

# Mastering Monthly Finances with Google Sheets: Innovative Data Visualization Techniques for Better Budgeting

## Introduction:

Effective budgeting is an essential aspect of personal finance management. Without a proper budget, it can be challenging to manage finances effectively. This report outlines the process of redesigning the 'Ultimate Monthly Budget Tracker,' a project aimed at assisting people in managing their monthly budget. The client approached me to redesign the existing project by making changes to its tables, design, colors, and features. In this report, I will describe the original project, the client's requirements, the changes I made, and the features of the new project.

## Original Project:

<https://docs.google.com/spreadsheets/d/1L2sSXtdspcnxvuyigmLThMW0l0sK8QVfXW6b6kHr-wM>

The original project was a Google spreadsheet that consisted of two tabs: "Read Me - Instructions" and "Monthly Budget." The "Read Me" tab contained detailed instructions on the necessary steps, while the "Monthly Budget" tab provided information on various income management aspects. It included income details such as income name, payday, expected and actual income, budget details such as budget names, due dates, budget amounts, and information on bills, expenses, savings, and debt.

## Read Me - Instructions

**Budget : Ultimate Monthly - USD**

File Edit View Insert Format Data Tools Extensions ...

55% View only

**Ultimate Monthly Instructions**

Please Watch This First [1 Minute Video Instructions] or follow the steps below:  
<https://www.youtube.com/watch?v=Fk2t2PmkHw>

**1. INCOME**

- > Go to Monthly Budget tab
- > Add Income Name, Payday, Expected, and Actual
- > Select Start Day; your balance overview will start from that day

**2. BUDGET**

- > Add Budget Name, Due Date, and Budget Amount

**3. TRANSACTIONS**

- > Scroll down to Transactions Tracker
- > Add Transactions for Bills, Expenses, Savings, and Debt
- > Maintain the same Budget Names across all tables. Otherwise, the transactions will no longer sync. You can change the order, as long as you keep the same name for each budget.

+ Keep scrolling 🔄

**SUPPORT:** If you have any questions, do not hesitate to contact us. We're always here for you.  
Access the link below and click the Contact button (right side, under the banner):  
<https://www.youtube.com/watch?v=Fk2t2PmkHw>

## Client Requirements:

The client required the creation of 15-20 financial spreadsheets using Google Sheets, starting with a "Monthly Budget" spreadsheet to track income and expenses for a month. The sample spreadsheet provided by the client served as the basis and inspiration for the project. The spreadsheet should include the same functionalities as the sample, but the design should be unique with different colors, tables in different places, different orders, different numbers of entries per table, and other ideas that could improve the spreadsheet's visual appeal and user interface. The most important requirements were clear data visualization using dynamic graphs, bar charts, and pie charts for important data. The client seeks a quote for the first spreadsheet, represented in this report.

I need around 15-20 financial spreadsheets made with google sheets.

First I want to start with 1 spreadsheet to see how the process will go.

The first spreadsheet will be a "monthly budget" spreadsheet where you can see your income and expenses during a month. Please check the sample spreadsheet on this link: <https://docs.google.com/spreadsheets/d/1L2sSXtdspcnxvuyigmlThMW0l0sK8QVfXW6b6kHr-wM>

This sample is read only. Therefore, you can also check this video to see the spreadsheet in action: <https://we.tl/t-heeWhh3Z0W>

Please check all the tabs (monthly budget, calendar, sinking funds and debt snowball).

This example is exactly how I need my spreadsheet to be in terms of what it can do, including all 4 tabs.

My spreadsheet should have the same functionalities, but it should be unique with a different design, so it shouldn't look the same.

For example: different colors, tables in different places, a bit different design, different order, different number of entries per table, etc.). You can come up with other ideas that could improve the spreadsheet.

The most important points are:  
1. Visually appealing design in terms of places of the tables, color combinations and shapes of the tables (clear user interface, easy to understand)  
2. Good and clear data visualization (dynamic graphs, bar charts and pie charts for important data).

If you still think you are the right person for the job, please tell me how much you would ask for this first spreadsheet and when you can finish it.

By the way, you can use this sample spreadsheet as a base/inspiration.

## Monthly Budget

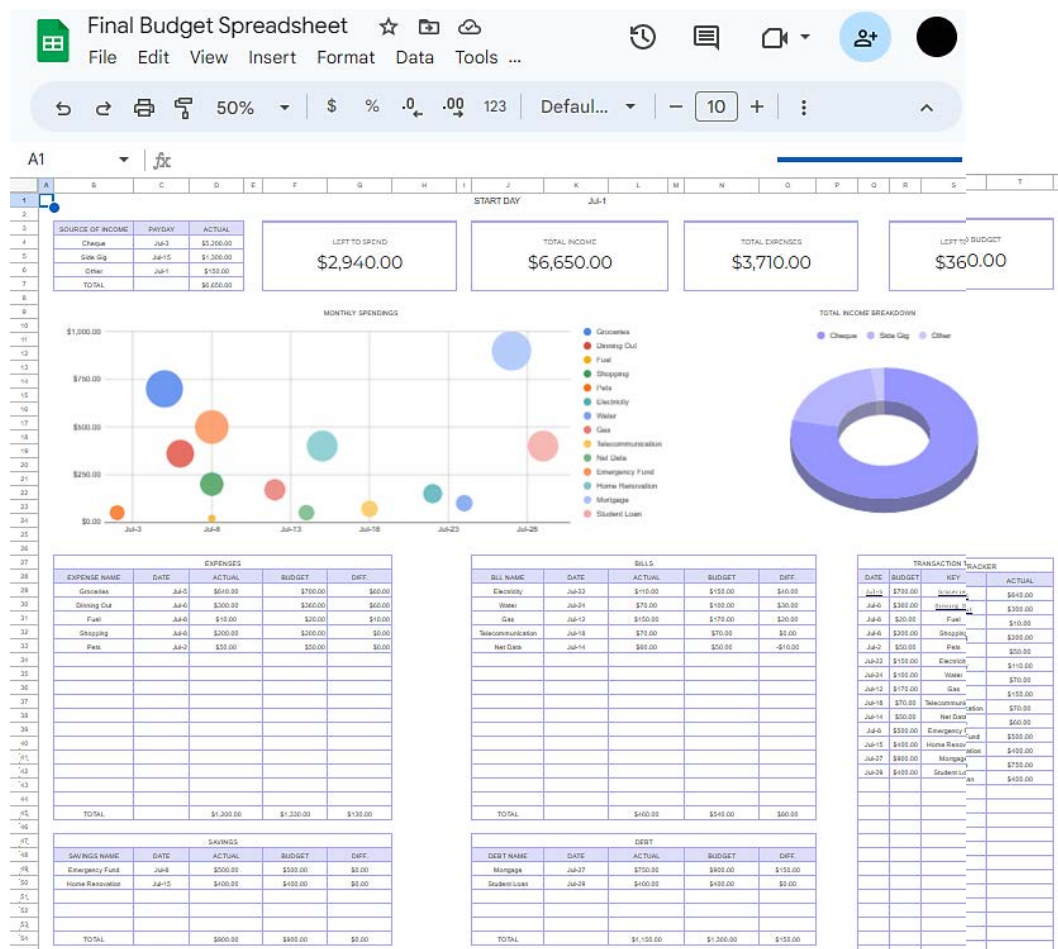
[illegible]

[https://docs.google.com/spreadsheets/d/1ffK8XR3C9JgFieOZw1mFs07\\_gNXHd-HXWUGloOwwiFc/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1ffK8XR3C9JgFieOZw1mFs07_gNXHd-HXWUGloOwwiFc/edit?usp=sharing)

## Read Me- Instructions

[illegible]

## Monthly Budget



## Conclusion:

In conclusion, the redesigned Ultimate Monthly Budget Tracker provides an efficient and effective way to manage monthly budgets. The new project fulfills the client's requirements by improving the Income, Budget, and Transactions sections. The new project is easy to use and provides a clear overview of monthly budgets. It includes dynamic graphs, bar charts, and pie charts, making data visualization clear and concise. The new project will help people manage their finances effectively and achieve their financial goals.

Project Video: <https://youtu.be/E1HOG8Dn65g>