Cross-Sell Early Account Monitoring Report 3

This report provides a comprehensive approach to preparing a final dataset for analysis by integrating, synthesizing, and cleaning the data from the provided datasets, ensuring it is ready for model building.

Step 1: Review of the provided raw cross-sell data

- Cross sell data consists of **29410** rows which might be a roadblock while data processing and model building.

	A FAKE_ACCTCODE	B OPT_IN_DATE	C FUEL_ONLY_PARENT_ACCT	D CLI_AMOUNT	E FLEETCOR_OPEN_DATE	F CITY
29388	311707	6/25/2019	0	2400.00	9/22/2016	LAS VEGAS
29389	300242	12/11/2019	0	4700.00	6/18/2011	MURRAY
29390	284081	2/22/2019	176450		2/9/2019	ROCKPORT
29391	284046	4/11/2019	175891		2/8/2019	SPARTA
29392	163890	11/26/2018	FUEL-ONLY PARENT ACCT	0.00	10/31/2013	FRESNO
29393	171195	11/17/2018	FUEL-ONLY PARENT ACCT	0.00	9/4/2015	WEST WARWICK
29394	315801	8/8/2019	0	7000.00	2/20/2018	GOLDEN
29395	298860	9/16/2019	0	6500.00	12/12/2017	EAST WINDSOR
29396	292377	8/25/2019	0	9000.00	6/9/2012	BEREA
29397	312925	1/11/2019	0		11/24/2016	Springfield
29398	285701	8/26/2019	180491		6/20/2019	DOUGLASVILLE
29399	277217	2/21/2020	0	36300.00	11/19/2013	BOCA RATON
29400	319898	11/16/2019	0	26000.00	1/22/2014	GAINESVILLE
29401	277161	2/7/2020	182603		1/17/2020	ROUND ROCK
29402	307695	9/23/2019	179452		4/5/2019	PAMPA
29403	312492	3/12/2020	0	3800.00	2/28/2017	HOLIDAY
29404	267187	10/12/2019	0	57000.00	2/28/2019	HARRISBURG
29405	177136	5/1/2019	FUEL-ONLY PARENT ACCT	0.00	1/12/2018	CHAMBLEE
29406	291043	12/19/2018	162479	5000.00	11/11/2018	WAYCROSS
29407	291061	3/29/2019	163811		11/11/2018	HOUSTON
29408	270188	10/22/2019	178081	2500.00	10/15/2019	ROCKLIN
29409	316612	10/22/2018	174711	4000.00	10/3/2018	COLFAX
29410	312016	1/26/2019	0		9/3/2015	SAN RAMON

Tabs: X-sell Acct | X-sell Spend | X-sell Trx | X-sell Revenue | X-sell WO | X-sell Payment | X-selll NSF Payment | ...

Step 2: Consolidated Cross Sell Data

- We took the first 500 accounts i.e. till FAKE_ACCTCODE **112517** for consideration by sorting on FAKE_ACCTCODE field.

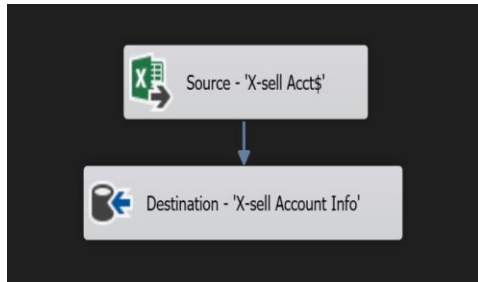|	A FAKE_ACCTCODE	B OPT_IN_DATE	C FUEL_ONLY_PARENT_ACCT	D CLI_AMOUNT	E FLEETCOR_OPEN_DATE	F CITY
485	112471	6/10/2022	0	14000.00	10/2/2020	SEDALIA
486	112474	1/13/2022	0	4500.00	10/2/2020	LITHONIA
487	112476	4/14/2022	0	4000.00	10/2/2020	MARIETTA
488	112479	2/8/2022	0	64000.00	10/2/2020	SAN JACINTO
489	112481	1/28/2022	0	55500.00	10/2/2020	CHIEFLAND
490	112484	1/13/2022	0	10500.00	10/2/2020	STERLING HEIGHTS
491	112486	7/22/2022	0	5000.00	10/2/2020	BROOKLYN
492	112490	8/19/2022	0	3000.00	10/2/2020	PORTAGE
493	112491	2/11/2022	0	5500.00	10/2/2020	PHILADELPHIA
494	112494	12/13/2021	0	4500.00	10/2/2020	NEWARK
495	112499	3/12/2022	0	5500.00	10/3/2020	BOCA RATON
496	112502	1/5/2022	0	4000.00	10/3/2020	VANCOUVER
497	112503	3/9/2022	0	9500.00	10/3/2020	CARSON
498	112504	2/22/2022	0	3500.00	10/3/2020	FORT WORTH
499	112507	5/26/2022	0	3500.00	10/6/2020	CLARKSVILLE
500	112509	1/8/2022	0	8500.00	10/6/2020	KENDALLVILLE
501	112517	10/27/2022	0	17500.00	10/6/2020	HONOLULU
502						
503						
504						

Tab: X-sell Acct +

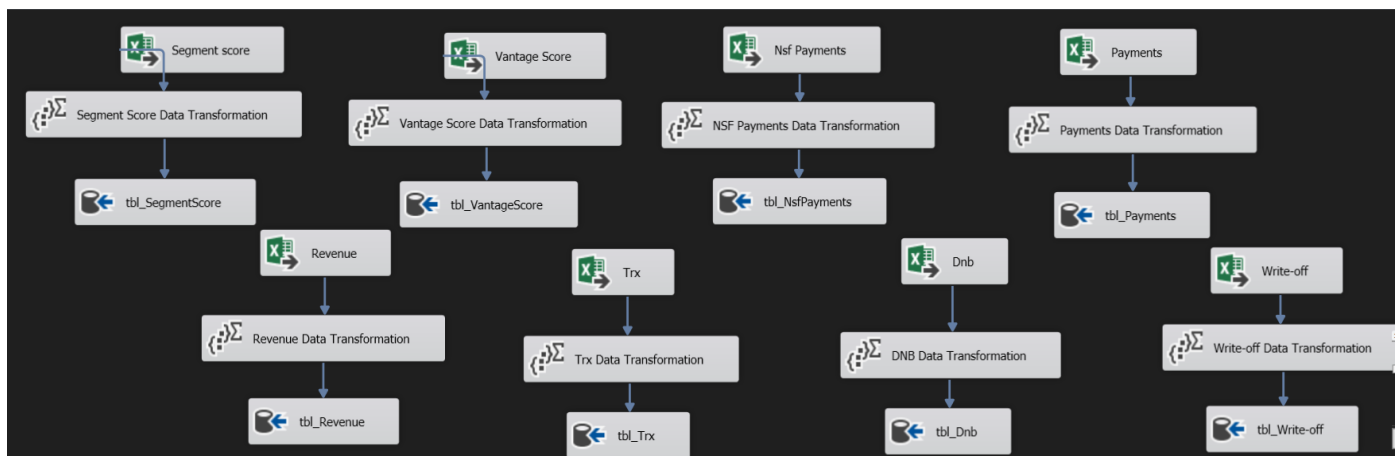Ready — Accessibility: Good to go

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Step 3: Data integration using Visual Studio, particularly with SQL Server Integration Services (SSIS): Utilized **Import and Export wizard** for data Integration between Excel and SQL Server.

ETL Operations:

- Extracted data from Excel.
- Transformed data by performing **Aggregate transformation** in SSIS i.e. Group by, sum, average and other required operations.
- Loaded the data into Database Fleetcor_Database in SQL SERVER.

Created data flows using **Source assistant**, **Destination assistant** and **Aggregate** actions.

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Step 4: Fleetcor Database after loading data

- ⊟ 🗄 Fleetcor_Database
  - ⊞ 📁 Database Diagrams
  - ⊟ 📁 Tables
    - ⊞ 📁 System Tables
    - ⊞ 📁 FileTables
    - ⊞ 📁 External Tables
    - ⊞ 📁 Graph Tables
    - ⊞ ▦ dbo.CrossSellAcct_MonitoringData
    - ⊞ ▦ dbo.tbl_Dnb
    - ⊞ ▦ dbo.tbl_NsfPayments
    - ⊞ ▦ dbo.tbl_Payments
    - ⊞ ▦ dbo.tbl_Revenue
    - ⊞ ▦ dbo.tbl_SegmentScore
    - ⊞ ▦ dbo.tbl_Spend
    - ⊞ ▦ dbo.tbl_Trx
    - ⊞ ▦ dbo.tbl_VantageScore
    - ⊞ ▦ dbo.tbl_Write-off
    - ⊞ ▦ dbo.X-sell Account Info

Step 5: Final Dataset after using joins, PKs, FKs, union statements, identify nulls if any, excluding any duplicates (There might be few nulls which will be handled in R)

	FAKE_ACCTCODE	OPT_IN_DATE	CLI_AMOUNT	FLEETCOR_OPEN_DATE	CITY	TERM_DAYS	ZIP	PAYDEX	TOT_SPEND	LOCK_C(
480	112005	2021-12-15 00:00:00.000	23000	2020-08-24 09:23:42.000	WAXHAW	30	28173	77.8571428571429	0	Z
481	112073	2021-10-29 00:00:00.000	17000	2020-08-28 08:48:26.000	SMYRNA	30	30080	44.9090909090909	8437.59	I
482	112078	2022-01-22 00:00:00.000	3000	2020-08-29 09:34:53.000	APPLE VALLEY	15	55124	80	0	Z
483	112087	2021-10-18 00:00:00.000	8500	2020-08-29 09:34:53.000	FLORISSANT	15	63034	65.8571428571429	0	A
484	112139	2022-02-26 00:00:00.000	3000	2020-09-04 08:28:15.000	SAN DIEGO	15	92107	79.8571428571429	4.51	Z
485	112145	2022-01-14 00:00:00.000	3000	2020-09-04 08:28:15.000	LANSDOWNE	15	19050	0	325.41	I
486	112162	2022-02-24 00:00:00.000	46500	2020-09-05 09:35:34.000	EL CAJON	7	92020	80	61.21	Z
487	112172	2021-12-15 00:00:00.000	12500	2020-09-08 08:46:42.000	NEWARK	7	07104	80	1892.08	Z
488	112188	2022-02-09 00:00:00.000	5500	2020-09-11 08:35:24.000	DETROIT	30	48235	69.4545454545455	2278.35	I
489	112207	2022-01-05 00:00:00.000	7000	2020-09-11 08:35:24.000	ELLENWOOD	15	30294	51.8181818181818	3070.7	I
490	112274	2021-11-05 00:00:00.000	3500	2020-09-16 08:42:16.000	BREA	15	92821	0	0	A
491	112306	2022-01-27 00:00:00.000	7500	2020-09-18 08:39:33.000	RUSH	15	14543	49	1593.29	I
492	112312	2022-01-22 00:00:00.000	4500	2020-09-18 08:39:33.000	NORTH PORT	15	34288	75.5714285714286	0	A
493	112348	2022-03-04 00:00:00.000	3500	2020-09-22 08:53:30.000	LAKE MARY	15	32746	78.8571428571429	14808.75	Z
494	112356	2022-03-09 00:00:00.000	15500	2020-09-23 08:36:54.000	CHARLOTTE	30	28277	69.6923076923077	53845.03	I
495	112408	2022-04-13 00:00:00.000	35500	2020-09-29 08:45:58.000	LA MESA	30	91942	80	8941.54	Z
496	112449	2022-02-11 00:00:00.000	61500	2020-09-30 09:54:42.000	FRESNO	30	93721	78.9285714285714	324059.04	G
497	112457	2022-02-13 00:00:00.000	3500	2020-10-01 08:51:47.000	SELDEN	30	11784	0	349	Q
498	112458	2021-12-18 00:00:00.000	6500	2020-10-01 08:51:47.000	LEES SUMMIT	7	64086	78.6428571428571	7280.26	I
499	112466	2022-01-14 00:00:00.000	5000	2020-10-01 08:51:47.000	SUGAR HILL	7	30518	73.2142857142857	0	Z
500	112507	2022-05-26 00:00:00.000	3500	2020-10-06 08:50:40.000	CLARKSVILLE	30	72830	70.7857142857143	11533.68	Z

✅ Query executed successfully. | 🔒 RAHUL_CHIRANCHI\SQLSERVER20... | RAHUL_CHIRANCHI\rahul ... | Fleetcor_Database | 00:00:00 | 500 rows