GENCRAFTIO / FREE PDF SAMPLE

Client CRM

Best for

Freelancers tracking clients, project pipelines and invoices manually.

What this sample includes

Two selected pages from the product. The full collection and guides are described on the product listing.

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Product and support

2000.io.vn/products/client-crm
For help, visit 2000.io.vn/contact.

Sample only. No device, stylus or software subscription is included.

PROJECTS · C01

‹ › ALL

Jobs, deliverables and money for this client.

PROFILE | PROJECTS | CONTACT LOG

PROJECT	START	DUE	FEE	PAID	STATUS

DELIVERABLES

- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐

SCOPE & REVISIONS

FEEDBACK & TESTIMONIAL

CLIENT 06

‹ › ALL

Profile · who they are and how they like to work

PROFILE | PROJECTS | CONTACT LOG

NAME _____ **COMPANY** _____

ROLE _____ **CLIENT SINCE** _____

EMAIL _____ **PHONE** _____

WEBSITE _____ **PREFERS** _____

HOW WE MET _____

SERVICES _____

RATE _____

PAYMENT TERMS _____

WHAT THEY CARE ABOUT

KEY DATES

STATUS

- ☐ LEAD
- ☐ ACTIVE
- ☐ PAUSED
- ☐ PAST CLIENT

HAPPINESS 1 2 3 4 5

LIFETIME VALUE _____