Content of the Project

1. 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.

2. Data from SQL

Import data to SQL database

- Prepare csv file
- Create tables in SQL
- Import csv file into SQL

3. Data processing & DAX

4. Dashboard & insights

5. Export & share project

week_num_new	Sum of Revenue	Previous_Week_Revenue	Current_Week_Revenue	wow_revenue	Count of client_num	current_wcc	Previous_wcc	wow_cc
53	1201601	933134	1201601	28.77%	185	185	164	12.80%
52	933134	1070439	933134	-12.83%	164	164	195	-15.90%
51	1070439	1026549	1070439	4.28%	195	195	195	0.00%
50	1026549	980152	1026549	4.73%	195	195	195	0.00%
49	980152	1008777	980152	-2.84%	195	195	195	0.00%
48	1008777	1047120	1008777	-3.66%	195	195	195	0.00%
47	1047120	1078915	1047120	-2.95%	195	195	195	0.00%
46	1078915	1094927	1078915	-1.46%	195	195	195	0.00%
45	1094927	1063063	1094927	3.00%	195	195	195	0.00%
44	1063063	934631	1063063	13.74%	195	195	195	0.00%
Total	56517011	933134	1201601	28.77%	10293	195	164	18.90%

state_cd	Sum of Revenue
TX	13015112
NY	12971863
CA	12901379
Total	38888354

marital_status	Sum of Revenue
Married	19162612
Single	16716129
Unknown	3009613
Total	38888354

week_num_new	Sum of Revenue	Sum of total_trans_amt	Sum of total_trans_vol	Current_wta	Previous_wta	wow_total_trans_amt	Current_wtc	Previous_wtc	wow_total_trans_cou
53	1201601	1011008	11583	1011008	748677	35.04%	11583	11203	3.39%
52	933134	748677	11203	748677	865275	-13.48%	11203	12587	-11.00%
51	1070439	865275	12587	865275	824791	4.91%	12587	12376	1.70%
50	1026549	824791	12376	824791	791352	4.23%	12376	12215	1.32%
49	980152	791352	12215	791352	808623	-2.14%	12215	12470	-2.04%
48	1008777	808623	12470	808623	847375	-4.57%	12470	12775	-2.39%
47	1047120	847375	12775	847375	865727	-2.12%	12775	12533	1.93%
46	1078915	865727	12533	865727	883695	-2.03%	12533	12900	-2.84%
45	1094927	883695	12900	883695	848559	4.14%	12900	12768	1.03%
44	1063063	848559	12768	848559	748600	13.35%	12768	12472	2.37%
Total	56517011	45533021	667234	1011008	748677	35.04%	11583	11203	3.39%

DAX Queries Used

```
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] < 50000, "Low",
    'public cust_detail'[income] >= 50000 && 'public cust_detail'[income] < 100000, "Medium",
    'public cust_detail'[income] >= 100000, "High","Unknown")

week_num_new = 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_num_new] = MAX('public cc_detail'[week_num_new])))

Previous_Week_Revenue = CALCULATE(
    SUM('public cc_detail'[Revenue]),
    FILTER(ALL('public cc_detail'),'public cc_detail'[week_num_new] = MAX('public cc_detail'[week_num_new])-1))
```
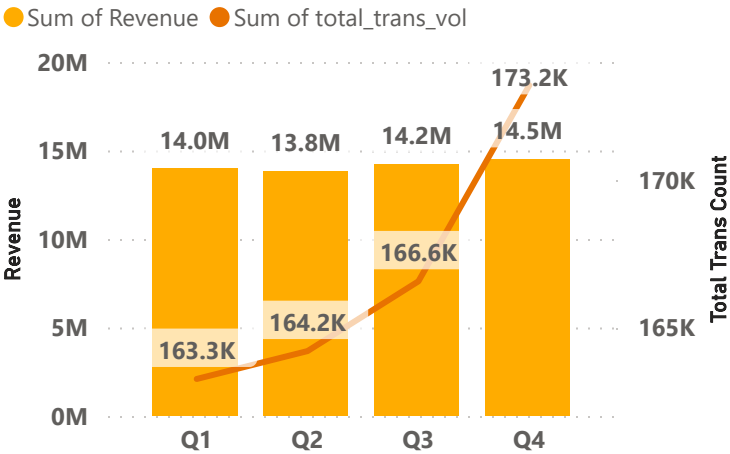
Credit Card Transaction Report

F | M

week_start_date ⌄
All ⌄

Revenue	Transaction Amount	Total Interest	Transaction Count
57M	**46M**	**8M**	**667K**

card_category	Sum of Revenue	Sum of total_trans_amt	Sum of interest_earned
Blue	47188612	37840749	6614173
Silver	5659109	4647596	821923
Gold	2533682	2091362	384755
Platinum	1135608	953314	161629
Total	**56517011**	**45533021**	**7982480**

Quarterly Revenue and Total Transaction Count

● Sum of Revenue ● Sum of total_trans_vol

- Q1: 14.0M, 163.3K
- Q2: 13.8M, 164.2K
- Q3: 14.2M, 166.6K
- Q4: 14.5M, 173.2K

Revenue by Use Chip

use_c... ● Swipe ● Chip ● Online

- 17M (30.68%)
- 4M (6.22%)
- 36M (63.1%)
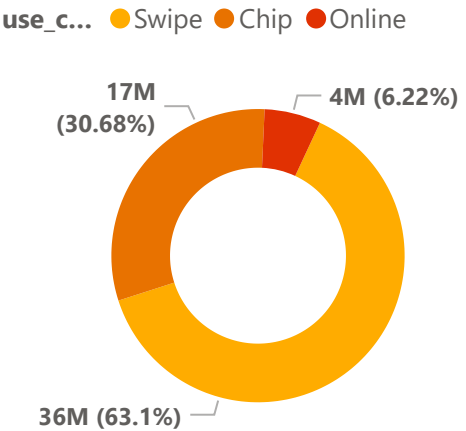
Revenue by Expenditure Type

- Bills: 14M
- Entertainment: 10M
- Fuel: 10M
- Grocery: 9M
- Food: 8M
- Travel: 6M

Revenue by Education Level

- Graduate: 23M
- High School: 11M
- Unknown: 9M
- Uneducated: 8M
- Post-Graduate: 3M
- Doctorate: 2M

Revenue by Customer Job

- Businessman: 18M
- White-collar: 10M
- Selfemployeed: 9M
- Govt: 8M
- Blue-collar: 7M
- Retirees: 5M
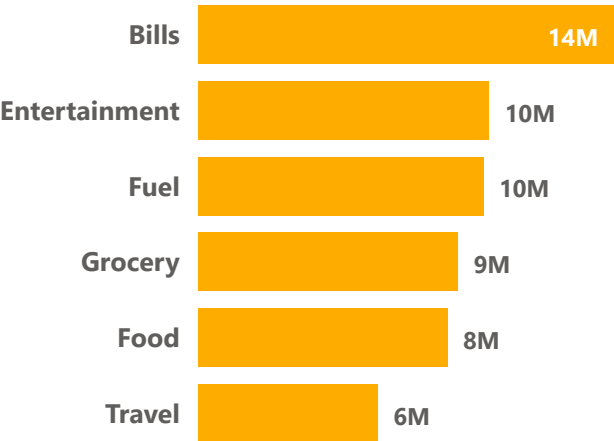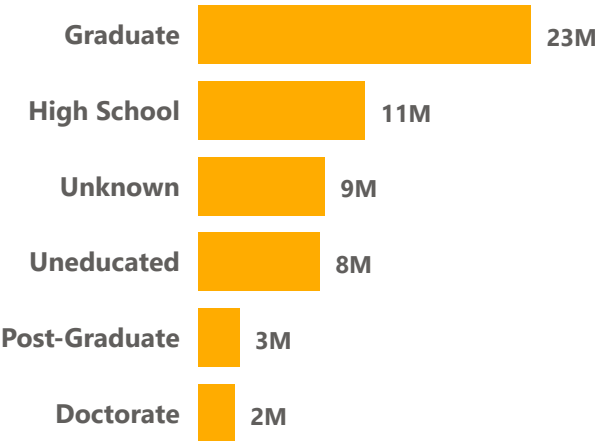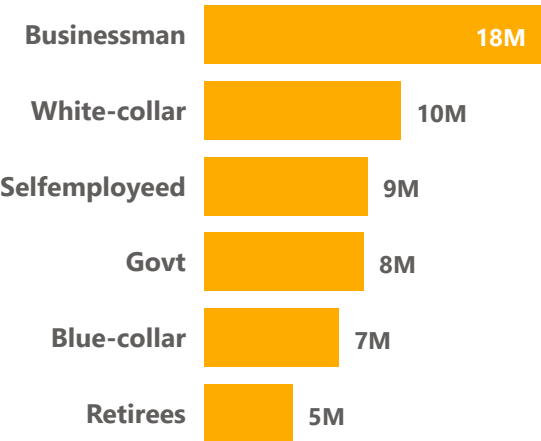
Revenue by Card Category

card_c... ● Blue ● Silver ● Gold ▶

- 47M (83.49%)
- 6M (10.01%)
- 3M (4.48%)
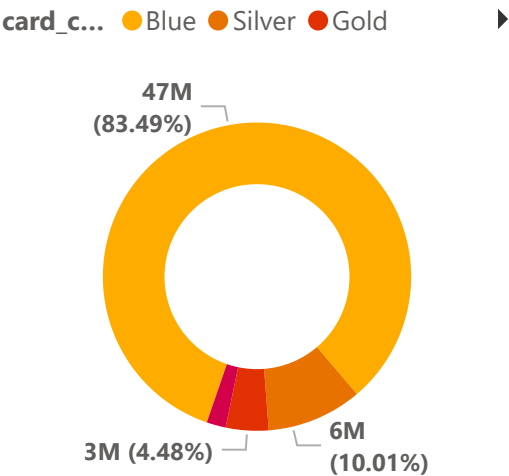
Credit Card Customer Report

M	F
31M	26M

week_start_date ▾
All ▾

Revenue	Average Income	Total Interest	CSS
57M	57.09K	8M	3.19

Revenue by AgeGroup

- 20-30
- 30-40: 4M | 6M
- 40-50: 11M | 14M
- 50-60: 9M | 10M
- 60+

Swipe | Chip
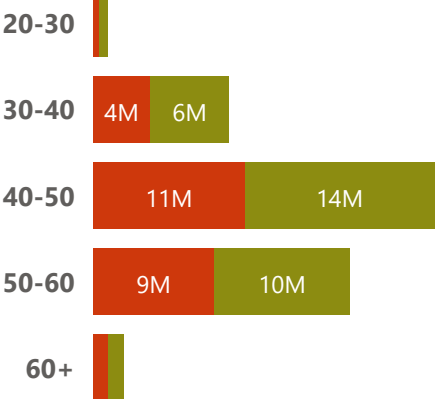
customer_job	Sum of income	Sum of Revenue	Sum of interest_earned
Businessman	190350431	17697472	2584604
White-collar	105618475	10283124	1464691
Govt	90834727	8335534	1182231
Selfemployed	77659931	8542826	1141510
Blue-collar	73516911	7040606	967751
Retirees	49619308	4617448	641692
Total	587599783	56517011	7982480

Revenue by Week

gender ● F ● M

0.72M 0.64M 0.56M 0.77M 0.69M 0.67M 0.55M 0.71M 0.49M 0.50M 0.52M 0.38M 0.41M 0.52M 0.38M

Jan 2023　Apr 2023　Jul 2023　Oct 2023

Revenue by education_level

- Graduate: 10M | 13M
- High School: 5M | 6M
- Unknown: 4M | 4M
- Uneducated: 4M | 5M
- Post-Graduate
- Doctorate
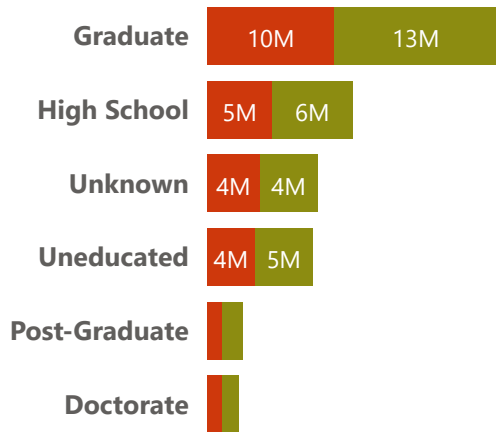
Revenue by Marital Status

- Married: 12M | 15M
- Single: 11M | 12M
- Unknown
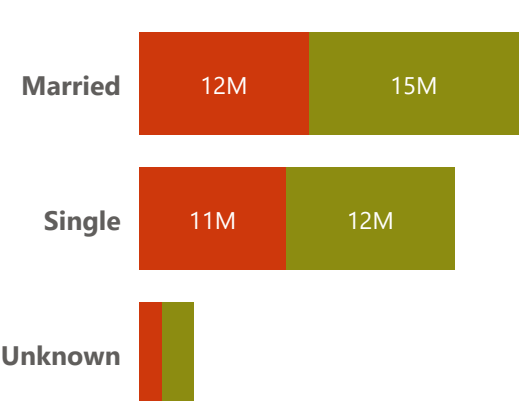
Revenue by IncomeGroup

gender ● F ● M

- High: 14M / 7M
- Medium: 15M / 3M
- Low: 2M / 15M

IncomeGroup

Revenue by Top 6 States

- TX: 6M | 7M
- NY: 6M | 7M
- CA: 7M | 6M
- FL: 4M | 6M
- NJ: 2M | 3M
- IL
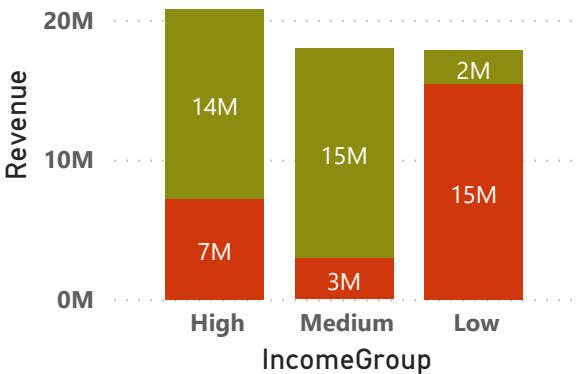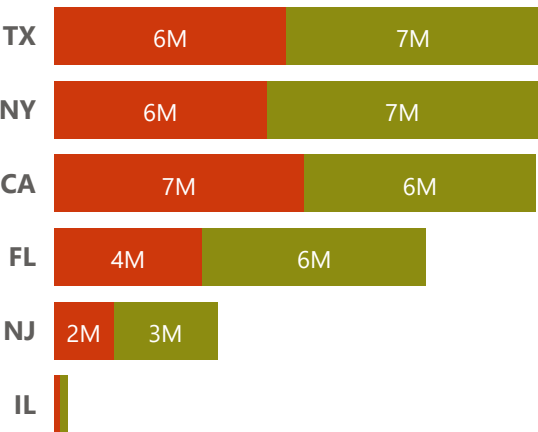
Project Insights- Week 53 (31st Dec)

WoW change:

- Revenue increased by 28.77%
- Total Transaction Amt & Count increased by 35.04% & 3.39%
- Customer count increased by 12.80%

Project Insights Overview YTD:

- Overall revenue is 56.52M
- Total interest is 8M
- Total transaction amount is 45.53M
- Male customers are contributing more in revenue 31M, female 26M
- Married Male Customers are contributing 48.43% and Married Female Customers are contributing 47.48% of their consecutive contribution in the total revenue
- Businessman and White-collar job customers are contributing 50% of total revenue and mostly they are graduates.
- Customers age between 30 to 60 are contributing 94.74% of total revenue
- Blue & Silver credit card are contributing to 93.50% of overall transactions
- 63.10 % of total revenue generated by swiping of credit cards
- TX, NY & CA is contributing to 68.68%
- Average Income of Customers are 57.09K.
- Average Customer Satisfaction Score is 3.19.
- Overall Activation rate is 57.5%
- Overall Delinquent rate is 6.06%
- Overall Customers are contributing 9.62% of their income in the total revenue