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Make Money Online · Book 2

How to Become a Virtual Assistant

The tasks, tools and daily habits of a reliable VA — and how to land and keep long-term clients

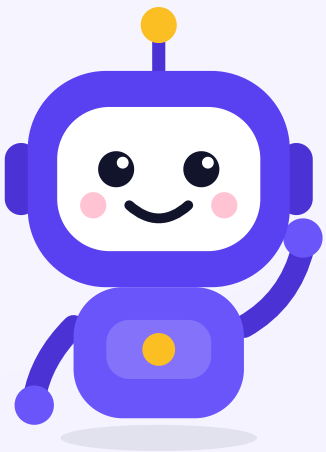
Total beginner · adults 18 and up

About 85 minutes

10 chapters with quizzes

Free

Welcome back! Today we learn one of the most popular online jobs: the virtual assistant. The secret? Be the person clients can always count on.



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How to Become a Virtual Assistant

The tasks, tools and daily habits of a reliable VA — and how to land and keep long-term clients
Make Money Online, Book 2 · First edition, November 2026

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What you will learn

- What a virtual assistant (VA) really does — and the kinds of VAs clients hire
- The core VA skills: inbox, calendar, research, documents, data and customer replies
- The free tools VAs use every day, and how to set up a simple home workspace
- How to build a VA portfolio with no experience and pass test tasks and interviews
- How to work like a pro: onboarding, SOPs, end-of-day reports and time zones
- How to keep a client's accounts and data safe — and how to spot VA job scams

This is **Book 2** of the **Make Money Online** series. Book 1 (Freelancing Starter Guide) taught the basics of any freelance work: offer, samples, proposals, agreements, payments and scams. This book goes deeper into one of the most in-demand beginner jobs: the **virtual assistant**.

Our honest promise (again)

Being a VA is real work with real responsibility: you may handle a client's emails, calendar and business accounts. Most beginners need **weeks or months** of practice and applying before the first long-term client. No honest course or "agency" can guarantee you a job.

Age rule

The big freelancing platforms are for adults 18 and up (see Book 1). If you are younger, read this book with a parent and practice the skills — they are useful for school and any future job.

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Quick refresher from Book 1

Idea	In one line
The path	Skill → Proof → Pitch → Deliver → Get paid safely.
Your offer	I help [who] with [what] so they can [result].
Proof	3 honest samples beat a list of promises.
Proposal	Hook, Plan, Proof, Question, Next step.
Agreement	Scope, deadline, changes, price and payment — in writing.
Golden rule	Honest clients never ask you to pay to get a job.

How to use this book

1 **Practice with your own life**

Organize your own inbox, plan your family's week, research a trip. Real practice makes real samples.

2 **Build your VA kit as you read**

By Chapter 7 you will have a portfolio, a resume, an SOP, an end-of-day report template and a safety checklist.

3 **Do the quiz and the task**

Every chapter ends with key takeaways, 3 quiz questions with answers, and a practice task.

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THE END Quick Summary

WHAT'S NEXT Your Next Learning Path

EXTRA Free ToolsKo Tools for This Book

EXTRA Words to Know (Glossary)

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CHAPTER 1

Why Virtual Assistants Matter

Busy people need help with many small tasks. A virtual assistant gives them that help — online, from anywhere.

Think of a small business owner. She sells online, answers customers, posts on social media, books meetings, pays bills and replies to 80 emails a day. She is good at her business — but the small tasks eat her whole day.

She doesn't need another office worker sitting next to her. She needs a **virtual assistant**.

New word: virtual assistant (VA)

A **virtual assistant** is a person who helps a client with tasks like email, scheduling, research, data and customer messages — working online, from their own home. "Virtual" means the work happens through the internet, not in the same room.

PICTURE 1 **Office assistant vs virtual assistant**

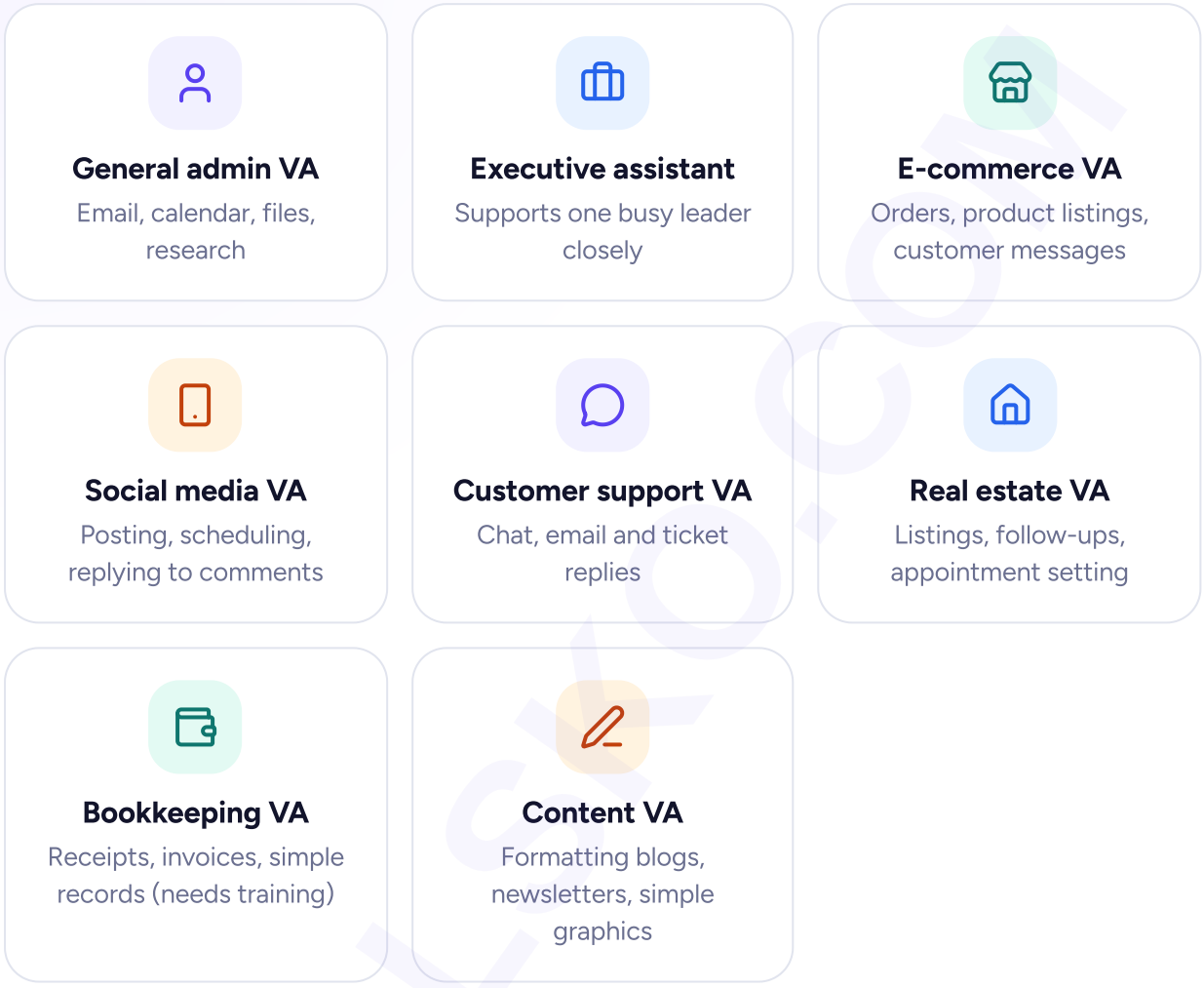
OFFICE ASSISTANT	VIRTUAL ASSISTANT
In the same building	**Online, from home**
Sits at a desk in the office	Works from home with a computer
Works the office hours	Hours agreed with the client (sometimes another time zone)
Talks face to face	Talks by chat, email and video calls
Usually one employer	One or a few clients

The tasks are similar. The difference is where and how the work happens.

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Kinds of VAs

PICTURE 2 **Eight kinds of virtual assistants**



Start as a general admin VA, then grow into the kind you enjoy most. Specialists usually earn more.

Why clients love good VAs

- **Time back.** The client focuses on the work only they can do.
- **Less stress.** Someone keeps the inbox, calendar and files in order.
- **Flexible help.** Part-time or full-time, without an office.
- **Trust.** A reliable VA becomes part of the team — often for years.

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The big idea of this book

Reliable beats amazing. Clients don't keep the VA who is brilliant once a month. They keep the VA who is clear, careful and on time **every day**.

A real-world example

Carlo was a sales clerk who was very organized. He practiced Google Calendar and Gmail on his own family's schedule, made three samples, and applied to part-time VA jobs. His first client, an online coach, hired him for 15 hours a week. A year later the coach still says, "Carlo is the reason my business runs on time."

QUICK RECAP

A VA helps clients online with email, calendar, research, data and customer messages. There are many kinds of VAs, and the ones clients keep are the reliable ones.

TRY IT NOW

Which VA could you be?

1. Read the eight kinds of VAs.
2. Circle 2 you feel you could start with (or learn in a few weeks).
3. Write one sentence about why each one fits you.

Key takeaways

- A virtual assistant helps clients online, from home.
- There are many kinds: admin, executive, e-commerce, social media, support and more.
- Clients hire VAs to get time back and reduce stress.
- The big idea: reliable beats amazing.

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Quiz: 3 quick questions

1. What does “virtual” mean in “virtual assistant”?

A Not real
B The work happens online, not in the same room
C Only robots can do it

2. Which is a common VA task?

A Managing a client’s email and calendar
B Fixing cars
C Performing surgery

3. What makes clients keep a VA for years?

A Being brilliant once a month
B Being clear, careful and on time every day
C Working for the lowest price

Answers

1. **B. The work happens online, not in the same room** — A VA works through the internet, usually from home.
2. **A. Managing a client’s email and calendar** — Email and calendar help are the classic VA tasks.
3. **B. Being clear, careful and on time every day** — Reliability builds trust, and trust keeps clients.

PRACTICE TASK

Your VA goal

Write a goal like: “In 90 days, land a part-time general admin VA client (10–20 hours a week), practicing 1 hour a day.” Add which kind of VA you want to grow into later.

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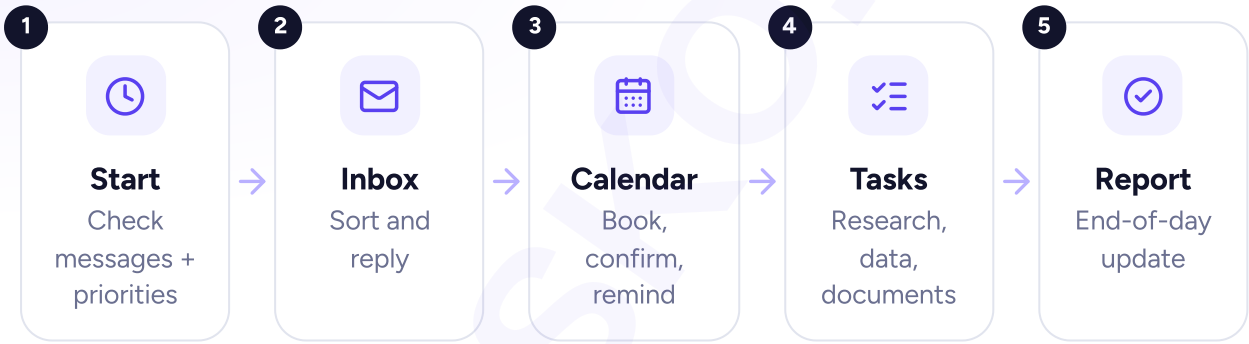
CHAPTER 2

Beginner Basics: A VA's Day and the Words Clients Use

Let's look at what a normal VA day looks like — and learn the words you will hear in every job post.

Most VA days follow the same simple rhythm. Once you know it, every new client feels familiar.

PICTURE 3 **A normal VA day**



Start with priorities, clear the inbox and calendar, do the tasks, then send a short report. Simple and steady.

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Words you will see in VA job posts

Word	What it means	Example
Admin tasks	Small office jobs that keep things running	Filing documents, updating a list
Inbox management	Sorting, replying and cleaning a client's email	Moving receipts to a "Finance" folder
Calendar management	Booking, moving and reminding about meetings	Booking a call for Tuesday 10 AM their time
SOP	Standard Operating Procedure: step-by-step instructions for a task	"How to answer a refund email" in 6 steps
EOD report	End-of-day report: what you did, what's pending, questions	A short message sent before you log off
Time zone	The local time in a place	Your 9 PM may be their 8 AM
Async	Working without being online at the same time	You leave notes; the client reads them later
KPI	A number that shows how well you do	"Reply to all customer emails within 12 hours"
Retainer	A fixed amount for a set number of hours each month	₱12,000 for 40 hours a month
Onboarding	Your first days learning the client's business	Getting access, reading SOPs, a welcome call

New word: async

Async (short for asynchronous, say "ay-SING-kruh-nus") means you and the client don't need to be online at the same time. Like leaving a note on the fridge: you write it now, they read it later. Clear written updates make async work smooth.

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Part-time, full-time, hourly or retainer?

Type	How it works	Good for
Part-time hourly	Paid per hour, often 10–20 hours a week	Beginners, students, parents
Full-time	About 40 hours a week for one client	Steady income once you have experience
Retainer	Fixed monthly price for a set number of hours	Predictable income for both sides
Per task	A price for one task or project	One-time jobs, like cleaning a contact list

Start part-time

Many VAs start with one part-time client while keeping school or another job. It's safer, and you learn without pressure. You can add clients later.

QUICK RECAP

A VA day: priorities, inbox, calendar, tasks, end-of-day report. Learn the key words — SOP, EOD report, async, time zone, retainer — and start part-time.

TRY IT NOW

Learn the words

1. Cover the meaning column of the word table.
2. Explain each word in your own words, out loud.
3. Write the 3 hardest words on a sticky note near your desk.

Key takeaways

- A steady VA day: priorities → inbox → calendar → tasks → report.

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- SOP = step-by-step instructions; EOD report = end-of-day update.
- Async work needs clear written notes.
- Part-time hourly is a safe start; retainers give steady income.

Quiz: 3 quick questions

1. What is an SOP?

A. A type of payment
B. Step-by-step instructions for a task
C. A social media post

2. What is an EOD report?

A. A short end-of-day update: done, pending, questions
B. A tax form
C. An emergency call

3. Your client is in New York and you are in Manila. What should you always check?

A. The weather
B. The time zone difference
C. Their favorite food

Answers

1. **B. Step-by-step instructions for a task** — SOPs make tasks repeatable and easy to hand over.
2. **A. A short end-of-day update: done, pending, questions** — It keeps the client informed without meetings.
3. **B. The time zone difference** — A 3 PM meeting means very different things in different time zones.

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PRACTICE TASK

Your practice day

Spend one hour acting as your own VA: clean your inbox, plan tomorrow in your calendar, do one small research task, then write a 5-line “EOD report” to yourself. Notice which part felt easiest.

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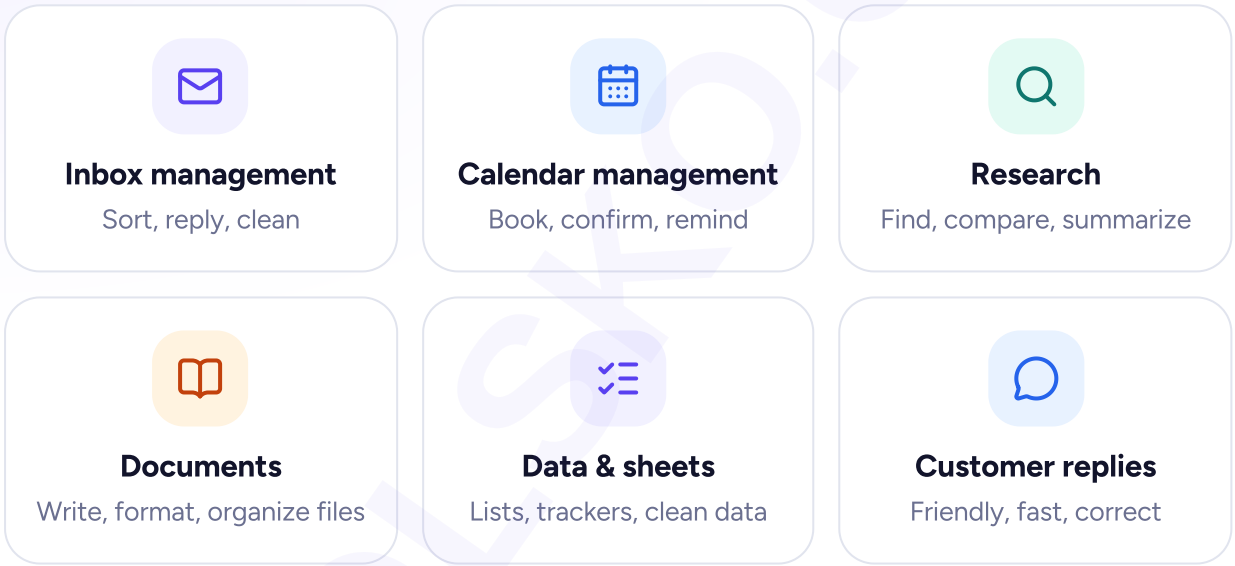
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CHAPTER 3 · LESSON 1

Core VA Skills: Inbox, Calendar, Research and More

Six skills cover most VA jobs. Learn a simple method for each, and you can help almost any client.

PICTURE 4 **The six core VA skills**



Get good at these six and you can apply to most general VA jobs.

Skill 1: Inbox management

A messy inbox hides important emails. Your job is to make sure nothing important is missed — and that the client sees only what needs them.

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PICTURE 5 **Inbox: before and after a good VA**

BEFORE

2,400 unread emails

- Bills mixed with newsletters
- Customer questions waiting for days
- The client feels lost
- Important emails get missed

AFTER

A calm, sorted inbox

- Folders: Action, Waiting, Finance, Read later
- Common questions answered with saved replies
- Only "Action" emails need the client
- A short daily summary of what matters

Sorting into a few clear folders turns chaos into a short list the client can handle.

1 **Ask the rules first**

Which emails can you answer? Which must go to the client? What should never be deleted?

2 **Make 4–6 folders or labels**

For example: Action (client), Waiting (on someone), Finance, Clients, Read later.

3 **Use saved replies**

Write approved answers for common questions (prices, hours, shipping). The client approves them once.

4 **Send a daily summary**

"3 emails need you today: …" — so the client never has to dig.

Skill 2: Calendar management

- Always write times **with the time zone**: "Tue 10:00 AM New York (10:00 PM Manila)".

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- Add the meeting link, phone number and a one-line purpose to every event.
- Leave buffer time between meetings (10–15 minutes).
- Send confirmations and reminders the day before.
- Never accept or move meetings without the client's rules — ask first.

Skill 3: Research

Clients ask things like "Find 3 venues for a 50-person event" or "List 20 local cafés with their emails". Good research is **organized**: a table, sources, and a short recommendation.

A RESEARCH SUMMARY FORMAT

```
Task: Find 3 venues for a 50-person dinner in Makati on March 14.

Top pick: [Venue A] — fits 60, ₱X per head, has parking. Source:
[link]
Option 2: [Venue B] — …
Option 3: [Venue C] — …

Not checked yet: availability on March 14 (I can call tomorrow).
```

AI can help — you check

From the **AI for Beginners** series: AI can draft a research plan or summarize pages. But AI can be wrong about prices, dates and contacts. Always open the real source and check before you send it to a client.

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Skills 4–6: Documents, data and customer replies

Skill	Do this	Practice idea
Documents	Use clear headings, consistent fonts, and name files the same way (2026-03-14 Venue options)	Turn a messy note into a tidy one-page document
Data & sheets	One row per item, one column per detail, no merged cells, check duplicates	Clean a list of 50 contacts in Google Sheets
Customer replies	Greet, answer the question, give the next step, sign off kindly	Write 10 replies to common shop questions

Learn free

Google, Microsoft and Canva all have free help centers and tutorials. Practice every skill on your own life first — your family calendar, your own inbox, your own shopping list.

QUICK RECAP

Six core skills: inbox, calendar, research, documents, data and customer replies. Each has a simple method — and every method starts with asking the client's rules.

TRY IT NOW

Organize your own inbox

1. Create 4 folders or labels: Action, Waiting, Finance, Read later.
2. Sort your last 50 emails into them.
3. Write a 3-line "daily summary" of what needs action.

Key takeaways

- Ask the client's rules before you touch their inbox or calendar.

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- Folders + saved replies + a daily summary = a calm inbox.
- Always write meeting times with the time zone.
- Good research is organized: table, sources, recommendation — and checked.

Quiz: 3 quick questions

1. What should you do first with a new client's inbox?

A Delete old emails
B Ask which emails you can answer and what must never be deleted
C Reply to everything

2. Which is the best way to write a meeting time?

A "Tuesday at 10"
B "Tue 10:00 AM New York (10:00 PM Manila)"
C "Morning"

3. AI gave you a list of venue prices. What next?

A Send it straight to the client
B Check the real sources before sending
C Make up the missing prices

Answers

1. **B. Ask which emails you can answer and what must never be deleted** — Rules first. Deleting or answering the wrong email can hurt the client.
2. **B. "Tue 10:00 AM New York (10:00 PM Manila)"** — Including both time zones prevents missed meetings.
3. **B. Check the real sources before sending** — AI can be wrong. Checking is your job.

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PRACTICE TASK

Three mini samples

Make three small practice pieces: (1) a sorted inbox plan with folder names and 3 saved replies, (2) a one-week calendar with time zones for a pretend client abroad, (3) a 3-option research summary. Save them — they become your portfolio in Chapter 5.

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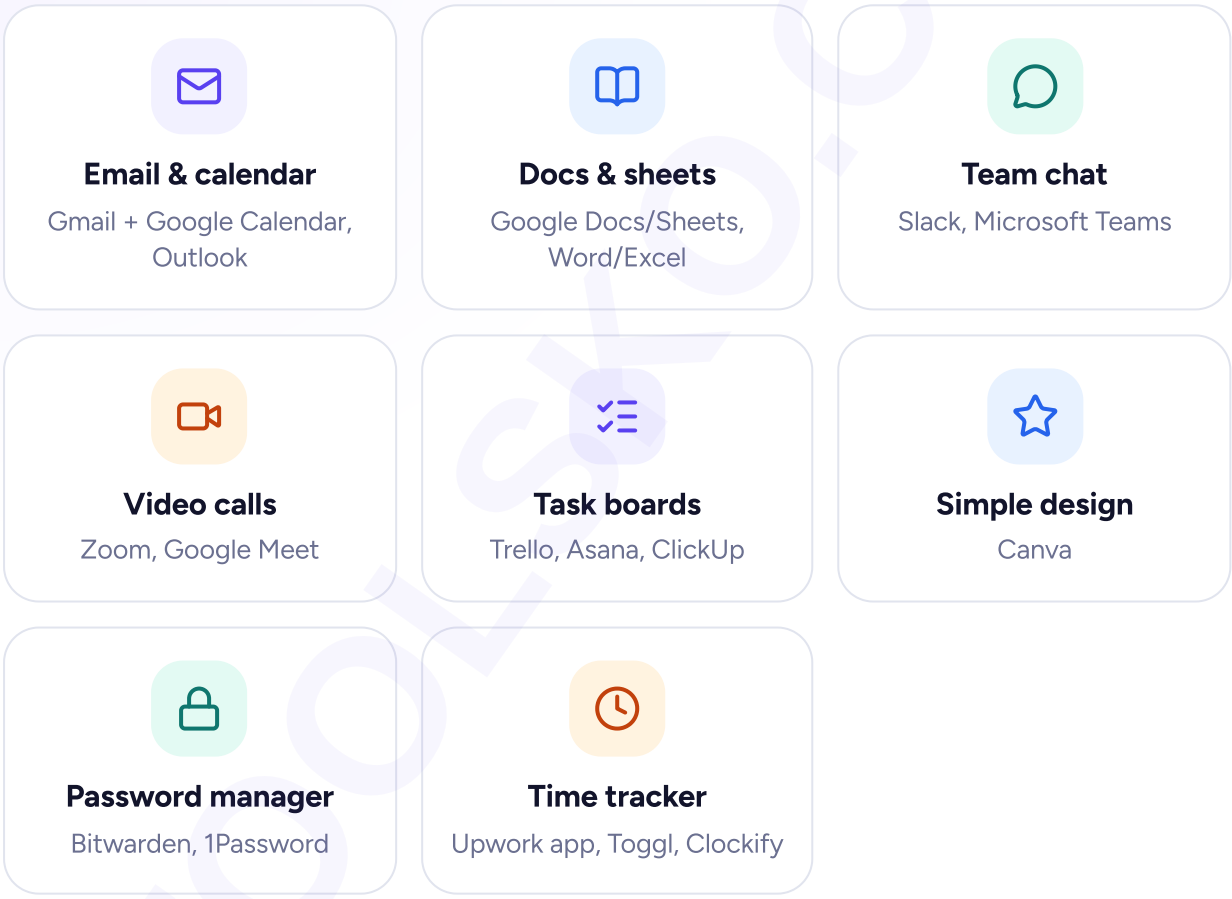
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CHAPTER 4 · LESSON 2

Your VA Toolkit and Home Workspace

You don’t need expensive software. Most VA tools have free versions — and your client often provides the paid ones.

PICTURE 6 **The VA toolkit (free versions are enough to start)**



Learn the basics of one tool in each box. Every client uses a slightly different mix — and they will show you theirs.

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Learn the idea, not just the app

Trello, Asana and ClickUp look different, but they all do the same thing: cards for tasks, columns for status (To do → Doing → Done). Learn one well, and the others take a day.

Time tracking (if you are paid hourly)

Hourly clients need to see your hours. On **Upwork**, hourly contracts come with payment protection only for time logged with the time tracker in the **Upwork Desktop App**, with a client who has a verified billing method. Hours you add by hand ("manual time") are not protected. Outside Upwork, use a simple tracker like Toggl or Clockify and send a weekly summary.

New word: time tracker

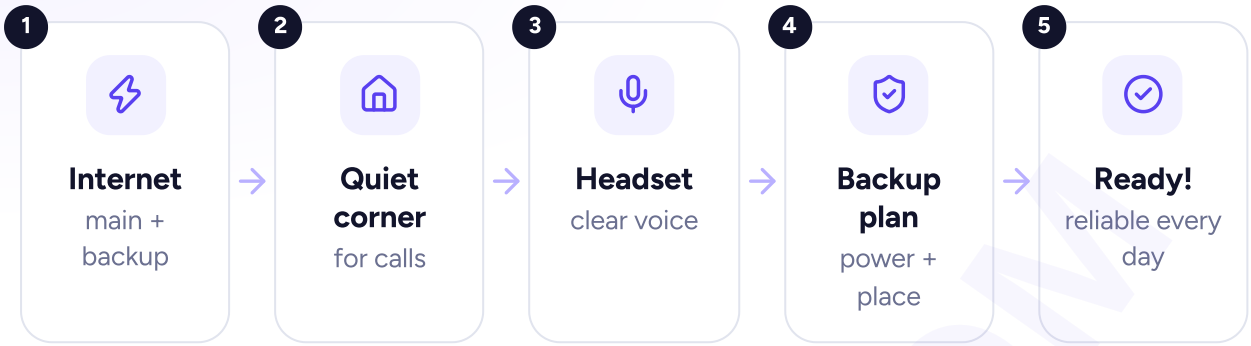
A **time tracker** is an app that records how long you work on each task — like a stopwatch with labels. It helps you bill honestly and shows the client what their money paid for.

Your home workspace

Need	Why	Simple tip
Stable internet	Video calls and uploads need it	Test your speed; keep mobile data as a backup
A quiet place	Calls with clients	A corner with a closed door at call times
A headset with a mic	Clear calls without echo	A basic wired headset works well
Backup power plan	Brownouts happen	Charged power bank for your phone; know a nearby café with Wi-Fi
A good chair and light	You will sit for hours	Face a window or lamp for video calls

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PICTURE 7 **Set up a reliable workspace**



Clients care less about a fancy desk and more about you being reachable, clear and on time.

Tell the client your backup plan

In your interview, say: "If my power or internet goes out, I switch to mobile data or go to a backup place, and I message you right away." Clients love a VA who planned for problems.

QUICK RECAP

Learn one tool in each category — email, docs, chat, calls, task boards, design, passwords and time tracking. Set up a quiet, connected workspace with a backup plan.

TRY IT NOW

Try three tools today

1. Make a free Trello (or similar) board with To do, Doing, Done.
2. Add 5 of your own tasks and move one to Done.
3. Install a free password manager and save one password in it.

Key takeaways

- Free versions of VA tools are enough to learn and start.
- Learn the idea behind each tool; apps change, ideas stay.

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- On Upwork, hourly protection needs time tracked in the Upwork Desktop App.
- A reliable workspace includes a backup plan for power and internet.

Quiz: 3 quick questions

1. What do Trello, Asana and ClickUp have in common?

A They are email apps
B They organize tasks into cards and status columns
C They are video call apps

2. On Upwork, which hourly time is covered by Hourly Payment Protection?

A Time tracked with the Upwork Desktop App
B Time you add manually
C Any time you remember

3. Your internet goes down during work. What should a good VA do?

A Disappear until it's back
B Switch to the backup plan and message the client right away
C Say nothing

Answers

1. **B. They organize tasks into cards and status columns** — All three are task boards. Learn one, and the others are easy.
2. **A. Time tracked with the Upwork Desktop App** — Manual time is not protected.
3. **B. Switch to the backup plan and message the client right away** — Communication + a backup plan keeps trust.

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PRACTICE TASK

Your toolkit checklist

Make a two-column list: each tool category and the tool you will practice. Spend 20 minutes on each tool this week. Also write your backup plan for power and internet in 3 lines — you will use it in interviews.

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CHAPTER 5 · LESSON 3

Get Hired: Portfolio, Applications, Test Tasks and Interviews

VA clients hire people they trust. Your job now is to show — clearly and honestly — that you are organized, careful and easy to work with.

A VA portfolio with no experience

Use the mini samples from Chapter 3, and add two VA "signature" samples: an **SOP** and an **EOD report**. These show clients you already think like a professional VA.

Sample	What it shows
Inbox plan (folders + 3 saved replies)	You can organize and write clearly
One-week calendar with time zones	You won't miss meetings
Research summary (3 options + sources)	You find, compare and check information
A one-page SOP (for example, "How to process a refund")	You can make tasks repeatable
An EOD report example	You communicate without being asked

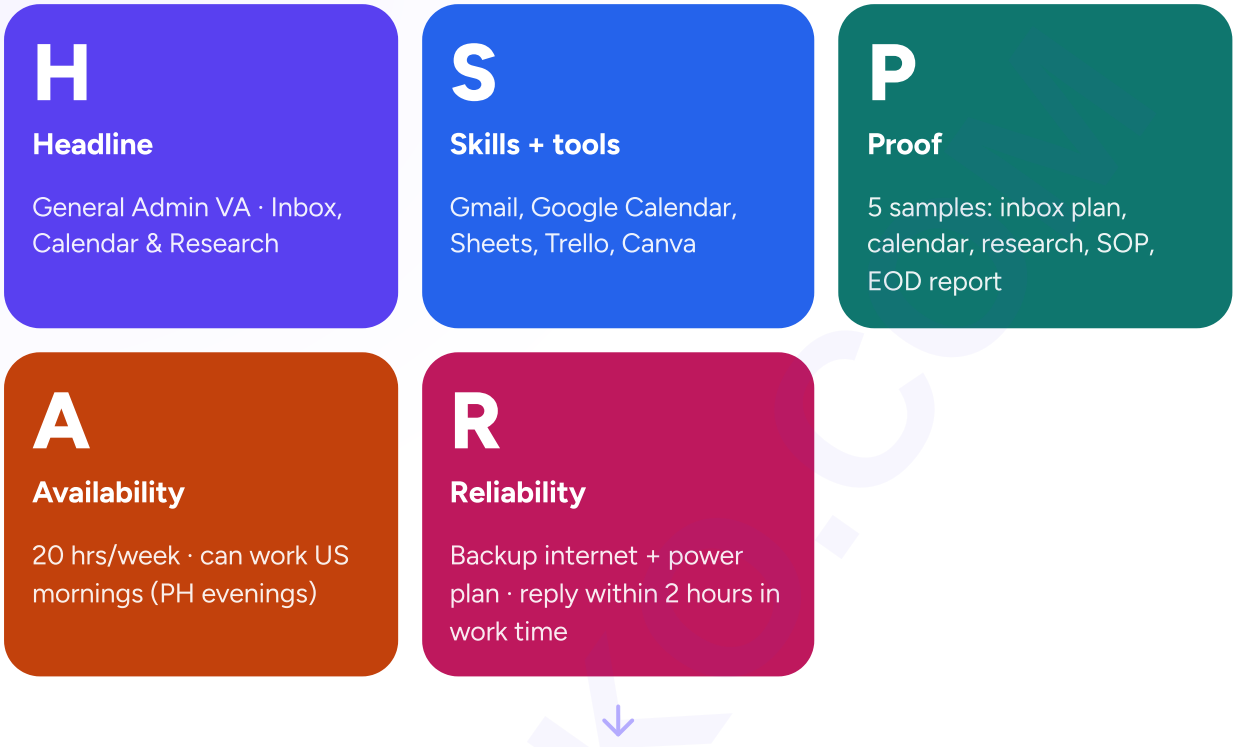
Keep samples private and honest

Use made-up or your own information in samples — never real people's emails, phone numbers or private data. Label them as **samples**.

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Your VA resume and profile

PICTURE 8 **The VA profile recipe: H-S-P-A-R**



Availability and reliability matter more for VAs than for most freelance jobs. Say them clearly.

On job boards like **OnlineJobs.ph**, clients often read your profile and resume before your message. Fill every part, add your samples link, and write your expected salary honestly. The free ToolsKo **Resume Builder** and **Cover Letter Generator** can help.

Applications that stand out

- Follow the job post's instructions exactly. Many VA posts hide a test like "Start your message with the word 'pineapple'" — it checks if you read carefully.
- Use the 5-part proposal from Book 1: Hook, Plan, Proof, Question, Next step.
- Mention your time zone and the hours you can work.

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- Link the one sample that matches the job best.

Test tasks

Many clients give a short **test task**: “Sort these 20 emails” or “Find 10 leads in a spreadsheet”. A fair test is short (about 1 hour or less) and uses sample data. For longer tests, it’s fair to ask: “Is this test paid?”

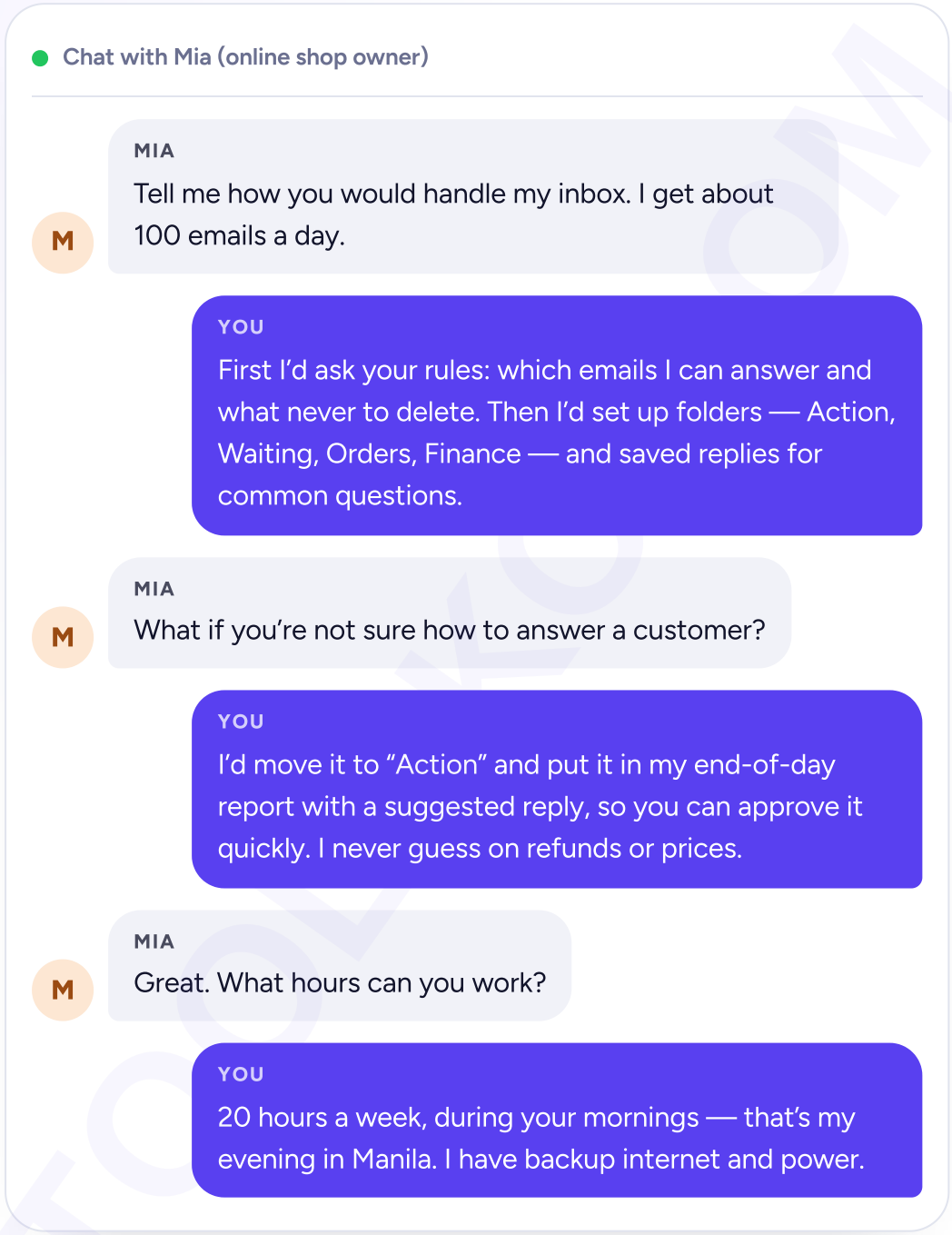
> ⚠ **When a “test” is really free work**
>
> If the “test” is many hours long, uses the client’s real business, or keeps growing (“just do 50 more”), be careful. Some people collect free work with fake jobs. Offer a short sample instead, or a paid trial.

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The interview

PICTURE 9 **A good VA interview answer**



Mia is looking for a VA. Notice the pattern: ask rules, organize, report, never guess on money — and say your hours clearly.

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Questions to ask the client

- What are the 3 tasks you most want off your plate?
- Which tools do you use, and will I get my own login?
- How do you prefer updates — chat, email, or a daily report?
- What hours should I be online, and in which time zone?
- How and when will I be paid?

Say thank you

After an interview, send a short thank-you message within a day. The free ToolsKo **Thank-You Email After Interview** tool can draft one for you to personalize.

QUICK RECAP

Build a 5-sample VA portfolio (including an SOP and an EOD report), write your profile with H-S-P-A-R, follow every job instruction, keep test tasks short and fair, and answer interviews with clear, organized steps.

TRY IT NOW

Write your SOP sample

1. Pick a task you know well (for example, “How to send a weekly newsletter”).
2. Write it in 5–8 numbered steps, with a title and “when to use this”.
3. Ask a friend to follow it. Fix any step that confused them.

Key takeaways

- A VA portfolio: inbox plan, calendar, research, SOP and EOD report.
- Profile recipe: Headline, Skills + tools, Proof, Availability, Reliability.
- Follow job-post instructions exactly — they are often a test.
- Fair test tasks are short; be careful with long unpaid “tests”.

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Quiz: 3 quick questions

1. A job post says: "Start your message with the word 'pineapple'." Why?

A The client loves fruit
B It checks if you read instructions carefully
C It's a mistake

2. Which sample shows a client you communicate without being asked?

A An EOD report example
B A selfie
C A list of hobbies

3. A "test task" asks for 8 hours of work on the client's real business, unpaid. What's a smart reply?

A Do it right away
B Politely offer a short sample or ask if it can be a paid trial
C Send your bank password

Answers

1. **B. It checks if you read instructions carefully** — VAs must follow instructions exactly. This is an easy test of that.
2. **A. An EOD report example** — An EOD report proves you keep clients informed.
3. **B. Politely offer a short sample or ask if it can be a paid trial** — Fair tests are short. Long unpaid "tests" can be free work in disguise.

PRACTICE TASK

Finish your VA kit

Finish all 5 samples and put them in one tidy folder or free portfolio page. Write your H-S-P-A-R profile and a one-page resume. Then send 5 careful applications that follow every instruction in the job posts.

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CHAPTER 6 · LESSON 4

Work Like a Pro: Onboarding, SOPs and EOD Reports

You got hired! The first two weeks decide whether this becomes a long-term job. Here is how to start strong and stay trusted.

Your first week: onboarding

PICTURE 10 **A strong first week**



Start small, learn the client's way, and ask for feedback at the end of week one.

- **Write things down.** Keep a "client notes" document: names, rules, preferences, logins (stored safely — see Chapter 7).
- **Ask once, write it down, don't ask twice.** Clients love VAs who learn fast.
- **Start with small wins.** Finish 2–3 easy tasks perfectly before bigger ones.
- **Ask for feedback.** "What should I do more of, or differently, next week?"

SOPs: your secret weapon

Every time you learn a task, turn it into an **SOP**. Then you never forget a step, the client sees you are serious, and if you get sick, someone else can follow it.

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SIMPLE SOP TEMPLATE

```
SOP: [Task name]
When: [daily / weekly / when a customer asks for a refund]
Tools: [Gmail, Shopify, Google Sheets]

Steps:
1. …
2. …
3. …

Done when: [what “finished” looks like]
Ask the client if: [situations you must not decide alone]
```

Let AI tidy your SOP

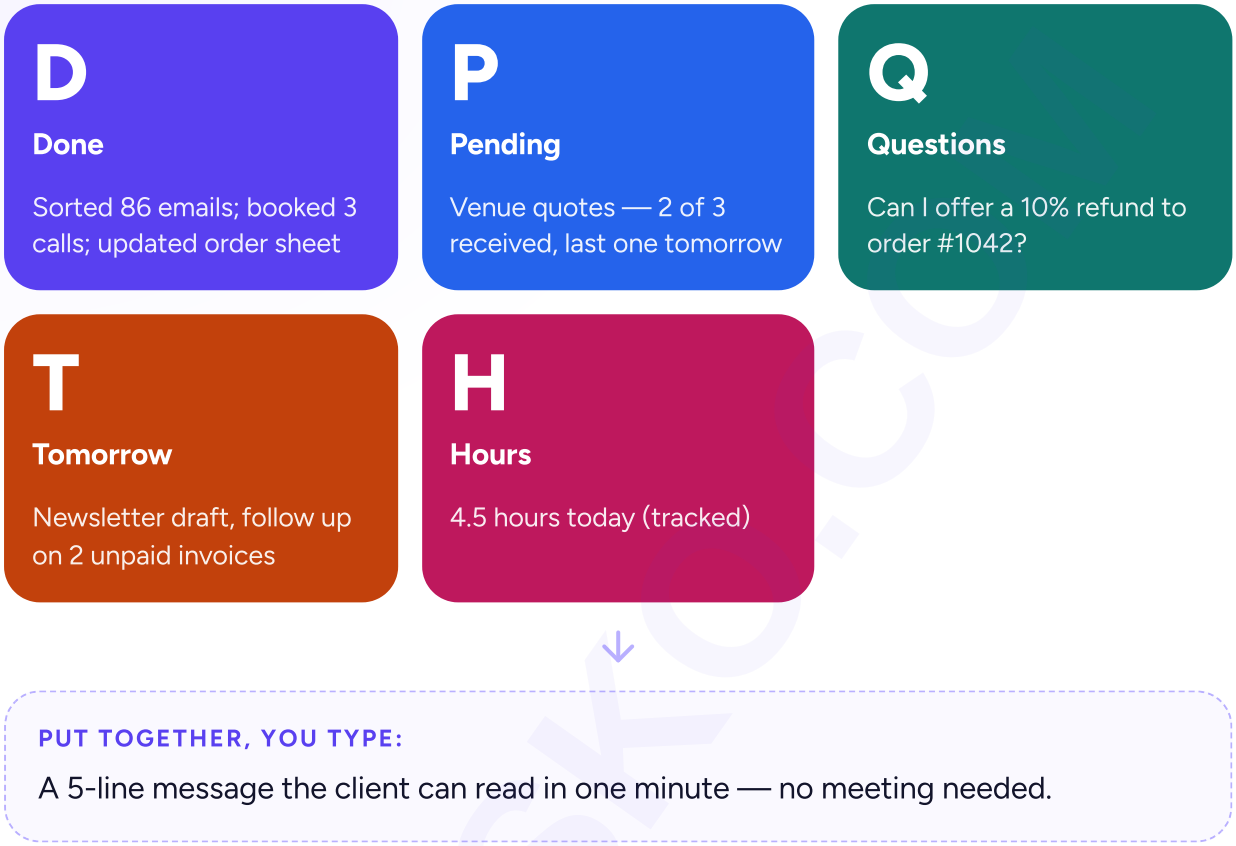
Write the steps yourself while you do the task, then ask AI: “Turn these notes into a clear numbered SOP. Keep every step and don’t add new ones.” Remove any private details first (no passwords, no customer names).

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The EOD report

PICTURE 11 **The EOD report recipe: Done, Pending, Questions, Tomorrow, Hours**



Send it at the end of every work day. It is the habit that clients mention most when they praise a VA.

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Communication habits

Situation	What to say
Starting work	“Online now — starting with today’s inbox.”
Not sure about something	“Quick question before I continue: …” (ask early, not after a mistake)
You made a mistake	“I sent the wrong file to the supplier. I already sent the right one and apologized. I’ll double-check attachments from now on.”
Running late on a task	“The report will be ready by 3 PM instead of 12 — the data came in late. Is that okay?”
Logging off	Send your EOD report.

Healthy boundaries

Agree on your working hours and how fast you reply outside them. Being reliable doesn’t mean being online 24/7. A rested VA makes fewer mistakes.

Time zones without tears

- Keep a clock for the client’s city on your phone or computer.
- Use a time zone converter when booking anything.
- Remember: some countries change their clocks (daylight saving time) twice a year — check again in March and November.

QUICK RECAP

Start strong with a careful first week, turn every task into an SOP, send an EOD report daily (Done, Pending, Questions, Tomorrow, Hours), communicate early and keep healthy boundaries.

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TRY IT NOW

Write tomorrow's EOD report

1. Think of what you will do tomorrow (school, work or home tasks).
2. At the end of the day, write an EOD report using D-P-Q-T-H.
3. Read it out loud. Could a busy person understand it in one minute?

Key takeaways

- Week one: welcome call, your own logins, learn SOPs, small wins, feedback.
- Every task you learn becomes an SOP.
- EOD report: Done, Pending, Questions, Tomorrow, Hours.
- Ask early, admit mistakes fast, and agree on working hours.

Quiz: 3 quick questions

1. What is the best way to start with a new client?

A Take on every big task on day one
B Do 2–3 small tasks perfectly and ask for feedback
C Wait for them to tell you everything

2. What goes in an EOD report?

A Done, Pending, Questions, Tomorrow, Hours
B Only complaints
C Your passwords

3. You're not sure if you can give a customer a refund. What do you do?

A Decide yourself
B Ask the client before acting
C Ignore the customer

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Answers

1. **B. Do 2–3 small tasks perfectly and ask for feedback** — Small wins build trust quickly.
2. **A. Done, Pending, Questions, Tomorrow, Hours** — D-P-Q-T-H keeps the client informed in one minute.
3. **B. Ask the client before acting** — Money decisions belong to the client unless an SOP says otherwise.

PRACTICE TASK

Two SOPs and a week of reports

Write two SOPs for tasks you do often (at home, school or work). Then send yourself an EOD report every day for 5 days. On day 5, read all five — you will see how clear you have become.

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CHAPTER 7 · LESSON 5

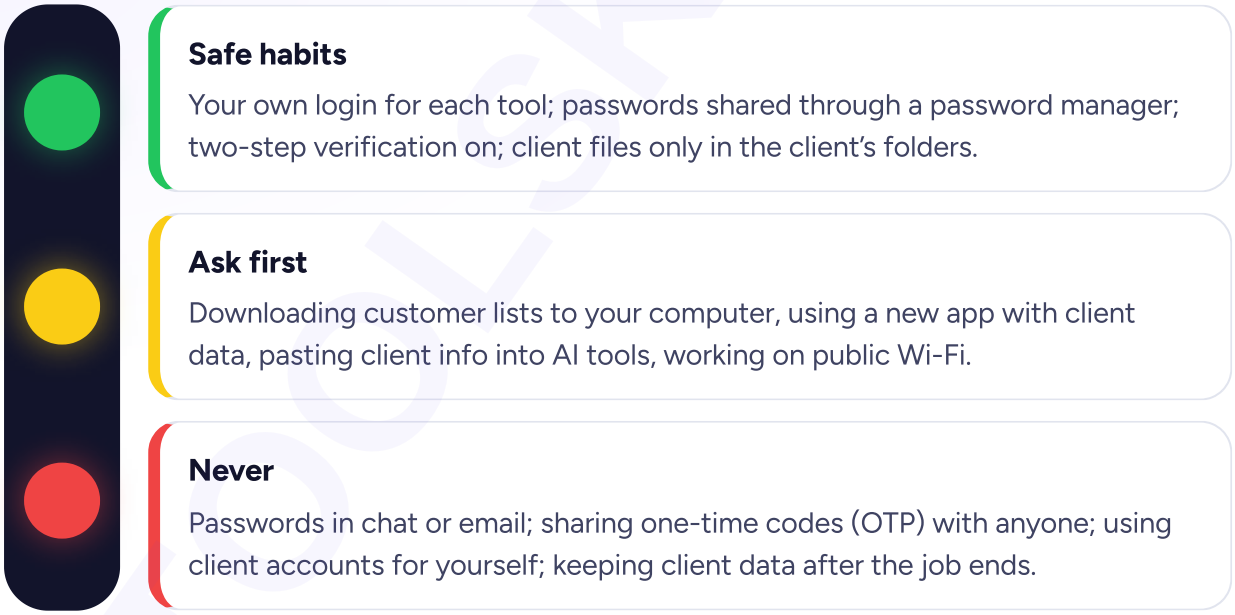
Keep Clients Safe (and Yourself): Data, Passwords and Scams

A VA often holds the keys to a client's business. Protecting those keys is part of the job — and it protects you too.

You may get access to a client's email, social media, online shop, customer list or even bank-related tools. That is a lot of trust. One careless click can cause real damage.

The safety traffic light for client data

PICTURE 12 **Client data: green, yellow, red**



Green: always. Yellow: only with the client's permission. Red: never, even if someone asks.

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PICTURE 13 How to receive passwords safely

RISKY

Passwords in chat

- Client sends “Pass: Shop2026!” in chat
- Saved in a note on your phone
- Same password for many accounts
- Anyone who sees the chat can log in

SAFE

Password manager sharing

- Client shares access through a password manager
- Access can be shared without showing the password
- Access is removed in one click when the job ends
- Two-step verification stays on

If a client sends a password in chat, kindly suggest a safer way. It shows you take their business seriously.

New word: two-step verification (2FA)

Two-step verification means logging in needs your password **plus** a second proof, like a code on your phone. Even if someone steals the password, they can’t get in. Never share that code — not even with someone claiming to be “support”.

Privacy is the law

Many countries protect personal data. The Philippines has the **Data Privacy Act of 2012**. Treat every customer’s name, number, address and order like it’s your own family’s: use it only for the job, keep it in the client’s systems, and don’t share it.

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Sign an NDA if asked

An **NDA** (non-disclosure agreement) is a promise to keep a client's information secret. Clients often ask VAs to sign one. Read it, ask about anything unclear, then keep the promise. The free ToolsKo **NDA Generator** shows what one usually contains.

Phishing: fake messages that steal access

- An email "from the bank" or "from Facebook" asks you to log in through a link. Don't click — go to the real website yourself.
- "Your client" messages from a new number asking for an urgent payment or gift cards. Confirm through your normal channel first.
- Unexpected attachments, especially files that ask you to "enable" something. Ask before opening.

VA job scams to know

Scam	How it works	What to do
Training or "starter kit" fee	"You're hired! Just pay ₱1,500 for training first."	Stop. Honest clients never charge you to get hired.
Equipment check	They send a check or money for a laptop, then ask you to send some to their "supplier".	Stop. It's a fake check or overpayment scam.
Task scams	"Like videos or rate products for money" — later you must deposit to "unlock" earnings.	Stop. Never deposit money to get paid.
Fake recruiter	A real company's name, but only chat on Telegram and no real interview.	Check the company's official website and contacts.
Endless "test"	Hours of unpaid "tests" on real business work.	Offer a short sample or a paid trial.

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If you see a scam, stop replying, never send money, and report it to the platform. In the Philippines, you can report online scams to the **CICC hotline 1326**. Beware of "recovery" offers that ask for a fee to get lost money back.

Protect your own future (Philippines)

Benefits are now your job

As a freelance VA, no employer pays your benefits. In the Philippines you can keep covered as a **self-employed** member: **SSS** contributions are 15% of your chosen monthly salary credit (from ₱5,000 to ₱35,000), and you pay all of it yourself. **PhilHealth** and **Pag-IBIG** also have self-employed memberships. For income tax and BIR registration, see Book 1, Chapter 7. Rates change — check the agencies' official websites.

QUICK RECAP

Protect client access with your own logins, a password manager and 2FA; ask before using client data in new places; never share passwords or codes; know the common VA scams; and set up your own benefits.

TRY IT NOW

Secure your own accounts first

1. Turn on two-step verification for your email.
2. Save 3 passwords in a password manager and make them strong (the free ToolsKo Password Generator helps).
3. Write the 3 "red light" rules on a sticky note.

Key takeaways

- Your own logins + password manager + 2FA = safe access.
- Never share passwords in chat or one-time codes with anyone.
- Ask before downloading client data or pasting it into new tools (including AI).

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- VA scams: training fees, fake checks, task scams, fake recruiters, endless free tests.

Quiz: 3 quick questions

1. A client sends their shop password in chat. What's the best response?

A Save it in your notes

B Thank them and suggest sharing access through a password manager instead

C Post it in a group chat

2. Someone "from support" asks for the code sent to the client's phone. What do you do?

A Send it quickly

B Never share it — tell the client right away

C Send half the code

3. Which is a VA job scam sign?

A A short, paid test task

B "You're hired! Pay ₱1,500 for training first."

C A video interview

Answers

1. **B. Thank them and suggest sharing access through a password manager instead** — Chat messages can leak. A password manager keeps access safe and easy to remove.
2. **B. Never share it — tell the client right away** — Sharing a one-time code lets an attacker into the account.
3. **B. "You're hired! Pay ₱1,500 for training first."** — Honest clients never ask you to pay to get hired.

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PRACTICE TASK

Your safety checklist

Make a one-page “VA safety checklist” with: how you receive passwords, your 2FA rule, what data you never download, how you spot phishing, the 5 VA scams, and where you report them. Show it to clients in interviews — it builds instant trust.

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CHAPTER 8

Practice Exercises: Your 14-Day VA Launch Plan

Two weeks, about an hour a day. By day 14 you will have a VA portfolio, a profile and careful applications out in the world.

PICTURE 14 **The 14-day VA launch plan**



Practice first, then proof, then applications. One small step every day.

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Day	Task (about 1 hour)	Done?
1	Organize your own inbox with 4 folders and 3 saved replies.	☐
2	Plan a week in your calendar with a pretend client abroad (use time zones).	☐
3	Do a 3-option research summary with sources.	☐
4	Set up a free task board and a password manager; turn on 2FA.	☐
5	Practice Google Sheets: clean a 50-row list (no duplicates, one row per item).	☐
6	Set up your workspace and write your backup plan.	☐
7	Write an SOP sample.	☐
8	Write an EOD report sample; tidy all 5 samples in one folder.	☐
9	Write your VA safety checklist.	☐
10	Write your H-S-P-A-R profile and resume. Send 2 careful applications.	☐
11	Send 2 applications. Practice the interview answers out loud.	☐
12	Send 2 applications. Tell 3 people you know that you're a VA now.	☐
13	Send 2 applications. Improve one sample.	☐
14	Review: which applications got replies? Improve your profile and message.	☐

Bonus exercises

1

The 10-minute inbox sprint

Set a timer. Sort 30 emails into folders in 10 minutes. Repeat until it feels easy.

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2 **Time zone drill**

Convert 5 meeting times between Manila, New York, London and Sydney. Check with a converter.

3 **Mock interview**

Ask a friend to read the interview questions in Chapter 5. Record your answers and listen back.

4 **Instruction test**

Read 5 VA job posts. Find every special instruction (keywords, file names, questions to answer).

Keep going after day 14

If you don't have a client yet, that's normal. Keep sending 2 careful applications a day, add one new sample a week, and improve your profile every 10 applications.

QUICK RECAP

Days 1–9 build skills, tools and proof. Days 10–13 send careful applications. Day 14 reviews and improves. Then keep going.

TRY IT NOW

Start today

1. Copy the 14-day table into your notes or print it.
2. Do Day 1 now.
3. Set a daily reminder for your VA hour.

Key takeaways

- Practice the core skills on your own life first.

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- By day 9: 5 samples and a safety checklist.
- From day 10: 2 careful applications a day.
- No client after 14 days is normal — keep going and improve.

Quiz: 3 quick questions

1. What should you do in days 1–3?

A Apply to 100 jobs
B Practice core skills on your own inbox, calendar and research
C Buy a course

2. Why practice time zone drills?

A For fun only
B Missed meetings from time zone mistakes can lose a client
C Time zones don't matter

3. How many applications a day from day 10?

A 2 careful ones
B 50 copy-paste ones
C None

Answers

1. **B. Practice core skills on your own inbox, calendar and research** — Skills and samples come before applications.
2. **B. Missed meetings from time zone mistakes can lose a client** — VAs often work with clients in other countries.
3. **A. 2 careful ones** — Careful applications that follow instructions win more interviews.

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PRACTICE TASK

Complete the 14 days

Do the full plan and tick each box. On day 14, write: 3 things you learned, your best sample, and your plan for the next 14 days.

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CHAPTER 9

Common VA Mistakes (and Easy Fixes)

Most VA mistakes are small — but small mistakes, repeated, lose clients. Here are the ten we see most.

Read the table slowly. Mark any mistake you might make, and write the fix in your notes.

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Mistake	Why it hurts	Easy fix
Not reading instructions	Shows you might miss details at work too	Read the whole post twice; list every instruction
Going silent	The client worries and checks on you	Start-of-day message + EOD report
Guessing instead of asking	Wrong replies, wrong refunds, wrong bookings	Ask early: “Quick question before I continue…”
Ignoring time zones	Missed meetings	Write both time zones every time
Passwords in chat or notes	Accounts can be stolen	Password manager + 2FA
Saying yes to everything	Late work, burnout	Confirm priorities: “Which of these is most urgent?”
No SOPs	Same questions again and again	Turn every task into an SOP
Hiding mistakes	Trust breaks when the client finds out	Tell them fast, with the fix
Logging time you didn’t work	Dishonest — and can end your account	Track honestly, with memos
Paying for “guaranteed VA jobs”	It’s a scam	Never pay to get hired

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PICTURE 15 **Stressed VA vs trusted VA**

STRESSED VA

Busy but losing trust

- Says yes to everything
- Replies late, no reports
- Guesses on money questions
- Passwords saved in chat

TRUSTED VA

Calm and kept for years

- Confirms priorities
- Start message + EOD report daily
- Asks before money decisions
- Password manager + 2FA

The trusted VA isn't smarter. They just have better habits.

The two-question habit

Before you start any task, ask yourself: "Do I know exactly what 'done' looks like?" and "Is there anything here involving money, customers or deleting things?" If the answer to the first is no — or the second is yes — ask the client first.

QUICK RECAP

VA mistakes come from rushing and silence: not reading, not asking, not reporting, not protecting passwords. Better habits fix them all.

TRY IT NOW

Check yourself

1. Read the mistakes table.
2. Mark the 3 you are most likely to make.
3. Write one rule for each and stick it near your desk.

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Key takeaways

- Read every instruction; ask early instead of guessing.
- Report daily; write both time zones.
- Protect passwords; track time honestly.
- Tell the client about mistakes fast, with the fix.

Quiz: 3 quick questions

1. Your client gives you 5 urgent tasks at once. Best response?

A Say yes and stay silent
B "Which of these is most urgent?"
C Do the easiest one only

2. You sent the wrong file to a supplier. What do you do?

A Hope nobody notices
B Fix it and tell the client right away
C Blame the supplier

3. What does the two-question habit check?

A If "done" is clear, and if money, customers or deleting are involved
B If it's lunchtime
C If the client is online

Answers

1. **B. "Which of these is most urgent?"** — Confirming priorities prevents late work on what matters most.
2. **B. Fix it and tell the client right away** — Fast honesty keeps trust.
3. **A. If "done" is clear, and if money, customers or deleting are involved** — Those two questions catch most risky situations.

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PRACTICE TASK

Your habit card

Make a small “VA habit card” with your top 5 rules (for example: “EOD report every day”, “Both time zones always”). Keep it next to your computer for your first 3 months of client work.

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CHAPTER 10

Real-Life Examples: How VAs Land and Keep Clients

These five example stories are based on common VA paths (names are made up). Look for the habits, not the luck.

C

Carlo, 27
Former sales clerk, Pasig

THE PROBLEM

He was organized but had never worked online, and his applications got no replies.

WHAT CARLO TYPED

```
Hi Jen — you mentioned your calendar is "a mess with 3 time zones". I made a sample one-week calendar for a coach with clients in New York, London and Manila, with buffers and reminders: [link]. I can work 15 hours a week during your mornings.
```

THE RESULT

His fourth careful application got an interview. The coach hired him part-time, then raised his hours after three months.

Lesson: A sample that matches the client's exact problem gets replies.

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Grace, 33
Mom and former school secretary, Batangas

THE PROBLEM

She worried that she was “just a secretary” with no online skills.

WHAT GRACE TYPED

```
I worked 6 years as a school secretary: scheduling 40 teachers,
answering parents and keeping records. I’ve practiced Google
Workspace and Trello. Here’s an SOP I wrote for enrollment emails:
[link].
```

THE RESULT

An e-commerce owner hired her for inbox and order support. Her SOPs became the shop’s training manual.

Lesson: Office experience is VA experience. Translate it into the client’s language.

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Jomar, 22
Fresh graduate, Cagayan de Oro

THE PROBLEM

He applied to 60 jobs in a week with the same message and got nothing.

WHAT JOMAR TYPED

```
pineapple — Hi Dan, I read the full post. You need 20 leads a day in Google Sheets with name, company, email and source. Here's a 10-row sample in exactly that format: [link]. Question: should I skip companies with no public email?
```

THE RESULT

By following instructions and sending fewer, better applications, he got 3 interviews in two weeks and one long-term client.

Lesson: Following instructions exactly beats sending many applications.

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Liza, 40
Part-time VA, Bacolod

THE PROBLEM

A client sent her the shop's main password in chat, and she wasn't sure what to do.

WHAT LIZA TYPED

```
Thank you! For your shop's safety, could you share access through a password manager or create a staff account for me? That way you can remove access anytime, and the password isn't sitting in our chat.
```

THE RESULT

The client set up a staff account — and later told her that message is why he trusted her with more of the business.

Lesson: Protecting a client's accounts builds trust faster than any skill.

Ben, 25
Aspiring VA, Caloocan

THE PROBLEM

A "recruiter" said he was hired and needed to pay ₱2,500 for a laptop setup and training.

WHAT BEN TYPED

```
Before I pay anything: what is the company's registered name and official website? Honest employers don't charge new hires.
```

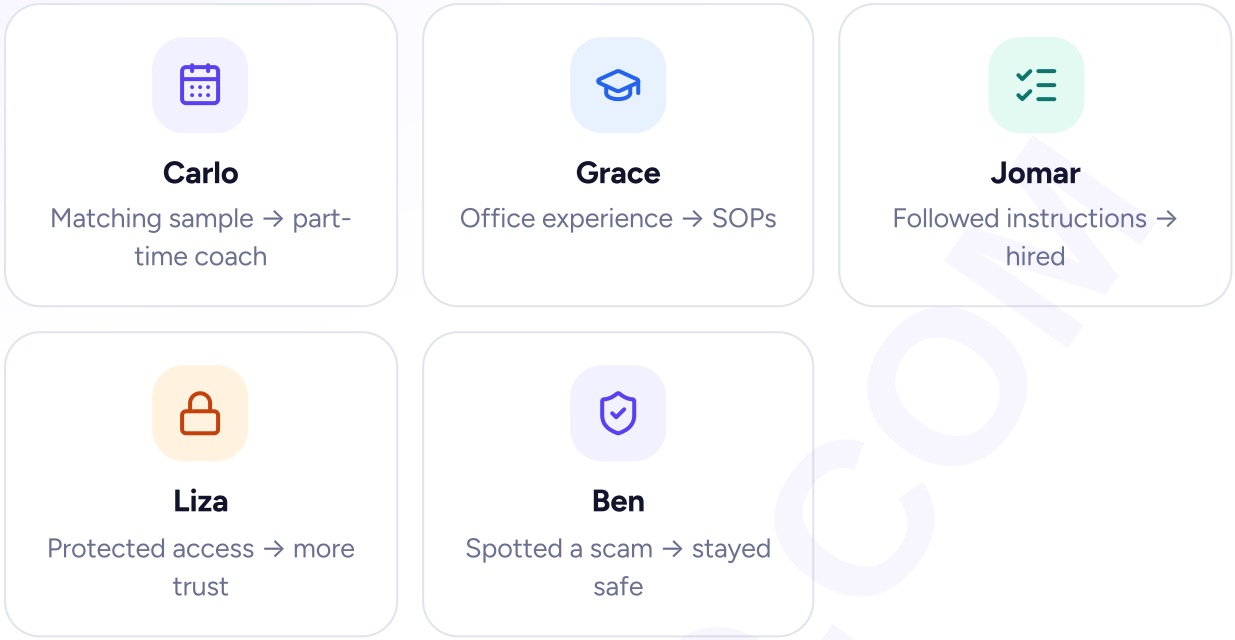
THE RESULT

The recruiter disappeared. Ben reported it to the platform and to the CICC hotline 1326, then kept applying the careful way.

Lesson: Never pay to get hired. One question can expose a scam.

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PICTURE 16 **Five VA paths, same habits**



Different lives and skills — all of them won with clear samples, careful reading, honesty and safety.

What these stories have in common

They chose **reliability** over speed: matching samples, careful reading, daily updates, safe handling of accounts, and saying no to scams. That's how VAs get hired — and stay hired.

QUICK RECAP

VAs land clients with matching samples, translated experience and careful applications — and keep them by protecting accounts and staying honest.

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TRY IT NOW

Translate your experience

1. List 3 things you did at school, work or home that involved organizing, scheduling or helping people.
2. Rewrite each one as a VA skill (for example: “planned the family budget” → “maintained a monthly budget tracker in Sheets”).
3. Add the best one to your profile.

Key takeaways

- Match your sample to the client’s exact problem.
- Office, school and home experience can be VA experience.
- Follow instructions exactly; quality beats quantity.
- Protect accounts and never pay to get hired.

Quiz: 3 quick questions

1. Why did Jomar start his message with “pineapple”?

A It was a joke
B The job post asked for it to check careful reading
C It’s a password

2. What did Liza do when she got a password in chat?

A Saved it on her phone
B Kindly suggested a password manager or staff account
C Shared it with a friend

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3. What exposed the scam in Ben's story?

A Asking for the company's registered name and website, and refusing to pay

B Paying half

C Sending his ID

Answers

1. **B. The job post asked for it to check careful reading** — Following hidden instructions shows you read carefully.
2. **B. Kindly suggested a password manager or staff account** — Safe access protects the client and builds trust.
3. **A. Asking for the company's registered name and website, and refusing to pay** — Honest employers never charge you to get hired.

PRACTICE TASK

Your VA story card

Write your own story card: who you are, your problem, the first lines of your best application, and the lesson you want to prove. Come back in 90 days and add the real result.

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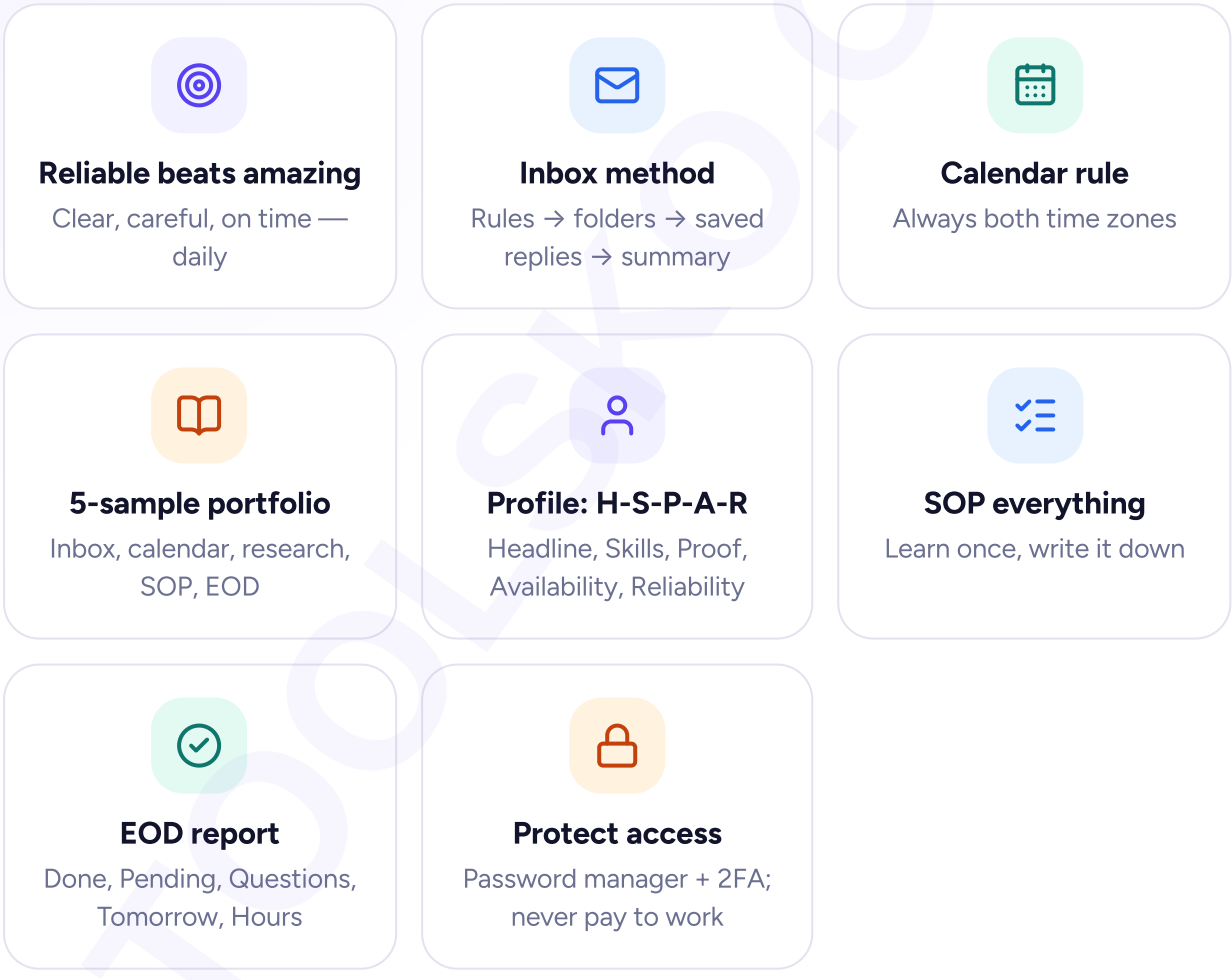
THE END

Quick Summary

Everything important, on one page.

The whole book on one page. Keep it next to your computer during your first months as a VA.

PICTURE 17 **Cheat sheet: the trusted VA in 8 cards**



Eight habits that get VAs hired — and kept.

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Remember	In one line
The big rule	Reliable beats amazing.
Before any task	Do I know what “done” looks like? Does it involve money, customers or deleting?
Every day	Start message → work → EOD report.
Every new task	Turn it into an SOP.
Every login	Your own account, password manager, 2FA.
Every “job offer”	Never pay to get hired.

You are ready to start

You know the tasks, the tools, the habits and the safety rules of a good VA. The rest comes from practice and careful applications. One reliable day at a time.

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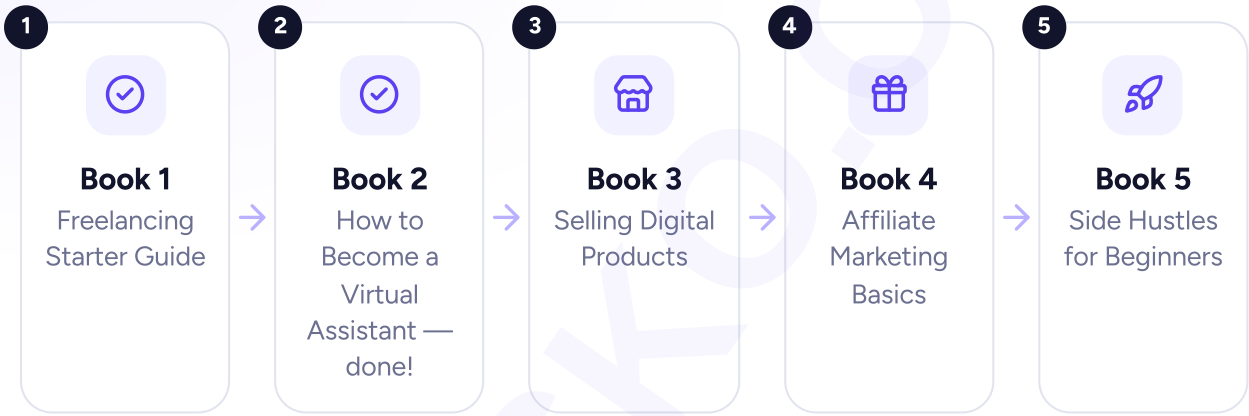
WHAT'S NEXT

Your Next Learning Path

You finished Book 2. Here is where to go from here.

This is **Book 2** of the **Make Money Online** series. Here is your path:

PICTURE 18 **Your Make Money Online path**



Books 1 and 2 are done. Next: learn to earn from things you make once and sell many times — digital products.

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What to do next

Next step	Why
Finish the 14-day launch plan	Applications sent are what bring interviews.
Pick a specialty after your first client	E-commerce, social media or executive support usually pay more.
Keep writing SOPs	Your SOP library becomes a valuable asset — and makes you easy to promote.
Use AI the honest way	The AI for Beginners series shows how AI can speed up drafts, summaries and planning.
Read Book 3 next	Selling Digital Products shows how to earn from things you make once and sell many times.

One last tip

Tools will change and new apps will appear. The VA habits in this book — clear communication, careful reading, SOPs, daily reports and safe access — will always be in demand.

Free ToolsKo tools for this book

Put what you learned to work. These tools are free on toolsko.com, need no sign-up, and most work right in your browser.

Free Resume Builder
Make a clean VA resume for job boards like OnlineJobs.ph.
toolsko.com/resume-builder ↗

Cover Letter Generator
Draft a cover letter, then personalize it for each client.
toolsko.com/cover-letter-generator ↗

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Thank-You Email After Interview
Send a polite thank-you within a day of your interview.

toolsko.com/thank-you-email-after-interview

Time Zone Converter
Book meetings in the client's time zone without mistakes.

toolsko.com/time-zone-converter

Email Signature Generator
Look professional in every email you send for a client.

toolsko.com/email-signature-generator

Password Generator
Make strong passwords for your own accounts.

toolsko.com/password-generator

NDA Generator
See what an NDA usually contains before you sign one.

toolsko.com/non-disclosure-agreement

Email List Cleaner & Deduper
Clean and de-duplicate contact lists — a common VA task.

toolsko.com/email-list-cleaner

Invoice Generator
Bill direct clients clearly for your hours or retainer.

toolsko.com/invoice-generator

Pomodoro Focus Timer
Work in focused rounds and take real breaks.

toolsko.com/pomodoro-timer

Words to know

Virtual assistant (VA)	A person who helps clients online with tasks like email, calendar, research and data.
Admin tasks	Small office jobs that keep a business running.
Inbox management	Sorting, replying to and cleaning a client's email.
Calendar management	Booking, moving and reminding about meetings.

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SOP	Standard Operating Procedure: step-by-step instructions for a task.
EOD report	End-of-day report: done, pending, questions, tomorrow, hours.
Async	Working without being online at the same time as the client.
Time zone	The local time in a place.
KPI	A number that shows how well a job is done.
Retainer	A fixed monthly price for a set number of hours.
Onboarding	The first days of learning a new client's business.
Time tracker	An app that records how long you work on each task.
Password manager	An app that stores and shares passwords safely.
Two-step verification (2FA)	Logging in with a password plus a second proof, like a phone code.
Phishing	A fake message that tries to steal logins or money.
NDA	Non-disclosure agreement: a promise to keep information secret.
Monthly salary credit (MSC)	In the Philippine SSS, the income amount your contribution is based on.

Where the facts come from

1. Upwork Help: How Hourly Payment Protection works

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2. Upwork Help: Log time with the time tracker
3. OnlineJobs.ph: How it works for job seekers
4. FTC: Job scams (including virtual assistant scams)
5. National Privacy Commission (Philippines): Data Privacy Act of 2012
6. SSS: Self-employed coverage
7. SSS: Contribution rate increase to 15%
8. PhilHealth Circular 2026-0011: Self-paying members

Platform rules, Philippine SSS and PhilHealth notes and scam advice were checked on November 21, 2026. They change — always check the platform's or agency's own pages. Tool and company names belong to their owners; ToolsKo is not connected to or endorsed by them. This book is general information, not legal, tax or financial advice. Written by ToolsKo Learn · toolsko.com/learn

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