

# 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	933134	1063063	13.74%	185	185	164	8.60%
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

57M

Transaction Amount

46M

Total Interest

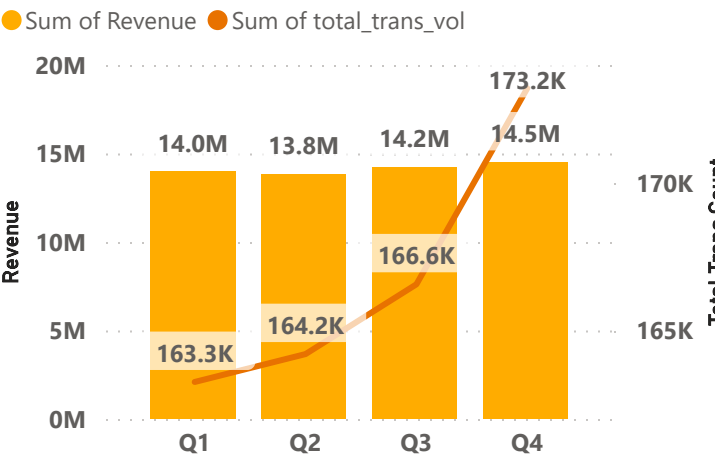
8M

Transaction Count

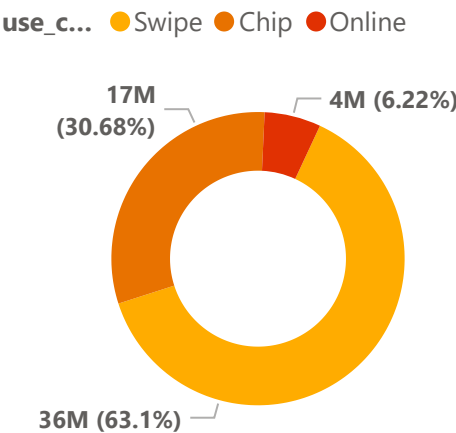
667K

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

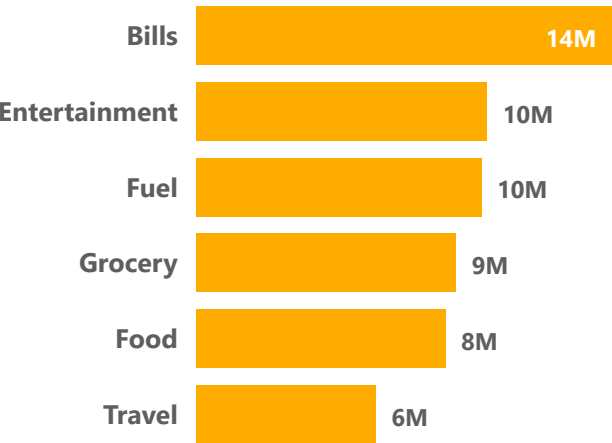
Quarterly Revenue and Total Transaction Count



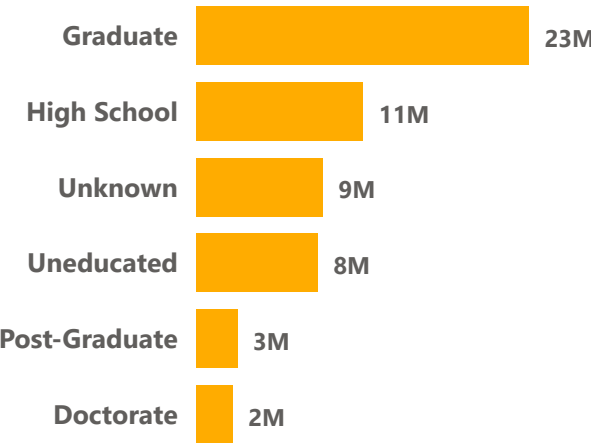
Revenue by Use Chip



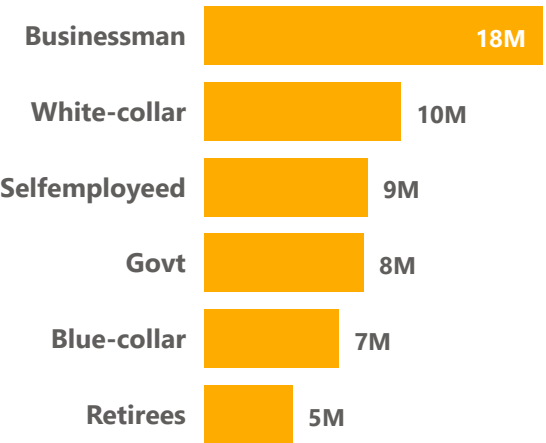
Revenue by Expenditure Type



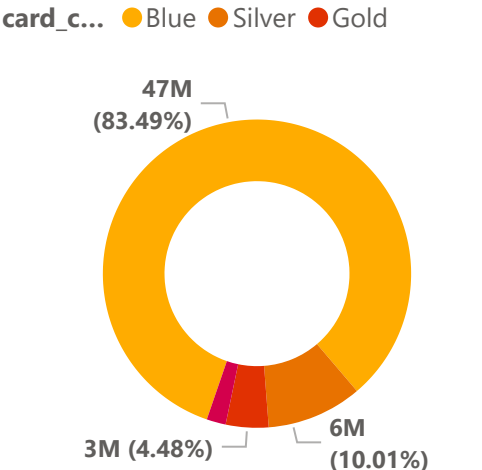
Revenue by Education Level



Revenue by Customer Job



Revenue by Card Category



# Credit Card Customer Report

Revenue

57M

Average Income

57.09K

Total Interest

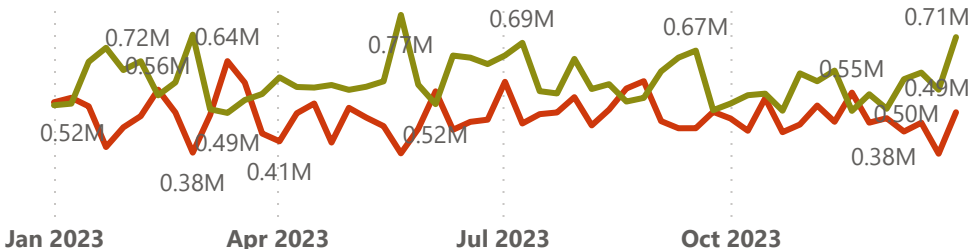
8M

CSS

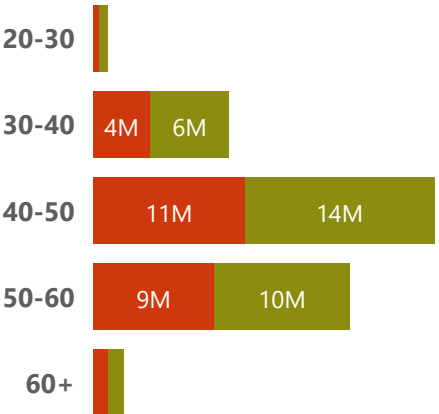
3.19

Revenue by Week

gender ● F ● M



Revenue by AgeGroup

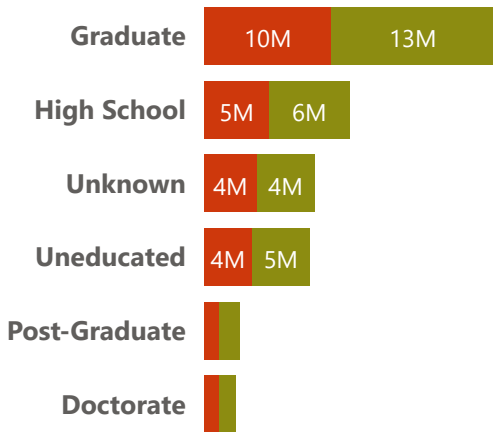


Swipe

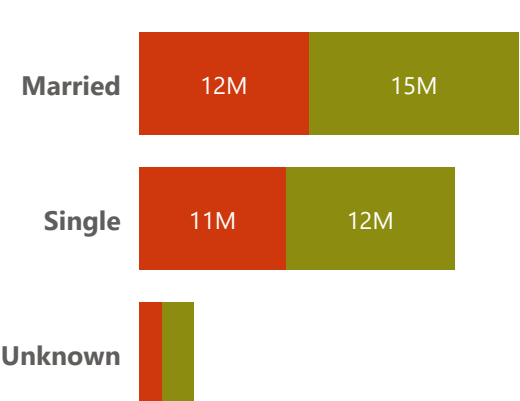
Chip

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 education\_level

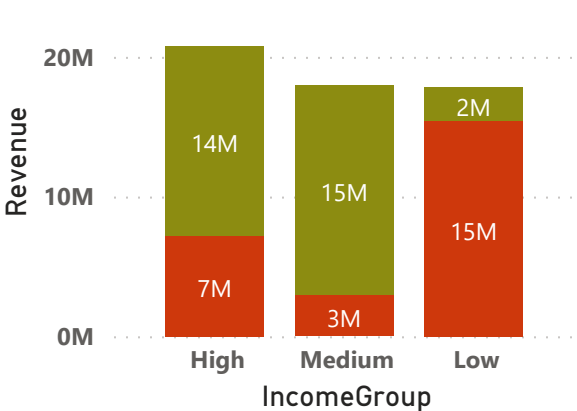


Revenue by Marital Status

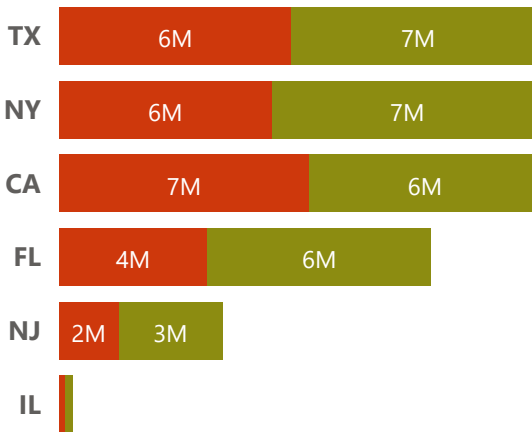


Revenue by IncomeGroup

gender ● F ● M



Revenue by Top 6 States



## 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