FREE STARTER · DESKFLOWS NOTION TEMPLATES

Freelance OS Starter

One-database Client Tracker for Notion. Seven properties, four views — importable CSV, zero subscriptions. Live in under 10 minutes.

`client-tracker.csv` `4 views pre-configured` `Notion Free plan` `v1.0 · July 2026` `deskflows.com/products`

WHAT YOU GET

Client Tracker Database

A single Notion database tracking every client, project status, hourly rate, invoice total, and next action — in one place. Import from the included CSV in 60 seconds.

WHY IT WORKS

One source of truth

Freelancers lose hours monthly hunting "which client paid?" across email, spreadsheets, and apps. One database with 4 views answers every status question instantly.

WHAT IT LOOKS LIKE IN NOTION

Freelance OS / Client Tracker / Active Now

WORKSPACE

- Freelance OS
- Client Tracker
  - All Clients
  - Active Now
  - Pipeline
  - Revenue Log

Client Tracker — Active Now

CLIENT NAME	STATUS	RATE	TOTAL INVOICED	NEXT ACTION	LAST CONTACT
Acme Design Co.	Active	$95	$4,560	Send brand guide v3	2026-06-28
Bright Labs	Active	$110	$2,200	Schedule Q3 kickoff call	2026-07-01
Nova Retail	On Hold	$85	$1,020	Follow up after July 15	2026-06-15

i Sorted oldest Last Contact first — the client most overdue for follow-up is always row 1.

7 PROPERTIES IN THE CSV

CLIENT NAME	Text — company or person
STATUS	Select: Active / On Hold / Completed / Prospect
HOURLY RATE	Number — your rate in USD
TOTAL INVOICED	Number — running total billed
NEXT ACTION	Text — one sentence, always current
LAST CONTACT	Date — last email, call, or meeting
NOTES	Text — anything that doesn't fit above

Set up in 5 steps — under 10 minutes

1. **Create a new page in Notion**
   In your sidebar click **+ New page**. Title it **Freelance OS**. This is your workspace root — all future databases live here as subpages.
2. **Import the CSV as a new database**
   Inside Freelance OS, type **/table → Table — Full page**. Then ··· menu (top right of database) → **Merge with CSV** → select **client-tracker.csv**. Column headers map automatically.
3. **Fix property types**
   Notion imports everything as Text. Click each column header and set: **Status** → Select; **Hourly Rate** → Number (Dollar); **Total Invoiced** → Number (Dollar); **Last Contact** → Date. The 4 views depend on these types.
4. **Add the 4 views**
   Click **+ Add a view** and create: **Active Now** (filter Status=Active, sort Last Contact ascending); **Pipeline** (Board, group by Status); **Revenue Log** (table, sort Total Invoiced descending, hide all except Name/Rate/Total).
5. **Delete example rows, add your real clients**
   The CSV seeds 5 anonymised rows (Acme Design Co., Bright Labs, etc.). Select all → delete. Add your clients. Update **Next Action** every time you touch a project — that field is how the tracker earns its keep.

USING IT DAILY

MORNING CHECK-IN · 2 MIN

Open Active Now

Oldest-contact-first sort means your most overdue follow-up is always row 1. Process the top 3: send the email, log the update, bump Last Contact to today.

AFTER BILLING · 1 MIN

Update Total Invoiced

When you send an invoice, add the amount to Total Invoiced. Revenue Log re-sorts automatically. You always know your top revenue client at a glance.

WHAT'S IN THE FULL PACK — DESKFLOWS.COM/PRODUCTS

FREELANCE OS — FULL WORKSPACE KIT · $19

4 databases. Every dimension of your freelance ops.

Client CRM · Project Pipeline · Invoice Log · Weekly Review — cross-linked so opening a client shows all their projects and invoices automatically.

- ✓ Client CRM — full contact + project history, 10 properties
- ✓ Project Pipeline — deliverables, deadlines, hours tracked
- ✓ Invoice Log — sent/due dates, paid status, overdue view
- ✓ Weekly Review — template for wins, blockers, next priorities
- ✓ 4 importable CSVs + 6-page illustrated setup guide

→ deskflows.com/products — one-time $19, no subscription