



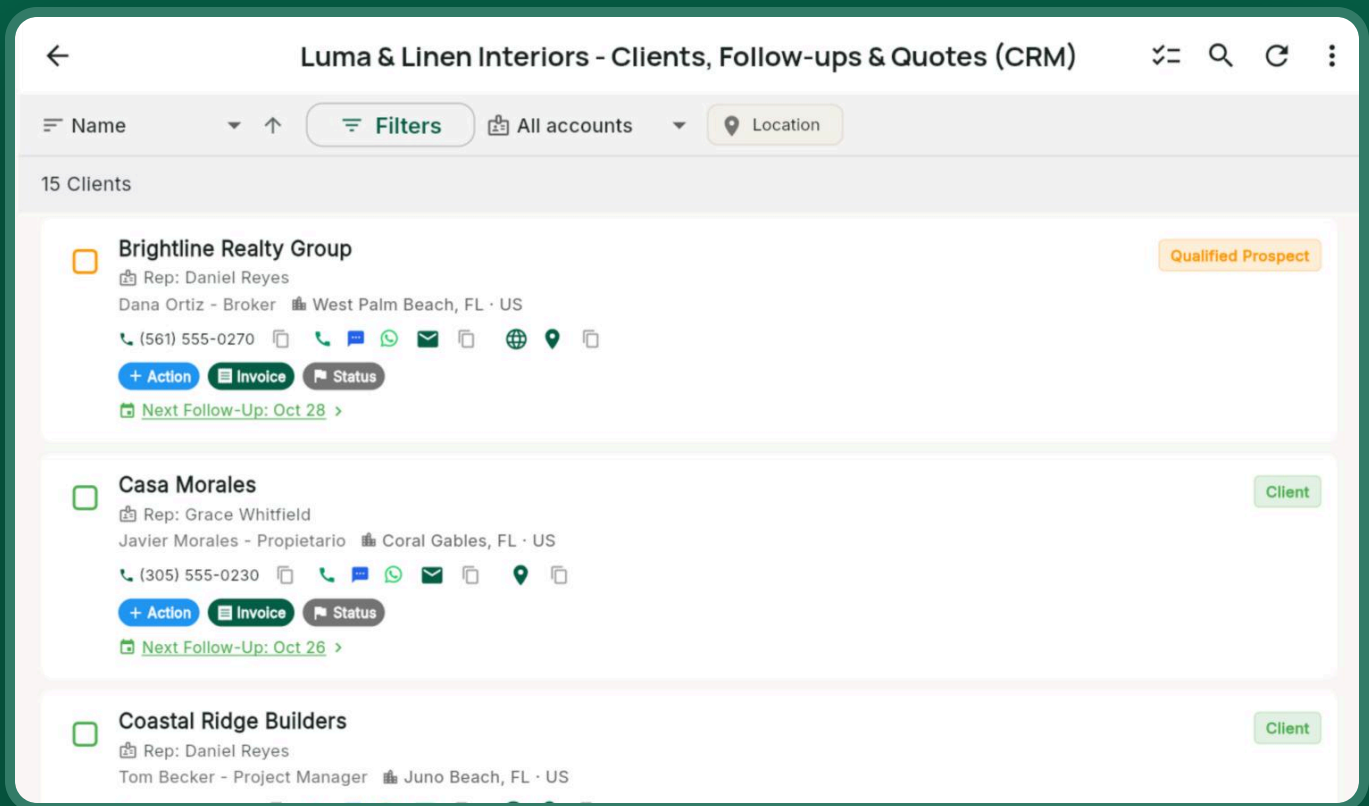
Bee203

BEE UNSTOPPABLE!

Your business, **all in one place.**

No monthly fee for the CRM.

A quick-start guide to Bee203: what it does, how to set it up, and how to share it with other business owners.



We built Bee203 because we needed it.

We're a small business too. We know what it's like to have a good idea and plenty of drive, and still watch it stall because everything else is a mess. Customers in one app. Invoices in another. Receipts in a shoebox. The call you meant to make on Tuesday that never happened, and the job that went to someone else.

Every one of those tools wanted a monthly payment. Then more for each person who helped us, and more again for each company. It added up fast, and very little of it felt made for us in Spanish.

So we built the tool we wished we'd had. One place for your customers, your money and your marketing, in the language you think in, at a price a one-person business can afford.

We're not here to take anything from anyone. We're here to give small business owners a fair shot.

Pay once for the basics

A small business shouldn't have to rent its own customer list.

Speak your language

Every screen in English and Spanish. Switch any time you like.

Grow at your pace

Start free. Add accounting, your team or more companies when you're ready.



The Bee203 team

One app instead of three monthly bills

Bee203 keeps a small business's customers, follow-ups, estimates, invoices and receipts in one place: on your phone, tablet and computer, in English and Spanish. Start free; the CRM is a single US\$35 payment.

Customer Management (CRM)

Find customers, follow up, quote, and get paid. Plus routes, card scanning and sales commissions.

US\$35 once ·
bee203.com/crm

Accounting (Books)

Bills, expenses, bank reconciliation and financial statements for every company you own.

US\$29/month · [/accounting](#)

Online Store

A public product catalog customers browse, request quotes from and order from.

Included on every plan ·
[/online-store](#)

The three parts work together: **an estimate starts from a client, an invoice lands in your books, and an online order becomes a customer.**

Up and running today

- 1 Create your free account**
Go to bee203.com/#/register. No card needed. Pick English or Spanish.
- 2 Add your customers**
Type them in, scan a business card, or import from Google Contacts or a spreadsheet.
- 3 Send your first estimate**
Turn it into an invoice and get paid by card, cash or check.

Start free

Watch the 1-minute demo

Also included on every plan

Tasks & projects: to-do lists, recurring tasks, due dates and priorities

Four views: Board, Calendar, My Actions and All Tasks

Approvals: ask someone to sign off on a task

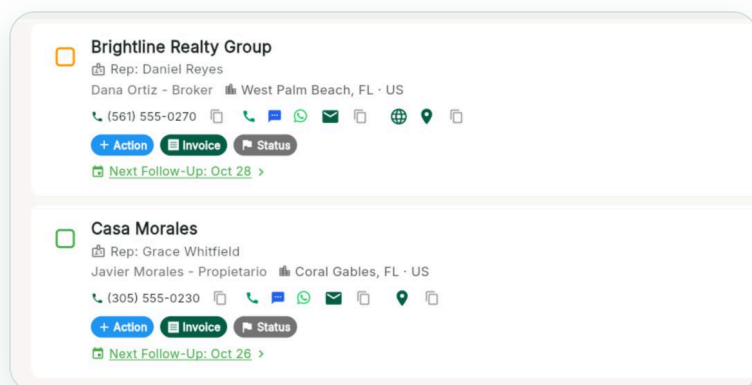
Templates: start a project fast

Google Calendar sync and **receipt photos**

Works anywhere: runs in the browser on any device

Stop losing customers to forgotten follow-ups

Every client with their people, phone, email, address and full history. Call, text or WhatsApp in one tap, and always know who to call next.



What you see on every client

- **Company, contact & role:** e.g. Kevin Nguyen, Owner
- **City and deal value:** \$1,800.00 for this pool service
- **One-tap buttons:** call, text, WhatsApp or email; copy any detail
- **Website & map pin:** open their site or get directions
- **+ Action · Invoice · Classify:** log the next step, bill them, or tag the client

Follow-up reminders

Who to call next, with Done and Reschedule in one tap. Syncs with Google Calendar.

Business card scan & Smart Lookup

Snap a card to fill in name, phone and email; pull a business's website, address and phone from Google.

Flyers, ready replies & lookbooks

Send flyers and saved messages to one client or many; share Before & After photo lookbooks.

Sort your clients

Key accounts, statuses, industries, locations and filters so you know where to focus.

Full history

Every call, visit, note and photo on one timeline per client, shared with your team.

Visit routes & client map

Plan the day's stops, check in at each one, and use Find Nearby to discover new businesses.

A private page per client

One link with every quote, invoice and document you've sent them.

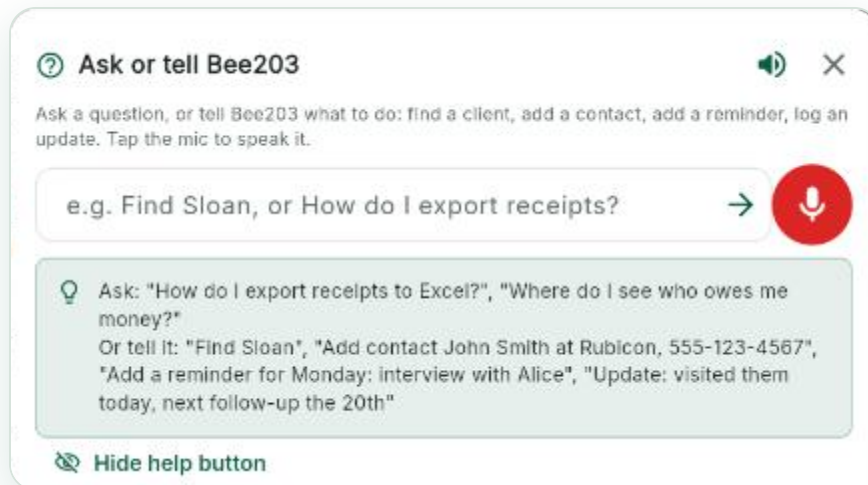
Bring your list

Import from Google Contacts or a spreadsheet. Export everything any time.

VOICE ASSISTANT

Just say it. Bee203 does the typing.

On the job site or in the car, tap the help button, then the microphone, and tell Bee203 what you need. It finds the client, adds the contact or sets the reminder for you, in English or Spanish.



The help button: type a question or tap the red microphone and say it.

Try saying

"Find Maria"

Opens the right client in seconds, without scrolling.

"Add contact John Smith at Rubicon, 555-123-4567"

Creates the contact with the details filled in.

"Remind me Monday: interview with Alice"

Sets the reminder so it isn't forgotten.

"Update: visited them today, next follow-up the 20th"

Logs the visit and schedules the next call.

"How do I export receipts to Excel?"

Answers how-to questions in plain words.

Hands busy, phone in hand

Perfect for owners and reps who work in the field.

Your language

Speak in English or Spanish.

Nothing to learn

If you can say it, Bee203 can do it.

Get your customers set up in an afternoon

How to set up your CRM

- 1 **Bring in your list**
Import from Google Contacts or a spreadsheet, add clients one by one, or scan business cards.
- 2 **Organize**
Mark key accounts and set a status, industry and location so filters work for you.
- 3 **Set a next follow-up on every active client**
Add the date and what to do, like "Call Javier about the warehouse bid," and you get reminders.
- 4 **Connect Google Calendar and invite your team**
Follow-ups appear next to the rest of your day. Up to 3 people per project on Starter; unlimited on Pro.

Estimates, invoices & getting paid

Open **Estimates & Invoices** on the client's page and choose **Create Estimate** or **Create Invoice**. Their details are filled in for you. Turn it into an invoice and mark it paid. Unlimited documents.

Next Follow-Up: Mon, Oct 26
 Follow up
 ✓ Done
🔄 Reschedule

Sales Team
 1

Grace Whitfield - Primary - 100%

Change Sales Team
 Ownership History

Estimates & Invoices
 1

Create Estimate
 Create Invoice

Send any way

PDF, link or text message. Each client receives documents in their own language.

Get paid by card

Connect Square or Stripe; customers pay online and money goes to your bank.

Export

PDF and Excel export on every plan.

Card fees, plainly: Square or Stripe charge their usual fee; Bee203 adds 1.25% per card payment (max \$25), and the first 30 days are free. No fee on cash or check. Starter includes 3 email sends from Bee203; downloading, links and texting are unlimited.

SALES COMMISSIONS

Pay your salespeople right. It's built into your CRM.

Your reps earn when the client pays, not before. Bee203 works out the commission on every invoice you collect, without tax or shipping, and has each month's statement ready for you.

1 · Set the plan

A base rate and, if you want, different rates by product category.



2 · Build the team

One or more reps per client, each with their share.



3 · The client pays

Commission counts on what you collected, without tax or shipping.



4 · Pay your people

PDF statement, record the payment and export to payroll.

Daniel Reyes - Lines (5)				×
Sep 29, 2026	INV-00008 - Palm Court Residences	Payment		
Collected: \$3,921.65	Commissionable: \$3,806.40	Rate: 5%		
Share: 60%	Commission: \$190.32			
Sep 15, 2026	INV-00005 - The Banyan Boutique Hotel	Payment		
Collected: \$8,000.00	Commissionable: \$7,552.36	Rate: 5%		
Share: 100%	Commission: \$377.62			
Aug 20, 2026	INV-00004 - Familia Rodriguez	Payment		
Collected: \$2,100.00	Commissionable: \$2,100.00	Rate: 5%		
Share: 100%	Commission: \$105.00			
Aug 10, 2026	INV-00003 - Coastal Ridge Builders	Payment		
Collected: \$4,484.90	Commissionable: \$4,270.00	Rate: 5%		
Share: 100%	Commission: \$213.50			
Jul 8, 2026	INV-00001 - Harbor Point Residence	Payment		
Collected: \$12,246.80	Commissionable: \$11,740.00	Rate: 5%		
Share: 100%	Commission: \$587.00			

Shared deals, clear numbers

When two reps work a client, each earns their share: 60/40, 50/50, whatever you agree.

Everyone sees their own

Reps watch their commission build as clients pay.

No arguments

Every change of rep on an account is logged, with the date and the reason.

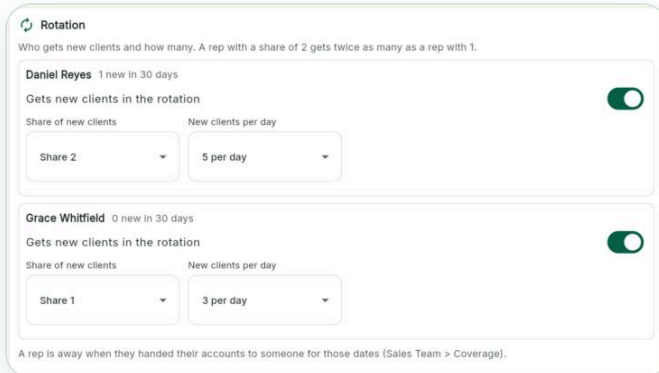
Ready for payroll

Export statements to CSV or Excel. No add-on to buy and no extra spreadsheet.

SALES MANAGEMENT

Every lead to the right rep. Every account looked after.

Bee203 decides who gets each new client, reminds reps who to call, and shows you how the team is doing, so no lead goes cold and your best accounts never get forgotten.



Rotation
Who gets new clients and how many. A rep with a share of 2 gets twice as many as a rep with 1.

Daniel Reyes 1 new in 30 days
Gets new clients in the rotation ☒

Share of new clients: New clients per day:

Grace Whitfield 0 new in 30 days
Gets new clients in the rotation ☒

Share of new clients: New clients per day:

A rep is away when they handed their accounts to someone for those dates (Sales Team > Coverage).

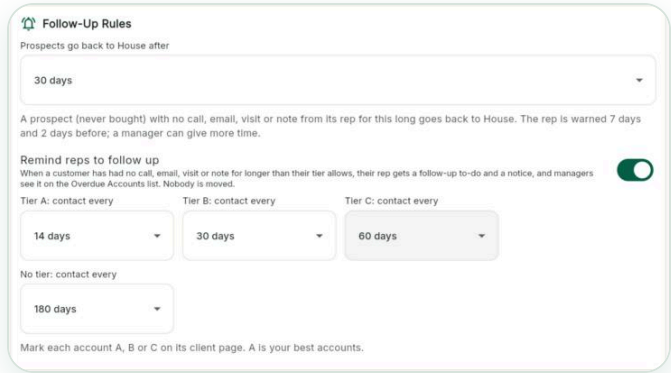
Rotation: a rep with share 2 gets twice as many new clients as a rep with share 1, up to a daily limit.

Fair rotation

New clients go to the next rep in turn, like a showroom's "up" list. Reps who are away or at their daily limit are skipped.

Targets and leaderboard

Monthly targets for the business, each store and each rep. You choose whether reps see the full leaderboard.



Follow-Up Rules
Prospects go back to House after

A prospect (never bought) with no call, email, visit or note from its rep for this long goes back to House. The rep is warned 7 days and 2 days before; a manager can give more time.

Remind reps to follow up
When a customer has had no call, email, visit or note for longer than their tier allows, their rep gets a follow-up-to-do and a notice, and managers see it on the Overdue Accounts list. Nobody is moved. ☒

Tier A: contact every Tier B: contact every Tier C: contact every

No tier: contact every

Mark each account A, B or C on its client page. A is your best accounts.

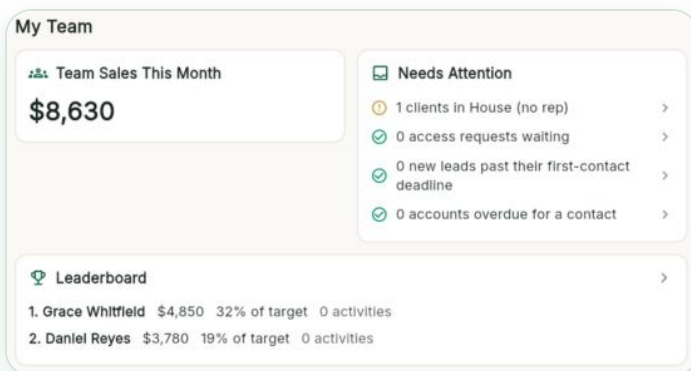
A/B/C grades: your best accounts get called most often. Overdue ones show up for the rep and the manager.

Response deadlines

Set how fast a new lead must be contacted, counted in your business hours. Optionally, a lead nobody contacted moves to the next rep.

Weighted pipeline

Open quotes weighted by how likely they are to close, per rep and for the team.



My Team

Team Sales This Month
\$8,630

Needs Attention

- 1 clients in House (no rep) >
- 0 access requests waiting >
- 0 new leads past their first-contact deadline >
- 0 accounts overdue for a contact >

Leaderboard >

Rank	Rep	Sales	% of target	Activities
1.	Grace Whitfield	\$4,850	32% of target	0 activities
2.	Daniel Reyes	\$3,780	19% of target	0 activities

The team view: sales this month, what needs attention, and the leaderboard against target.

Reward great months. Know which jobs make money.

Pay more when a rep beats target, run a bonus to push a product line, and see the real margin on every job.

Accelerators

Pay more when a rep beats their monthly target. The highest step reached applies to that month's commission.

Designer Standard Base rate 5%

At 100% of target: commission x1.25

At 125% of target: commission x1.5

[Edit Accelerators](#)

Bonuses

A bonus for selling something during a set time, for example \$25 for every quartz slab sold in March. It is paid when the invoice is paid in full and shows on that month's statement.

Holiday lighting push

Oct 1, 2026 - Dec 31, 2026 \$25.00 per line sold Lighting

Accelerators multiply a rep's monthly commission when they beat target. Bonuses pay a fixed amount per item sold for a set time.

Accelerators

For example, 100% of target pays the commission x1.25 and 125% pays x1.5. You set the steps.

Time-limited bonuses

For example, US\$25 for every lighting item sold through December. Paid once the invoice is paid in full.

Every rep sees their own

A rep's dashboard shows their sales, % of target, commission and what more they'd earn if their open quotes close.

Real margin per job

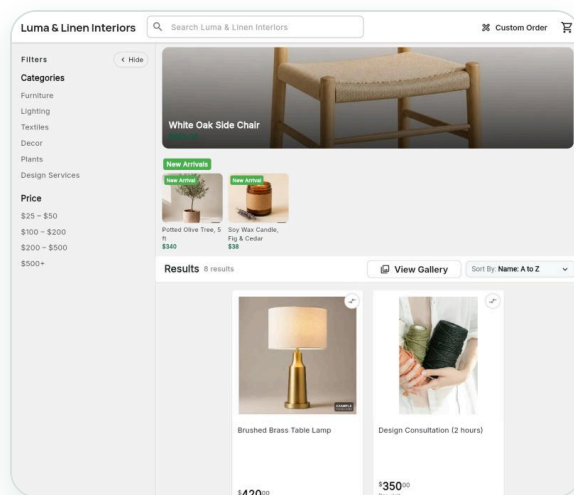
See which jobs earned the most, so you price the next one right.

3 jobs				
Invoiced				\$36,266.80
Labour				\$3,575.00
Receipts				\$16,640.00
Margin				\$16,051.80 (44.3%)
Banyan Hotel - Lobby Refresh				
The Banyan Boutique Hotel				
Invoiced	Labour	Receipts	Margin %	
\$16,588.20	\$1,770.00	\$8,380.00	38.8%	\$6,438.20
Harbor Point - Living & Dining				
Harbor Point Residence				
Invoiced	Labour	Receipts	Margin %	
\$12,246.80	\$1,040.00	\$4,900.00	51.5%	\$6,306.80
Seagrape Dental - Waiting Room				
Seagrape Dental Studio				
Invoiced	Labour	Receipts	Margin %	
\$7,431.80	\$765.00	\$3,360.00	44.5%	\$3,306.80

Job profit: invoiced, labor, receipts and margin for every job. Included on the Business plan.

Your own online store, free on every plan

Put your products online with photos, colors and prices. Customers browse, build a list and ask for a quote without creating an account. Every request lands in your CRM, ready to follow up.



A real Bee203 store, live at bee203.com/store/luma-linen-interiors.

Product catalog

Photos, colors, materials, sizes and specifications for every product.

Requests become clients

Each request is added to your CRM automatically.

Trade pricing

Optional price tiers for designers, wholesale and trade accounts.

Quote & sample requests

Customers build a list and send it to you.

Lookbooks & price lists

Magazine-style branded PDFs and clean price lists to share.

Get paid by card

Turn a quote into an invoice your customer pays online.

How to set up your store

1

Add your products

Photos, colors, sizes and prices. Show a price or "ask for a quote".

2

Share your store link

On your website, social media and email signature. Works in English and Spanish.

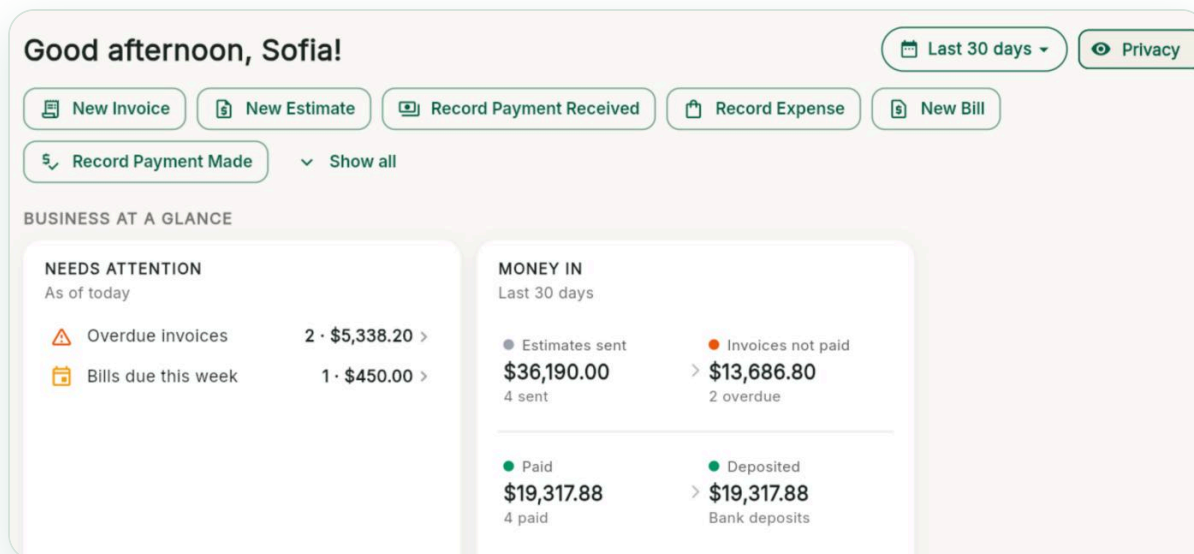
3

Follow up on requests

New quote requests land in your CRM, ready for an estimate.

Real bookkeeping for every company you own

Open the app and see at a glance what needs attention, what came in, who owes you and what you owe. One price covers every company you own.



Real reports

Profit and loss, balance sheet, cash flow and more.

Who owes you

Unpaid invoices by age.

Bank reconciliation

Import your bank file and match every line.

Price for profit

Cost plus overhead: what to charge to make money.

Two currencies

Buy from vendors in another currency; it converts when you pay.

One price, every company

US\$29 a month, or US\$288 a year.

How to set up your accounting

- 1 **Choose the Books plan and add each company**
Everything in your CRM comes with it. Several businesses, one login.
- 2 **Set up your chart of accounts**
Start from the setup for your type of business.
- 3 **Record bills and expenses**
Attach receipt photos as you go.
- 4 **Reconcile monthly**
Match your bank statement, then review profit and loss.

PRICE IT RIGHT

"What should I charge?" Bee203 does the math.

Many owners price by gut feeling and find out too late that a good sale barely paid the bills. Type what you pay your supplier and Bee203 shows the real cost, your overhead, your break-even and the profit you actually keep.

What I should charge

Markup - % added to cost

85 %

\$343.00

Markup	Margin	Your profit
% added to cost	% of selling price	after overhead
85.2%	46%	1.6%

A 85.2% markup is a 46% margin. They are not the same number.

Break-even **\$337.50**

You have to mark up at least 82.2% before you have earned a cent

What it costs me to exist as a company

\$10,050.40 of operating costs / 66 units sold in Last 3 months = \$152.28 per unit

Cash basis - the same basis as your Profit & Loss

Overhead per unit

152.28

Rent, insurance, software, salaries - divided across what you sell

Period Last month Last 3 months Last 12 months

A \$180 lamp at \$343: 85% markup, 46% margin, and only 1.6% profit after overhead.

The real cost

Freight, card fees, duties and handling, added to the supplier price.

Break-even

The price below which every sale loses money.

Markup vs. margin

"An 85% markup is a 46% margin." Bee203 shows both.

What others charge

Add competitor prices and see what you would make. Internal only.

Cost templates for your industry (on the Business plan, edit them or build your own): interior design furniture (FF&E), imported goods with tariffs and duties, service calls, IT installs, professional services, hauling and more. Find it in your store menu: What Should I Charge?

Tell us what you do. Bee203 sets itself up.

Answer a few plain questions in the Setup Wizard and pick from 17 industries. Your industry sets your accounting categories and your cost template. Then make it look like your business.

2 What is the business?

Business name *

Luma & Linen Interiors

Slogan

Rooms that feel like you.

Full legal name

Luma & Linen Interiors LLC

Is the business a company or an individual?

☒ Company
 ☐ Individual

Industry *

Interior Design

This sets up your accounting categories to fit the work you do.

Setup Wizard: your business, company or individual, and your industry.

Select a Template

16 Browse All

Search templates...

No Template

Start with an empty project

AC / HVAC Service — Before & After

The coil was filthy. Now it is clean. Show the customer instead of telling them. Photograph the unit before ser...

Before & After — Any Job

Prove the work. Two photos, one email, and the argument is over. Shoot the before, do the job, shoot the afte...

City Code Violation — Inspection

16 ready-made project templates, or start empty.

Choose Theme

Emerald

Refined emerald & ivory (default)

Honey

Warm yellow tones

Dark

Easy on the eyes

Ocean

Cool blue vibes

Forest

Natural green tones

Six app themes, including Graphite.

Invoice Appearance

Classic

Modern

Minimal

Accent Color

#27374A

Interior Design

Sets the default Chart of Accounts for this brand. Each project has its own.

Invoice style: Classic, Modern or Minimal, with your accent color.

Your team is included

Free, Starter and Books include 3 people per project. Pro and Business are unlimited. No paying per user.

More than one business?

Settings, Add Another Business. Your plan covers every business you own.

Tell us what you need

Settings, Feedback: send a feature request, a suggestion or report a problem. It goes straight to the people who build Bee203.

Why choose Bee203

Many leading CRM and accounting programs charge every month, often per user and per company, and their Spanish support varies. Here is what Bee203 includes.

WHAT MATTERS	BEE203	MANY LEADING SUBSCRIPTION TOOLS
How you pay for the CRM	✓ One payment of US\$35, no recurring fee	A monthly or yearly subscription for as long as you use it
Several businesses	✓ Unlimited companies, each with its own separate books and client list, at one price	Each company is commonly its own paid subscription
Your team	✓ Up to 3 people per project included; unlimited on Pro	Often priced per user, so cost grows with your team
Spanish and English	✓ Every screen in both. Each person picks a language and can switch any time; clients get documents in theirs	Spanish support varies and is sometimes limited
Sales commissions	✓ Built into the CRM and tied to real invoices	Often tracked in a spreadsheet or a separate add-on
Know your real profit	✓ Cost of goods sold (COGS) and job profit, so you see what you actually make on each sale	Availability varies by provider and plan
Other currencies	✓ Currency exchange for working in US dollars and other currencies	Availability varies by provider and plan
Everything in one place	✓ CRM, estimates, invoices, books, tasks and an online store in one app	Commonly separate apps, each with its own bill
Online store	✓ Included on every plan, even Free	Often a separate e-commerce subscription



Ideal for accountants and bookkeepers

Manage every client company under one login: separate books, separate client lists, one price. Work in English or Spanish, and keep each client's records organized online in one place.

This comparison describes general features commonly found in subscription-based CRM and accounting software as of October 2026. It does not refer to any specific product. Features, plans and pricing of other products vary by provider and change over time; check each provider's current offerings. All trademarks belong to their respective owners.

Works with the tools you already use

Bee203 connects with services small businesses already count on, so you don't have to start over.

Square

Customers pay your invoices by card.

Stripe

Online card payments, straight to your bank.

Google Calendar

Your follow-ups sit next to the rest of your day.

Google Contacts

Bring your client list in with a few taps.

WhatsApp

Message any client in one tap.

Google business info

Smart Lookup fills in a business's website, address and phone.

Excel and spreadsheets

Import your list. Export to Excel or PDF any time.

Your tool here?

Tell us what you use. We'll look at connecting it.

Need something else connected?

Tell us what you use every day. If it helps you run your business, we'll look at how to connect it. We're a small team, so your request goes straight to the people who build Bee203.

Let's work together

We're open to partnerships. We're not here to replace the people and tools small businesses already trust. We'd rather work alongside them. If you serve small businesses, we'd love to talk.

Accountants and bookkeepers

Business consultants

Chambers of commerce

Banks and lenders

Payment and software companies

Community organizations

Write to us at andy@cabanawest.com. We read every message.

PLANS & PRICING

Start free. Grow when you're ready.

Every plan includes estimates and invoices, card payments, an online store, and English and Spanish. Prices in US dollars.

	Free	Starter	Books	Pro	Business
	\$0 free	\$35 one time	\$29 per month	\$39 per month	\$89 per month
LIMITS					
Clients in the CRM	25	Unlimited	Unlimited	Unlimited	Unlimited
Tasks and to-dos	120	Unlimited	Unlimited	Unlimited	Unlimited
People per project	3	3	3	Unlimited	Unlimited
Storage	500 MB	500 MB	5 GB	25 GB	100 GB
CUSTOMER MANAGEMENT					
Clients, follow-ups, history, map, one-tap call/text/WhatsApp	✓	✓	✓	✓	✓
Visit routes, flyers, Before & After lookbooks	–	✓	✓	✓	✓
Find Nearby & Smart Lookup (per day)	–	10	25	100	500
INVOICING & STORE					
Estimates, invoices, card payments, online store	✓	✓	✓	✓	✓
Email documents from Bee203	3	3	Unlimited	Unlimited	Unlimited
Recurring invoices & customer statements	–	–	✓	✓	✓
ACCOUNTING & BACK OFFICE					
Chart of accounts, bills, bank reconciliation, reports	–	–	✓	✓	✓
Inventory, purchase orders, job costing, Route & Site Services	–	–	–	–	✓

Yearly options: Books \$288, Pro \$348, Business \$828. Full comparison at bee203.com/#plans.

TYPICAL SUBSCRIPTION SOFTWARE

A bill every month

Often charged per user and per company, for as long as you use it.

BEE203 STARTER

US\$35

One payment, no recurring fee. Up to 3 people per project.

Sharing Bee203 with people you know

When you tell other business owners about Bee203, start with what's frustrating them today. Then show them how Bee203 helps.

"Stop paying every month."

The CRM is US\$35 once. No monthly fee, no charge per person, and as many companies as you need.

"Stop losing jobs to missed calls."

Follow-up reminders mean no more forgotten call-backs that send work to a competitor.

"Pay your sales team right."

Sales commissions are built in. No add-on, no extra spreadsheet.

"Everything in one place."

Customers, estimates, invoices, receipts, store and books, in English and Spanish.

Common questions

Is the US\$35 really one payment?

Yes. Starter is one payment with no recurring fee. Monthly plans are only for full accounting or bigger teams.

Can I try it first?

Yes. Start free, no card needed.

Does it work on my phone?

Yes, in the browser on any phone, tablet or computer.

Does it work in Spanish?

Every screen. Each person picks their language; clients get documents in theirs.

Useful links

Home page	bee203.com
Start free	bee203.com/#/register
Log in	bee203.com/#/login
1-minute demo	bee203.com/crm#demo
CRM	bee203.com/crm
Accounting	bee203.com/accounting
Online store	bee203.com/online-store
Plans	bee203.com/#plans
En español	bee203.com/es
Email	andy@cabanawest.com



Bee Unstoppable!

Start free today. No card needed.

[Start free](#)

Bee203 is a product of Cabana West, Florida, USA. Also from Cabana West: **Chat203**, an AI chat assistant for your website. Independent affiliate of Cabana West: **Terra 203**, handmade rugs for interior designers (Terra 203, LLC). Prices are in US dollars, current as of October 2026 and subject to change; see bee203.com for current plans and terms. The Free plan includes up to 25 clients and 120 tasks. Card processors charge their own fees. Other product names belong to their owners.