Freelancer CRM for Notion

Markdown + CSV import pack - setup guide

Track leads, clients, projects, follow-ups and invoices in one connected freelance CRM.

What is inside

File	Becomes in Notion
Freelancer CRM.md	The home page of your system, with links to everything below
Freelancer CRM/Clients.csv	Database "Clients" (8 sample rows, 9 columns)
Freelancer CRM/Projects.csv	Database "Projects" (4 sample rows, 6 columns)
Freelancer CRM/Interactions.csv	Database "Interactions" (6 sample rows, 5 columns)
Freelancer CRM/Invoices.csv	Database "Invoices" (4 sample rows, 7 columns)
Freelancer CRM/Follow-up Email Templates.md	Page "Follow-up Email Templates"
Freelancer CRM/Proposal Checklist.md	Page "Proposal Checklist"

All of these files are inside **Notion-Import-Freelancer-CRM.zip**. The same files are also included unzipped in the **notion-files** folder so you can open them in any text editor or spreadsheet first.

Step 1-3: Import into Notion

1. Open Notion on desktop or in a web browser and choose the workspace you want to use.
2. In the left sidebar click **Import** (in some Notion versions it is under **Settings** > **Import**).
3. Choose the Markdown & CSV option (labelled **Text & Markdown** in some versions) and upload **Notion-Import-Freelancer-CRM.zip** as it is. Do not unzip it first.
4. Wait for the import to finish. A page called **Freelancer CRM** appears in your sidebar; the databases and pages sit inside it.
5. Optional: drag the page to where you want it in the sidebar, and add an icon and cover.

If your Notion version only accepts single files, import each CSV with the **CSV** option and each .md file with the Markdown option, then move them under one page.

Step 4: Set property types

CSV columns usually import as text. Open each database as a table, click a column header, choose **Edit property** > **Type**, and pick the type below. Notion converts the existing values; check a few rows afterwards.

SAMPLE

Preview: page 1 of 4 of the setup guide - full pack in the download

Database: Clients

Property	Set type to	Notes
Client	Title	Contact name
Company	Text	
Email	Email	
Stage	Select	Lead, Contacted, Proposal sent, Negotiating, Won, Lost
Source	Select	Referral, Website form, LinkedIn, Instagram, Conference, Past client
Estimated value	Number	Number format: US dollar (or your currency)
Last contact	Date	
Next follow-up	Date	
Notes	Text	

Database: Projects

Property	Set type to	Notes
Project	Title	
Client	Relation to Clients	Convert after importing Clients (step 5)
Status	Select	Not started, In progress, In review, Complete
Fee	Number	Currency format
Start	Date	
Deadline	Date	

Database: Interactions

Property	Set type to	Notes
Interaction	Title	
Client	Relation to Clients	Convert after importing Clients (step 5)
Date	Date	
Type	Select	Call, Email, Meeting, Social
Next step	Text	

Database: Invoices

Property	Set type to	Notes
Invoice	Title	
Client	Relation to Clients	
Project	Relation to Projects	
Amount	Number	Currency format
Issued	Date	
Due	Date	
Paid	Checkbox	

SAMPLE