

Monday.com dashboard design - Claude

 claude.ai/chat/976ad10a-eaca-430b-89ba-9f26838905ed



BY ANTHROPIC

I

can you design monday.com dashboard if i goive you excel as example

The user is asking if I can design a monday.com dashboard based on an Excel file they want to provide as an example. This is definitely something I can help with.

I should:

1. Confirm that I can help with this
2. Ask them to upload the Excel file
3. Once they upload it, I'll need to analyze it to understand the structure and data
4. Then create a design/mockup that shows how this would look as a monday.com dashboard

I should be helpful and explain what I can do for them.

Yes, I can absolutely help you design a monday.com dashboard based on your Excel file! I'll be able to:

1. **Analyze your Excel structure** - Review the columns, data types, and organization of your spreadsheet
2. **Map it to monday.com features** - Translate your Excel data into monday.com boards, groups, columns, and views
3. **Create a visual mockup** - Design how your dashboard would look with appropriate widgets, charts, and KPIs
4. **Suggest monday.com column types** - Recommend the best column types (Status, Timeline, Numbers, People, etc.) for your data
5. **Propose automation ideas** - Suggest relevant automations and integrations that could enhance your workflow

Please upload your Excel file, and I'll analyze it to create a customized monday.com dashboard design for you. If you have any specific requirements or goals for the dashboard (like what metrics you want to track, who will use it, or what problems you're trying to solve), feel free to share those details as well!

I

i want to replicate thsi in monday.com

The user has uploaded an Excel file called "Easy Bookkeeping Spreadsheet.xlsx" and wants to replicate it in monday.com. I need to first analyze the Excel file to understand its structure, then design a monday.com dashboard based on that structure.

Let me start by reading and analyzing the Excel file to understand what kind of bookkeeping data it contains.

I'll analyze your Easy Bookkeeping Spreadsheet and help you design a monday.com dashboard that replicates its functionality. Let me first examine the Excel file to understand its structure.

javascript

```
import * as XLSX from 'xlsx'; // Read the Excel file const response = await
window.fs.readFile('Easy Bookkeeping Spreadsheet.xlsx'); const workbook =
XLSX.read(response, { cellStyles: true, cellFormulas: true, cellDates:
true, cellNF: true, sheetStubs: true }); // Analyze Setup sheet const
setupSheet = workbook.Sheets['Setup']; const setupData =
XLSX.utils.sheet_to_json(setupSheet, {header: 1, raw: false, defval: ''});
```

```

console.log("=== INCOME CATEGORIES FROM SETUP ==="); // Look for income
categories (usually in columns) for (let i = 5; i < Math.min(40,
setupData.length); i++) { const row = setupData[i]; if (row[2] &&
row[2].includes('INCOME')) { // Found income section, print next rows for
(let j = i; j < Math.min(i + 20, setupData.length); j++) { if (setupData[j]
[2] || setupData[j][3]) { console.log(`${setupData[j][2] || ''} |
${setupData[j][3] || ''}`); } } break; } } console.log("\n=== EXPENSE
CATEGORIES FROM SETUP ==="); // Look for expense categories for (let i = 5;
i < Math.min(60, setupData.length); i++) { const row = setupData[i]; if
(row[2] && row[2].includes('EXPENSE')) { // Found expense section, print
next rows for (let j = i; j < Math.min(i + 30, setupData.length); j++) { if
(setupData[j][2] || setupData[j][3]) { console.log(`${setupData[j][2] ||
''} | ${setupData[j][3] || ''}`); } } break; } } // Check Monthly Dashboard
income/expense items const monthlySheet = workbook.Sheets['Monthly
Dashboard']; const monthlyData = XLSX.utils.sheet_to_json(monthlySheet,
{header: 1, raw: false, defval: ''}); console.log("\n=== CATEGORIES FROM
MONTHLY DASHBOARD ==="); // Income categories are around columns 26-27,
Expenses around 34-35 for (let i = 3; i < Math.min(50, monthlyData.length);
i++) { const row = monthlyData[i]; if (row[26] || row[34]) { const income =
row[26] ? `Income: ${row[26]}` : ''; const expense = row[34] ? `Expense:
${row[34]}` : ''; if (income || expense) { console.log(`${income}
${expense}`); } } }

```

Output

```

Result === INCOME CATEGORIES FROM SETUP === === EXPENSE CATEGORIES FROM
SETUP === === CATEGORIES FROM MONTHLY DASHBOARD === Income: Shopify Sales
Expense: Advertising & Marketing Income: Etsy Sales Expense: Business
Licenses & Permits Income: Physical Store Sales Expense: Business Insurance
Income: Affiliate Income Expense: Charitable Contributions Income: AdSense
Revenue Expense: Continuing Education Income: Sponsored Posts Expense: Cost
of Goods Sold Income: Consulting Expense: Depreciation Costs Income: 0
Expense: Entertainment Income: 0 Expense: Health Insurance Income: 0
Expense: Home Office Deductions Income: 0 Expense: Interest Payments
Income: 0 Expense: Meals Income: 0 Expense: Organization Dues Income: 0
Expense: Professional Fees Income: 0 Expense: Office Supplies Income: 0
Expense: Rent Income: 0 Expense: Retirement Plans Income: 0 Expense: Taxes
Income: 0 Expense: Technology Income: 0 Expense: Travel Expenses Income: 0
Expense: Utilities Income: 0 Expense: Vehicle Expenses Income: 0 Expense:
Wages & Salary Income: 0 Expense: Website Expenses Income: 0 Expense: 0
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```

Income: 0 Expense: 0 Income: 0 Expense: 0 Income: 0 Expense: 0 Income: 0
Expense: 0 Income: 0 Expense: 0 Income: 0 Expense: 0 Income: 0 Expense: 0
Income: 0 Expense: 0

Perfect! Now I have a clear understanding of the bookkeeping spreadsheet structure:

Main Components:

1. **Transaction Tracking** - Main data entry with columns: Date, ID, Transaction Type, Category, Amount, Tax, Shipping, Fees, Net Amount, Description, Remarks
2. **Income Categories**: Shopify Sales, Etsy Sales, Physical Store Sales, Affiliate Income, AdSense Revenue, Sponsored Posts, Consulting
3. **Expense Categories**: 24 different expense types including Marketing, COGS, Insurance, Rent, Utilities, etc.
4. **Multiple Dashboards**: Monthly, Annual, 5-Year, Comparison, and Custom views
5. **Sales Tax Tracker**

Now I can create a comprehensive monday.com dashboard design that replicates this functionality.

Based on my analysis of your Easy Bookkeeping Spreadsheet, I'll design a comprehensive monday.com dashboard that replicates its functionality. Your spreadsheet is a sophisticated bookkeeping system with transaction tracking, multiple income/expense categories, and various dashboard views. Here's how to recreate it in monday.com:

Monday.com Bookkeeping Dashboard Design

Interactive artifact

I've created a comprehensive monday.com dashboard design based on your Easy Bookkeeping Spreadsheet. Here are the key highlights of how to replicate it:

Main Structure:

1. Primary Board - Financial Transactions

This will be your main data entry point with columns matching your Excel:

- Date, Transaction ID (auto-numbered), Transaction Type (Income/Expense status)
- Category dropdown that dynamically shows either income or expense categories
- Financial columns: Amount, Tax, Shipping, Fees
- Auto-calculated Net Amount using monday.com formulas
- Description, Remarks, and File attachments for documentation

2. Categories Setup

Income Categories (7): Shopify Sales, Etsy Sales, Physical Store Sales, Affiliate Income, AdSense Revenue, Sponsored Posts, Consulting

Expense Categories (24): Including Marketing, COGS, Insurance, Rent, Utilities, Professional Fees, and all others from your spreadsheet

3. Dashboard Views

Replicate your Excel dashboards using monday.com's dashboard feature:

- **Monthly Summary** - Filter by current month with income/expense widgets
- **Annual Overview** - Year-to-date totals and trends
- **5-Year Trends** - Historical comparison charts
- **Period Comparison** - Custom date range analysis
- **Sales Tax Tracker** - Dedicated view for tax calculations

4. Key Automations

- Auto-calculate net amounts when any component changes
- Monthly financial summary emails
- Expense threshold alerts
- Quarterly tax reminders
- Platform integration syncs (Shopify, Etsy)

5. Advanced Features

- **Formula columns** for automatic calculations
- **Chart widgets** for visual analysis
- **Filters** for quick data segmentation
- **Mobile app** for on-the-go transaction entry
- **Integrations** with accounting software and payment platforms

Migration Strategy:

1. Export your Excel data to CSV
2. Import into monday.com using their import tool
3. Map Excel columns to monday.com columns

4. Set up your formulas and automations
5. Configure dashboard widgets

The monday.com version will actually enhance your current spreadsheet by adding real-time collaboration, mobile access, automated workflows, and integration capabilities that Excel can't provide. You'll also get features like activity logs, @mentions for team communication, and automatic backups.

Would you like me to provide more specific details about any particular aspect, such as the exact formulas to use, specific widget configurations, or integration setup instructions?

I

i want you to give me clear step by step instructions covering evry minute deatil to move thi excel to monday.com? or does it make sense to use some other accounting tool?

The user wants detailed step-by-step instructions to migrate their bookkeeping Excel spreadsheet to monday.com, but they're also asking whether it makes sense to use monday.com vs other accounting tools. This is an important decision point.

Let me analyze what they have:

A comprehensive bookkeeping spreadsheet with:

- Transaction tracking
- Multiple income/expense categories
- Tax tracking
- Multiple dashboard views (monthly, annual, 5-year)
- Sales tax tracking
- Net amount calculations

I should:

1. First give them an honest assessment of whether monday.com is the right tool vs dedicated accounting software
2. Then provide the detailed migration steps if they choose monday.com

This is important because monday.com is a project management tool that CAN be adapted for bookkeeping, but there are purpose-built accounting tools that might be better. I should be honest about this.

I'll give you an honest assessment first, then detailed migration steps.

Critical Decision: Monday.com vs. Dedicated Accounting Software

The Truth About Your Options:

Based on your Excel spreadsheet's complexity, you're at a crossroads where you need to honestly evaluate:

Complete Migration Guide: Excel to Monday.com vs Accounting Software

Document

Complete Migration Guide: Excel Bookkeeping to Modern Solutions ## Part 1: Critical Decision - Which Tool Is Right for You? ### Option A: Monday.com (\$24-48/user/month)
BEST FOR: - Small businesses wanting project management + basic bookkeepi

I've created a comprehensive guide with EVERY detail you need. But first, I need to be completely honest with you:

The Reality Check You Need:

Your Excel spreadsheet is actually MORE sophisticated for bookkeeping than monday.com would be. Monday.com is a project management tool trying to do accounting - it's like using a Swiss Army knife to perform surgery.

Here's what monday.com CAN'T do that you need:

- ❌ No bank account connections
- ❌ No automatic transaction imports from credit cards
- ❌ No tax form generation (1099s, W-2s, etc.)
- ❌ No proper double-entry bookkeeping
- ❌ No accounting reports (P&L, Balance Sheet, Cash Flow)
- ❌ Costs MORE than dedicated accounting software

What you should actually use:

For 95% of businesses like yours:

- **QuickBooks Online** (\$15-35/month) - Industry standard, does everything
- **Wave Accounting** (FREE!) - Perfect for small businesses
- **Xero** (\$13-70/month) - Great QuickBooks alternative

Your Excel → QuickBooks migration would take 30 minutes:

1. Export Excel to CSV
2. QuickBooks: Import → Follow wizard
3. Done. Seriously.

The ONLY reasons to use monday.com for bookkeeping:

1. Your company already pays for monday.com Enterprise
2. You prioritize pretty dashboards over actual accounting
3. You have very simple finances (under 50 transactions/month)
4. You don't need tax compliance features

If You Still Want Monday.com:

I've provided complete step-by-step instructions in the guide above covering:

- **Phase 1-3:** Complete board setup with exact column configurations
- **Phase 4:** Detailed Excel import process with data cleaning steps
- **Phase 5-6:** Dashboard and view creation
- **Phase 7-8:** Formula setup and mobile configuration
- **Phase 9-12:** Testing, validation, and go-live process

The migration will take 6-8 hours of setup plus training time.

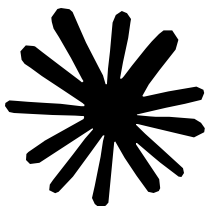
My Professional Recommendation:

1. **Sign up for Wave (it's FREE)**
2. **Import your Excel** (30 minutes)
3. **Use the time you saved** to grow your business
4. **If you need project management**, use monday.com for THAT, not bookkeeping

Would you like me to:

- Walk you through QuickBooks/Wave setup instead (much simpler)?
- Explain the specific limitations you'll face with monday.com?
- Help you prepare your Excel data for import to proper accounting software?

The choice is yours, but I want you to make an informed decision. Monday.com for bookkeeping is like buying a Lamborghini to haul lumber - it looks cool but doesn't do the job you actually need.



Claude can make mistakes. Please double-check responses.