

Notion Import Guide

3 files, 3 imports, under 5 minutes. No Notion account needed until step 1.

WHAT'S IN THE PACK

-  **client-lead-tracker.csv** -> imports as a database (10 columns, 7 example rows)
-  **income-invoice-tracker.csv** -> imports as a database (9 columns, 8 example rows)
-  **solopreneur-business-hub.md** -> imports as a page (headings + checkboxes)

THE 3 IMPORTS

1

Import the two CSV files as databases

In Notion, click Import in the sidebar (or the + next to a workspace).

Pick the CSV importer, then select client-lead-tracker.csv from your computer.

Notion builds a new database in a few seconds: one page per row, one property per column.

Repeat for income-invoice-tracker.csv. Now you have two databases, both still plain text/numbers.

2

Import the Markdown file as a page

Click Import again, but pick the Markdown/Text importer this time.

Select solopreneur-business-hub.md.

Notion turns the headings into a page outline and the "- []" lines into real to-do checkboxes automatically — no manual formatting.

3

Convert Stage and Status to Select (about 30 seconds each)

Open the Client & Lead Tracker, click the Stage column header, change its type to Select.

Notion reads your existing values (New Lead, Contacted, Won...) and turns each into a colorable tag.

Do the same for the Status column in the Income & Invoice Tracker.

This is the one manual step — nothing else needs configuring to start using the pack.

Why import a file instead of clicking “Duplicate”?

Notion's marketplace templates are fast, but you inherit a stranger's whole structure — properties you didn't ask for, views you'll delete within a week. These three files start from a blank column set you already understand, because every property in it is one you're about to add on purpose.

That's slower on day one and faster every day after — which is the trade worth making for a system you'll actually keep using past week two.

After You Import

Optional polish, plus the two mistakes worth avoiding on day one.

OPTIONAL: A BOARD VIEW FOR THE PIPELINE

Converting Stage to Select does not create a kanban board by itself — that is a separate step.

In the Client & Lead Tracker, click the + next to your view tabs, choose Board, and group it by Stage.

Now you can drag a card from Proposal Sent to Negotiating and the property underneath updates on its own.

Same trick works on the Income & Invoice Tracker, grouped by Status, if you want a visual receivables board.

OPTIONAL: LINK THE HUB PAGE TO BOTH TRACKERS

Open the Business Hub page. Under "Client & Lead Pipeline," type / then Linked View, and pick the Client & Lead Tracker database. Repeat under "Income Snapshot" for the other tracker. Now both databases are one click away instead of a sidebar search.

TWO MISTAKES WORTH AVOIDING

1

Recasting Amount / Deal Value as Number too early

They import as plain numbers already — add a currency format only if you want the \$ sign to display automatically. Skipping this costs nothing; it is cosmetic, not functional.

2

Treating the CSVs as a replacement for dedicated software

If you already run a real CRM or invoicing tool, use these as a lightweight mirror or a planning space, not a migration target — export back out once your volume outgrows a flat file.

Your 5-Minute Checklist

- ☐ Import client-lead-tracker.csv as a database
- ☐ Import income-invoice-tracker.csv as a database
- ☐ Import solopreneur-business-hub.md as a page
- ☐ Convert Stage (Client & Lead Tracker) to Select
- ☐ Convert Status (Income & Invoice Tracker) to Select

Everything past this line (the board view, the linked databases) is optional polish.

Everything above is optional. The 3 imports on page 1 are all you need to start using the pack today.

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