

Problem & background

There is great saying that “Save Money and Money will save you”. We work hard to earn money for living. But some times overlook on that hard earned money.

So, budgeting and tracking is very important. As once we know where we are spending unnecessary, we can stop that spend and save money.

Solution

In Daily life while working for office, commuting hectic travels and finally spending with happy time with family we could track our expense but we couldn't analyse it. And if they are in the form of Numbers then its really difficult to our brain to get any insight from it.

Budget trackers helps you with analysing the spend you did in past with beautiful dashboards and charts. Which can easily help you to take decision on the spend.

Methodology & Project scope

Follow the steps mentioned below to get optimum use of this tracker

- ❖ Ensure that you enter details of your income and expense on day-to-day basis in “Data” Sheet. Here in sample, we have entered data from 1st Jan 2022 to 30th September
- ❖ Further there is not need to do anything. The Excel itself does if for you
- ❖ Dashboard: You can see the data have entered from Jan 22 in form of beautiful dashboard. Where Column chart is giving information that in month of July 2022 there were higher expense around ₹ 63K. Further Bar Chart is clarifying that maximum expense were on investment followed by groceries
- ❖ You can easily filter between category and month to see details in form of bar chart and column chart.

Goals & KPIs

- ✓ Following were the goal and KPIs of this project
- ✓ Goal 1 : Track the all kind of income
- ✓ Goal 2 : Track the all kind of expense
- ✓ Goal 3 : Give anasysis of you past exense where you can decide to futures one

Concepts Used

- Concept 1 : Table
- Concept 2 : Pivot Table
- Concept 3 : Charts
- Concept 4 : Slicer

Conclusion

This tracker is helping to identify unnecessary expense. And Also giving details information at one spot for all expense in past

Project Owner

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