

SoloKit Notion Business Hub v1.0

Your All-in-One Solo Business Command Center

One Notion workspace to run your entire solo business. Projects, finances, clients, goals — all in one place.

Quick Setup (2 minutes)

1. Click the Notion template link (provided with your purchase)
 2. Click "Duplicate" in the top-right corner
 3. The entire workspace is now yours — customize it to fit your business
 4. Follow the section-by-section setup guide below
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Template Structure

This template includes **6 interconnected databases** and **4 dashboard views** designed specifically for solopreneurs.

Section 1: Main Dashboard

Your business at a glance. Open this every morning.

What's Included:

- **Revenue Tracker** — Monthly income widget showing current month vs. target
- **Active Projects** — Filtered view showing only in-progress projects
- **This Week's Tasks** — Auto-filtered to show tasks due this week
- **Quick Capture** — Inbox for new ideas, tasks, and notes
- **Key Metrics** — Customizable KPI cards

Database Properties:

Revenue Tracker Database:

- └── Date (Date)
- └── Source (Select: Product Sales, Services, Affiliate, Other)
- └── Amount (Number, USD)
- └── Status (Select: Received, Pending, Invoiced)
- └── Client (Relation → Clients DB)
- └── Notes (Text)
- └── Month (Formula: formatDate(prop("Date"), "YYYY-MM"))

Views to Create:

1. **Monthly Summary** — Table grouped by Month, with sum of Amount
 2. **By Source** — Board view grouped by Source
 3. **This Month** — Filtered table showing current month only
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Section 2: Project Tracker

Manage every project from idea to completion.

Database Properties:

Projects Database:

- └── Project Name (Title)
- └── Status (Select:  Idea,  Planning,  In Progress, Complete,  Cancelled)
- └── Priority (Select:  High,  Medium,  Low)
- └── Start Date (Date)
- └── Due Date (Date)
- └── Client (Relation → Clients DB)
- └── Revenue (Relation → Revenue DB)
- └── Tasks (Relation → Tasks DB)
- └── Progress (Rollup: % of related tasks completed)
- └── Category (Select: Product, Client Work, Marketing, Operations, Content)
- └── Notes (Text)
- └── Files (Files & Media)

Views:

1. **Kanban Board** — Board view grouped by Status (default view)
2. **Timeline** — Timeline view by Start Date → Due Date
3. **By Client** — Table grouped by Client
4. **Active Only** — Filtered to show only "In Progress" projects

How to Use:

- Create a new project for every initiative (product launch, client job, marketing campaign)
 - Link related tasks, clients, and revenue entries
 - Move cards across the Kanban board as you progress
 - Check the Progress rollup to see completion percentage
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Section 3: Task Manager

Your daily to-do system with smart filtering.

Database Properties:

Tasks Database:

- └── Task Name (Title)
- └── Status (Select: To Do, In Progress, Done, Scheduled)
- └── Priority (Select: Urgent, Important, Low)
- └── Due Date (Date)
- └── Project (Relation → Projects DB)
- └── Time Estimate (Number, in minutes)
- └── Actual Time (Number, in minutes)
- └── Category (Select: Build, Write, Market, Admin, Finance, Learn)
- └── Recurring (Checkbox)
- └── Notes (Text)
- └── Energy Level (Select:  High Focus,  Medium,  Low Energy)

Views:

1. **Today's Focus** — Filter: Due Date is today OR Status is "In Progress", sorted by Priority
2. **This Week** — Filter: Due Date is within next 7 days
3. **By Project** — Table grouped by Project relation
4. **Eisenhower Matrix** — Board view with 4 columns: Urgent+Important, Important, Urgent, Neither
5. **Done Log** — Filtered to show completed tasks, sorted by date (for weekly review)

Daily Workflow:

1. Open "Today's Focus" view every morning
2. Pick your top 3 tasks (mark as In Progress)
3. Work in focused blocks
4. Mark done when complete

5. End of day: quick review of tomorrow's tasks

Section 4: Client CRM

Track every relationship that matters to your business.

Database Properties:

Clients Database:

- └── Name (Title)
- └── Company (Text)
- └── Email (Email)
- └── Phone (Phone)
- └── Status (Select: Active, Lead, Past Client, Prospect)
- └── Source (Select: Referral, Social Media, Cold Outreach, Inbound, Other)
- └── Projects (Relation → Projects DB)
- └── Revenue (Rollup: Sum of related Revenue entries)
- └── Last Contact (Date)
- └── Next Follow-up (Date)
- └── Notes (Text)
- └── Tags (Multi-select: VIP, Long-term, Quick Project, High Budget, Referral Partner)
- └── Rating (Select: ★★★★★, ★★★★☆, ★★★☆☆, ★★☆☆, ☆)

Views:

1. **All Clients** — Default table, sorted by Last Contact
2. **Pipeline** — Board view grouped by Status
3. **Follow-up Due** — Filtered: Next Follow-up is before or on today
4. **Top Clients** — Sorted by Revenue (highest first)
5. **By Source** — Board view grouped by Source (see where clients come from)

CRM Workflow:

1. Add every potential client as a "Prospect" or "Lead"
 2. After first meeting → update to "Lead" with notes
 3. When they pay → update to "Active", create a Project
 4. After project → update to "Past Client"
 5. Set follow-up dates to stay in touch (referrals come from here!)
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Section 5: ⚡ Goal Setting & OKRs

Quarterly goals with measurable key results.

Database Properties:

Goals Database:

- └── Goal (Title)
- └── Quarter (Select: Q1 2025, Q2 2025, Q3 2025, Q4 2025)
- └── Category (Select: Revenue, Growth, Product, Personal, Marketing)
- └── Status (Select: ⚡ Active, ✓ Achieved, ✗ Missed, ⏸ Paused)
- └── Target (Number)
- └── Current (Number)
- └── Unit (Select: \$, subscribers, customers, products, hours)
- └── Progress (Formula: round(prop("Current") / prop("Target") * 100))
- └── Key Results (Relation → Key Results DB)
- └── Due Date (Date)
- └── Reflection (Text – fill this in at end of quarter)

Key Results Sub-Database:

Key Results Database:

- └── Key Result (Title)
- └── Goal (Relation → Goals DB)
- └── Target (Number)
- └── Current (Number)
- └── Status (Select: On Track, At Risk, Behind, Complete)
- └── Owner (Text – it's just you, but good habit)
- └── Weekly Update (Text)

Views:

1. **This Quarter** — Filtered by current quarter, showing progress bars
2. **Goal Board** — Board view grouped by Category
3. **Progress Dashboard** — Gallery view with progress visualization

How to Use:

1. At the start of each quarter, set 3-5 goals
2. For each goal, define 2-3 measurable key results
3. Update "Current" numbers weekly

4. End of quarter: write reflections, adjust next quarter
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Section 6: Idea Vault & Swipe File

Never lose a good idea again.

Database Properties:

Ideas Database:

- Idea (Title)
- Type (Select: Product, Content, Feature, Marketing, Partnership, Random)
- Potential (Select:  High,  Medium,  Low)
- Effort (Select: Quick Win, Medium, Big Project)
- Status (Select:  New,  Researching,  Approved,  In Progress,  Rejected)
- Notes (Text)
- Inspiration Source (URL)
- Date Added (Date, auto-filled)
- Related Project (Relation → Projects DB)

Swipe File Properties:

Swipe File Database:

- Item (Title)
- Type (Select: Headline, Email, Ad, Landing Page, Tweet, Design, Pricing)
- Source (URL)
- Screenshot (Files & Media)
- Why It Works (Text)
- Tags (Multi-select)
- Date Saved (Date)

Views:

1. **Ideas Board** — Kanban by Status
 2. **Quick Wins** — Filtered: Potential = High AND Effort = Quick Win
 3. **Swipe by Type** — Board view grouped by Type
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Setup Instructions

Step 1: Duplicate the Template

- Click the Notion share link
- Click "Duplicate" in the top-right
- Choose your workspace

Step 2: Customize Your Categories

Go through each database and update the Select options:

- Revenue sources (match YOUR income sources)
- Project categories (match YOUR business areas)
- Client tags (match YOUR relationship types)

Step 3: Add Your Data

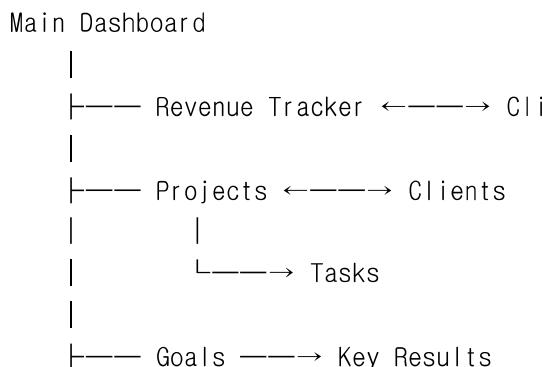
Start with:

1. Add your current clients to the CRM
2. Add your active projects
3. Set this quarter's goals
4. Start logging revenue

Step 4: Set Your Daily Routine

- **Morning (5 min):** Open Main Dashboard → check today's tasks
- **During work:** Update task status as you go
- **Evening (5 min):** Log any revenue, update project progress
- **Weekly (15 min):** Review goals, plan next week's tasks
- **Monthly (30 min):** Financial review, goal check-in

🔗 Database Relations Map





Everything connects. When you add a revenue entry and link it to a client, you can see total revenue per client. When you link tasks to projects, you see project completion percentage. It's all automatic.

💡 Customization Tips

Colors

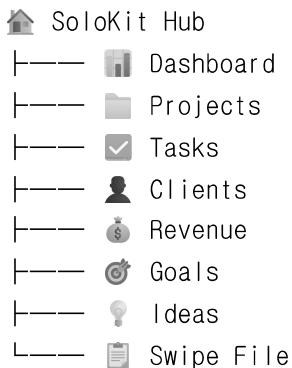
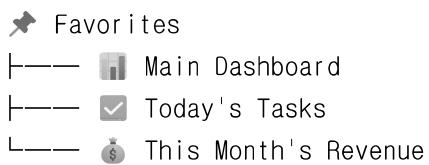
- Use Notion's built-in color coding for priorities
- Red = Urgent/High, Yellow = Medium/Important, Green = Low/Easy

Icons

- Add page icons to each database for visual navigation
- Recommended: Revenue, Projects, Tasks, Clients, Goals, Ideas

Sidebar Organization

Create this sidebar structure:



💡 Formulas Reference

Revenue: Monthly Total

```
// In Revenue database - "Month" property  
formatDate(prop("Date"), "YYYY-MM")
```

Tasks: Overdue Flag

```
// Returns true if task is past due and not done  
if(  
    and(  
        prop("Status") != "✓ Done",  
        prop("Due Date") < now()  
    ),  
    true,  
    false  
)
```

Goals: Progress Percentage

```
// In Goals database  
round(prop("Current") / prop("Target") * 100)
```

Projects: Days Until Due

```
// Countdown to deadline  
dateBetween(prop("Due Date"), now(), "days")
```

Client: Total Revenue

```
// Rollup property on Clients database  
// Relation: Revenue entries  
// Property: Amount  
// Calculate: Sum
```

Update Log

- **v1.0** — Initial release: 6 databases, 4 dashboards, full documentation
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Need Help?

- **Setup questions?** Email us or DM on Twitter/X: @SoloKitHQ
 - **Feature requests?** We update the template quarterly based on user feedback
 - **Notion basics?** Check Notion's official guides at notion.so/guides
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Thank you for purchasing SoloKit Notion Business Hub!

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