

# RevoFinance Data Visualization

FADILA UTAMI | [LINKEDIN](#)





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# Target User

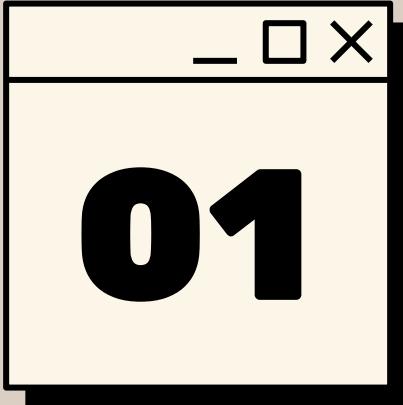
This dashboard is designed for RevoFinance end users, specifically individual users of the personal finance application who actively track and manage their personal spending.

TABLEAU



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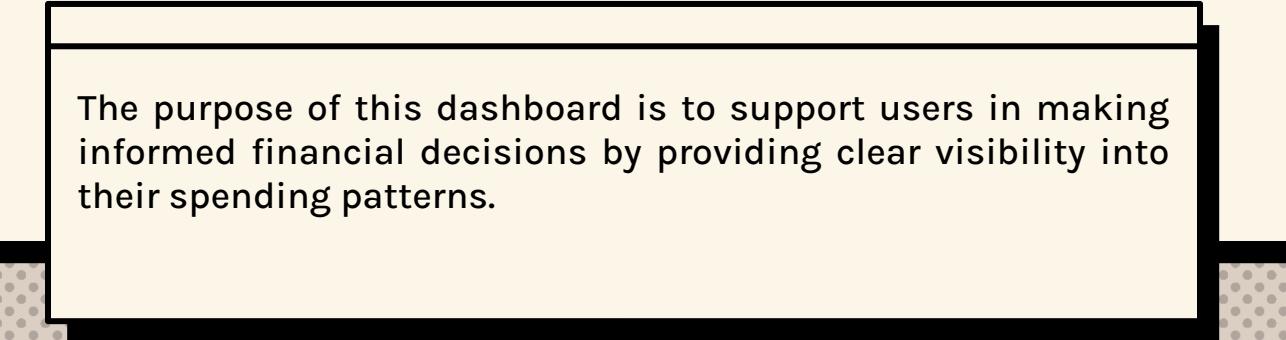




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# Purpose



The purpose of this dashboard is to support users in making informed financial decisions by providing clear visibility into their spending patterns.

# Key Metrics



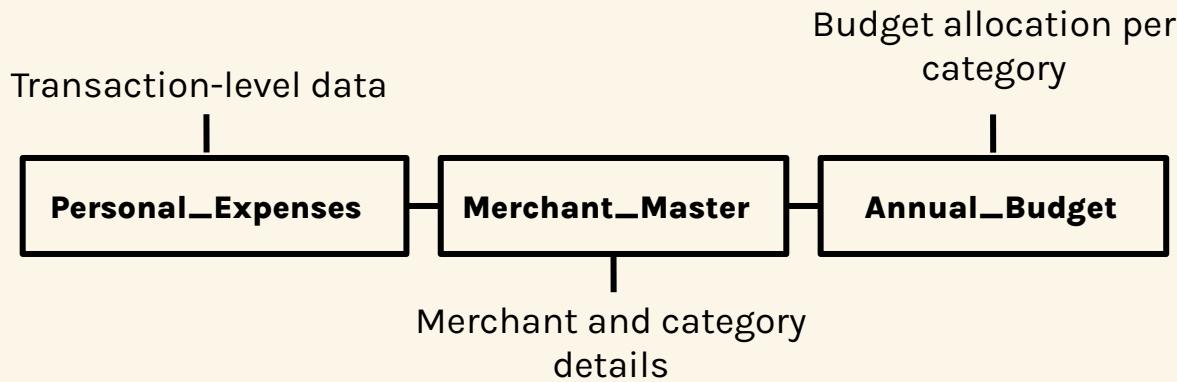
|                                 |                                                                                                      |
|---------------------------------|------------------------------------------------------------------------------------------------------|
| Total Expense                   | The total amount of money spent across all recorded transactions.                                    |
| Total Transactions              | Counts the number of expense records in the dataset.                                                 |
| Average Expense per Transaction | Calculated by dividing total expense by total transactions.                                          |
| Spending by Category            | Aggregates expenses based on expense categories such as Groceries, Dining, Transport, and Utilities. |
| Spending by Merchant            | Displays expenses by individual merchants using merchant-level data.                                 |
| Budget Utilization (%)          | Measures actual spending compared to the allocated annual budget for each category.                  |
| Monthly Spending Trend          | Shows how total expenses change over time based on transaction dates.                                |

Connections

Add

PUBLISH\_Personic\_Merchants  
Microsoft Excel

# Join and Blend



Data preparation ensures all expense transactions can be analyzed by merchant, category, and budget allocation accurately.



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# Relationships

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The data uses relationships to connect Personal\_Expenses, Merchant\_Master, and Annual\_Budget. Expenses are linked to merchants through Merchant ID and to budgets through Category, enabling accurate analysis of spending by merchant and comparison with category-level budgets without data duplication.

# >>> Join Logic and Cardinality .....

The data is connected using a **one-to-many relationship**, where one merchant or category can have many expense transactions. This allows all transaction details to be kept while still showing correct totals and summaries in the analysis.



# Score Card

## Total Transaction

Counts The Number Of Expense

Rp. 1K

1,000 transactions were recorded, indicating the overall frequency of user spending activity.

## Total Expense

Total Amount Spent By User

Rp. 509M

The user spent Rp 509M in total, representing the aggregate value of all recorded expenses.

## Avg Per Transaction

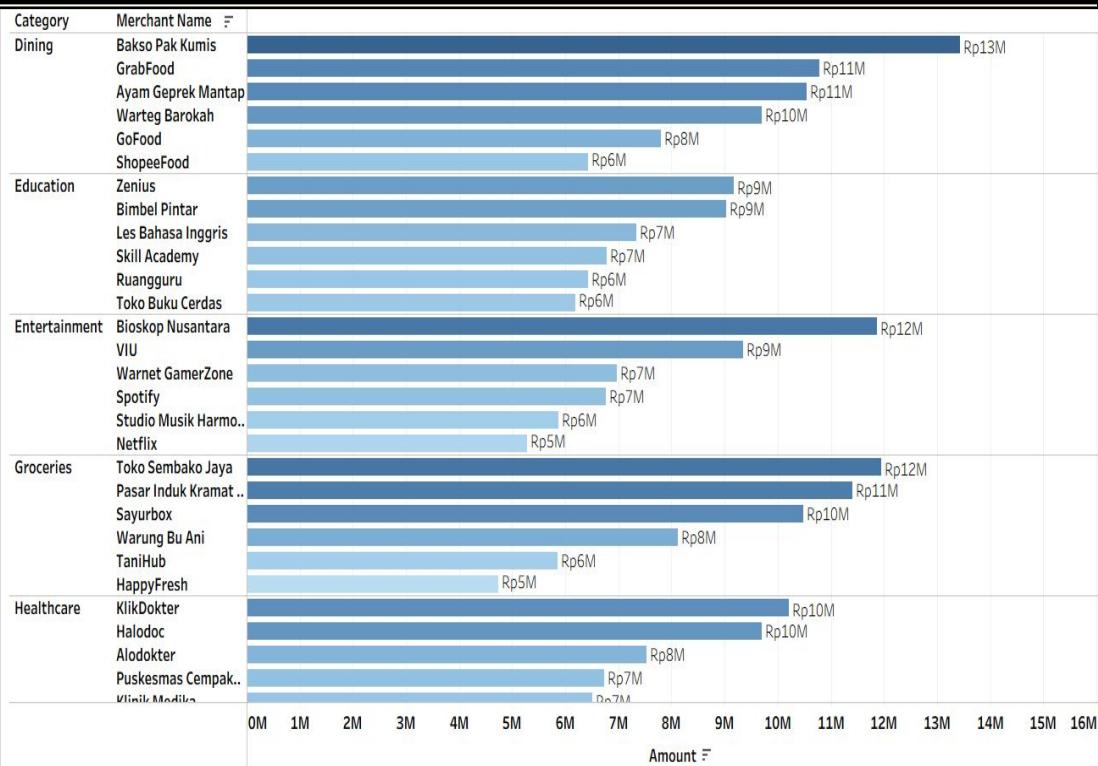
Total Average Per Transactions

Rp. 509K

The average spending per transaction is **Rp 509K**.

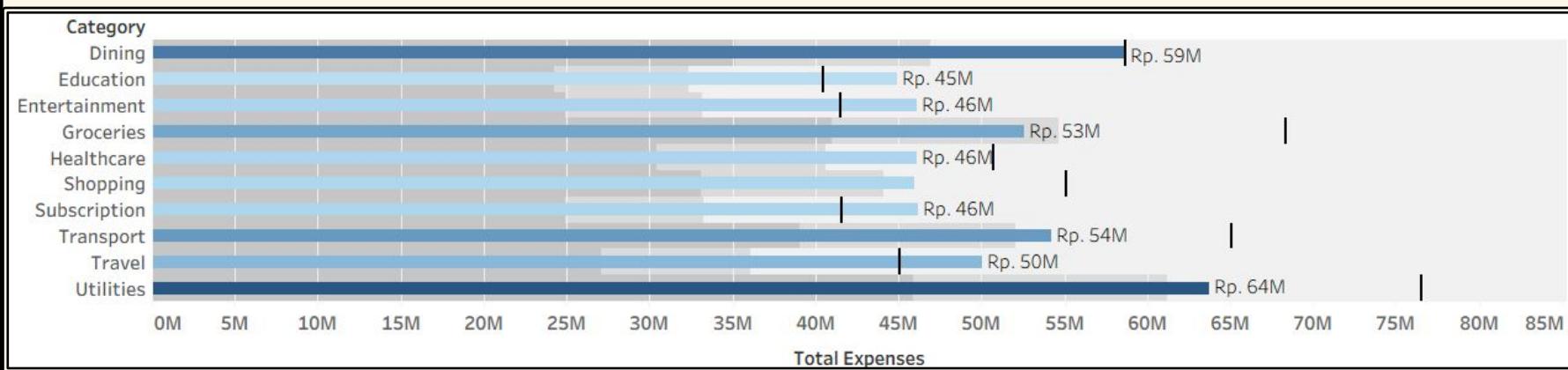
>>> Based on the score card, spending is mainly driven by frequent transactions rather than high-value purchases.

# Hierarchy



Bakso Pak Kumis is the top-spending merchant in the Dining category, indicating strong repeat purchases and high customer preference, which makes it a key target for spending control or loyalty optimization.

# Spend per Category vs Budget



Overall, the analysis shows that current budgets do not align with actual spending, as key categories such as Travel, Subscription, and Education consistently exceed their allocated budgets.

# Monthly Total Spending Trend



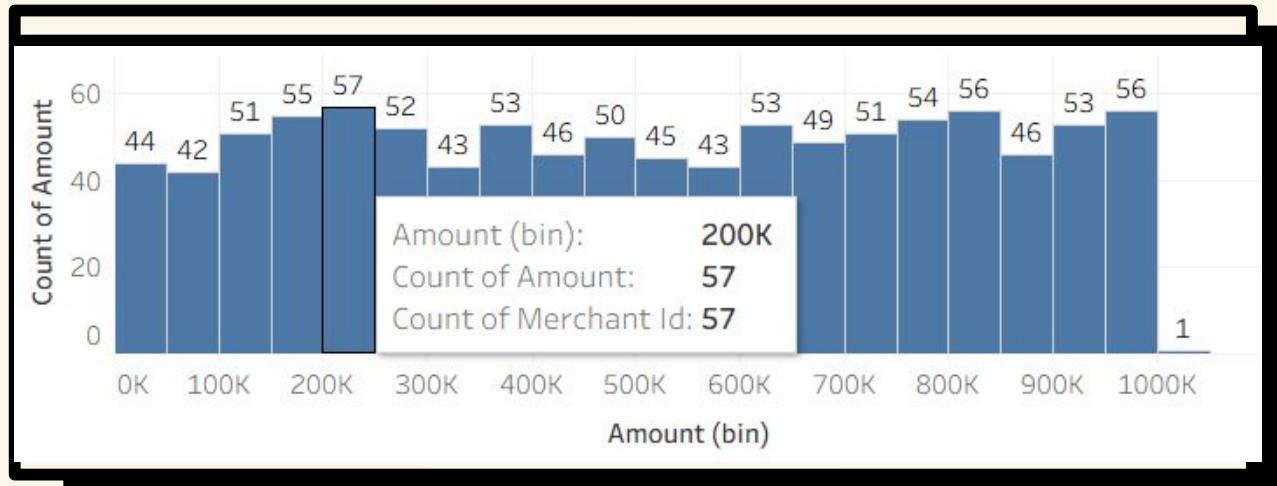
The spike in December shows that the business spends more at year-end, meaning budgets and cash planning must account for seasonal behavior to avoid overspending.

# Calculated

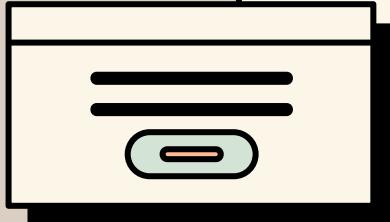
Budget Utilization  
Percentage Of The Budget  
93,7%

A budget utilization of **93.7%** indicates that spending is closely aligned with the allocated budget, but the limited remaining buffer (**6.3%**) increases the risk of over-budget exposure if unexpected expenses occur.

# Calculated



Most transactions are concentrated in the mid-value range (around Rp200K-Rp250K), indicating that overall spending is primarily driven by frequent, routine expenses rather than a small number of high-value transactions.



The visualizations follow best practices by using appropriate chart types for each analysis objective, ensuring the insights are clear, accurate, and easy to interpret.

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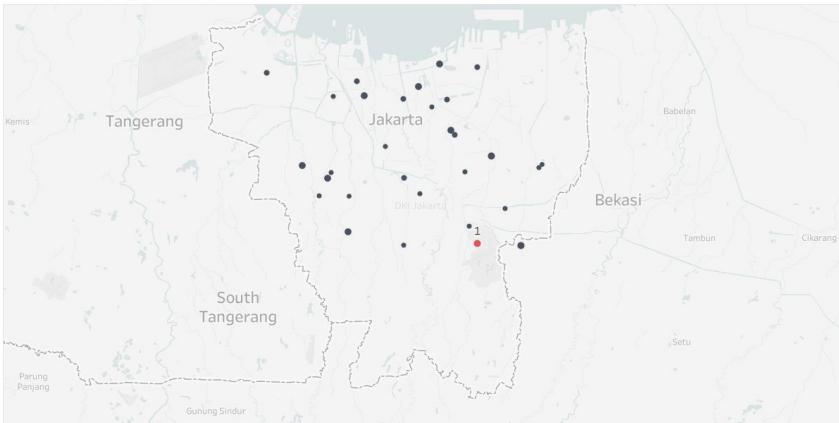
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# Milestone 2

Tableau

# Calculated

Offline Spending Locations



The map reveals that offline spending is concentrated in specific geographic areas, mainly around Jakarta. This insight supports location-based cost analysis and helps optimize operational and regional spending strategies.

# LOD

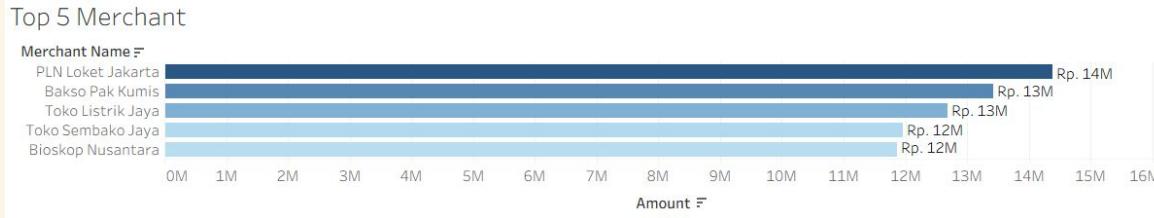
Total Spending Merchant

Total Number Of Transaction

Rp. 509M

Total merchant spending amounts to **Rp 509M**, indicating a high level of transaction activity. This metric serves as a key baseline for assessing merchant performance, analyzing spending trends, and supporting strategic decisions to optimize transaction volume and value.

# Top 5 Merchant



Spending is concentrated among a small number of merchants, with the top merchants accounting for a large portion of total expenses. This indicates vendor dependency and presents an opportunity for cost optimization through supplier negotiations.

# Running Total



The running total shows a steady increase in spending throughout the year, indicating consistent expense behavior. From a business perspective, this suggests predictable cash outflows but also highlights the need for closer monitoring toward year-end when spending accelerates.

# Category Filter

## Category

- (All)
- Dining
- Education
- Entertainment
- Groceries
- Healthcare
- Shopping
- Subscription
- Transport
- Travel
- Utilities

Helps RevoFinance identify which spending categories contribute most to total transactions, supporting targeted budget control and category-focused business strategies.

# Merchant Type Filter

## Type

- (All)
- Offline
- Online

Enables RevoFinance to compare online and offline transaction performance, informing channel strategy, partnerships, and digital adoption initiatives.

# Date Range Filter

Date

01/01/2024      31/12/2024

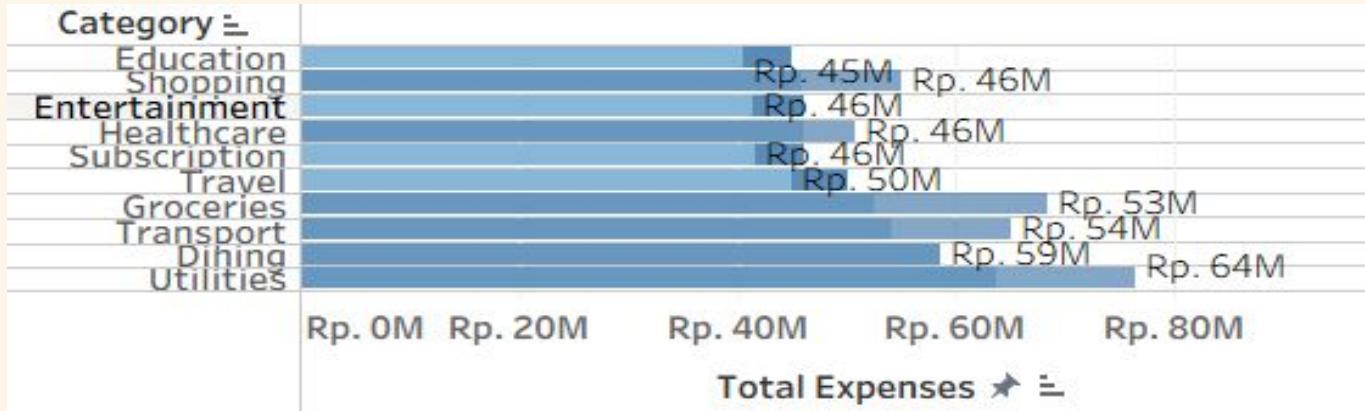


Allows RevoFinance to monitor spending trends over time, supporting performance evaluation, seasonality analysis, and financial planning decisions.

# Hover Tooltips & Titles

Clear titles and hover tooltips provide instant context on category spending and variance, enabling RevoFinance stakeholders to quickly interpret data and make faster, data-driven decisions without additional analysis.

# Color Categories



White-labeled categories indicate **over-budget spending** and highlight areas requiring immediate cost control, while black-labeled categories are **within or below budget**, reflecting efficient expense management. This helps the business quickly identify financial risks and optimize budget allocation.

# BUSINESS RECOMMENDATIONS

| Objective Issue       | Business Impact                                                         | Isolation (Insight)                                                             | Prioritization | Recommendation                                                               |
|-----------------------|-------------------------------------------------------------------------|---------------------------------------------------------------------------------|----------------|------------------------------------------------------------------------------|
| Cost Control          | Uncontrolled spending reduces profit margin and budget efficiency       | Education and Shopping categories consistently exceed allocated budget          | VERY HIGH      | Introduce spending limits, tighter approval processes, and vendor evaluation |
| Budget Optimization   | Suboptimal allocation limits financial flexibility and growth potential | Groceries, Transport, and Utilities remain within or below budget               | MEDIUM         | Reallocate unused budget to high-impact or growth-focused initiatives        |
| Channel Effectiveness | Inefficient channel focus reduces ROI on transactions                   | Online and offline channels show different spending behaviors and contributions | HIGH           | Prioritize promotions and partnerships on channels with higher ROI           |

# RevoFinance Dashboard

## Total Expense

Total Amount Spent By User  
Rp. 509M

## Total Transaction

Counts The Number Of Expense  
Rp. 1K

## Avg Per Transaction

Total Average Per Transactions  
Rp. 509K

## Budget Utilization

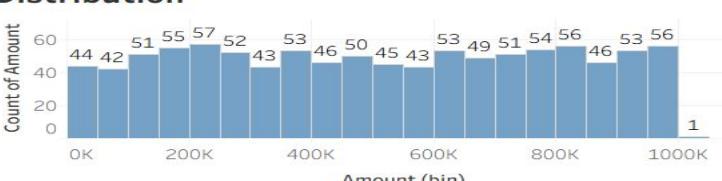
Percentage Of The Annual Budget  
93,7%



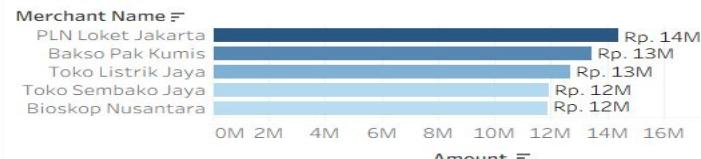
## Offline Spending Locations



## Distribution



## Top 5 Merchant



## Running Total



## Total Spending Merchant

Total Number Of Transaction  
Rp. 509M

