# Finance Dashboard Project

# Introduction

# This Finance Dashboard, developed in Power BI, enables users to manage and visualize their financial activities comprehensively. It provides insights into expenses, savings, and investment trends, empowering users with the knowledge to make informed financial decisions.

# Project Objective

# The primary goal of this dashboard is to facilitate detailed tracking and analysis of personal finances, including expenses by category, overall savings, and the health of emergency funds, presented through interactive and engaging visualizations.

# Features

# Expenses by Date : A line graph showcasing the percentage of income spent over time, allowing users to track spending trends and budget adherence.

**Income Insights**: Displays total income with monthly growth percentages, enabling users to evaluate their earning trends.

# Savings Analysis: Visualizes savings as a percentage of income and shows monthly savings growth, highlighting financial health over time.

**Expense Breakdown:** A donut chart that categorizes spending into areas such as house rent, groceries, EMIs, and more, offering a detailed view of where money is going.

# Savings Breakdown: Similar to expenses, this donut chart categorizes savings into components like liquid cash, mutual funds, and fixed deposits, providing a clear picture of asset allocation.

# Detailed Financial Table: Provides a tabular breakdown of yearly financial data, including types of income and expenses, which helps in detailed fiscal planning.

# Technologies Used

# Power BI: Utilized for creating dynamic, interactive visualizations and for data management capabilities.

# Microsoft Excel: Used to preprocess and organize financial data before it is loaded into Power BI.

# Building the Project From Scratch

# Conceptualization

# Identifying Needs: Determined the necessity for a comprehensive finance tracking tool during brainstorming sessions with potential users.

# Feature Design: Detailed features were designed to ensure all aspects of personal finance are covered effectively.

# Development

# Data Preparation: Compiled and structured the financial data in Excel.

# Dashboard Creation: Developed interactive visualizations in Power BI that respond to user inputs for a dynamic experience.

# Feature Implementation: Programmed the dashboard to reflect real-time financial data changes and trends.

# Testing

# User Experience Testing: Ensured the interface is intuitive and user-friendly.

# Data Accuracy Testing: Verified that all financial data displayed is accurate and updates correctly.

# Installation and Setup

# Prerequisites

# Power BI Desktop

# Microsoft Excel

# Running the Project

**Clone the Repository**:

git clone <repository-url>

**Open the Power BI File**:

Navigate to the directory and open Finance Dashboard by The Developer.bix.pbix with Power BI Desktop.

**Load and Refresh Data**:

Ensure the data source (Finance Dataset.xlsx) is updated to see the most current data on the dashboard.

**Usage :**

Navigate through various sections of the dashboard using interactive controls to view detailed analytics on your financial health. Use filters to select different time frames or specific financial categories.

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