# Objective

- What is the key point?

Our client is struggling with his finances and wants a clear visualization of his spending habits for the month of November, in order to take better decisions with his savings.

- What is the ideal solution?

To create a dashboard that provides insights into the client's monthly expenditure that includes his

- Total Income and expenditure
- Amount spend each day
- Where he spends the most money
- What are his biggest expenses

This will help our client make informed decisions regarding his budget.

## User story

*As the Head of Marketing, I want to use a dashboard that analyses YouTube channel data in the UK .*

*This dashboard should allow me to identify the top performing channels based on metrics like subscriber base and average views.*

*With this information, I can make more informed decisions about which Youtubers are right to collaborate with, and therefore maximize how effective each marketing campaign is.*

# Data source

- What data is needed to achieve our objective?

We need data for the expenses of the month of November detailing:

- Total income and Total expenses
- Daily expenses

- Places where the money is spend the most
- Biggest purchases


- Where is the data coming from?
- The data is sourced from the client's N26 account.

# Stages

- Design
- Developement
- Testing
- Analysis

# Design

## Dashboard mockup

- What should it look like?

Some of the data visuals that may be appropriate for answering our questions include:

1. Pie Chart
2. Line Chart
3. Column chart
4. Scorecards

*/PICTURE/*

## Tools

| Tool | Purpose |
| --- | --- |
| Excel | Exploring the data |
| SQL Server | Cleaning, testing, and analyzing the data |

| | |
|---|---|
| Power BI | Visualizing the data via interactive dashboards |
| GitHub | Hosting the project documentation and version control |
| Mokkup AI | Designing the wireframe/mockup of the dashboard |

DATA EXPLORATION ON EXCEL:

We only need 4 or 5 (name them)

We need to change and unify certain rows. (MAIORA SRL FIL.70 PAOL x Interspar // Telefonica xxx x Telefonica GmbH // GOOGLE * Google One x Google One).

we need to delete rows with "ahorro" in either partner name or account name, since its irrelevant, because they both equal to 0.

We need to delete "Gastos Italia" rows in account_name, since we don't care about it. It is our "income"

DATA CLEANING ON SQL:
● Changing column names
● 17 rows of data
● Select necessary columns (4)
● Changing and Unifing row names. (Interspar xxx to Interspar, etc)
● Check duplicates (?
● Delete the "Gastos ITALIA" rows

| Column Name | Data Type | |
|---|---|---|
| Booking_Date | DATE | |
| Partner_Name | TEXT | |
| Account_Name | TEXT | |
| Amount_EUR | DECIMAL | |

- Create VIEW, aliasing the columns & Texting (Row count, column check, data type check, duplicate check)
  /code/

- Delete the "Ahorros" rows

/code/
- Delete "Gastos Italia"

/code/

# Testing

Here are the data quality tests conducted:

- Row count.
- */code/*
- Column count.
- */code/*
- Data type.
- */code/*
- Duplicates.
- */code/*

# Visualization

Exportamos nuestro View a Excel y lo abrimos con PowerBI.
Split columns between Ingresos and Egresos. All positive numbers.

*Foto del Dashboard*

DAX Measures
1. Saved Money
```
 SUM('view_nov_transactions csv'[Ingresos])-SUM('view_nov_transactions
csv'[Gastos])
```

# Analysis

## Findings