Task 1: Build a Personal Budget Tracker with Automatic Totals

This task walks you through building a personal budget tracker using Google Sheets. By the end of this task, you'll have a working sheet that records your expenses, categorizes them, calculates totals, and shows a pie chart of where your money goes.

Step 1 – Create a new Google Sheet

Open Google Sheets and create a new blank spreadsheet. Give it a meaningful title like `My Budget Tracker`.

GIF of Step 1

Step 2 – Set up your columns

In Row 1, enter the following headers:

```
Date | Description | Category | Amount
```

These will be the core of your budget log.

GIF of Step 2

Step 3 – Format the "Amount" column as currency

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Select the "Amount" column (column D), then go to `Format > Number > Currency` to ensure all amounts display as dollars.

GIF of Step 3

Step 4 – Add a dropdown list for "Category"

Use data validation to keep categories consistent:

1. Select column C
2. Go to `Data > Data validation`
3. Choose "List of items" and enter something like:

```
Food, Rent, Utilities, Entertainment, Transportation, Other
```

4. Click "Done"

!!! tip
You can add or edit these categories later. Be consistent with spelling to avoid filtering issues.

GIF of Step 4

Step 5 – Add a total sum

Below the "Amount" column, enter:

```
=SUM(D2:D)
```

This will add up all your recorded expenses.

GIF of Step 5

Step 6 – Add a total for a specific category (e.g. Food)

In an empty cell, use:

```
=SUMIF(C2:C, "Food", D2:D)
```

This will total only the amounts labeled "Food".

!!! warning
Category names in the formula must exactly match what's in your dropdown list.

GIF of Step 6

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Step 7 – Insert a pie chart

1. Select your Category and Amount columns (C and D)
2. Go to `Insert > Chart`
3. In the Chart Editor, choose "Pie Chart"
4. Adjust as needed to group your spending visually

GIF of Step 7

Step 8 – Lock the header row

1. Select row 1

2. Go to `View > Freeze > 1 row`
   This keeps your headers visible as you scroll.

GIF of Step 8

What you’ve built

You now have a working personal budget tracker:

- Easy to fill out and update
- Totals and sub-totals calculated automatically
- A visual breakdown of where your money goes

This tracker can be expanded later with things like monthly filters, savings goals, or automatic formatting.

!!! tip
Want to reuse this sheet? Make a copy and clear out the rows — the formulas and dropdowns will still work.