NILFORGE DIGITAL SOLUTIONS · USER MANUAL

Client & Appointment Tracker

Bookings, clients and revenue for service businesses, with no monthly subscription.

Version 3.0 · November 2026 · Screenshots show this exact version with sample data.

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1. What it does and who it is for

Salons, cleaners, tutors and other service businesses that want bookings, client history and revenue without a subscription.

Result: In about 10 minutes: services and clients set up, bookings entered, and an upcoming list in date and time order.

- Upcoming bookings in date and time order
- Unpaid visits and no-show rate
- Visits, last visit and lifetime value per client

Capacity (tested): 400 clients, 2,000 appointments, 30 services per file.

2. Requirements and compatibility

Program	Status
Microsoft Excel 2016 or newer (Windows)	Built for it: uses only Excel 2016 functions, no macros. Not yet tested in real Excel by Nilforge.
Excel for Mac	No macros are used. Not yet tested on a Mac.
Google Sheets	Not yet verified: use Excel for now. If you try it, sheet protection does not carry over.
LibreOffice Calc 24+	All calculations are verified against independent models in LibreOffice (automated tests).

3. Clean and demo versions

You receive two files. The **clean** file has no data. Use it for your business. The **_DEMO** file is the same tracker filled with sample data, so you can explore every feature first. Cream cells are for typing. Grey cells calculate automatically and are protected (no password).

4. Set up

1 Open the clean file

Use Nilforge_Client_Appointment_Tracker.xlsx for real data; the _DEMO file shows examples.

2 Services

List what you offer with default price and minutes.

Service	Default price	Minutes
Haircut	$45.00	45
Colour	$120.00	120
Beard trim	$20.00	20
Consultation	$0.00	15

3 Clients

Add each client once.

Client	Phone	Email	Notes	Visits	No-shows	Last visit	Next booking	Lifetime value	Unpaid	Active?	Check
Ava Chen (SAMPLE)			SAMPLE	2	1	10/16/2026		$155.00	$0.00	Yes	OK
Liam Patel (SAMPLE)			SAMPLE	1	0	10/04/2026	11/28/2026	$120.00	$0.00	Yes	OK
Noah Martin (SAMPLE)			SAMPLE	1	1	11/14/2026	11/30/2026	$45.00	$0.00	Yes	OK
Mia Roy (SAMPLE)			SAMPLE	2	0	11/21/2026	12/15/2026	$165.00	$165.00	Yes	OK
Zoe Clark (SAMPLE)			SAMPLE	1	0	11/07/2026	11/28/2026	$0.00	$0.00	Yes	OK

5. Everyday tasks

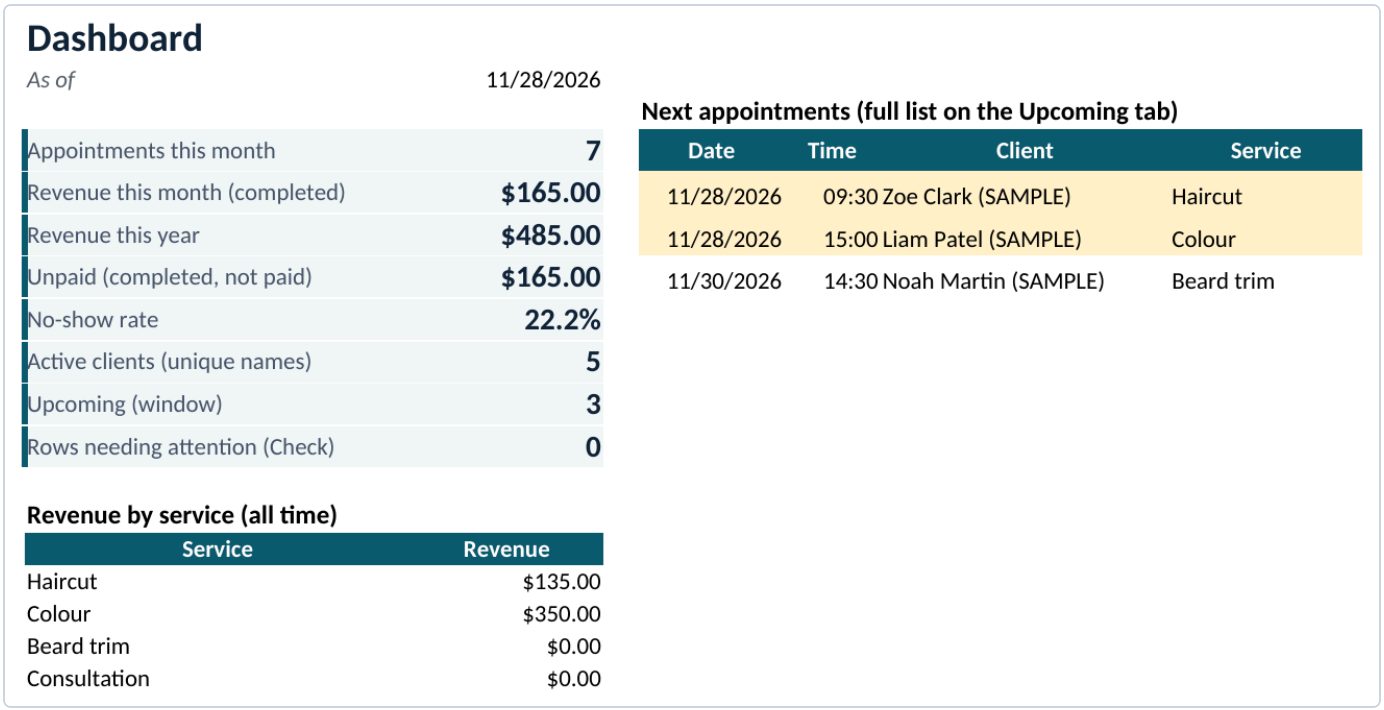
Book and complete appointments

1. Appointments tab: date, time (e.g. 14:30), client, service; leave Price blank for the default.
2. After the visit, set Status to Completed and Paid? to Yes when paid.

Date	Time	Client	Service	Price	Status	Paid?	Notes
10/01/2026	10:00	Ava Chen (SAMPLE)	Haircut		Completed	Yes	SAMPLE
10/04/2026	14:00	Liam Patel (SAMPLE)	Colour		Completed	Yes	SAMPLE
10/09/2026	11:30	Noah Martin (SAMPLE)	Beard trim		No-show		SAMPLE
10/16/2026	09:00	Ava Chen (SAMPLE)	Colour	$110.00	Completed	Yes	SAMPLE
10/23/2026	16:00	Mia Roy (SAMPLE)	Haircut		Completed	No	SAMPLE
10/31/2026	10:00	Liam Patel (SAMPLE)	Haircut		Cancelled		SAMPLE
11/07/2026	13:00	Zoe Clark (SAMPLE)	Consultation		Completed	Yes	SAMPLE
11/14/2026	12:00	Noah Martin (SAMPLE)	Haircut		Completed	Yes	SAMPLE
11/21/2026	15:00	Mia Roy (SAMPLE)	Colour		Completed	No	SAMPLE
11/26/2026	10:30	Ava Chen (SAMPLE)	Haircut		No-show		SAMPLE
11/28/2026	15:00	Liam Patel (SAMPLE)	Colour		Booked		SAMPLE
11/28/2026	09:30	Zoe Clark (SAMPLE)	Haircut		Booked		SAMPLE
11/30/2026	14:30	Noah Martin (SAMPLE)	Beard trim		Booked		SAMPLE
12/15/2026	10:00	Mia Roy (SAMPLE)	Haircut		Booked		SAMPLE

See who is coming

1. Upcoming tab: every booking in the upcoming window in date and time order; the Dashboard shows the next 15.



Dashboard

As of 11/28/2026

Appointments this month	7
Revenue this month (completed)	$165.00
Revenue this year	$485.00
Unpaid (completed, not paid)	$165.00
No-show rate	22.2%
Active clients (unique names)	5
Upcoming (window)	3
Rows needing attention (Check)	0

Revenue by service (all time)

Service	Revenue
Haircut	$135.00
Colour	$350.00
Beard trim	$0.00
Consultation	$0.00

Next appointments (full list on the Upcoming tab)

Date	Time	Client	Service
11/28/2026	09:30	Zoe Clark (SAMPLE)	Haircut
11/28/2026	15:00	Liam Patel (SAMPLE)	Colour
11/30/2026	14:30	Noah Martin (SAMPLE)	Beard trim

6. Status meanings

Status	Meaning
Booked	A future appointment.
Completed	Done; counts as revenue (unpaid until Paid? = Yes).
No-show	Client did not come.
Cancelled	Cancelled; not counted.
Upcoming	Booked within the upcoming window (Settings, default 7 days).

7. Check messages and how to fix them

Every data tab has a **Check** column. It says OK, or names the problem. Dropdowns block most typing mistakes. Pasted values skip dropdown rules, so the Check column is your safety net. Until you fix them, flagged rows can make totals wrong.

Message	What to do
Choose a status	Pick Booked, Completed, No-show or Cancelled.

Client not on Clients list	Add the client on the Clients tab first or pick from the dropdown.
Completed but dated in the future	Check the date, or set the status back to Booked.
Date missing or not a date	Type the date as a date.
Date passed: update status	This booking's date has passed: set Completed, No-show or Cancelled.
Duplicate client name	Two clients share a name; make one unique.
Email looks wrong	Check the email has an @, or clear it.
Paid? should be Yes or No	Pick Yes or No.
Price cannot be negative	Type a positive price.
Price must be a number	Type the price as a number, or clear it to use the default.
Service not on Services list	Add the service on the Services tab or pick from the dropdown.
Time should be a time like 14:30	Type the time as 14:30 (not '2pm').
Add the service name	Type the service name in column A, or clear the row.
Default price must be a number (0 or more)	Type the default price as a number (0 for free).
Duplicate service name	Each service name must be unique; both rows count until fixed.

8. FAQ

Does it send reminders to clients?

No. It is a tracker; nothing is sent.

Limits?

400 clients, 2,000 appointments and 30 services per file (tested).

Is client data private?

It stays in your file. Store only what you need.

Which edition (currency) should I use?

The download includes Canada, US, UK, Australia, EU and Universal editions. They differ only in currency symbol, date display and (Quotes) default tax name and rate; pick the one for where you work.

9. Troubleshooting

Problem	Fix
The Dashboard is blank when the file opens	Click **Enable Editing** (Excel Protected View). The numbers then calculate.
I can't type in a cell	Grey cells are protected calculations. Type only in cream cells. To change a formula: Review > Unprotect sheet (no password).
A dropdown rejects my entry	Add the item to its list first (e.g. the Clients or Categories tab), then pick it.
Dates show as numbers	Home > Number > Short Date.
Printing shows many blank pages	Print areas cover the full capacity, so no data is ever cut off. Filter out blank rows first (Data > Filter, untick Blanks), then print.
Totals look too low	Look at "Rows needing attention" on the Dashboard. Rows with a Check message can make totals wrong. Fix each flagged row (the message changes to OK).
I deleted a whole row and see #REF!	Use Undo (Ctrl+Z). If that's too late, copy the formulas down from the row above, or start again from the clean file. Always clear cells instead of deleting rows.

10. Backup, recovery and updates

- Save a dated copy each month (File > Save As, e.g. tracker_2026-11.xlsx). Keep one copy outside your computer (cloud drive or USB).
- To recover, open the latest copy. If a file is damaged, paste your cream-cell data into a fresh clean file.
- Updates: bug-fix versions are free through your Payhip download link. To move to a new version, copy your cream-cell data (values only: Paste Special > Values) into the new clean file, tab by tab.

11. Licence

For personal use, or use within one business. Do not resell or redistribute the file or its parts. © Nilforge Digital Solutions. This is an organisational tool, not accounting, tax or legal advice.

12. Support

Email **nilforge@gmail.com** with the product name, your program (Excel version) and a screenshot. Replies take up to 2 business days. If the file does not work as described, tell us within 14 days of purchase and we fix it or refund you in full. Custom changes are a paid service.

Manual for version 3.0, generated 2026-11-28 from the verified product specification. Screenshots are real renders of this version.