Financial Transactions Dashboard - Project Description & Feedback

Project Description

This project focuses on analyzing personal or business financial transactions over a 3-month period (Feb to Apr 2024) using Microsoft Excel.
The goal is to summarize key financial trends, understand category-wise spending, and visualize income vs. expenses using a dynamic dashboard.

Objectives:
- Clean and structure transactional data.
- Categorize expenses and income sources.
- Extract monthly trends in income and spending.
- Highlight major spending areas.
- Build an interactive, visual dashboard for summary insights.

Dataset Columns:
- Transaction ID
- Date
- Description
- Amount
- Type (Credit/Debit)
- Category (e.g., Rent, Utilities, Salary)

Key Steps Performed:
1. Added Month column using =TEXT(Date, "mmm yyyy")
2. Created PivotTables for monthly and category-wise analysis
3. Designed dashboard with charts and slicers

Tools Used: Excel, Pivot Tables, Charts, Slicers, Conditional Formatting, SUMIFS

Skills Demonstrated: Financial analysis, dashboarding, Excel formulas, data visualization, reporting.

Project Feedback

What Went Well:

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- Relevant, practical scope with strong real-world applicability.
- Effective use of Excel tools like PivotTables, charts, slicers.
- Well-structured and interactive dashboard.
- Strong focus on clarity and data insight.

Areas for Improvement:

- Ensure formula reliability by validating data types early.
- Add data validation for cleaner input control.
- Use Excel Tables to support dynamic data.
- Explore Power Query for scalable, automated data processing.

Overall Verdict:

This is a strong project showcasing analytical and technical Excel skills.

It is a great fit for a portfolio or interview discussion in finance or data analytics.