

Credit Card Power BI Dashboard – Step by Step Documentation

Project Overview

This project includes two interactive Power BI dashboards: 1) Credit Card Customer Report and 2) Credit Card Transaction Report. The dashboards provide insights into customer demographics, spending behavior, and weekly revenue performance using DAX calculations and slicers.

Tools Used

- Power BI Desktop
- DAX (Data Analysis Expressions)
- CSV datasets (Customer & Credit Card Transactions)

Dashboard 1: Credit Card Customer Report – Steps

- 1 Load customer.csv and CreditCard.csv into Power BI Desktop.
- 2 Create relationship: customer[Client_Num] → CreditCard[Client_Num].
- 3 Create calculated column Age Group using DAX.
- 4 Create calculated column Income Group (Low, Medium, High).
- 5 Create measures: Total Customers, Avg Income, Avg Customer Age, Customer Satisfaction Score.
- 6 Add slicers for Gender, Age Group, and Income Group.
- 7 Add KPI cards at the top for key metrics.
- 8 Create visuals: Gender Distribution (Donut), Customers by Age Group (Bar), Customers by Income Group (Column).
- 9 Add a table for Customer Job, Income, and Satisfaction Score.
- 10 Format the dashboard with a light gray background and aligned visuals.

Dashboard 2: Credit Card Transaction Report – Steps

- 1 Use CreditCard table for transaction analysis.
- 2 Create Week Num column using WEEKNUM function.
- 3 Create measures: Total Revenue, Total Transactions, Current Week Revenue, Previous Week Revenue.
- 4 Add slicers for Week Num and Expense Type.
- 5 Add KPI cards for revenue and transaction metrics.
- 6 Create Revenue by Spending Category (Bar chart).
- 7 Create Transaction Mode Distribution (Donut chart).

- 8 Create Weekly Revenue Trend using Line chart.
- 9 Apply consistent formatting and titles.

Key Insights

- Medium income customers form the largest customer segment.
- Male customers contribute a higher share of total customers.
- Bills and Entertainment are the highest revenue-generating categories.
- Swipe transactions dominate transaction modes.
- Weekly revenue shows consistent performance with periodic peaks.

Conclusion

This Power BI project demonstrates strong skills in data modeling, DAX calculations, dashboard design, and business insight generation. The dashboards are fully interactive and suitable for business reporting and interview presentation.