

Build Your AI Business Dashboard

Build one screen that shows what is stuck, where spending is creeping up and what to tackle next. Start with a working example, then let Claude adapt it to your business.

01 Visualize → 02 Automate → 03 Optimize

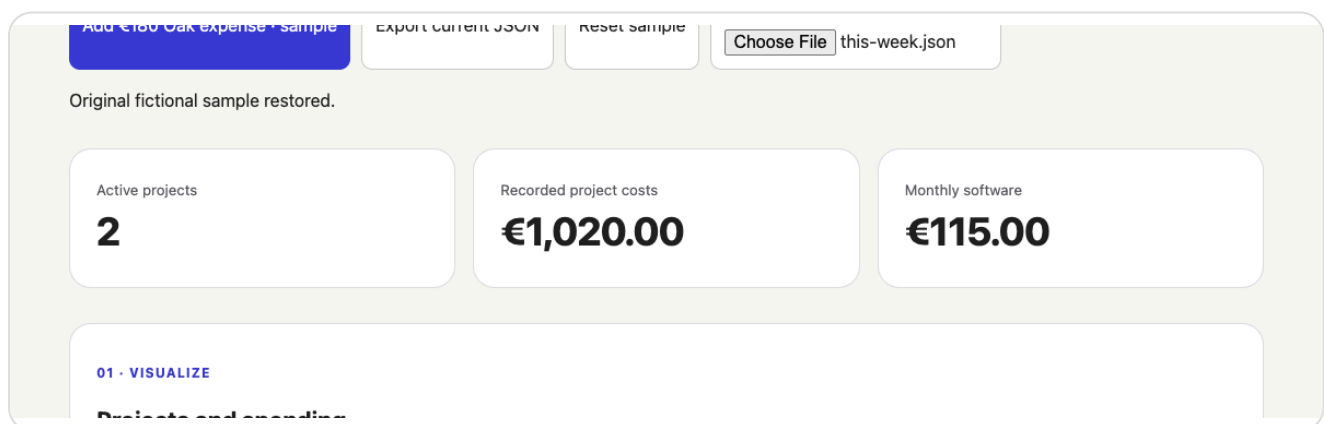
What you will have

A working business dashboard, editable sample records, and the prompts for an assistant that updates files and prepares work.

Start here: [Download the starter folder](#), unzip it, then open **dashboard.html**.

Explore the demo in your browser. To adapt it with AI, use Claude Desktop → Cowork with access to the folder. An account with Cowork access is required; the starter is free.

This is a starter version of a business assistant, not Dani's complete Garry setup.



Open the finished example first

STEP 1 · VISUALIZE

Do this

Download the starter folder, unzip it, and double-click dashboard.html. No AI account is needed to explore the sample. It opens in your browser. The example business is Cedar Studio; the money and projects are fictional.

You should see

Two projects, €115 in monthly software commitments, and €720 spent on Oak against an €800 spending limit. The project fee is not the spending limit.

Why it matters

This is what you are making: a working view of the business, not another report to read.

Make the dashboard react

STEP 2 · VISUALIZE

Do this

In the sample, press 'Add €180 Oak expense'. This adds one fictional revision cost. Then open 'What needs attention' and 'This week's improvement'.

You should see

Oak spending changes from €720 to €900. Its remaining allowance changes from €80 to €100 over. The unused €39 clipping subscription is still highlighted separately.

Why it matters

One new piece of information changes the picture. The demo uses visible calculation rules; Claude is what you use to adapt the system and investigate new questions.

Give Claude a folder to work in

STEP 3 · AUTOMATE

Do this

Install Claude Desktop from claude.com/download. Use Cowork with folder access and choose the unzipped starter folder. You need an account with Cowork access. Keep this sample separate from your real files. Open 01-build-dashboard.md and paste its prompt into Cowork.

You should see

Claude reads business.json and BRAIN.md, opens the existing dashboard code, and creates your first weekly-review.md. It should work with the files, not merely describe a dashboard.

Why it matters

The folder is the assistant's working material: goals, records, the dashboard and the results it saves.

Replace the sample with your business

STEP 4 · AUTOMATE

Do this

Ask Claude to interview you for your business name, one priority, active projects, each project's spending limit, recent costs and monthly tools. Provide an exported expense file if you have one. Start with one currency. Ask it to show the proposed data before replacing the sample.

You should see

business.json contains your information, with stable expense IDs. Refresh dashboard.html after Claude updates the file through the dashboard's Import JSON button. Import the new business.json—not the old sample.

Why it matters

This starter reads files you provide. It is not connected to your bank, and costs are recorded spending—not tax advice or a profit calculation.

Ask it to do the next useful job

STEP 5 · OPTIMIZE

Do this

Use 02-weekly-review.md to ask Claude to inspect the records, identify a recurring cost worth reviewing, propose one project improvement, and create an action file it can work on. Give it a clear allowed task such as drafting a revised delivery plan in this folder.

You should see

A saved weekly-review.md and needs-you.md. The assistant drafts the plan; your list holds the decisions, such as approving a scope change or cancelling a subscription.

Why it matters

The upgrade is from 'tell me something' to 'keep the records, find the problem and prepare the next move'.

Visualize. Automate. Optimize.

01 Visualize → 02 Automate → 03 Optimize

Visualize

Open the dashboard. Understand the work and the numbers.

Automate

Give Claude a folder and a repeatable job. Let it update records and prepare the next action. Add a schedule once the job works.

Optimize

Choose one change. Keep the decision. Check next week whether it helped.

Stuck? If the dashboard looks unchanged, import the updated JSON. If Claude only replies in chat, confirm Cowork has access to the folder and ask it to save the named files. If the review cannot find data, point it to the exact files.

[Claude Cowork setup help](#) · [Scheduling help](#)

Want to build the connected version with your own work? [Join a Switchboards workshop.](#)