Personal Trainer Client, Session and Income 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 clients and sessions 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 (5 minutes):

1. Settings: your clients (up to 15), your session types with the price of each (up to 15), your expense categories, the year (G2), the % of income you set aside for tax (G4) and the check date (G6).

2. Sessions: one row per session: date, client, session type and what happened: Completed, No-show, Late cancel or Cancelled. Type in the amount the client paid you for it.

The price comes from your Settings list. Completed, No-show and Late cancel are charged at the full price; Cancelled (in time) is charged nothing. Balance = charged minus paid, so you see who owes you.

3. Expenses: gym or studio rent, insurance, certifications, equipment, software, marketing. One row each.

What you get:

Dashboard: sessions completed, no-shows and late cancels, charged, received, expenses, profit and tax set-aside by month; each client with sessions, charged, paid, still owed and no-shows; each session type with count and income.

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

Record-keeping tool, not tax advice. It stores no health data: keep client notes and health forms elsewhere.

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.