

Business Financial Operations Dashboard

Project Type:
Business Operations Dashboard

Industry:
Small Business / Professional Services

Status:
Completed

Project Overview

Designed and implemented a centralized business operations dashboard using Airtable to provide real-time visibility into expenses, recurring costs, startup expenditures, tax deductions, receipt management, and software subscriptions.

Business Problem

Small businesses often manage expenses, receipts, subscriptions, and startup costs across multiple systems, creating inefficiencies and limiting financial visibility. This project addressed the need for a single source of truth for operational spending and documentation.

Client Need

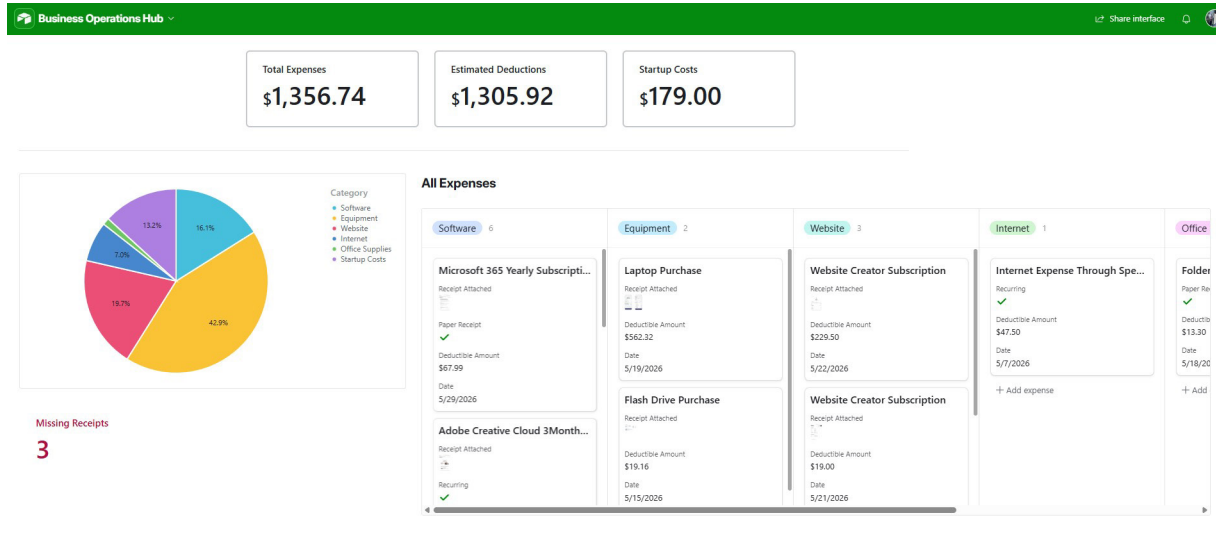
The business required a centralized system to track startup expenses, recurring software costs, receipts, and operational spending while maintaining visibility into tax-deductible expenses.

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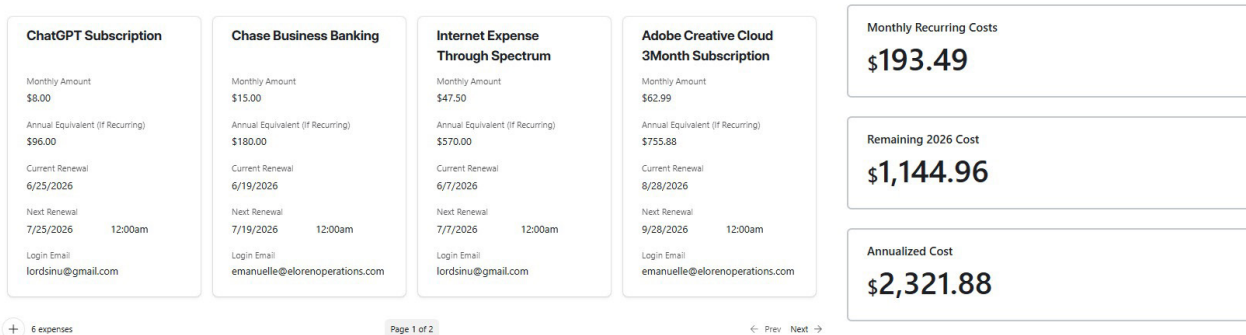
Solution Delivered

Developed a custom Airtable-based operations dashboard that centralizes expense tracking, recurring payment management, deduction estimation, receipt monitoring, and financial reporting through an interactive interface.



Executive Financial Dashboard

Provides real-time visibility into business expenses, tax deductions, startup costs, expense categories, and documentation status.



Subscription & Recurring Cost Management

Tracks recurring software and operational expenses, renewal dates, annualized costs, and projected spending to improve budgeting and operational visibility.

A Vendor	Category	f, Deductible Amount	Business Purpose	Receipt Attached	Paper Receipt	Recurring
TEST	Software	\$50.00	TEST		✓	✓
Spectrum	Internet	\$47.50	Estimated 50% business us...			✓
Corporate Filings LLC	Startup Costs	\$164.00	State LLC filing fee paid to l...			
Namecheap	Website	\$18.17	Domain registration and w...			
Amazon	Equipment	\$19.16	Flash drives purchased for ...			
Office Depot	Office Supplies	\$13.30	Office supplies purchased f...		✓	
Walmart	Equipment	\$562.32	Laptop purchased for busin...			
Chase for Business	Startup Costs	\$15.00	Business bank account esta...			✓
Carrd	Website	\$19.00	Carrd subscription used for...			
McAfee	Software	\$13.99	McAfee security software s...			
SquareSpace	Website	\$229.50	Squarespace subscription u...			
Microsoft 365 Business	Software	\$15.00	Microsoft 365 Business sub...			
ChatGPT	Software	\$8.00	ChatGPT subscription used ...			✓
Adobe Creative Cloud	Software	\$62.99	Adobe Creative Cloud subs...			✓
Microsoft 365	Software	\$67.99	Microsoft 365 subscription ...		✓	
Test 2	Software	\$10.00	Test 2		✓	✓

Operational Data Structure & Financial Tracking

Structured database design supporting expense categorization, deduction calculations, receipt management, and operational reporting.

Key Features

- Expense tracking and categorization
- Estimated tax deduction calculations
- Startup cost monitoring
- Recurring subscription management
- Annualized and remaining-year cost projections
- Receipt tracking and missing receipt alerts
- Interactive KPI dashboard
- Renewal date management for recurring services
- Business software and operational cost visibility

Skills Demonstrated

- Operations Management
- Business Process Design
- Airtable Database Architecture
- Dashboard Development
- Financial Tracking Systems
- Workflow Organization
- Data Visualization
- Subscription and Asset Management

Project Metrics

16 Expenses Tracked

6 Active Recurring Services

\$2,322 Annualized Recurring Cost Visibility

3 Missing Receipt Alerts Identified

100% Deduction Documentation Tracking

Business Outcomes

- Created centralized expense tracking for 100% of business expenditures
- Established recurring expense monitoring across 6 active subscriptions
- Implemented receipt tracking system with missing-document alerts
- Created operational visibility into startup, software, website, and equipment costs
- Built scalable foundation for future CRM, revenue tracking, and reporting

Tools Used

Airtable, Business Process Mapping, KPI Reporting, Financial Tracking Frameworks

Future Enhancements

- Revenue Tracking
 - Client CRM
- Lead Management
 - Invoice Tracking
- Business Reporting
- Automation Workflows
- Renewal Notifications
- Owner Contribution Tracking

Need Better Visibility Into Your Business Operations?

Eloren Operations Group helps small businesses improve organization, streamline workflows, and implement systems that support sustainable growth.

Services Include:

- Operations Management
- Custom Business Systems
- Process Improvement
- Business Administration
- Automation & Technology
- Client & Project Management

Solutions We Help Build

- Business Operations Dashboards
- Expense & Subscription Tracking Systems
- Client CRM Systems
- Client Onboarding Workflows
- Project Management Systems
- Reporting & KPI Dashboards
- Process Documentation & SOPs
- Workflow Automations

Contact

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