Dog Grooming Business Appointment, Income and Expense Tracker: how to use it

Start here:

Yellow cells are yours to fill in. Green-grey cells hold formulas: leave them alone and they fill themselves.

Drop-down cells only take values from the lists on the Settings tab. Edit the lists and the drop-downs follow.

The example file is filled with fictional appointments, tips and expenses so you can see every number working. The blank file is the same workbook, empty. Use the blank one for your business.

Google Sheets: File > Import > Upload the .xlsx (or open it from Google Drive), then File > Save as Google Sheets. Excel: just open it (Excel 2010 or newer, Windows or Mac). Numbers on Mac also opens it.

Set up (4 minutes):

1. Settings: your services (up to 15) with the price and the usual minutes for each, your expense categories (up to 15), the year (G2), the % of profit you set aside for tax (G4) and the check date (G6).

2. Appointments: one row per dog per visit: date, dog or owner, service, any extras you add (de-matting, nail grind), tip, whether it is paid, and the minutes it took. The price comes from Settings; Total charged = price + extras.

Rows marked "No" under Paid count as unpaid until you change them to "Yes".

3. Expenses: shampoo, blades and sharpening, laundry, insurance, rent or van costs, software, advertising. One row each, the day you pay it.

What you get:

Dashboard: appointments, service revenue, tips, expenses, profit and tax set-aside by month; every service with count, revenue, average price and revenue per hour; the total still unpaid.

Use the Year cell on Settings to start a new year in a copy of the file.

This is a record-keeping tool, not tax advice. Keep owners' details out of it if you prefer: dog names or first names are enough.

Help:

Something wrong, or a column you need? Message us; we fix it and update the download for every buyer.

Designed by Tuper. Built with AI tools and tested by us; tell us if anything breaks.