

**\*Note - For this project to work, the user must set internet explorer download preferences to download new files by default to the same location as this workbook is located**

My project was to create a master financial spreadsheet that can help us take the tools we have with mint.com, which aggregates all of our financial transactions, and then dynamically analyze them in ways not currently available in mint.

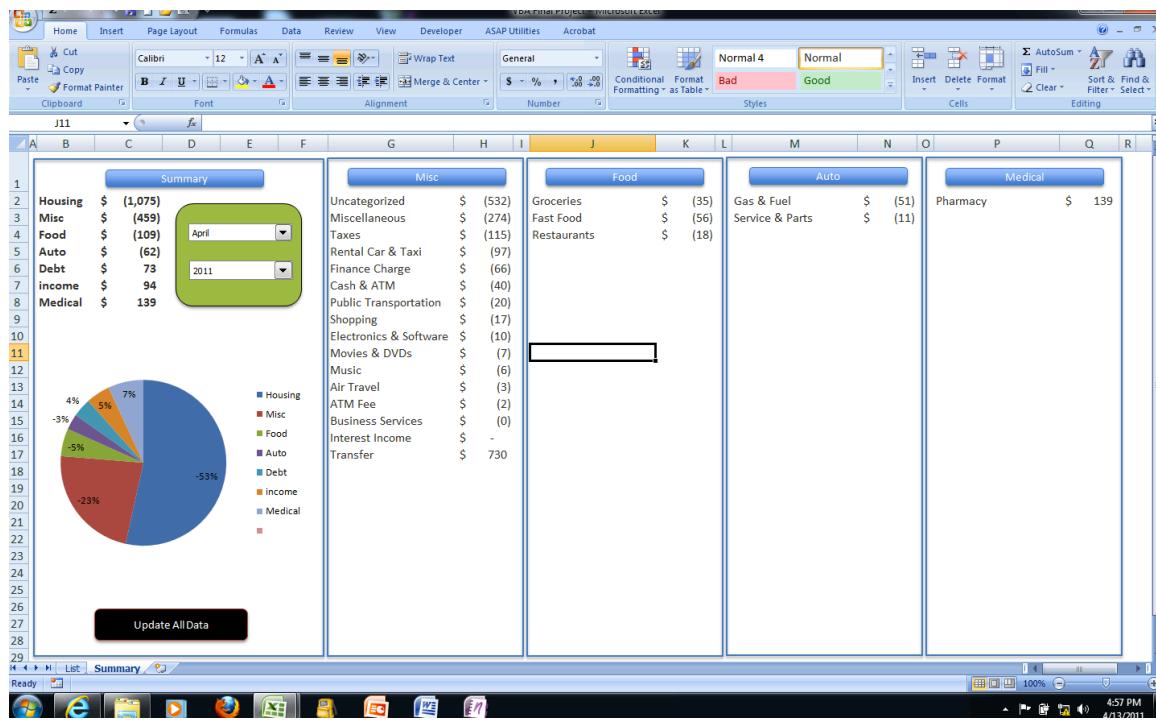
(In the time that I have currently been able to work on the project, I only succeeded in creating a table of all our transactions and a basic initial dashboard completed of the transactions pulled from mint and organized by month. The rest of the analysis sheets are yet to come)

Steps I completed in Code:

- Input box for logging in to Mint with password
- Logs into Mint
- Downloads all transactions via a CSV file
- Imports CSV file
- Copies transactions on CSV file into a table
- Write formulas in table to label transactions
- A column of data are added as comments to another column
- Updates dashboard for current date
- Populates the dashboard with the current months' transactions
- The dashboard can be updated afterwards to any month
- Table of transactions filters by date as it is selected on summary sheet

The screenshot shows a Microsoft Excel spreadsheet titled "VBA Final Project". The table has columns labeled Date, Description, Amount, Transaction, Category, Account, and Fix Cts. The data includes various transactions such as Target, Daisy Mart, Byu Creame, Nyc Taxi Q, Rita Aid, Timview Pharmacy, Transfer to B of A CC, Max Brenne, Byu O, Nyc Taxi Q, Nyc Taxi M, Byu T, Grove, Orpheum, Byu H, Withdrawal Adjustmentonline Tax, Circle K, H&R Block, Blockbuster, MTA, Costco, Shake Shack, Jo-Ans Stores, Transfer from ING Checking, Brigham Yo, Brigham Yo, MTA, and ATM Fee. The table is sorted by Date and has a filter applied to the Date column.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Date	Description		Amount	Transaction	Category	Account	N	Fix Cts						
2	4/13/2011	Target		(\$42.33)	debit	Miscellaneous: MACU Checkin	Misc								
3	4/12/2011	Daisy Mart		(\$22.59)	debit	Groceries	ING Checking	Food							
4	4/12/2011	Byu Creame		(\$2.90)	debit	Fast Food	ING Checking	Food							
5	4/12/2011	Nyc Taxi Q		(\$8.20)	debit	Rental Car & TING	Checking	Misc							
6	4/11/2011	Rita Aid		\$ 98.59	credit	Pharmacy	B of A CC	Medical							
7	4/11/2011	Timview Pharmacy		\$ 53.95	credit	Pharmacy	B of A CC	Medical							
8	4/11/2011	Transfer to B of A CC		(\$100.00)	debit	Credit Card	PaING	Checking	Debt						
9	4/11/2011	Max Brenne		(\$14.04)	debit	Uncategorized	ING Checking	Misc							
10	4/11/2011	Byu O		(\$5.30)	debit	Uncategorized	ING Checking	Misc							
11	4/11/2011	Nyc Taxi Q		(\$7.40)	debit	Rental Car & TING	Checking	Misc							
12	4/11/2011	Nyc Taxi M		(\$14.16)	debit	Rental Car & TING	Checking	Misc							
13	4/11/2011	Byu T		(\$10.00)	debit	Uncategorized	ING Checking	Misc							
14	4/11/2011	Grove		(\$11.29)	debit	Uncategorized	ING Checking	Misc							
15	4/11/2011	Orpheum		(\$12.50)	debit	Uncategorized	ING Checking	Misc							
16	4/11/2011	Byu H		(\$194.00)	debit	Uncategorized	ING Checking	Misc							
17	4/11/2011	Byu H		(\$30.00)	debit	Uncategorized	ING Checking	Misc							
18	4/11/2011	Withdrawal Adjustmentonline Tax		\$ 79.90	credit	Income	MACU Checkin	income							
19	4/11/2011	Circle K		(\$12.63)	debit	Gas & Fuel	MACU Checkin	Auto							
20	4/11/2011	H&R Block		\$114.85	debit	Taxes	MACU Checkin	Misc							
21	4/11/2011	Blockbuster		(\$7.46)	debit	Movies & DVE	MACU Checkin	Misc							
22	4/10/2011	MTA		(\$10.00)	debit	Public Transp	ING	Checking	Misc						
23	4/10/2011	Costco		(\$170.79)	debit	Miscellaneous:	ING	Checking	Misc						
24	4/10/2011	Shake Shack		(\$6.53)	debit	Restaurants	ING	Checking	Food						
25	4/9/2011	Jo-Ans Stores		(\$5.32)	debit	Miscellaneous:	MACU	Checkin	Misc						
26	4/8/2011	Transfer from ING Checking		\$ 100.00	credit	Credit Card	P a B of A CC	Debt							
27	4/8/2011	Brigham Yo		(\$10.00)	debit	Uncategorized	ING	Checking	Misc						
28	4/8/2011	Brigham Yo		(\$30.00)	debit	Uncategorized	ING	Checking	Misc						
29	4/8/2011	MTA		(\$10.00)	debit	Public Transp	ING	Checking	Misc						
30	4/8/2011	ATM Fee		(\$2.00)	debit	ATM Fee	ING	Checking	Misc						



In addition I plan to integrate our plan for getting out of debt from student loans and a car loan.

(This part is still pending as I need to grab data from a website that isn't up and running yet)

After the previous step is complete, I want to dynamically link our entire financial plan together using the concepts we have studied. Specifically this will entail creating dynamically linked menus and tables, which update data simultaneously, with dynamic charts.