

## **EXPERIMENT - 15**

**15) Create a complete personal financial planner workbook.**

- a) **Create and rename sheets as:**
  - a. *Expenses*
  - b. *Budget*
  - c. *Charts*
- b) **Enter at least 20 rows of expense data:**

**Date, Category, Expense Detail, Amount, Payment Method.**

- c) **Use Data Validation dropdown to create a category list (Food, Travel, Fees, Shopping, Other).**
- d) **Use Remove Duplicates on the Category column if repeated incorrectly.**
- e) **Use SUMIF to calculate total spending for each category.**
- f) **In the *Budget* sheet, create the monthly budget and compare with actual expenses using:**

**Difference = Budget – Actual (formula required)**

- g) **Highlight expenses above ₹2000 using Conditional Formatting.**
- h) **Create:**
  - i. **A Pie Chart showing category-wise spending ii. A Bar Chart comparing *Budget vs Actual***
    - iii. **Use Flash Fill to separate date into Day / Month / Year if needed.  
Also explain its detail**

**Save worksheet in Page Layout view and adjust print area.**

Personal\_Finance\_Planner\_Fixed [Protected View] - E...

File Home Insert Page Layout Formulas Data Review View Help

PROTECTED VIEW Be careful - files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

A1 Date

Date	Description	Category	Amount	Day	Month	Year
2025-01-0	Groceries Food	Food	1800	1	1	2025
2025-01-0	Bus Ticket Travel	Travel	120	2	1	2025
2025-01-0	College & Fees	Fees	2500	3	1	2025
2025-01-0	Restaurant Food	Food	900	4	1	2025
2025-01-0	Mobile Re Other	Other	299	5	1	2025
2025-01-0	Shoes Shopping	Shopping	5200	6	1	2025
2025-01-0	Metro Pass Travel	Travel	1400	7	1	2025
2025-01-0	Snacks Food	Food	250	8	1	2025
2025-01-0	Books Fees	Fees	1800	9	1	2025
2025-01-0	T-shirt Shopping	Shopping	1500	10	1	2025
2025-01-1	Train Tick Travel	Travel	2100	11	1	2025
2025-01-1	Fast Food Food	Food	650	12	1	2025
2025-01-1	Exam Fee Fees	Fees	3000	13	1	2025
2025-01-1	Gift Shopping	Shopping	2200	14	1	2025
2025-01-1	Taxi Travel	Travel	2400	15	1	2025
2025-01-1	Grocery Food	Food	1950	16	1	2025
2025-01-1	Online Co Fees	Fees	1700	17	1	2025
2025-01-1	Watch Shopping	Shopping	4100	18	1	2025
2025-01-1	Snacks Food	Food	300	19	1	2025
2025-01-2	Misc Expe Other	Other	900	20	1	2025

Expenses Budget Charts

Category

Category	Budget	Actual	Difference
Food	5000	5850	-850
Travel	3000	6020	-3020
Fees	6000	9000	-3000
Shopping	7000	11000	-4000
Other	2000	1199	-801

Expenses Budget Charts

