

Credit Card

Weekly status report



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Project Objective

Develop a complete weekly credit card dashboard in order to have real-time information on the performance of operations, allowing interested parties to monitor and analyze credit card operations effectively.



Import data to SQL - POWERBI



Create database and tables

I use queries to create the database and tables I need for the information I have in my CSV file.
(file in repository)

CSV to SQL

Use query to import the files to SQL.
(file in repository)

SQL to PowerBI

In the POWERBI data load menu, I use the PostgreSQL option to connect my data via (localhost) and start working

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, "Medium",
```

```
'public cust_detail'[income] >= 70000, "High",  
"unknown"
```

```
)
```



```
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	Overview YTD
Revenue increased by 28.8%,	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%

Thank you!

