Project 3

Credit Card – Weekly Dashboard

Power BI Dashboards: Credit Card Insights That Drive Action

Dashboards

- **Customer Card Transaction Dashboard**
- **Customer Card Customer Dashboard**

Credit card data is often just a mess of numbers no one wants to deal with.
But what if I told you those numbers could reveal who's spending big, which cards are most profitable, and even how different users swipe differently?

That's exactly what these two Power BI dashboards deliver.
I took raw transaction data—the kind that usually makes eyes glaze over—**and turned it into clear, clickable insights.**

You'll uncover:

- Businessmen spent $17M, while retirees spent just $5M
- Blue cards generated 46x more revenue
- High-income men spent 3x more than women

How I built it

- Pulled raw data from GitHub (CSV)
- Cleaned it in PostgreSQL
- Visualized it in Power BI
- Published back to Notion with full documentation

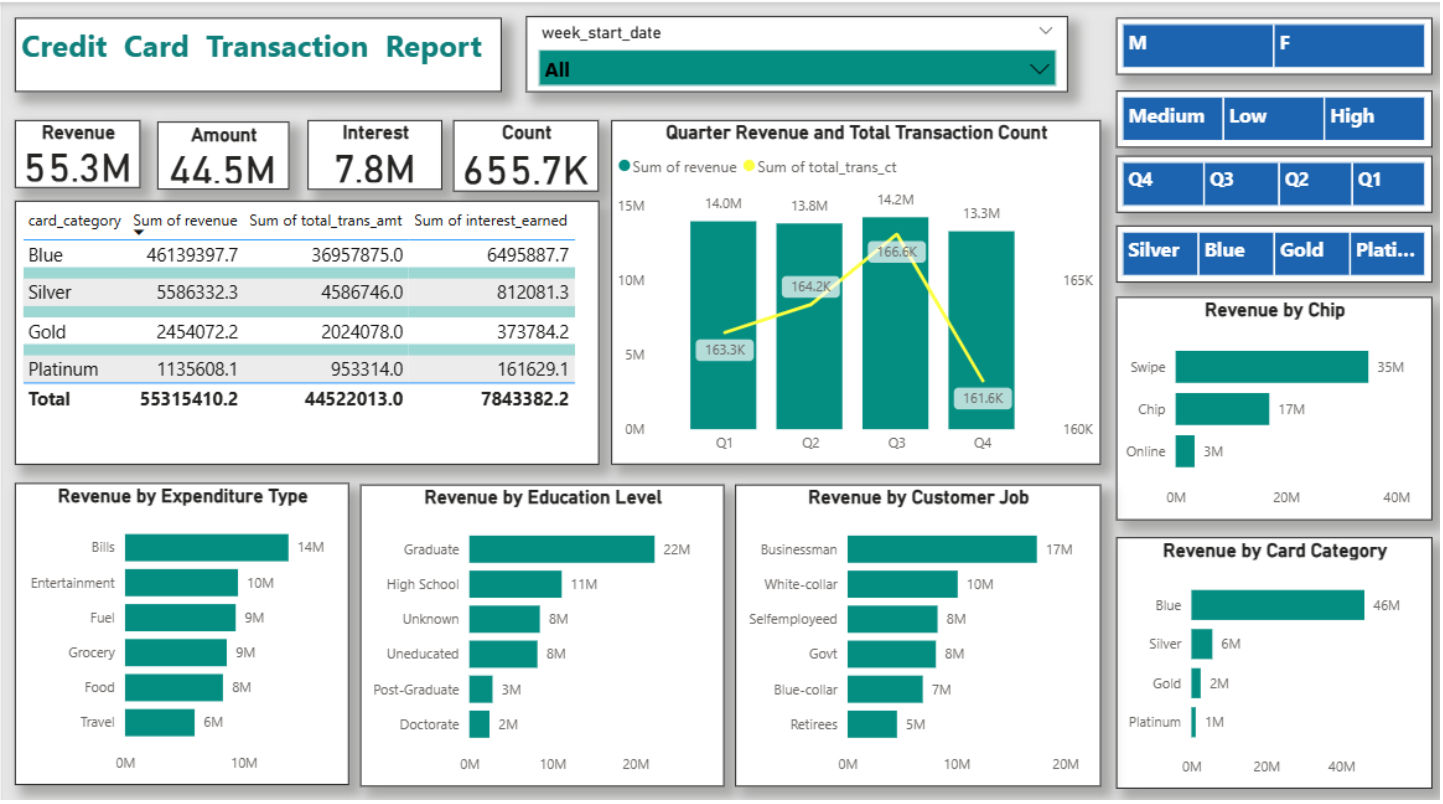
These dashboards give real, actionable intel banks and businesses can use to boost profits.

So, if you've ever wondered where all that credit card money really goes...
Now you know where to look.

Key Questions Answered:

1. **Which card type** (Blue, Silver, or Gold) brings in the most revenue and is used most often?
2. **How do spending habits vary** by age, gender, income level, or marital status?
3. **Which job types or income groups** spend the most on credit cards?
4. **Which states or cities** have the highest transaction volumes or spending totals?
5. **Are there seasonal trends** in spending based on card types?

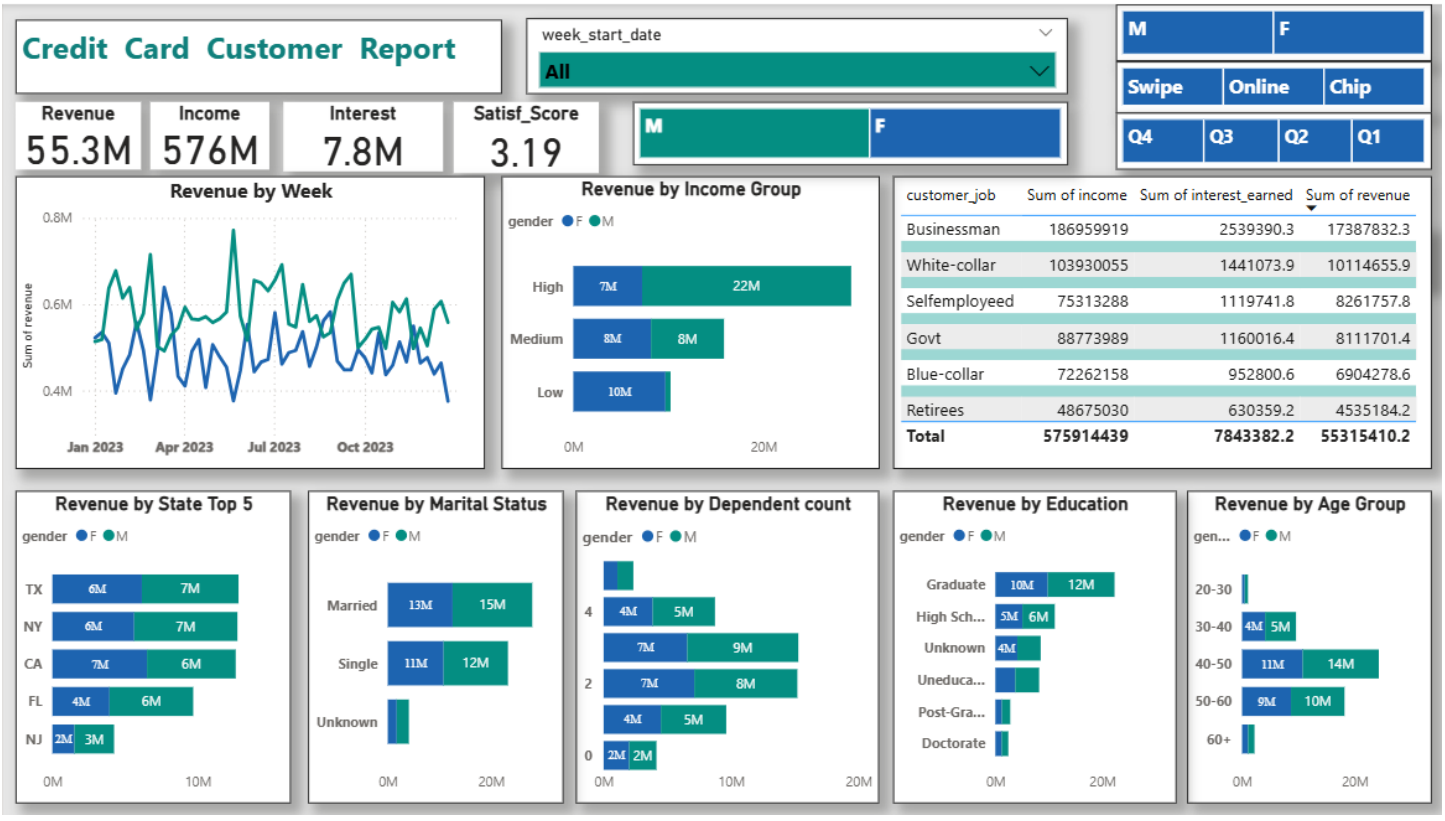
1. CC Transaction Dashboard



Section	Description
Title	Credit Card Transaction Report
Revenue	Total Revenue: **55.3M**
Amount	Total Transaction Amount: **44.5M**
Interest	Total Interest Earned: **7.8M**
Count	Total Number of Transactions: **655.7K**
Revenue by Card Category	- Blue: 46.1M - Silver: 5.6M - Gold: 2.5M - Platinum: 1.1M
Quarterly Trends	- Q1: 14.0M, 163K transactions - Q2: 13.8M, 164.2K transactions - Q3: 14.2M, 166.6K transactions - Q4: 13.3M, 161.6K transactions
Revenue by Expenditure Type	- Bills: 14M - Entertainment: 10M - Fuel: 9M- Grocery: 9M - Food: 8M - Travel: 6M

Revenue by Education Level	- Graduate: 22M - High School: 11M - Unknown: 8M - Uneducated: 8M - Post-Graduate: 3M - Doctorate: 2M
Revenue by Customer Job	- Businessman: 17M - White-collar: 10M - Self-employed: 8M - Govt: 8M - Blue-collar: 7M - Retirees: 5M
Revenue by Chip Type	- Swipe: 35M - Chip: 17M - Online: 3M
Revenue by Card Category	- Blue: 46M - Silver: 6M - Gold: 2M - Platinum: 1M
Filters Used	- Gender: M, F- Income Group: Low, Medium, High - Quarter: Q1, Q2, Q3, Q4 - Card Type: Silver, Blue, Gold, Platinum - Date: All

2. CC Customer Dashboard



<table>
<tr><th>Section</th><th>Description</th></tr>
<tr><td>Title</td><td>Credit Card Customer Report</td></tr>
<tr><td>Revenue</td><td>Total Revenue: 55.3M</td></tr>
<tr><td>Income</td><td>Total Income: 576M</td></tr>
<tr><td>Interest</td><td>Total Interest Earned: 7.8M</td></tr>
<tr><td>Satisfaction Score</td><td>Avg. Satisfaction Score: 3.19</td></tr>
<tr><td>Revenue by Week</td><td>Weekly trend line chart comparing revenue by gender over time (Jan 2023 – Oct 2023)</td></tr>
<tr><td>Revenue by Income Group</td><td>
<table>
<tr><th>Income Group</th><th>Female</th><th>Male</th></tr>
<tr><td>High</td><td>7M</td><td>22M</td></tr>
<tr><td>Medium</td><td>8M</td><td>8M</td></tr>
<tr><td>Low</td><td>10M</td><td>0.5M</td></tr>
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<tr><td>Revenue by State (Top 5)</td><td>
<table>
<tr><th>Top 5 States</th><th>Female</th><th>Male</th></tr>
<tr><td>TX</td><td>6M</td><td>7M</td></tr>
<tr><td>NY</td><td>6M</td><td>7M</td></tr>
<tr><td>CA</td><td>7M</td><td>6M</td></tr>
<tr><td>FL</td><td>4M</td><td>6M</td></tr>
<tr><td>NJ</td><td>2M</td><td>3M</td></tr>
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<tr><td>Revenue by Marital Status</td><td>
<table>
<tr><th>Marital Status</th><th>Female</th><th>Male</th></tr>
<tr><td>Married</td><td>13M</td><td>15M</td></tr>
<tr><td>Single</td><td>11M</td><td>12M</td></tr>
<tr><td>Unknown</td><td>1.5M</td><td>2.5M</td></tr>
</table>
</td></tr>
<tr><td>Revenue by Dependent Count</td><td>
<table>
<tr><th>Dependent count</th><th>Female</th><th>Male</th></tr>
<tr><td>0</td><td>2M</td><td>2M</td></tr>
<tr><td>1</td><td>4M</td><td>5M</td></tr>
<tr><td>2</td><td>7M</td><td>8M</td></tr>
<tr><td>3</td><td>7M</td><td>9M</td></tr>
<tr><td>4</td><td>4M</td><td>5M</td></tr>
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Revenue by Education

Education	Female	Male
Graduate	10M	12M
High School	5M	6M
Unknown	4M	4M
Uneducated	4M	4.5M
Post-graduate	1M	3M
Doctorate	1M	1.5M

Revenue by Age Group

Age Group	Female	Male
20 - 30	0.48M	0.57M
30 - 40	4M	5M
40 - 50	11M	14M
50 - 60	9M	10M
60+	1M	1.1M

Revenue by Job Type

Customer Job	Income	Interest Earned	Revenue
Businessman	187M	3M	17M
White-collar	104M	1M	10M
Self employed	75M	1M	8M
Govt	89M	1M	8M
Blue-collar	72M	1M	7M
Retirees	49M	1M	5M
Total	**576M**	**8M**	**55M**

Filters Used

Filter Category	Options
Gender	M, F
Card Type	Swipe, Online, Chip
Quarter	Q1, Q2, Q3, Q4
Date	Drop Down dates on weekly basis