FINANCE DASHBOARD OVERVIEW

An intuitive visual representation of financial data over time.

Purpose of the Dashboard

The Finance Dashboard is designed to provide a clear and immediate picture of financial health over time, helping track incomes, expenses, and savings.
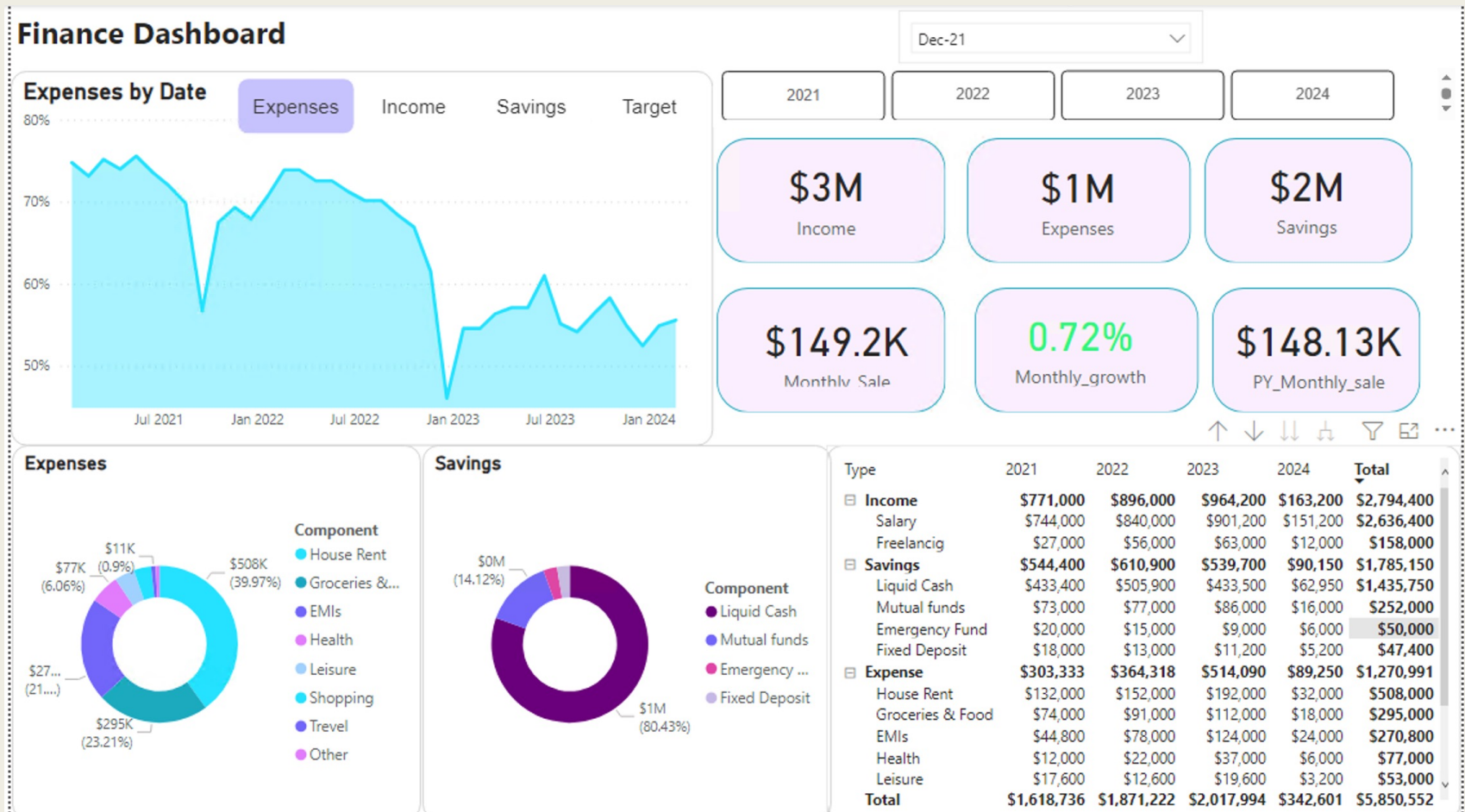
Understanding the Visualizations

■ Expenses by Date: A line chart for trends in expenses.

■ Key Metrics: Cards displaying crucial financial figures.

■ Donut Charts: Proportions of expenses and savings.

■ Detailed Table: Numerical breakdown for detailed analysis.

Why These Visualizations?

■ Line Chart: Best for showing changes over time.

■ Cards: Instantly draw attention to the most important figures.

■ Donut Charts: Display parts of a whole, ideal for understanding composition.

■ Table: Provides a comprehensive view for those wanting detail.

Created Measures and Rationale

Monthly Sale:

- ▪ - Shows the total income for each month.

- ▪ - Calculated as the sum of all monthly income figures.

- ▪ - Important for tracking revenue and income trends.

Monthly Growth:

- ▪ - Shows the percentage change in monthly income.

- ▪ - Calculated as the month-to-month percentage change.

- ▪ - Indicates the growth trajectory, revealing trends.

$3M	$1M	$2M
Income	Expenses	Savings
$149.2K	0.72%	$148.13K
Monthly_Sale	Monthly_growth	PY_Monthly_sale

Line_Chart_Measures

- This is a special measure designed to change what data shows up in a line chart based on the user's selection. Think of it as a control knob that you can turn to display different types of information on the same chart. Here's a breakdown:

- When you choose option 1, it shows the "Expense Percentage" — this tells you what part of your income you're spending.

- If you turn it to option 2, you'll see the "Income Change Month-over-Month Percentage" — this highlights how much your income has gone up or down compared to the previous month.

- Selecting option 3 will display the "Savings Percentage" — which shows how much of your income you're managing to save.

- And finally, option 4 presents the "Target" — which could be a goal you've set for savings or expenses.

In simpler terms, this measure is like a TV remote that lets you switch between different financial channels on your chart, giving you control over what information you want to see.
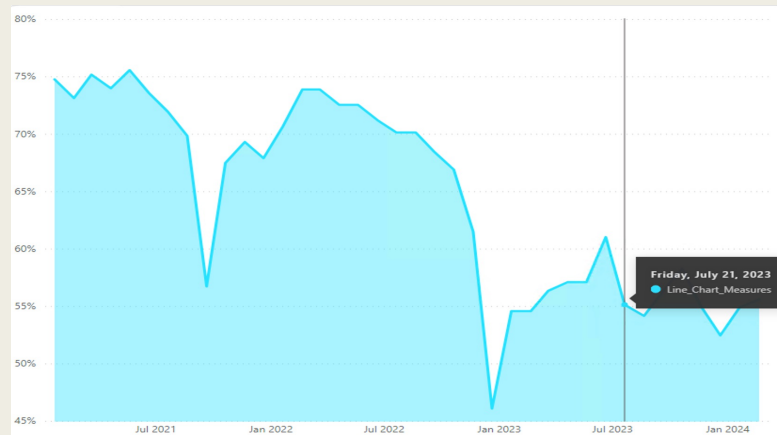
Previous Monthly Sale

This measure looks back in time to find out how much you sold in the same month of the previous year. It's a way to compare this month's performance with how you did last year at the same time. Here's what it does step-by-step:

First, it finds the previous month's date.

Then, it calculates the total value (like sales or income) for that previous month.

- It's like looking at an old photograph to remember what happened at the same time last year, but instead of a photograph, it's the sales numbers you're looking back at.

- These measures help you understand your financial story by showing you different parts of it depending on what you're interested in, and by comparing your current numbers with the past.

Conditional Formatting & Enhanced Control with Individual Tables

Dynamic titles

- What They Do: The titles on the dashboard change automatically to reflect the data being shown. For example, when you choose 'Expenses' from the button, the title updates to 'Expenses by Date'.

- Benefit: This feature makes the dashboard more intuitive, ensuring that users always know exactly what they're looking at.

Conditional Formatting for Growth:

- Green for Positive Growth: When the growth is positive, indicating an increase, it shows up in green.

- Red for Negative Growth: If the growth is negative, showing a decrease, it appears in red.

- Benefit: This visual cue instantly communicates performance without the need to process numbers, making it easier to identify areas of success or concern at a glance.

Separate Control Tables:

- What They Do: Two separate tables have been created to individually control different visualizations on the dashboard.

- How It Works: Each table interacts with specific parts of the dashboard, allowing for more refined and targeted data analysis.

- Benefit: Users can manipulate and explore data with greater precision, leading to more focused insights.

Insights

- ■ Data Span: The dataset encompasses a period from 2021 to 2024.

- ■ Expense Trends: Expenses show a general upward trend with two notable declines – a slight drop around November 2021 and a significant decrease in January 2023.

- ■ Income Growth: There is a clear increasing trend in income from the year 2021 through to 2024.

- ■ Savings Fluctuation: Savings display fluctuations, with a peak observed in November 2021, coinciding with the period of reduced expenses.

- ■ Composition of Savings: Liquid cash forms the largest share of savings, accounting for approximately 80.43%.

- ■ Expense Breakdown: House rent is the predominant category within expenses, making up about 40% of the total.

Thank you

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