SoloForms

The One-Afternoon Paperwork System

Organize, track and sign your client documents with tools you already have. No enterprise software, no monthly fees.

Free guide · 2026 edition

```
Clients/
  2026-014_Harbor-Bakery/
    01_Proposal/
    02_Agreements/
    03_Project/
    04_Billing/
    05_Closeout/
Records_Index.xlsx
```

soloforms.co
A guide by SoloForms, a brand of K2 Business Strategies LLC

START HERE

What you'll have by tonight

Most freelancers and consultants don't need document-management software. They need a place for everything, a list of what's out there, and a habit. This guide gives you all three in about two to three hours.

- ☐ One folder structure every client gets, identical every time
- ☐ A file-naming rule that makes any document findable in seconds
- ☐ Your system set up in Google Drive, OneDrive/SharePoint or plain desktop folders
- ☐ A records index spreadsheet that tells you what's signed, what's pending and what's overdue
- ☐ A signing routine that keeps a clean, final copy of every agreement
- ☐ Ready-to-paste prompts so an AI assistant handles the busywork
- ☐ A short backup and retention checklist

> **What you need:** a Google or Microsoft account (the free tier is fine), Excel or Google Sheets, and the free **Client Records Index** spreadsheet that came with this guide.

Contents

This guide is general business information, not legal, tax or IT security advice. Rules for signatures and record keeping vary by location and industry; confirm anything important with a qualified professional.

PART 1

The folder structure

Every client gets the same five folders, numbered in the order a job actually happens. When everything has one obvious home, filing takes seconds and nothing gets lost.

```
Business/
├── 00_Templates/            ← your blank forms live here, never edited directly
├── Clients/
│   ├── _CLIENT-TEMPLATE/    ← copy this folder for every new client
│   │   ├── 01_Proposal/
│   │   ├── 02_Agreements/   ← NDA, services agreement, SOW, change orders
│   │   ├── 03_Project/      ← working files, deliverables
│   │   ├── 04_Billing/      ← invoices, receipts
│   │   └── 05_Closeout/     ← acceptance forms, final files
│   ├── 2026-014_Harbor-Bakery/
│   └── 2026-015_Bluefin-Analytics/
├── Contractors/             ← your subcontractors, same idea
├── Admin/                   ← insurance, licenses, tax, bank
└── Records_Index.xlsx       ← the one list of everything
```

Name client folders with a number first

Use `YEAR-###_Client-Name`, for example `2026-014_Harbor-Bakery`. The number keeps folders in the order you signed them, gives every client a short ID you can put on invoices, and stays unique even if two clients share a name.

The file-naming rule

```
YYYY-MM-DD_ClientID_DocumentType_Status.ext

2026-09-12_2026-014_ServicesAgreement_SIGNED.pdf
2026-09-20_2026-014_Invoice-INV0102_SENT.pdf
2026-10-02_2026-014_ChangeOrder-CO01_DRAFT.docx
```

- **Date first** (year-month-day) so files sort by time automatically.
- **Client ID** so a file still makes sense if it's emailed or moved.
- **Status last:** DRAFT, SENT, SIGNED, PAID or VOID. Change the status by saving a new file, not by editing a signed one.
- No spaces or special characters. Use hyphens inside a part and underscores between parts.

> **Rule of thumb:** if you'd have to open a file to know what it is, rename it.

PART 2

Set it up where you already work

Pick one home and stick with it. All three options below work; the best one is the one you already open every day.

Option A: Google Drive

1. In Drive, create a folder called **Business** and build the structure from Part 1 inside it.
2. Upload your blank templates to `00_Templates`. Right-click a Word file and choose **Open with › Google Docs** if you'd rather edit in Docs; keep the originals too.
3. For a new client, right-click `_CLIENT-TEMPLATE`, make a copy of its subfolders into a new client folder, and rename it.
4. Add your Records Index: upload the Excel file and open it with Google Sheets, or use **File › Import** into a new Sheet.
5. Star the Business folder and the index so they're one click away.

> **Sharing:** share a single client subfolder (for example `03_Project`) with a client, never the whole Business folder. Remove access when the job closes.

Option B: OneDrive or SharePoint (Microsoft 365)

1. **Solo:** create the Business folder in OneDrive. **With a team:** create it in a SharePoint document library so everyone sees the same files.
2. Build the Part 1 structure and put templates in `00_Templates`.
3. Keep `Records_Index.xlsx` in the Business folder and open it in Excel for the web or the desktop app. Several people can edit it at once.
4. Turn on the OneDrive sync app so the same folders appear in File Explorer or Finder.

> **Version history** is on by default in OneDrive and SharePoint (and in Google Drive). If someone saves over a file, you can restore the earlier version.

Option C: Desktop folders (no cloud)

1. Create the Business folder in Documents and build the structure from Part 1.
2. Keep the Records Index in Excel, Numbers or LibreOffice.
3. Set up an automatic backup: Time Machine (Mac), File History (Windows), or a backup service. A folder that only exists on one laptop is one spilled coffee from gone.

Which should you choose?

If you...	Choose	Why
Already use Gmail and Google Calendar	Google Drive	Free, easy sharing, works on any device
Use Outlook, Teams or Microsoft 365	OneDrive / SharePoint	Everything in one place, strong team permissions
Rarely share files and prefer working offline	Desktop + backup	Simple and private, but you manage the backups

Want this set up for you?

The **SoloForms Client Hub** builds this whole folder system with all 16 templates built in, plus a **New client** button that creates the folders, copies the right documents with the client's name filled in, and logs them in your index. Google, Microsoft and offline editions.

soloforms.co/products/client-hub

PART 3

The records index

Folders hold your documents. The index tells you what's going on with them. One row per document, one glance to see what needs you today.

Column	What goes in it
Client ID	`2026-014`, matching the folder name
Client	Harbor Street Bakery
Document type	Picked from a list: Proposal, NDA, Services Agreement, SOW, Change Order, Invoice...
Status	Draft, Sent, Signed, Paid, Expired or Void
Date sent / signed	When it went out and when it came back
Due or renewal date	Payment due, NDA end date, retainer renewal
Amount	For invoices, SOWs and change orders
File link	A link to the file in Drive/OneDrive, or its folder path
Next action	"Chase signature," "Send invoice," "Renew by 11/30"
Flag (automatic)	Overdue, Due in 7 days, or Renew soon

Three habits that keep it accurate

- **Log on send.** Add the row when a document leaves your hands, not when it comes back.
- **Update on return.** When it's signed or paid, change the status and paste the final file link.
- **Friday five minutes.** Sort by the Flag column and clear anything red.

> **Your free Client Records Index** already has these columns, a document-type list covering every SoloForms template, and the Flag formulas. Open it in Excel or Google Sheets and replace the example rows.

PART 4

Map every record to a form

Each stage of a client relationship produces a specific document. When you know which form goes where, nothing gets skipped and every file lands in the right folder.

Stage	Document	Folder	SoloForms template
Before you say yes	Non-Disclosure Agreement	02_Agreements	NDA Starter Complete
	Proposal	01_Proposal	Proposal Template Starter Complete
Signing	Main agreement (pick one)	02_Agreements	Freelance Services Agreement Starter ; Fixed-Fee, Retainer, Project-Based or Time & Materials Agreement Consulting ; Client Engagement Letter Complete
	Scope for a specific project	02_Agreements	Statement of Work Consulting Complete
Onboarding	Kickoff checklist	03_Project	Client Onboarding Checklist Starter Complete
Doing the work	Scope changes	02_Agreements	Change Order Form Complete
	Bringing in help	Contractors/	Independent Contractor Agreement Complete
Getting paid	Invoices and payment tracking	04_Billing	Invoice & Payment Tracker Starter ; Invoice Template Complete
	Receipts	04_Billing	Receipt Template Complete
Closing out	Client sign-off	05_Closeout	Deliverable Acceptance Form Complete

Using your own documents? The map still works: put each one in the matching folder and log it with the matching document type.

Get the forms that fill this map

Freelancer Starter Kit · $47
Services agreement, proposal, NDA, onboarding checklist and the Excel invoice & payment tracker.

Consulting Contract Bundle · $49
Fixed-fee, retainer, project-based and time & materials agreements, plus the SOW.

Complete Business Kit · $79
All 16 templates, including the contractor agreement, change order and acceptance form.

Word and Excel, with a plain-English note on every section. **soloforms.co**

PART 5

Signatures and signed records

You don't need an expensive e-signature subscription to get agreements signed properly. You need a clean final version, a reliable way to sign, and one untouched signed copy you keep.

What the law generally allows

In the United States, the federal ESIGN Act and state laws based on the Uniform Electronic Transactions Act generally give electronic signatures the same legal effect as ink for most business contracts. There are exceptions (for example, some real-estate, family-law and estate documents), and other countries have their own rules. When the stakes are high, ask an attorney what your document needs.

Low-cost ways to sign

- **Built-in tools you may already have:** some Google Workspace and Microsoft 365 plans include basic e-signature features, and free PDF readers (such as Adobe Acrobat Reader or macOS Preview) let you add a signature to a PDF.
- **Free tiers of e-signature services:** several services offer a small number of free envelopes per month, with an audit trail. Check current limits before you rely on one.
- **Print, sign, scan:** still perfectly acceptable. Use your phone's document-scan feature to get a clean PDF.

The signing routine

1. Finish the document in Word or Docs. Delete any notes and guide pages.
2. Export to PDF and save it as `…_SENT.pdf`. Send the PDF, not the editable file.
3. When it comes back signed by everyone, save it as `…_SIGNED.pdf` in `02_Agreements`.
4. Update the index row: status Signed, date signed, link to the signed PDF.
5. Never edit a signed file. Changes go in a new Change Order, signed the same way.

> **Keep the trail.** Save the email or the service's completion certificate showing who signed and when, in the same folder as the signed PDF.

PART 6

Let an AI assistant do the busywork

Gemini, Copilot, ChatGPT or Claude can fill templates, sort files and draft follow-ups in seconds. Copy these prompts, replace the brackets, and paste.

Before you paste client information: check your AI tool's data settings and your client agreements. Use a business account where your data isn't used for training, and leave out anything you promised to keep confidential. Always read what the assistant writes before it goes to a client.

1 · Fill a template from your notes

```
I'm attaching my Freelance Services Agreement template and my notes from a client call.
Fill in every [BRACKETED] field you can from the notes. For each option with □ boxes,
tell me which one fits and why. List any blanks the notes don't answer as questions I
need to ask the client. Don't change any clause wording.
Notes: [paste notes]
```

2 · Name and file a document

```
Using the rule YYYY-MM-DD_ClientID_DocumentType_Status, suggest a file name and which
folder (01_Proposal, 02_Agreements, 03_Project, 04_Billing, 05_Closeout) this document
belongs in. Client ID is [2026-014]. Document: [describe or attach]
```

3 · What needs me this week?

```
Here is my records index as a table. Today is [date]. List everything overdue or due in
the next 7 days, grouped by client, with the next action for each. Then draft a short,
polite reminder email for each overdue invoice or unsigned agreement.
[paste index rows]
```

4 · Turn a call into a scope

```
From these meeting notes, draft the Services and Deliverables sections of a Statement of
Work: each deliverable with a description, acceptance criteria and a due date. Add an
"Out of scope" list for anything the client mentioned that we did not agree to.
[paste notes]
```

5 · Draft a change order

```
The client asked for [new request] on the [project] under our agreement dated [date].
Draft the "Description of change," "Impact on fees" and "Impact on schedule" sections of
a change order in plain English. Original fee: $[amount]. Proposed added fee: $[amount].
New completion date: [date].
```

6 · Renewal reminder

```
My retainer with [client] renews on [date] at $[amount]/month for [hours] hours. Write a
friendly email 30 days before renewal summarizing what we delivered this term: [bullets].
Propose [same terms / new terms: …] and ask them to confirm by [date].
```

7 · Explain a clause before you sign

```
Explain this clause in plain English: what it requires, what could go wrong for me as the
[freelancer/client], and what people commonly negotiate. I understand this is not legal
advice.
[paste clause]
```

8 · Clean up a messy folder

```
Here is a list of file names from a client folder. Suggest a new name for each using
YYYY-MM-DD_ClientID_DocumentType_Status (client ID [2026-014]) and the folder it belongs
in. Output a table: old name, new name, folder. Flag anything you can't identify.
[paste file list]
```

> **Agents and assistants inside Drive or OneDrive** (like Gemini in Google Workspace or Copilot in Microsoft 365, where your plan includes them) can read the files in your folders directly. Point them at a client folder and use the same prompts without pasting.

PART 7

Automate the repetitive parts

Start with the free automations below. Each one saves a few minutes a week and removes a chance to forget something.

Free automations anyone can set up

Automation	How
Renewal and due-date reminders	Add each due or renewal date from the index to your calendar with a reminder 7 days before. Recurring retainers get a recurring event.
Auto-sort signed documents	In Gmail or Outlook, create a filter for messages from your e-signature service or containing "signed" and apply a label or folder, so completed agreements never get buried.
New-client in two clicks	Copy the `_CLIENT-TEMPLATE` folder and rename it. On Google Drive, keep a "New client" bookmark to the template folder.
Weekly review	A recurring Friday calendar event with a link to your index, sorted by the Flag column.
Invoice numbering	Use the next number from your index. The SoloForms Invoice & Payment Tracker totals invoices and flags overdue ones automatically.

Going further

- **Google:** Google Apps Script (free, built into Sheets) can create folders, copy templates and fill in names from a spreadsheet row.
- **Microsoft:** Power Automate can create folders and files in OneDrive or SharePoint when you add a row to an Excel table. Some connectors require specific Microsoft 365 plans.

PART 8

Backup and retention checklist

Ten minutes now saves a very bad day later.

Backups

☐ Follow 3-2-1: three copies, on two kinds of storage, one kept off-site or in the cloud

☐ Cloud users: turn on two-step verification for the account that holds your Business folder

☐ Once a quarter, download or copy the Business folder to an external drive

☐ Test a restore once a year: can you actually open last year's signed agreement?

Retention

☐ Keep signed agreements for as long as they're in effect, plus several years after. Ask an attorney how long claims can be brought in your state.

☐ Keep invoices, receipts and payment records with your tax records. In the US, the IRS generally says to keep records for at least three years, and longer in some situations. Your tax professional can tell you what applies to you.

☐ When a job closes, move the client folder to `Clients/_Archive/YEAR/` and set its sharing to you only

☐ Delete personal data you no longer need, and honor client requests to do so where the law requires

Access

☐ Share single subfolders, never the whole Business folder

☐ Remove client and contractor access when a job ends

☐ Review who has access to what, once a quarter
