**Project Summary: Dynamic Budget vs. Actuals Dashboard in Excel with Power Query**

In this project, I built a **dynamic Budget vs. Actuals Dashboard** in Excel leveraging the power of **Power Query** for data transformation and automation. The goal was to create a tool that provides clear insights into financial performance by comparing budgeted figures against actual results, while also highlighting variances for better decision-making.

**How I Built the Dashboard**

* **Data Preparation:** I started with two datasets — one containing budgeted figures and another with actuals. To ensure flexibility, I defined named ranges for both sets and used Power Query to transform the data into a clean, analysis-friendly format.
* **Unpivoting & Transformation:** Using Power Query, I unpivoted the data to restructure it from a wide format (dates across columns) into a long format (dates in a single column). This made the data easier to analyze and eliminated issues with rigid table structures.
* **Combining Data:** I added a column to distinguish between “Budget” and “Actuals” and then appended both datasets into one consolidated table. This setup allows the dashboard to automatically refresh whenever new actuals are added.
* **Dynamic Reporting:** With the cleaned and combined dataset, I created a dashboard using formulas such as **SUMIFS, FILTER, LET,** and **IFERROR** alongside **XLOOKUP** and simple calculations (e.g., gross profit, net income, variance analysis). The dashboard is linked to dynamic date ranges, making it easy to adjust reporting periods.

**Key Benefits of the Dashboard**

* **Automated Updates:** As new months of actuals are added, the dashboard refreshes automatically with one click, eliminating manual data manipulation.
* **Variance Analysis:** The model provides both **dollar** and **percentage variances**, helping quickly identify where performance exceeded or missed expectations.
* **Decision Support:** With a clear breakdown of revenue, costs, and net income, this tool helps management teams track financial health and make informed decisions.
* **Scalable & Reusable:** The approach is flexible and can be adapted to different businesses, datasets, or time periods without rebuilding from scratch.
* **Professional Presentation:** Donut charts, variance indicators, and clean formatting transform raw numbers into executive-ready insights.

“By automating data preparation and integrating dynamic variance analysis with clear visual reporting, this dashboard not only improves accuracy but also saves significant reporting time — making it a practical tool for finance teams, CFOs, and executives.”