

# CREDIT CARD

WEEKLYC

STATUS REPORT

# Content in this tutorial video

- Project objective
- Data from SQL
- Data processing & DAX
- Dashboard & insights
- Export & share project

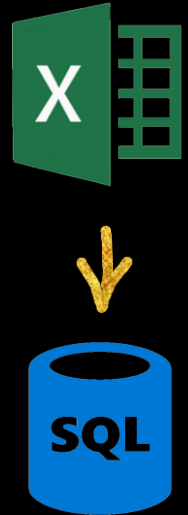


# Project objective

- To develop a comprehensive credit card weekly dashboard that provides real-time insights into key performance metrics and trends, enabling stakeholders to monitor

# Import data to SQL database

- Prepare csv file
- Create tables in SQL
- Import csv file into SQL



# DAX Queries

- `ageGroup = SWITCH( TRUE(), 'customer (1)'[Customer_Age]<30, "20-30",`
- `'customer (1)'[Customer_Age] >= 30 && 'customer (1)'[Customer_Age] < 40, "30-40",`
- `'customer (1)'[Customer_Age] >= 40 && 'customer (1)'[Customer_Age] < 50, "40-50",`
- `'customer (1)'[Customer_Age] >= 50 && 'customer (1)'[Customer_Age] < 60, "50-60",`
- `'customer (1)'[Customer_Age] >=60, "60+",`
- `"unknown"`
- `)`
  
- `IncomeGroup = SWITCH(`
- `TRUE(),`
- `'customer (1)'[Income] < 35000, "Low-income",`
- `'customer (1)'[Income] >=35000 && 'customer (1)'[Income] < 70000, "med_income",`
- `'customer (1)'[Income] >= 70000, "High-income",`
- `"unknown"`
- `)`

# DAX Queries

```
Week_num2 = WEEKNUM(credit_card[Week_Start_Date].[Date])
```

```
Revenue = credit_card[Annual_Fees] + credit_card[Total_Trans_Amt] +  
credit_card[Interest_Earned]
```

```
current_week_revenue = CALCULATE(  
    sum(credit_card[Revenue]),  
    FILTER(  
        ALL(credit_card),  
        credit_card[Week_num2] = MAX(credit_card[Week_num2])))
```

- previous\_week\_revenue = CALCULATE(
  - sum(credit\_card[Revenue]),
  - FILTER(
    - ALL(credit\_card),
    - credit\_card[Week\_num2] = MAX(credit\_card[Week\_num2])-1))



# Project insights — week 52 (24<sup>th</sup>DEC)

- **Revenue** increased by **25.6%**.
- **Total Transaction Amount & Count** increased by **22.3%** and **18.7%**, respectively.
- **Customer Count** increased by **19.5%**.
- **Key Metrics**
- Overall revenue is **\$60M**.
- Total interest is **\$9M**.
- Total transaction amount is **\$50M**.
- Male customers are contributing more to revenue (**\$33M**), while female customers contribute **\$27M**.
- **Insights**
- **Blue & Silver credit cards** are contributing to **88%** of overall transactions.
- **TX, NY, and CA** are contributing to **72%** of total revenue.
- Overall **activation rate** is **60.2%**.
- Overall **delinquent rate** is **5.8%**.