

PREVIEW

SYMOH · ONLINE INCOME SYSTEMS

The Freelance Client CRM & Project Tracker

A full client pipeline, project tracker, and invoice log in one spreadsheet — no monthly software fee.

Live

DASHBOARD

5

CONNECTED SHEETS

This is a preview — Dashboard shown in full, Client CRM shown as a sample.

What's Inside

This spreadsheet replaces three separate tools — a client tracker, a project board, and an invoicing log — with one connected file. Update any sheet and the Dashboard reflects it instantly.

Sheet	What it does
Start Here	Usage rules and which cells are editable
Dashboard	Live KPIs pulled automatically from every other sheet
Client CRM	Every lead and client, sortable by status and source
Project Tracker	Status, deadlines, and payment tracking per project
Invoice Log	Auto-calculates days outstanding from the send date

EDITABLE IN EXCEL OR GOOGLE SHEETS

No new software to learn — open it and start typing. The next page shows exactly what the live Dashboard looks like.

Dashboard (shown in full)

This updates automatically the moment you add or change a row in Client CRM, Project Tracker, or Invoice Log — no manual math, ever.

Dashboard.xlsx

ACTIVE CLIENTS

1

OPEN LEADS

2

ACTIVE PROJECTS

1

UNPAID (\$)

\$900

Metric	Value
Estimated pipeline value (open leads)	\$950
Total invoiced this file	\$1,800
Total collected (paid)	\$900
Overdue invoices (count)	0

Projects past deadline (not complete)

0

Client CRM (sample)

Every lead and client in one sortable database. Status and source use dropdowns, so nothing breaks the formatting.

Client CRM.xlsx

Client Name	Source	Status	Est. Value
Jordan Blake	Referral	Client	\$1,800
Priya Nair	Cold Outreach	Proposal Sent	\$950
Marcus Webb	Instagram	Lead	\$0

Full Client CRM + 2 More Sheets

25 editable rows in Client CRM · Project Tracker (status, deadlines, payment tracking) · Invoice Log (auto-calculated days outstanding)

Like what you see?

Get the full tracker.

This preview showed the Dashboard in full and a 3-row sample of Client CRM. Here's what's waiting in the full version:

- ✓ Full Client CRM with 25 editable rows and dropdowns
- ✓ Project Tracker — status, deadlines, and payment tracking
- ✓ Invoice Log with auto-calculated days outstanding
- ✓ Start Here guide covering exactly how the sheets connect

GET THE FULL CRM TRACKER →

\$27 · Instant download · Works in Excel and Google Sheets