

CREDIT CARD

WEEKLY STATUS REPORT



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Outlines

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.

Power BI vs Excel	Learning Curve	Flexibility
Data Size & Model Complexity	Cloud-based Features & Accessibility	Visualization Options
Chart Interactivity	Cost	Data Security

Download Data

GitHub:

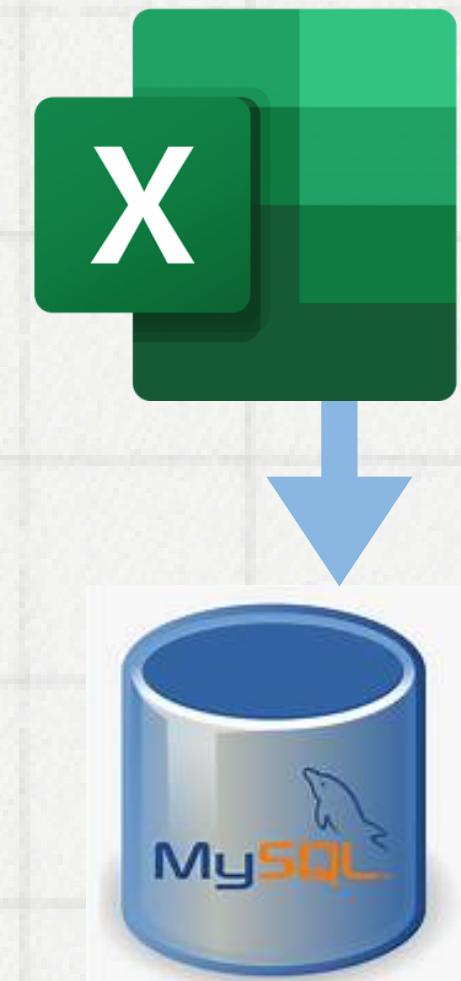
https://github.com/Krishna2001sahani/Credit_Card_Report_Dashboard



Import data to SQL database

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

	customer_name	order_date	total_orders
▶	John Doe	2022-01-01	100.00
	Jane Smith	2022-01-02	50.00
	John Doe	2022-01-03	75.00
	Jane Smith	2022-01-04	200.00
	John Doe	2022-01-05	125.00



NOTE: Find all SQL queries & project data-

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



CUSTOMER INSIGHT

**Thank you
very much!**