

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 - Expenses (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

fx Date

Date	Description	Category	Amount	Day	Month	Year
2023-01-0	Groceries	Food	1800	1	1	2023
2023-01-0	Bus Ticket	Travel	120	2	1	2023
2023-01-0	College F Fees		2500	3	1	2023
2023-01-0	Restaurant	Food	900	4	1	2023
2023-01-0	Mobile Re	Other	299	5	1	2023
2023-01-0	Shoes	Shopping	5200	6	1	2023
2023-01-0	Metro Pass	Travel	1400	7	1	2023
2023-01-0	Snacks	Food	250	8	1	2023
2023-01-0	Books	Fees	1800	9	1	2023
2023-01-0	T-shirt	Shopping	1500	10	1	2023
2023-01-1	Train Ticket	Travel	2100	11	1	2023
2023-01-1	Fast Food	Food	650	12	1	2023
2023-01-1	Exam Fee	Fees	3000	13	1	2023
2023-01-1	Gift	Shopping	2200	14	1	2023
2023-01-1	Taxi	Travel	2400	15	1	2023
2023-01-1	Grocery	Food	1950	16	1	2023
2023-01-1	Online Co	Fees	1700	17	1	2023
2023-01-1	Watch	Shopping	4100	18	1	2023
2023-01-1	Snacks	Food	100	19	1	2023
2023-01-2	Misc Expe	Other	900	20	1	2023

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

