Solancer — Lite

Your clients, projects and daily tasks in one connected Notion workspace.

Thanks for downloading!

Three steps and you are up and running:

- **1. Open your template link** below and sign in to Notion (a free account works).
- **2. Click "Duplicate"** (top-right corner). Your own private copy lands in your Notion.
- **3. Follow the yellow "Start Here" box** on the Home page. You will be working in under 10 minutes.

Your template link (keep it private):

https://peach-tithonia-953.notion.site/Freelancer-OS-Lite-423cfd926e1481428676da8d776cb053

It always opens the latest version of the template, so re-downloading is never needed.

What's inside

- Home dashboard: today, follow-ups and active projects on one page
- Client CRM: leads to past clients, with follow-up reminders
- Project tracker: statuses, deadlines, automatic progress bars
- Task manager: today and this-week views, per-project views
- Pre-loaded fictional sample data, so you can see a full system before adding yours

How the databases connect

Clients connect to Projects, and Projects connect to Tasks. You type things once; the dashboard answers the questions.

Want invoices and meetings too?

The full Solancer adds an invoice tracker (who owes you what, overdue alerts), meeting notes, a money dashboard and a Weekly Review page, with the same one-click views.

Daily routine

- **Morning (2 min):** open Home and check the Today view. That is your day.
- **Friday (10 min):** open Weekly Review: follow-ups, what is due next week.

Common actions

- **Lead said yes**: set their Stage to Active, then add a Project.
- **Project finished**: set Status to Done.
- **Done with a client**: set Stage = Past. They leave your dashboards but stay in your records.

Good to know

- All sample people, companies and emails are fictional (example.com). Delete them whenever you like.
- Works on Notion's free plan. No other tools needed.
- You can add or rename views and select options freely; the locked database structure keeps you from breaking anything by accident.
- This is an organization tool, not accounting, tax or legal advice. Not affiliated with Notion.

Tell me how it went

Did Solancer Lite help, or is something missing or confusing? Reply to yousefsg2023@gmail.com and tell me honestly. I read every message and use it to improve the template.