CREDIT CARD

WEEKLY STATUS REPORT

INTRODUCTION

The Credit Card Weekly Report Power BI Dashboard project aims to provide a dynamic and insightful tool for analyzing credit card performance and consumer behavior.

By utilizing Power BI's robust data visualization capabilities, the dashboard will facilitate real-time reporting and analysis, empowering decision-makers with actionable insights.

The project will incorporate various data sources, allowing for comprehensive analysis and segmentation of credit card usage by demographics, spending categories, and trends over time.

OBJECTIVE

- The objective of the Credit Card Weekly Report Power BI Dashboard project is to develop a comprehensive and user-friendly dashboard that provides stakeholders with actionable insights into credit card usage, performance, and trends.

- Provide detailed insights into transaction categories and merchant behaviors to inform decision-making and enhance customer engagement.

PROJECT PHASES

- **REQUIREMENT GATHERING** : Prepare a CSV file for the dataset and create tables in the SQL. Import the CSV file to SQL.

- **DATA PREPRATION** : Connect the dataset from SQL to Power BI. Identify key metrics and KPIs to be included in the dashboard.

- **Dashboard Development** : Build the Power BI dashboard with interactive features and visualizations based on the defined requirements.

DAX QUERIES

```
Age Group = SWITCH(
    True(),
    customer_detail[Customer_Age]<30,"20-30",
    customer_detail[Customer_Age]>=30 && ''customer_detail'[Customer_Age]<40,"30-40",
    customer_detail[Customer_Age]>=40 && 'customer_detail'[Customer_Age]<50,"40-50",
    customer_detail[Customer_Age]>=50 && 'customer_detail'[Customer_Age]<60,"50-60",
    customer_detail[Customer_Age]>=60,"60+",
    "unknown"
   )
```

DAX QUERIES

```
Income Group = SWITCH(
    TRUE(),
    customer_detail[Income]<35000,"Low Income",
    customer_detail[Income]>=35000 && customer_detail[Income]<70000,"Med Income",
    customer_detail[Income]>=70000,"High Income",
    "unknown"
)
```

```
Week num2 = WEEKNUM(credit_card_detail[Week_Start_Date])
```

DAX QUERIES

Revenue = credit_card_detail[Annual_Fees] + credit_card_detail[Total_Trans_Amt] + credit_card_detail[Interest_Earned]

Current_week_revenue = CALCULATE(

SUM(credit_card_detail[Revenue]),

ALL(credit_card_detail),

credit_card_detail[Week num2]=MAX(credit_card_detail[Week num2]))

Previous_week_revenue = CALCULATE(

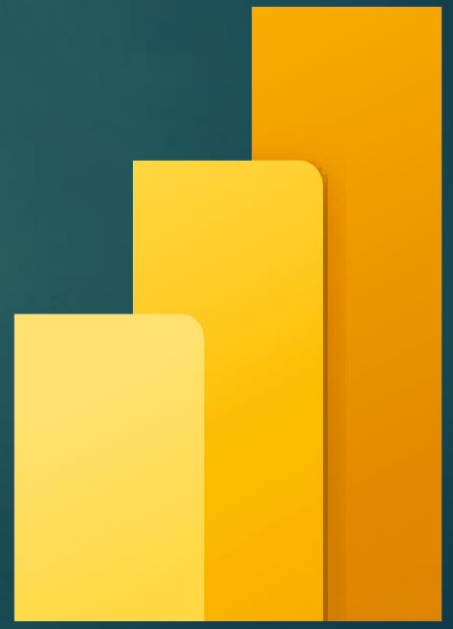
SUM(credit_card_detail[Revenue]),

FILTER(

ALL(credit_card_detail),

credit_card_detail[Week num2]=MAX(credit_card_detail[Week num2])-1

))



PROJECT INSIGHTS

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%**