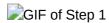
# Task 1: Build a Personal Budget Tracker with Automatic Totals

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.

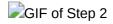


#### Step 2 – Set up your columns

In Row 1, enter the following headers:

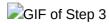
```
Date | Description | Category | Amount
```

These will be the core of your budget log.



## Step 3 – Format the "Amount" column as currency

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



# 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:

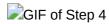
Food, Rent, Utilities, Entertainment, Transportation, Other

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4. Click "Done"

!!! tip

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

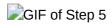


### Step 5 – Add a total sum

Below the "Amount" column, enter:

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

This will add up all your recorded expenses.



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

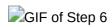
In an empty cell, use:

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

This will total only the amounts labeled "Food".

!!! warning

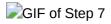
Category names in the formula must exactly match what's in your dropdown list.



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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

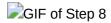


# Step 8 – Lock the header row

1. Select row 1

#### 2. Go to View > Freeze > 1 row

This keeps your headers visible as you scroll.



# 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

**+** 3 / 3 **+** 

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.