

CREDIT CARD

WEEKLY
STATUS REPORT



Content in this tutorial video

1. Project objective
2. Data from SQL
3. Data processing & DAX
4. Dashboard & insights
5. 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 and analyze credit card operations effectively.



Import data to SQL database

1. Prepare csv file
2. Create tables in SQL
3. import csv file into SQL



Data Output	Messages	Notifications
COPY 10108		
Query returned successfully in 82 msec.		

DAX Queries

```
AgeGroup = SWITCH(  
    TRUE(),  
    'public cust_detail'[customer_age] < 30, "20-30",  
    'public cust_detail'[customer_age] >= 30 && 'public cust_detail'[customer_age] < 40, "30-40",  
    'public cust_detail'[customer_age] >= 40 && 'public cust_detail'[customer_age] < 50, "40-50",  
    'public cust_detail'[customer_age] >= 50 && 'public cust_detail'[customer_age] < 60, "50-60",  
    'public cust_detail'[customer_age] >= 60, "60+",  
    "unknown"  
)
```

```
IncomeGroup = SWITCH(  
    TRUE(),  
    'public cust_detail'[income] < 35000, "Low",  
    'public cust_detail'[income] >= 35000 && 'public cust_detail'[income] < 70000, "Med",  
    'public cust_detail'[income] >= 70000, "High",  
    "unknown"  
)
```



DAX Queries

```
week_num2 = WEEKNUM('public cc_detail'[week_start_date])
```

```
Revenue = 'public cc_detail'[annual_fees] + 'public cc_detail'[total_trans_amt] + 'public cc_detail'[interest_earned]
```

```
Current_week_Revenue = CALCULATE(  
    SUM('public cc_detail'[Revenue]),  
    FILTER(  
        ALL('public cc_detail'),  
        'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])))
```

```
Previous_week_Revenue = CALCULATE(  
    SUM('public cc_detail'[Revenue]),  
    FILTER(  
        ALL('public cc_detail'),  
        'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])-1))
```



Project Insights- Week 53 (31st Dec)

WoW change:

- Revenue increased by 28.8%,
- Total Transaction Amt & Count increased by xx% & xx%
- Customer count increased by xx%

Overview YTD:

- Overall revenue is 57M
- Total interest is 8M
- Total transaction amount is 46M
- Male customers are contributing more in revenue 31M, female 26M
- Blue & Silver credit card are contributing to 93% of overall transactions
- TX, NY & CA is contributing to 68%
- Overall Activation rate is 57.5%
- Overall Delinquent rate is 6.06%



Note: You can add more insights

Credit Card Transaction Report

Revenue

55M

Total Interest

8M

Transaction Amount

45M

Transaction Count

656K

Q4

Q3

Q2

Q1

Low

Med

High

Week_Start_Date

All

F

M

Silver

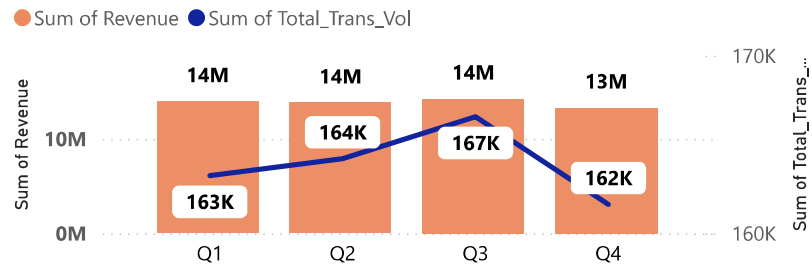
Gold

Blue

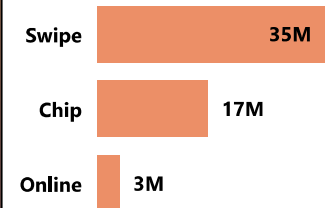
Platinum

Card_Category	Sum of Revenue	Sum of Total_Trans_Amt	Sum of Interest_Earned
Blue	46139398	36957875	6495888
Silver	5586332	4586746	812081
Gold	2454072	2024078	373784
Platinum	1135608	953314	161629
Total	55315410	44522013	7843382

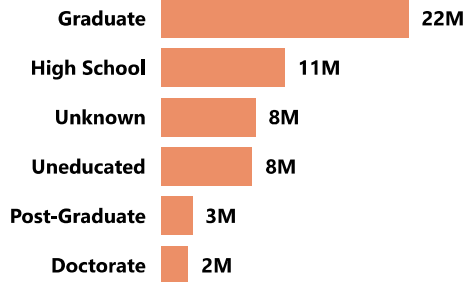
QTR Revenue and Total trans count



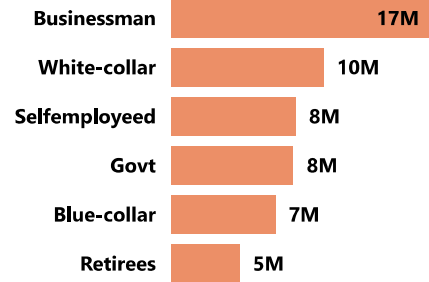
Revenue by Chip Type



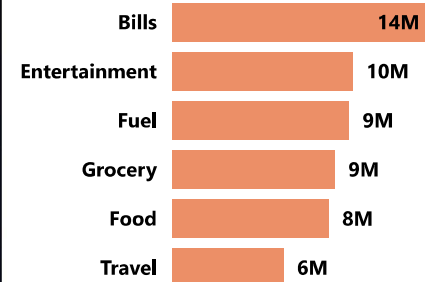
Revenue by Education Level



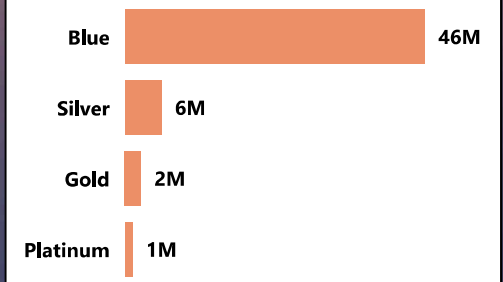
Revenue by Profession Type



Revenue by Expenditure Type



Revenue by Card Type



Credit Card Customer Report

Q4

Q3

Q2

Q1

Week_Start_Date ▼
All ▼

Silver

Gold

M

F

30M

25M

Blue

Platinum

Swipe

Online

Chip

Revenue

55M

Total Interest

8M

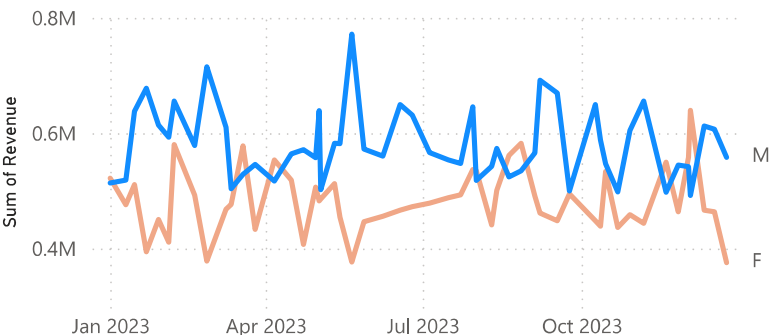
Income

576M

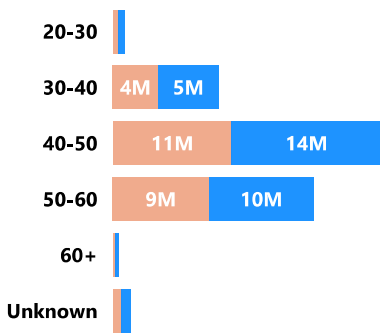
CSS

3.19

Revenue by Week

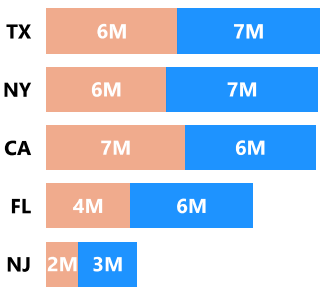


Revenue by Age Group

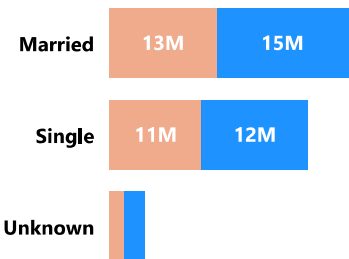


Customer_Job	Sum of Revenue	Sum of Interest_Earned	Sum of Income
Blue-collar	6904279	952801	72262158
Businessman	17387832	2539390	186959919
Govt	8111701	1160016	88773989
Retirees	4535184	630359	48675030
Selfemployed	8261758	1119742	75313288
White-collar	10114656	1441074	103930055
Total	55315410	7843382	575914439

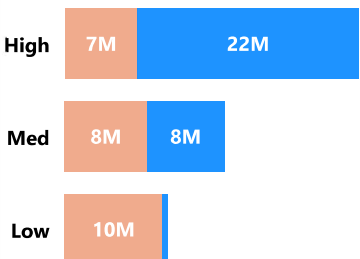
Top 5 States



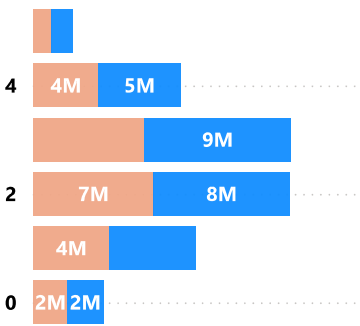
Revenue by Marital Status



Revenue by Income Group



Revenue by Dependent



Revenue by Education

