}, { 'name': 'Expense Calendar', 'type': 'Calendar', 'description': 'Date-based view of expenses for monthly spending pattern analysis'}]]



No special requirements. Works on all modern devices and platforms.



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