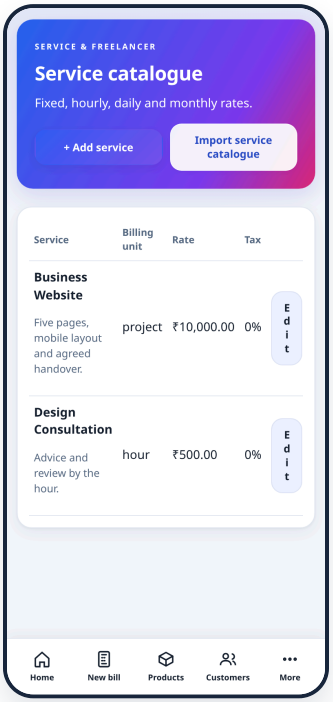
BUSINESS 04 · GET READY

Service / Freelancer

Keep work, approvals and billing together.

Best for: Designers, developers, consultants, agencies and project-based freelancers.



Actual app interface in an isolated browser preview. Fictional sample records; native activation and hardware are not demonstrated.

1. **Choose the preset**
   Settings → Features → Business type → Service / Freelancer.
2. **Add services**
   Create fixed, hourly, daily, monthly or session rates in Service catalogue.
3. **Create the project**
   Choose client, contract value, deadline, scope, deliverables, revision allowance and payment terms.

Your main tools
Service catalogue · Projects · Renewals & support · Project reports

BUSINESS 04 · DAILY WORKFLOW

Follow these steps.

1. **Record requirements**
   Open Projects → New project. Save the scope, client inputs, checklist and delivery link.
2. **Issue a quotation**
   Create a quote version with validity. Record the client decision and reference; approval is entered by you.
3. **Record the advance**
   Enter money actually received in the project. Keep it linked so it can be applied without a second receipt.
4. **Invoice a milestone**
   Use Milestones & payments. Complete the configured approval requirement and create the milestone invoice once.
5. **Track changes and time**
   Record hours / days, included revisions and approved extra work. Bill eligible entries once.
6. **Handover and collect**
   Record final approval, complete the checklist, collect the balance and mark the project completed.

> **30% advance, 70% balance**
> For a ₹10,000 contract at 0% sample tax: receive ₹3,000 advance. Apply it to the first milestone invoice. After final approval, invoice and receive ₹7,000. Total received: ₹10,000, not ₹13,000.

BUSINESS 04 · STAY IN CONTROL

Useful tools. Clear checks.

Time and retainers

Set hourly / daily rates or monthly retainer fee, included hours and extra-hour rate. Review the billing month and entries before invoicing.

Revisions

Record included revisions. For chargeable extra work, record client approval before issuing the extra invoice.

Renewals and support

Record renewal dates, fees and tickets. Create renewal bills yourself and review reminders before opening WhatsApp.

Profit and due follow-up

Project reports compare invoiced revenue excluding tax with recorded expenses. Contract value and unbilled work are not received cash.

Before you finish

- ✓ Scope, deadlines and payment terms are agreed.
- ✓ Advances are applied once, not entered twice.
- ✓ Final approval and handover have a clear reference.

A recorded approval is a record you enter; it is not proof that an email or WhatsApp message was automatically sent or approved.