



From scattered records to one clear view of the business

A lightweight finance dashboard helped an acupuncture practice with two locations see what was happening across revenue, expenses, clients, and referrals.

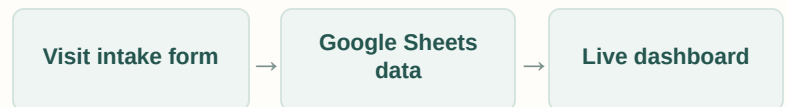
The business was operating without a reliable view

Routine activity was happening every day, but there was no simple way to turn it into useful business information.

- No clear view of revenue versus expenses
- No comparison of earnings across two locations
- No record of how new clients found the practice

A simple intake flow created a live dashboard

A per-visit form feeds a live Google Sheets dashboard with charts, while expenses are recorded in a separate tracker tab.



After each appointment, the practice logs the visit date, client, new or returning status, referral source, location, appointment type, amount charged, and payment method.

One view now answers the questions that matter

Illustrative monthly view · Sample figures, not client records

Total revenue

\$18,420

Total expenses

\$5,980

Net income

\$12,440

Unique clients

61

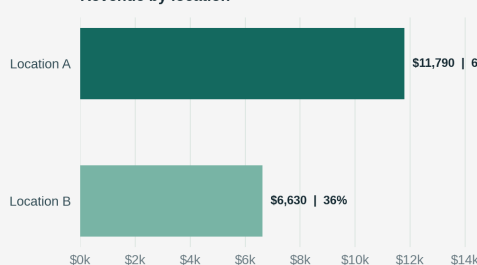
New clients

14

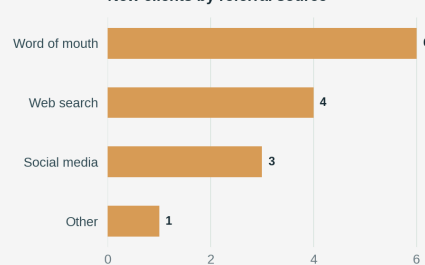
Revenue / visit

\$236

Revenue by location



New clients by referral source



Weekly or monthly filters turn activity into decisions

The practice can scan the numbers at a glance, compare locations, and see which referral channels are bringing in new clients.

- ◆ Total revenue and expenses
- ◆ Unique and new clients
- ◆ Revenue by location
- ◆ Net income
- ◆ Revenue per visit
- ◆ New clients by referral source

Useful analysis without another software rollout

No new software to learn. No recurring subscription. The practice moved from running blind to opening one dashboard and seeing exactly how the business is doing.