BIZTHRIVERS / FREE AGENCY RESOURCE

Count real customer outcomes.

Six separate weekly results, with evidence and a named reviewer. This sheet does not connect to your accounts.

Week: _____ Business / location: _____
Timezone: _____ Currency: _____ Checked at: _____
Preparer: _____ Reviewer / backup: _____

Result / date rule	Total	Private evidence / owner
New genuine enquiries First received; count the same request only once.	_____	_____ Owner: _____
New appointments booked Booking created; link reschedules to the original.	_____	_____ Owner: _____
Appointments attended Appointment date; staff confirm actual attendance.	_____	_____ Owner: _____
Jobs fully paid Final balance received; deposits alone do not qualify.	_____	_____ Owner: _____
Net receipts Receipts minus refunds; state deposit, tax and fee rules.	_____	_____ Owner: _____
Advertising spend Platform spend; state account, currency and timezone.	_____	_____ Owner: _____

Unavailable is not zero. Weekly event totals are not a customer conversion rate.
Record deposits, refunds, cancellations and late corrections in the editable template.

One next action / owner / due: _____
Reviewer approval / version: _____

Check the report before sharing.

Use sample records and private evidence references. Mark a pass only after checking the actual result.

01 The dates and accounts match the labels

Each total has the right date basis, account, timezone and currency; differences are disclosed.

Result: Untested / Needs work / Passed Evidence / owner: _____

02 Repeats do not create extra results

One request, one booking and one fully paid job are counted; instalments remain payment transactions.

Result: Untested / Needs work / Passed Evidence / owner: _____

03 A booking is not recorded as attendance

Only the staff-verified visit enters attended appointments; clicks and confirmations stay separate.

Result: Untested / Needs work / Passed Evidence / owner: _____

04 Won, unpaid, deposit and refund stay distinct

Unpaid and deposit-only jobs are not fully paid; receipts and refunds follow the written money rule.

Result: Untested / Needs work / Passed Evidence / owner: _____

05 Missing evidence remains visible

Unknown source remains Unknown; unavailable payment data is not reported as zero or assigned to an ad.

Result: Untested / Needs work / Passed Evidence / owner: _____

06 One reviewer approves the report and action

The total can be reproduced; corrections, owner approval and the next review date are recorded.

Result: Untested / Needs work / Passed Evidence / owner: _____

Report decision and correction owner

Ready / Needs work: _____ Approved by: _____
Fix / owner / review date: _____
Report version / previous version: _____