

Credit Card Transaction Report

Total Revenue

55M

Total Interest

8M

Transaction Amount

45M

Transaction Count

656K

card_category	Sum of Revenue	Sum of total_trans_amt	Sum of interest_earned
Blue	46139398	36957875	6,495,887.74
Gold	2454072	2024078	373,784.16
Platinum	1135608	953314	161,629.05
Silver	5586332	4586746	812,081.28
Total	55315410	44522013	7,843,382.23

Q4

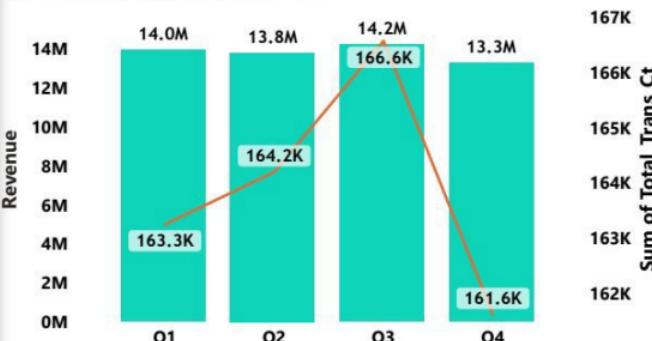
Q3

Q2

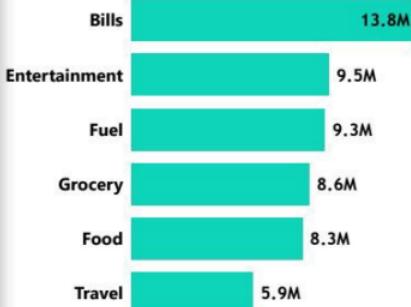
Q1

Qtr Revenue & Transaction Count

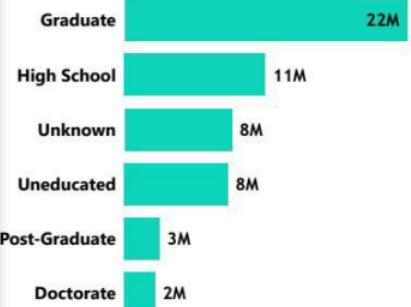
● Sum of Revenue ● Sum of total_trans_ct



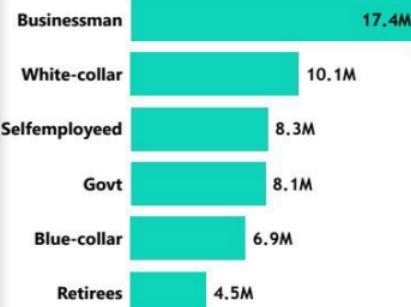
Revenue by Expenditure Type



Revenue by Education



Revenue by Customer Job



Week_Start_Date

All

F

M

Low

Medium

High

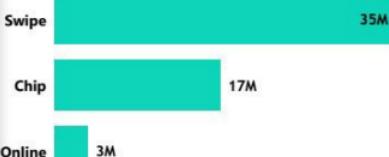
Silver

Blue

Gold

Platinum

Revenue by Use Chip

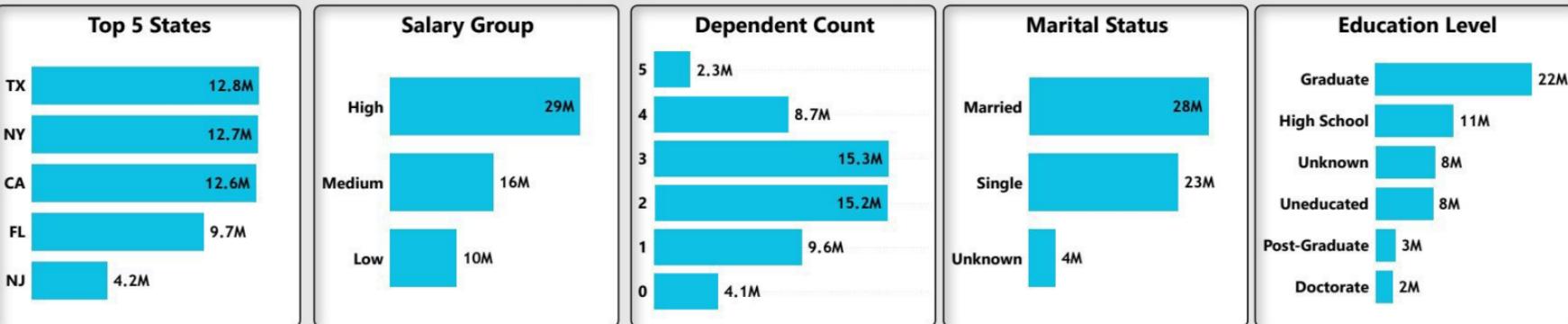
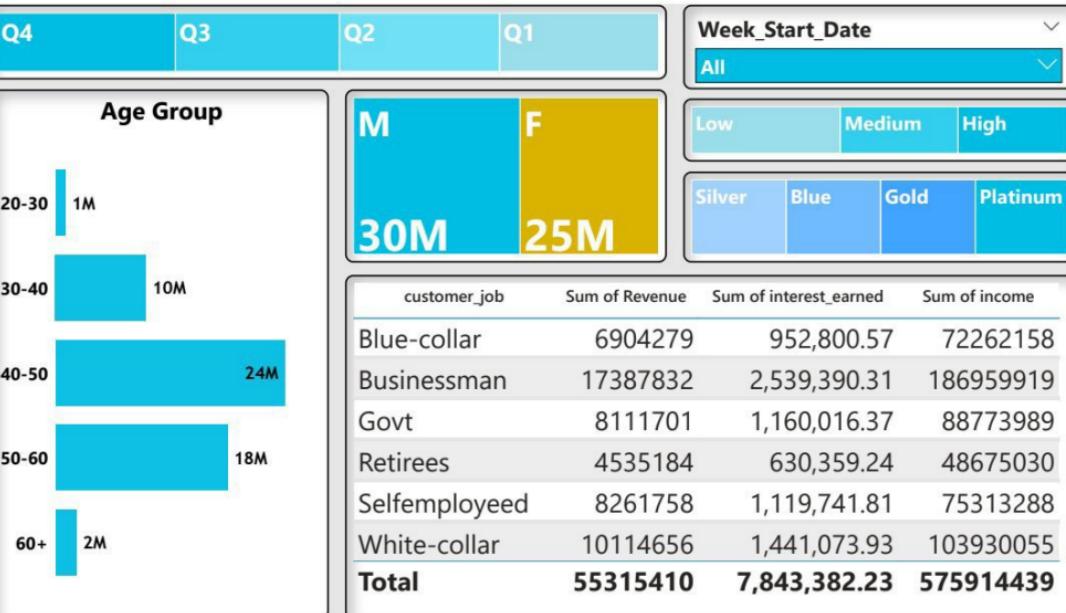
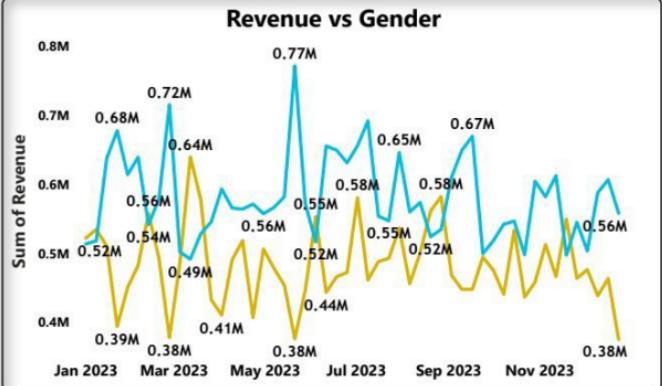


Revenue by Card Category



Credit Card Customer Report

Total Revenue	Total Interest	Total Income	Satisfaction Score
55M	8M	576M	3.2



Sum of Revenue by card_category

50M

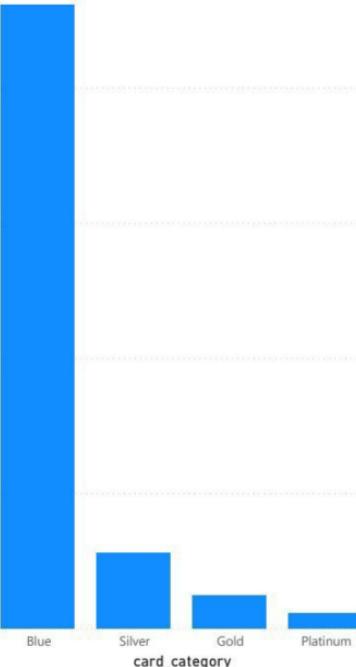
40M

30M

20M

10M

0M



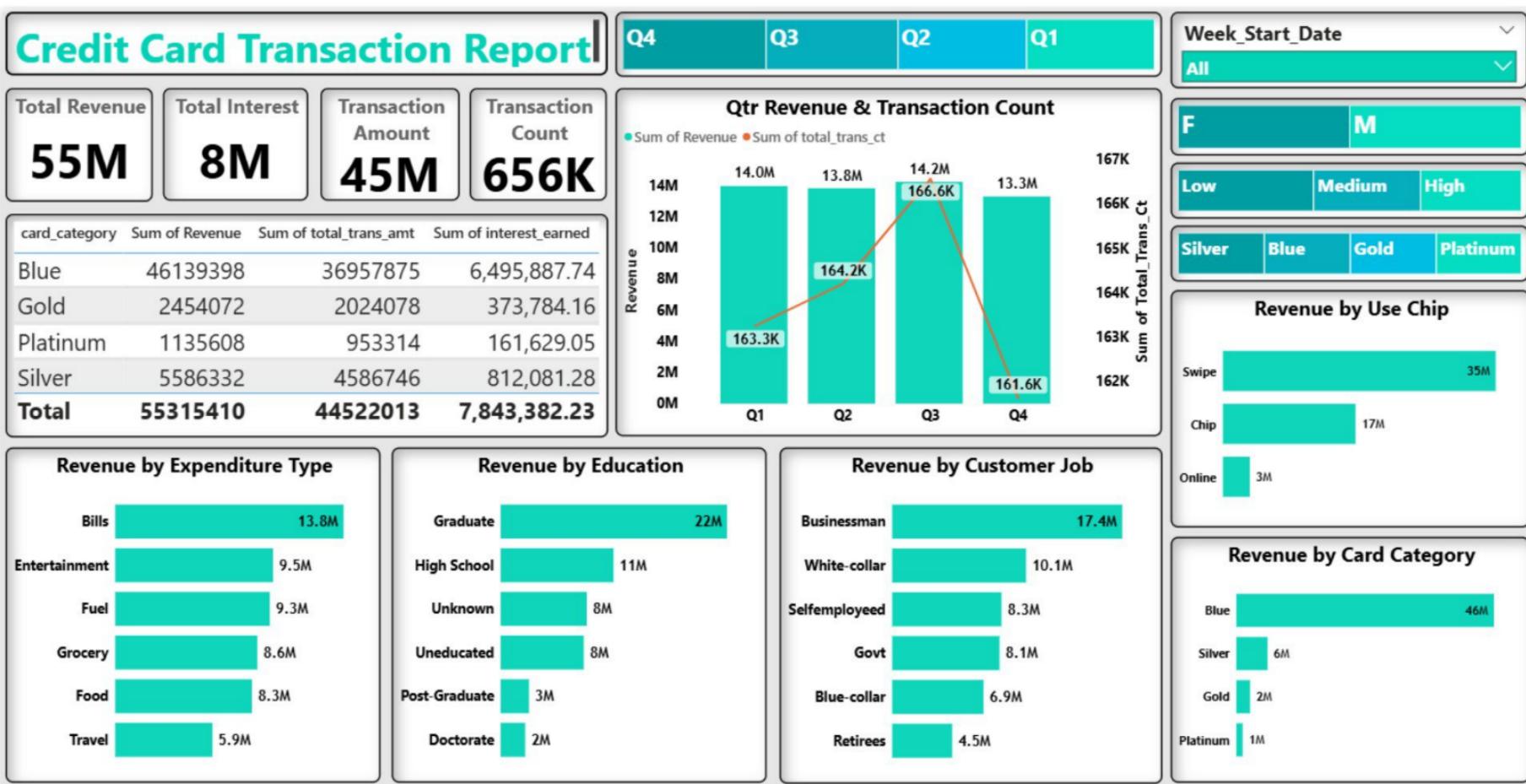
week_num	week_num2	Sum of Revenue	Previous_week_Revenue	Current_week_Revenue	%GT wow_Revenue
Week-1	1	1035629		1035629	
Week-2	2	1053089	1035629	1053089	-13.14%
Week-3	3	1148250	1053089	1148250	-70.45%
Week-4	4	1071919	1148250	1071919	51.82%
Week-5	5	1064578	1071919	1064578	5.34%
Week-6	6	1121745	1064578	1121745	-41.86%
Week-7	7	1099909	1121745	1099909	15.18%
Week-8	8	1071542	1099909	1071542	20.11%
Week-9	9	1093502	1071542	1093502	-15.98%
Week-10	10	987820	1093502	987820	75.35%
Week-11	11	1131281	987820	1131281	-113.22%
Week-12	12	1106533	1131281	1106533	17.05%
Week-13	13	978565	1106533	978565	90.16%
Week-14	14	1003844	978565	1003844	-20.14%
Week-15	15	1056485	1003844	1056485	-40.88%
Week-16	16	1082609	1056485	1082609	-19.28%
Week-17	17	978441	1082609	978441	75.01%
Week-18	18	1063741	978441	1063741	-67.97%
Week-19	19	1044817	1063741	1044817	13.87%
Week-20	20	1035861	1044817	1035861	6.68%
Week-21	21	1147870	1035861	1147870	-84.30%
Week-22	22	1018518	1147870	1018518	87.85%
Week-23	23	1070103	1018518	1070103	-39.48%
Week-24	24	1099070	1070103	1099070	-21.10%

Muhammad Siraj | Data Analyst

Credit Card Analytics Project

Complete Insights

Dashboard 1: Credit Card Transaction Report



Overall Business Performance



- Total Revenue: **55M**
- Total Transaction Amount: **45M**
- Total Interest Earned: **8M**
- Total Transaction Count: **656K**

Insight:

The bank is generating high revenue driven majorly by transaction volume and interest income across card tiers.

Quarterly Performance



- Q1 Revenue: 14.0M | Transactions: 163K
- Q2 Revenue: 13.8M | Transactions: 164K
- Q3 Revenue: 14.2M | Transactions: 166K
- Q4 Revenue: 13.3M | Transactions: 161K

Insight:

Revenue and transaction volume peak in Q3, indicating seasonal spending or promotional activities. Q4 shows a slight dip and may require targeted campaigns.

Revenue by Card Category



- Blue Cards: 46M
- Silver: 6M
- Gold: 2M
- Platinum: 1M

Insight:

Blue Card customers make up over 80% of total revenue, showing this is the bank's largest customer group and key segment.

Revenue by Expenditure Type



- Bills: 13.8M
- Entertainment: 9.5M
- Fuel: 9.3M
- Grocery: 8.6M
- Food: 8.3M
- Travel: 5.9M

Insight:

Essential categories like Bills, Fuel, Grocery, and Food are the biggest drivers. Indicating customers use credit cards heavily for day-to-day transactions.

Revenue by Education Level



- Graduate: 22M
- High School: 11M
- Unknown / Uneducated: 16M (combined)
- Post-Graduate: 3M
- Doctorate: 2M

Insight:

Graduates contribute the largest share of revenue, and the mid-level educated segment is highly active.

Revenue by Customer Job



- Businessman: 17.4M
- White-collar: 10.1M
- Self-employed: 8.3M
- Govt Employees: 8.1M
- Blue-collar: 6.9M
- Retirees: 4.5M

Insight:

Businesspeople and white-collar professionals generate the highest spending, indicating strong purchasing power.

Revenue by Card Usage Type



- Swipe (POS): 35M
- Chip: 17M
- Online: 3M

Insight:

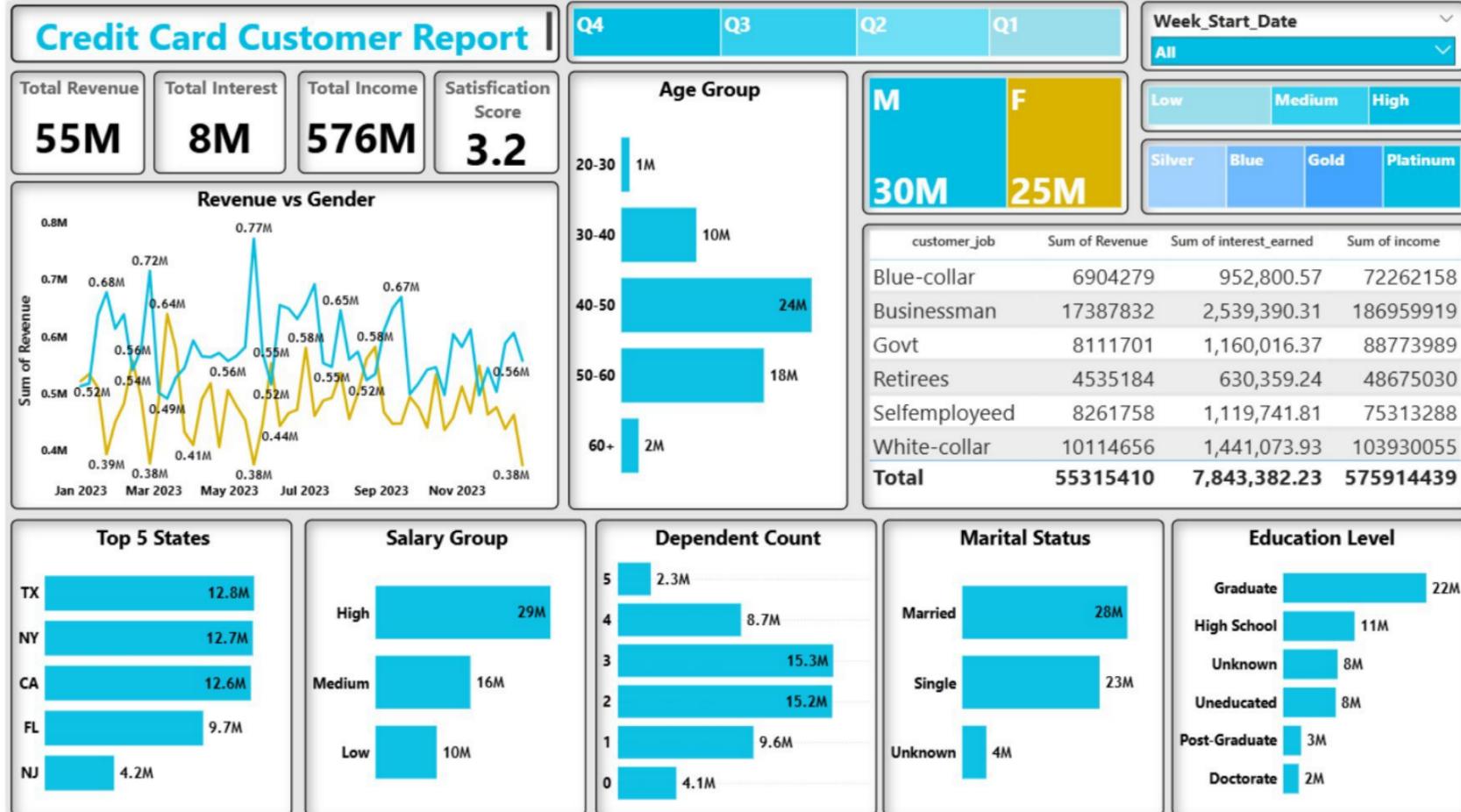
In-store physical card usage dominates. Online transactions are significantly lower, showing opportunity to promote e-commerce usage.

Transaction Dashboard Summary



- Revenue peaks in Q3; Q4 requires improvement.
- Blue cardholders generate majority revenue.
- Bills, fuel, groceries, and food categories drive spending.
- Businessmen and graduates are key revenue drivers.
- POS transactions dominate over online purchases.

Dashboard 2: Credit Card Customer Report



Customer-Level Overview



- Total Revenue: 55M
- Total Interest: 8M
- Total Income of Users: 576M
- Average Satisfaction Score: 3.2

Insight:

Moderate satisfaction score suggests service improvement areas.

Revenue by Gender



- Male Customers: 30M
- Female Customers: 25M

Insight:

Male customers contribute slightly more, but the gap is not large-indicating balanced usage across genders.

Monthly revenue from both genders is unstable with peaks in May and July, showing seasonal buying behavior.

Revenue by Age Group



- 40–50 years: 24M
- 50–60 years: 18M
- 30–40 years: 10M
- 20–30 years: 1M
- 60+ years: 2M

Insight:

Middle-aged customers (30–60 years) contribute almost 90% of revenue, representing the bank's core customer base.

Revenue by Customer Job



- Businessman: 17M
- White-collar: 10M
- Self-employed: 8.2M
- Government: 8.1M
- Blue-collar: 6.9M
- Retirees: 4.5M

Insight:

The same pattern appears in the customer dashboard. Businessmen and white-collar employees spend the most.

Top 5 States by Revenue



- TX: 12.8M
- NY: 12.7M
- CA: 12.6M
- FL: 9.7M
- NJ: 4.2M

Insight:

Texas, New York, and California are the strongest markets. These states alone contribute ~40% of total revenue.

Revenue by Salary Group



- High Salary: 29M
- Medium Salary: 16M
- Low Salary: 10M

Insight:

High-income customers generate 50%+ of revenue-showing strong correlation between income level and credit card usage.

Revenue by Dependent Count



- Customers with 2 or 3 dependents contribute the most (15.2M & 15.3M).
- Customers with 0 dependents contribute only 4M.

Insight:

Family-oriented customers show higher spending levels.

Revenue by Marital Status



- Married: 28M
- Single: 23M
- Unknown: 4M

Insight:

Married customers spend the most, likely due to shared household expenses.

Revenue by Education Level



- Graduate: 22M
- High School: 11M
- Uneducated / Unknown: ~16M (combined)
- Post-Graduate & Doctorate: ~5M (combined)

Insight:

Most revenue comes from moderately educated customers, not highly educated ones.

Customer Dashboard Summary



- Revenue is highest from males, middle-aged groups (30–60), and high earners.
- Texas, New York, and California are top-performing states.
- Married and high-salary customers spend the most.
- Satisfaction score 3.2 indicates service improvement potential.



A1	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Client_Num	Customer_Age	Gender	Dependent_Count	Education_Level	Marital_Status	state_cd	Zipcode	Car_Owner	House_Owner	Personal_loan	contact	Customer_Job	Income	Cust_Satisfaction_Score
1	708082083	24	F	1	Uneducated	Single	FL	91750	no	yes	no	unknown	Businessman	2E+05
2	708083283	62	F	0	Unknown	Married	NJ	91750	no	no	no	cellular	Selfemployed	5225
3	708084558	32	F	1	Unknown	Married	NJ	91750	yes	no	no	unknown	Selfemployed	14235
4	708085458	38	M	2	Uneducated	Single	NY	91750	no	no	no	cellular	Blue-collar	45683
5	708086958	48	M	4	Graduate	Single	TX	91750	yes	yes	no	cellular	Businessman	59279
6	708095133	33	F	1	High School	Single	NY	91750	no	yes	no	cellular	Selfemployed	14254
7	708098133	34	F	3	Graduate	Single	CA	91750	yes	no	no	telephone	Selfemployed	14975
8	708099183	34	F	2	Uneducated	Single	CA	91750	no	no	no	cellular	Retirees	31982
9	708100533	48	M	2	High School	Married	NJ	91750	yes	no	no	telephone	Businessman	86668
10	708103608	53	F	1	Graduate	Married	NJ	91750	yes	yes	no	cellular	Businessman	2E+05
11	708104658	31	F	0	Post-Graduate	Single	CA	91750	no	yes	no	telephone	Businessman	33625
12	708108333	34	F	4	Graduate	Single	NY	91750	no	no	no	cellular	Selfemployed	14975
13	708112008	51	F	2	Graduate	Single	NJ	91750	yes	yes	no	cellular	Selfemployed	14975
14	708113208	36	M	1	High School	Single	NJ	91750	yes	no	no	telephone	White-collar	59416
15	708117933	49	F	4	Graduate	Married	CA	91750	no	yes	no	unknown	Retirees	28122
16	708119658	53	F	2	Graduate	Single	FL	91750	yes	no	no	cellular	Govt	29021
17	708121908	49	F	1	Graduate	Married	TX	91750	no	no	no	unknown	Selfemployed	20632
18	708123033	47	F	5	Graduate	Married	FL	91750	no	no	no	cellular	Businessman	2E+05
19	708125733	43	F	4	Graduate	Single	FL	91750	no	no	no	cellular	Retirees	57168
20	708128733	47	M	3	Graduate	Married	NY	91750	no	no	no	cellular	Govt	89954
21	708129933	34	F	3	Uneducated	Single	TX	91750	yes	yes	yes	telephone	Blue-collar	53762
22	708132783	37	F	5	Unknown	Married	NJ	91750	yes	yes	no	cellular	Selfemployed	45476
23	708134283	63	M	0	Graduate	Single	TX	91750	yes	yes	yes	cellular	Selfemployed	14975
24	708136908	55	M	2	Doctorate	Married	MO	91750	yes	yes	no	cellular	Retirees	72878
25	708139833	38	F	1	Unknown	Single	NY	91750	no	no	no	cellular	Businessman	25667
26	708145908	40	M	3	Graduate	Single	MA	91750	no	yes	no	cellular	Blue-collar	47224
27	708147108	55	F	0	Graduate	Single	NY	91750	yes	no	no	unknown	White-collar	25341

credit_card - Excel																Search		Muhammad Siraj				
File		Home		Insert		Page Layout		Formulas		Data		Review		View		Developer		Help		Power Pivot		
A1																						Share
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P							
Client_Num	Card_Category	Annual_Fees	Activation_30_Days	Customer_Acq_Cost	Week_Start_Date	Week_Num	Qtr	current_year	Credit_Limit	Total_Revolving_Bal	Total_Trans_Amt	Total_Trans_Vol	Avg_Utilization_Ratio	Use_Chip	Exp_Type							
1	708082083	Blue	200	0	87	01/01/2023	Week-1	Q1	2023	3544	1661	15149	111	0.469	Chip	Travel						
2	708083283	Blue	445	1	108	01/01/2023	Week-1	Q1	2023	3421	2517	992	21	0.736	Swipe	Entertainment						
3	708084558	Blue	140	0	106	01/01/2023	Week-1	Q1	2023	8258	1771	1447	23	0.214	Chip	Bills						
4	708085458	Blue	250	1	150	01/01/2023	Week-1	Q1	2023	1438.3	0	3940	82	0	Online	Grocery						
5	708086958	Blue	320	1	106	01/01/2023	Week-1	Q1	2023	3128	749	4369	59	0.239	Swipe	Fuel						
6	708095133	Blue	100	0	94	01/01/2023	Week-1	Q1	2023	33304	1833	1448	29	0.055	Swipe	Bills						
7	708098133	Blue	225	1	75	01/01/2023	Week-1	Q1	2023	2834	1418	1598	39	0.5	Swipe	Bills						
8	708099183	Blue	400	1	75	01/01/2023	Week-1	Q1	2023	5723	1873	2732	63	0.327	Swipe	Grocery						
9	708100533	Blue	200	1	64	01/01/2023	Week-1	Q1	2023	2679	2277	4943	85	0.85	Chip	Food						
10	708103608	Platinum	95	1	80	01/01/2023	Week-1	Q1	2023	11898	2517	15798	128	0.212	Chip	Grocery						
11	708104658	Blue	455	1	118	01/01/2023	Week-1	Q1	2023	1438.3	890	2928	48	0.619	Swipe	Fuel						
12	708108333	Blue	485	0	86	01/01/2023	Week-1	Q1	2023	5590	0	1507	32	0	Swipe	Entertainment						
13	708112008	Blue	440	1	86	01/01/2023	Week-1	Q1	2023	23510	1049	1661	35	0.045	Swipe	Grocery						
14	708113208	Blue	300	1	149	01/01/2023	Week-1	Q1	2023	1688	0	4375	69	0	Chip	Fuel						
15	708117933	Blue	360	0	70	01/01/2023	Week-1	Q1	2023	1880	0	2469	34	0	Chip	Bills						
16	708119658	Blue	340	0	44	01/01/2023	Week-1	Q1	2023	12836	1034	2519	53	0.081	Swipe	Bills						
17	708121908	Blue	405	0	71	01/01/2023	Week-1	Q1	2023	22917	0	2045	45	0	Swipe	Grocery						
18	708123033	Silver	355	0	78	01/01/2023	Week-1	Q1	2023	11463	0	14511	105	0	Swipe	Fuel						
19	708125733	Blue	220	0	69	01/01/2023	Week-1	Q1	2023	1438.3	0	4311	77	0	Swipe	Entertainment						
20	708128733	Blue	125	1	105	01/01/2023	Week-1	Q1	2023	1814	0	5014	99	0	Swipe	Entertainment						
21	708129933	Blue	350	1	77	01/01/2023	Week-1	Q1	2023	2072	1544	4210	64	0.745	Chip	Entertainment						
22	708132783	Blue	250	1	92	01/01/2023	Week-1	Q1	2023	16411	1179	3929	71	0.072	Swipe	Food						
23	708134283	Blue	125	1	101	01/01/2023	Week-1	Q1	2023	3131	629	1483	31	0.201	Swipe	Food						
24	708136908	Blue	110	1	73	01/01/2023	Week-1	Q1	2023	2616	801	4655	68	0.306	Swipe	Entertainment						
25	708139833	Blue	460	0	111	01/01/2023	Week-1	Q1	2023	6391	0	2323	44	0	Swipe	Grocery						
26	708145908	Blue	320	0	78	01/01/2023	Week-1	Q1	2023	4906	2185	3999	71	0.445	Swipe	Bills						
27	708147108	Blue	320	0	112	01/01/2023	Week-1	Q1	2023	21084	2517	2309	71	0.119	Swipe	Travel						
28	708148158	Blue	175	0	73	01/01/2023	Week-1	Q1	2023	1827	0	4207	86	0	Swipe	Fuel						
29	708151008	Blue	440	1	86	01/01/2023	Week-1	Q1	2023	6250	644	2433	41	0.103	Swipe	Fuel						
30	708152358	Blue	335	1	101	01/01/2023	Week-1	Q1	2023	18512	1664	8019	57	0.09	Swipe	Food						
31	708153558	Blue	375	0	150	01/01/2023	Week-1	Q1	2023	34516	1802	7936	101	0.052	Swipe	Fuel						
32	708154833	Blue	250	0	82	01/01/2023	Week-1	Q1	2023	1438.3	811	2336	46	0.564	Chip	Fuel						

```
1 Creating Tables....  
2 CREATE TABLE cc_detail (  
3     Client_Num INT,  
4     Card_Category VARCHAR(20),  
5     Annual_Fees INT,  
6     Activation_30_Days INT,  
7     Customer_Acq_Cost INT,  
8     Week_Start_Date DATE,  
9     Week_Num VARCHAR(20),  
10    Qtr VARCHAR(10),  
11    current_year INT,  
12    Credit_Limit DECIMAL(10,2),  
13    Total_Revolving_Bal INT,  
14    Total_Trans_Amt INT,  
15    Total_Trans_Ct INT,  
16    Avg_Utilization_Ratio DECIMAL(10,3),  
17    Use_Chip VARCHAR(10),  
18    Exp_Type VARCHAR(50),  
19    Interest_Earned DECIMAL(10,3),  
20    Delinquent_Acc VARCHAR(5)  
21 );
```



ccdb/postgres@PostgreSQL 18

No limit

Query History

```
20      Delinquent_Acc VARCHAR(5)
21
22
23
24 CREATE TABLE cust_detail (
25     Client_Num INT,
26     Customer_Age INT,
27     Gender VARCHAR(5),
28     Dependent_Count INT,
29     Education_Level VARCHAR(50),
30     Marital_Status VARCHAR(20),
31     State_cd VARCHAR(50),
32     Zipcode VARCHAR(20),
33     Car_Owner VARCHAR(5),
34     House_Owner VARCHAR(5),
35     Personal_Loan VARCHAR(5),
36     Contact VARCHAR(50),
37     Customer_Job VARCHAR(50),
38     Income INT,
39     Cust_Satisfaction_Score INT
40 );
41
```

Data Output Messages Notifications

Total rows: CRLF Ln 1, Col 1

File SQL Statistics Dependencies Dependents Processes postgres/postgres... Credit Transaction SQL File.sql

Servers (1)
PostgreSQL 18
Databases (2)
ccdb (1)
Casts
Catalogs
Event Triggers
Extensions
Foreign Data Wrappers
Languages
Publications
Schemas (1)
public (1)
Aggregates
Collations
Domains
FTS Configuration
FTS Dictionaries
FTS Parsers
FTS Templates
Foreign Tables
Functions
Materialized Views
Operators

ccdb/postgres@PostgreSQL 18

No limit

Query History

```
State_CD VARCHAR(50),
Zipcode VARCHAR(20),
Car_Owner VARCHAR(5),
House_Owner VARCHAR(5),
Personal_Loan VARCHAR(5),
Contact VARCHAR(50),
Customer_Job VARCHAR(50),
Income INT,
Cust_Satisfaction_Score INT
);
Checking Tables.....
SELECT * FROM cc_detail;
SELECT * FROM cust_detail;
```

Data Output Messages Notifications

Showing rows: 1 to 1000 Page No: 1 of 11

	client_num integer	card_category character varying (20)	annual_fees integer	activation_30_days integer	customer_acq_cost integer	week_start_date date	week_num character varying (20)	qtr character
1	708082083	Blue	200	0	87	2023-01-01	Week-1	Q1
2	708083283	Blue	445	1	108	2023-01-01	Week-1	Q1
3	708084558	Blue	140	0	106	2023-01-01	Week-1	Q1

Total rows: 10108 Query complete 00:00:00.802 CRLF Ln 43, Col 1

- Servers (1)
 - PostgreSQL 18
 - Databases (2)
 - ccdb
 - Casts
 - Catalogs
 - Event Triggers
 - Extensions
 - Foreign Data Wrappers
 - Languages
 - Publications
 - Schemas (1)
 - public
 - Aggregates
 - Collations
 - Domains
 - FTS Configuration
 - FTS Dictionaries
 - FTS Parsers
 - FTS Templates
 - Foreign Tables
 - Functions
 - Materialized Views
 - Operators

ccdb/postgres@PostgreSQL 18

No limit

```
State_cd VARCHAR(50),
Zipcode VARCHAR(20),
Car_Owner VARCHAR(5),
House_Owner VARCHAR(5),
Personal_Loan VARCHAR(5),
Contact VARCHAR(50),
Customer_Job VARCHAR(50),
Income INT,
Cust_Satisfaction_Score INT
);
Checking Tables.....
SELECT * FROM cc_detail;
SELECT * FROM cust_detail;
```

Data Output Messages Notifications

Showing rows: 1 to 1000

Page No: 1 of 11

	client_num	customer_age	gender	dependent_count	education_level	marital_status	state_cd	zip_code
	integer	integer	character varying (5)	integer	character varying (50)	character varying (20)	character varying (50)	character
1	708082083	24	F		1	Uneducated	Single	FL
2	708083283	62	F		0	Unknown	Married	NJ
3	708084558	32	F		1	Unknown	Married	NJ

Total rows: 10108 Query complete 00:00:00.390

CRLF Ln 44, Col 1

Credit Card Transaction Report • Last saved: Today at 9:24 PM

Search

Sign in

File Home Help Table tools

Name public cc_detail

Manage relationships New measure Quick New measure column New table Mark as date table Calculations Calendars

Structure Relationships Data

Search

public cc_detail

public cust_detail

client_num	card_category	annual_fees	activation_30_days	customer_acq_cost	week_start_date	week_num	qtr	current_year	credit
708508758	Blue	375	1	52	Sunday, 8 January 2023	Week-2	Q1	2023	
709042908	Blue	95	1	119	Sunday, 15 January 2023	Week-3	Q1	2023	
709297608	Blue	290	1	83	Sunday, 22 January 2023	Week-4	Q1	2023	
709345008	Blue	460	1	85	Sunday, 22 January 2023	Week-4	Q1	2023	
709465758	Blue	95	1	44	Sunday, 22 January 2023	Week-4	Q1	2023	
709531908	Blue	125	0	69	Sunday, 22 January 2023	Week-4	Q1	2023	
709633533	Blue	100	1	106	Sunday, 22 January 2023	Week-4	Q1	2023	
710211783	Blue	400	0	73	Sunday, 5 February 2023	Week-6	Q1	2023	
710284233	Blue	415	0	113	Sunday, 5 February 2023	Week-6	Q1	2023	
710487033	Blue	125	1	98	Sunday, 5 February 2023	Week-6	Q1	2023	
711274458	Blue	410	1	96	Sunday, 26 February 2023	Week-9	Q1	2023	
711445233	Blue	150	0	78	Sunday, 26 February 2023	Week-9	Q1	2023	
711487533	Blue	365	0	84	Sunday, 26 February 2023	Week-9	Q1	2023	
711540108	Blue	125	1	80	Sunday, 26 February 2023	Week-9	Q1	2023	
711551958	Blue	420	1	103	Sunday, 26 February 2023	Week-9	Q1	2023	
711593808	Blue	440	1	50	Sunday, 26 February 2023	Week-9	Q1	2023	
711643458	Blue	455	0	80	Sunday, 5 March 2023	Week-10	Q1	2023	
711873033	Blue	440	0	121	Sunday, 5 March 2023	Week-10	Q1	2023	
712300683	Blue	435	1	80	Sunday, 12 March 2023	Week-11	Q1	2023	
712422608	Blue	285	0	42	Sunday, 19 March 2023	Week-12	Q1	2023	

Table: public cc_detail (10,108 rows)

Credit Card Transaction Report • Last saved: Today at 9:24 PM

Search

Sign in

File Home Help Table tools

Name public cust_detail

Manage relationships New Quick New New measure measure column table

Structure Relationships Calculations Calendars

X ✓

client_num customer_age gender dependent_count education_level marital_status state_cd zipcode car_owner house_owner pers

client_num	customer_age	gender	dependent_count	education_level	marital_status	state_cd	zipcode	car_owner	house_owner	pers
708707808	47	F	3	Graduate	Married	CA	91750	yes	no	ye
708784083	43	F	3	Graduate	Married	CA	91750	yes	no	ye
708874533	43	F	3	Graduate	Married	CA	91750	no	no	nu
708894183	46	M	3	Graduate	Married	CA	91750	yes	no	nu
708928008	58	F	3	Graduate	Married	CA	91750	no	yes	nu
709051533	43	M	3	Graduate	Married	CA	91750	yes	yes	nu
709161108	46	F	3	Graduate	Married	CA	91750	no	no	nu
709381383	45	F	3	Graduate	Married	CA	91750	no	no	nu
709657533	43	M	3	Graduate	Married	CA	91750	no	no	nu
709695333	47	F	3	Graduate	Married	CA	91750	no	no	ye
709759908	39	M	3	Graduate	Married	CA	91750	no	yes	ye
710006958	37	M	3	Graduate	Married	CA	91750	yes	yes	nu
710438358	46	F	3	Graduate	Married	CA	91750	no	yes	ye
710458758	46	F	3	Graduate	Married	CA	91750	no	no	nu
710611683	41	F	3	Graduate	Married	CA	91750	no	yes	nu
710632683	42	F	3	Graduate	Married	CA	91750	no	no	nu
710809833	35	F	3	Graduate	Married	CA	91750	no	no	nu
711040758	42	F	3	Graduate	Married	CA	91750	no	no	nu
711041508	41	F	3	Graduate	Married	CA	91750	yes	no	nu
711240108										

Table: public cust_detail (10,108 rows)

Data

Search

public cc_detail

public cust_detail

File Home Help Table tools Column tools

Name: Revenue

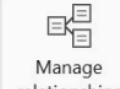
Data type: Decimal number

Format: General

\$ %

Summarization: Sum

Data category: Uncategorized



Structure

Formatting

Properties

Sort by column

Groups

Relationships

Calculations

```
1 Revenue = 'public cc_detail'[annual_fees] + 'public cc_detail'[total_trans_amt] + 'public cc_detail'[interest_earned]
```

total_revolving_bal	total_trans_amt	total_trans_ct	avg_utilization_ratio	use_chip	exp_type	interest_earned	delinquent_acc	Revenue
0	692	16	0	Swipe	Bills	76.12	0	1143.12
0	2207	68	0	Swipe	Bills	154.49	0	2456.49
0	1585	32	0	Swipe	Bills	301.15	0	2176.15
0	807	22	0	Swipe	Bills	169.47	0	1436.47
0	902	31	0	Swipe	Bills	117.26	0	1114.26
0	2184	53	0	Swipe	Bills	480.48	0	2789.48
0	2789	50	0	Swipe	Bills	334.68	0	3223.68
0	2264	39	0	Swipe	Bills	543.36	0	3207.36
0	2439	43	0	Swipe	Bills	536.58	0	3390.58
0	4445	78	0	Swipe	Bills	755.65	0	5325.65
0	2478	45	0	Swipe	Bills	446.04	0	3334.04
0	4653	78	0	Swipe	Bills	1302.84	0	6105.84
0	1687	38	0	Swipe	Bills	404.88	0	2456.88
0	2316	48	0	Swipe	Bills	648.48	0	3089.48
0	844	24	0	Swipe	Bills	236.32	0	1500.32
0	888	18	0	Swipe	Bills	133.2	0	1461.2
0	1439	41	0	Swipe	Bills	359.75	0	2253.75
0	2549	56	0	Swipe	Bills	407.84	0	3396.84
0	4897	96	0	Swipe	Bills	293.82	0	5625.82
0	724	16	0	Swipe	Bills	108.6	0	1117.6

Data

Search

- ✓ public cc_detail
 - Σ activation_30_days
 - Σ annual_fees
 - Σ avg_utilization_ratio
 - card_category
 - client_num
 - Σ credit_limit
 - Σ current_year
 - Σ customer_acq_cost
 - delinquent_acc
 - exp_type
 - Σ interest_earned
 - qtr
- Revenue
 - Σ total_revolving_bal
 - Σ total_trans_amt
 - Σ total_trans_ct

File Home Help Table tools Column tools

Name	AgeGroup
Data type	Text

\$% Format	Text
\$ %	Auto

Σ Summarization	Don't summarize
Data category	Uncategorized

Sort by column
Data groups
Manage relationships
New column

Structure Formatting Properties Sort Groups Relationships Calculations

`1 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")`

zipcode	car_owner	house_owner	personal_loan	contact	customer_job	income	cust_satisfaction_score	AgeGroup	IncomeGroup
91750	yes	no	yes	cellular	Blue-collar	37378		3 40-50	Medium
91750	yes	no	yes	cellular	Selfemployed	57111		3 40-50	Medium
91750	no	no	no	cellular	Selfemployed	1250		2 40-50	Low
91750	yes	no	no	cellular	White-collar	64783		2 40-50	Medium
91750	no	yes	no	cellular	Retirees	48210		3 50-60	Medium
91750	yes	yes	no	cellular	Selfemployed	87414		2 40-50	High
91750	no	no	no	cellular	Selfemployed	14975		1 40-50	Low
91750	no	no	no	cellular	Businessman	43175		3 40-50	Medium
91750	no	no	no	cellular	Govt	112593		2 40-50	High
91750	no	no	yes	cellular	Selfemployed	39032		2 40-50	Medium
91750	no	yes	yes	cellular	Govt	57930		2 30-40	Medium
91750	yes	yes	no	cellular	Govt	76798		1 30-40	High
91750	no	yes	yes	cellular	Retirees	22553		1 40-50	Low
91750	no	no	no	cellular	Selfemployed	9535		2 40-50	Low
91750	no	yes	no	cellular	Selfemployed	56312		1 40-50	Medium
91750	no	no	no	cellular	White-collar	25311		1 40-50	Low
91750	no	no	no	cellular	Selfemployed	35387		1 30-40	Medium
91750	no	no	no	cellular	Govt	34162		2 40-50	Low

Data

Search

- > public cc_detail
- > public cust_detail
- AgeGroup
 - car_owner
 - client_num
 - contact
- Σ cust_satisfaction_score
- Σ customer_age
- customer_job
- Σ dependent_count
- education_level
- gender
- house_owner
- Σ income
- IncomeGroup
 - marital_status
 - personal loan

File Home Help Table tools Measure tools

Share

Name Current_week_Reve...

\$% Format General

Data category Uncategorized



New measure

Quick measure

Calculations

Structure

Formatting

Properties

bal	total_trans_amt	total_trans_ct	avg_utilization_ratio	use_chip	exp_type	interest_earned	delinquent_acc	Revenue	week_num2
0	692	16	0	Swipe	Bills	76.12	0	1143.12	2
0	2207	68	0	Swipe	Bills	154.49	0	2456.49	3
0	1585	32	0	Swipe	Bills	301.15	0	2176.15	4
0	807	22	0	Swipe	Bills	169.47	0	1436.47	4
0	902	31	0	Swipe	Bills	117.26	0	1114.26	4
0	2184	53	0	Swipe	Bills	480.48	0	2789.48	4
0	2789	50	0	Swipe	Bills	334.68	0	3223.68	4
0	2264	39	0	Swipe	Bills	543.36	0	3207.36	6
0	2439	43	0	Swipe	Bills	536.58	0	3390.58	6
0	4445	78	0	Swipe	Bills	755.65	0	5325.65	6
0	2478	45	0	Swipe	Bills	446.04	0	3334.04	9
0	4653	78	0	Swipe	Bills	1302.84	0	6105.84	9
0	1687	38	0	Swipe	Bills	404.88	0	2456.88	9
0	2316	48	0	Swipe	Bills	648.48	0	3089.48	9
0	844	24	0	Swipe	Bills	236.32	0	1500.32	9
0	888	18	0	Swipe	Bills	133.2	0	1461.2	9
0	1439	41	0	Swipe	Bills	359.75	0	2253.75	10

Data

Search

public cc_detail

Σ activation_30_days

Σ annual_fees

Σ avg_utilization_ratio

card_category

client_num

Σ credit_limit

Current_week_Revenue

Σ current_year

Σ customer_acq_cost

delinquent_acc

exp_type

Σ interest_earned

qtr

Revenue

Σ total_revolving_bal

Σ total_trans_amt

Name	IncomeGroup	Format	Text	Summarization	Don't summarize		Data groups	Manage relationships	New column
Data type	Text	\$ %	Auto	Data category	Uncategorized		Groups	Relationships	Calculations
Structure		Formatting		Properties		Sort	Groups	Relationships	Calculations

	zipcode	car_owner	house_owner	personal_loan	contact	customer_job	income	cust_satisfaction_score	AgeGroup	IncomeGroup
91750	yes	no	yes	yes	cellular	Blue-collar	37378		3 40-50	Medium
91750	yes	no	yes	yes	cellular	Selfemployed	57111		3 40-50	Medium
91750	no	no	no	no	cellular	Selfemployed	1250		2 40-50	Low
91750	yes	no	no	no	cellular	White-collar	64783		2 40-50	Medium
91750	no	yes	no	no	cellular	Retirees	48210		3 50-60	Medium
91750	yes	yes	no	no	cellular	Selfemployed	87414		2 40-50	High
91750	no	no	no	no	cellular	Selfemployed	14975		1 40-50	Low
91750	no	no	no	no	cellular	Businessman	43175		3 40-50	Medium
91750	no	no	no	no	cellular	Govt	112593		2 40-50	High
91750	no	no	yes	cellular	Selfemployed		39032		2 40-50	Medium
91750	no	yes	yes	cellular	Govt		57930		2 30-40	Medium
91750	yes	yes	no	cellular	Govt		76798		1 30-40	High
91750	no	yes	yes	cellular	Retirees		22553		1 40-50	Low
91750	no	no	no	cellular	Selfemployed		9535		2 40-50	Low
91750	no	yes	no	cellular	Selfemployed		56312		1 40-50	Medium
91750	no	no	no	cellular	White-collar		25311		1 40-50	Low
91750	no	no	no	cellular	Selfemployed		35387		1 30-40	Medium
91750	no	no	no	cellular	Govt		34162		2 40-50	Low
91750	yes	no	no	cellular	Govt		30945		2 40-50	Low

Data

Search

- > public cc_detail
- ✓ public cust_detail
- AgeGroup
- car_owner
- client_num
- contact
- \sum cust_satisfaction_score
- \sum customer_age
- customer_job
- \sum dependent_count
- education_level
- gender
- house_owner
- \sum income
- IncomeGroup
- marital_status
- personal_loan

File Home Help Table tools Measure tools

Share

Name wow_Revenue

\$% Format General

Data category Uncategorized

New measure
measure

Home table public cc_detail

\$ % , .00 Auto

Quick measure
measure

Structure

Formatting

Properties

Calculations

	client_num	card_category	annual_fees	activation_30_days	customer_acq_cost	week_start_date	week_num	qtr	current_year	credit
	708508758	Blue	375	1	52	Sunday, 8 January 2023	Week-2	Q1	2023	
	709042908	Blue	95	1	119	Sunday, 15 January 2023	Week-3	Q1	2023	
	709297608	Blue	290	1	83	Sunday, 22 January 2023	Week-4	Q1	2023	
	709345008	Blue	460	1	85	Sunday, 22 January 2023	Week-4	Q1	2023	
	709465758	Blue	95	1	44	Sunday, 22 January 2023	Week-4	Q1	2023	
	709531908	Blue	125	0	69	Sunday, 22 January 2023	Week-4	Q1	2023	
	709633533	Blue	100	1	106	Sunday, 22 January 2023	Week-4	Q1	2023	
	710211783	Blue	400	0	73	Sunday, 5 February 2023	Week-6	Q1	2023	
	710284233	Blue	415	0	113	Sunday, 5 February 2023	Week-6	Q1	2023	
	710487033	Blue	125	1	98	Sunday, 5 February 2023	Week-6	Q1	2023	
	711274458	Blue	410	1	96	Sunday, 26 February 2023	Week-9	Q1	2023	
	711445233	Blue	150	0	78	Sunday, 26 February 2023	Week-9	Q1	2023	
	711487533	Blue	365	0	84	Sunday, 26 February 2023	Week-9	Q1	2023	
	711540108	Blue	125	1	80	Sunday, 26 February 2023	Week-9	Q1	2023	
	711551958	Blue	420	1	103	Sunday, 26 February 2023	Week-9	Q1	2023	
	711593808	Blue	440	1	50	Sunday, 26 February 2023	Week-9	Q1	2023	
	711643458	Blue	455	0	80	Sunday, 5 March 2023	Week-10	Q1	2023	
	711873033	Blue	440	0	121	Sunday, 5 March 2023	Week-10	Q1	2023	
	712300683	Blue	435	1	80	Sunday, 12 March 2023	Week-11	Q1	2023	
	712433508	Blue	285	0	43	Sunday, 19 March 2023	Week-12	Q1	2023	

Data

Search

- exp_type
- Σ interest_earned
- Previous_week_Revenue
- qtr
- Revenue
- Σ total_revolving_bal
- Σ total_trans_amt
- Σ total_trans_ct
- use_chip
- week_num
- week_num2
- > week_start_date
- wow_Revenue
- public cust_detail
- AgeGroup
- car_owner
- client_num

File Home Help Table tools Measure tools

Name Previous_week_Rev...

Format General

Data category Uncategorized

New measure Quick measure

Home table public cc_detail

\$ v % , → Auto

Structure

Formatting

Properties

Calculations

```

1 Previous_week_Revenue = CALCULATE(
2     SUM('public cc_detail'[Revenue]),
3     FILTER(
4         ALL('public cc_detail'),
5         'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])-1)
)

```

client_num	card_category	annual_fees	activation_30_days	customer_acq_cost	week_start_date	week_num	qtr	current_year	credit
708508758	Blue	375		1	Sunday, 8 January 2023	Week-2	Q1	2023	
709042908	Blue	95		1	Sunday, 15 January 2023	Week-3	Q1	2023	
709297608	Blue	290		1	Sunday, 22 January 2023	Week-4	Q1	2023	
709345008	Blue	460		1	Sunday, 22 January 2023	Week-4	Q1	2023	
709465758	Blue	95		1	Sunday, 22 January 2023	Week-4	Q1	2023	
709531908	Blue	125		0	Sunday, 22 January 2023	Week-4	Q1	2023	
709633533	Blue	100		1	Sunday, 22 January 2023	Week-4	Q1	2023	
710211783	Blue	400		0	Sunday, 5 February 2023	Week-6	Q1	2023	
710284233	Blue	415		0	Sunday, 5 February 2023	Week-6	Q1	2023	
710487033	Blue	125		1	Sunday, 5 February 2023	Week-6	Q1	2023	
711274458	Blue	410		1	Sunday, 26 February 2023	Week-9	Q1	2023	
711445233	Blue	150		0	Sunday, 26 February 2023	Week-9	Q1	2023	
711487533	Blue	365		0	Sunday, 26 February 2023	Week-9	Q1	2023	
711540108	Blue	125		1	Sunday, 26 February 2023	Week-9	Q1	2023	
711551958	Blue	420		1	Sunday, 26 February 2023	Week-9	Q1	2023	
711593808	Blue	440		1	Sunday, 26 February 2023	Week-9	Q1	2023	
711643458	Blue	455		0	Sunday, 5 March 2023	Week-10	Q1	2023	

Data

Search

public cc_detail

 \sum activation_30_days \sum annual_fees \sum avg_utilization_ratio

card_category

client_num

 \sum credit_limit

Current_week_Revenue

 \sum current_year \sum customer_acq_cost

delinquent_acc

exp_type

 \sum interest_earned

Previous_week_Revenue ↴ ...

qtr

Revenue

 \sum total revolving bal

File Home Help Table tools Column tools

Share

Name	week_num2	Format	Whole number	Summarization	Sum	Sort by column	Data groups	Manage relationships	New column
Data type	Whole number	\$ % , .	0	Data category	Uncategorized	Sort	Groups	Relationships	Calculations

bal	total_trans_amt	total_trans_ct	avg_utilization_ratio	use_chip	exp_type	interest_earned	delinquent_acc	Revenue	week_num2
0	692	16		0	Swipe	Bills	76.12	0	2
0	2207	68		0	Swipe	Bills	154.49	0	3
0	1585	32		0	Swipe	Bills	301.15	0	4
0	807	22		0	Swipe	Bills	169.47	0	4
0	902	31		0	Swipe	Bills	117.26	0	4
0	2184	53		0	Swipe	Bills	480.48	0	4
0	2789	50		0	Swipe	Bills	334.68	0	4
0	2264	39		0	Swipe	Bills	543.36	0	6
0	2439	43		0	Swipe	Bills	536.58	0	6
0	4445	78		0	Swipe	Bills	755.65	0	6
0	2478	45		0	Swipe	Bills	446.04	0	9
0	4653	78		0	Swipe	Bills	1302.84	0	9
0	1687	38		0	Swipe	Bills	404.88	0	9
0	2316	48		0	Swipe	Bills	648.48	0	9
0	844	24		0	Swipe	Bills	236.32	0	9
0	888	18		0	Swipe	Bills	133.2	0	9
0	1439	41		0	Swipe	Bills	359.75	0	10
0	2549	56		0	Swipe	Bills	407.84	0	10
0	4897	96		0	Swipe	Bills	293.82	0	11
0	724	16		0	Swipe	Bills	108.6	0	12

Search
↳ credit_limit
Σ current_year
Σ customer_acq_cost
delinquent_acc
exp_type
Σ interest_earned
qtr
Revenue
Σ total_revolving_bal
Σ total_trans_amt
Σ total_trans_ct
use_chip
week_num
week_num2
> week_start_date
✓ public cust_detail
fx AgeGroup

Credit Card Transaction Report • Last saved: Today at 9:24 PM

Search

Sign in

File Home Insert Modeling View Optimize Help

Share

Refresh Sensitivity Publish Prep data for AI Copilot

Credit Card Transaction Report

Total Revenue **55M**

Total Interest **8M**

Transaction Amount **45M**

Transaction Count **656K**

card_category	Sum of Revenue	Sum of total_trans_amt	Sum of interest_earned
Blue	46139398	36957875	6,495,887.74
Gold	2454072	2024078	373,784.16
Platinum	1135608	953314	161,629.05
Silver	5586332	4586746	812,081.28
Total	55315410	44522013	7,843,382.23

Revenue by Expenditure Type

Bills	13.8M
Entertainment	9.5M
Fuel	9.3M
Grocery	8.6M
Food	8.3M
Travel	5.9M

Revenue by Education

Graduate	22M
High School	11M
Unknown	8M
Uneducated	8M
Post-Graduate	3M
Doctorate	2M

Revenue by Customer Job

Businessman	17.4M
White-collar	10.1M
Self-employed	8.3M
Govt	8.1M
Blue-collar	6.9M
Retirees	4.5M

Revenue by Card Category

Blue	46M
Silver	6M
Gold	2M
Platinum	1M

Q4 Q3 Q2 Q1

Qtr Revenue & Transaction Count

Sum of Revenue Sum of total_trans_ct

Quarter	Revenue	Transactions
Q1	14.0M	163.3K
Q2	13.8M	164.2K
Q3	14.2M	166.6K
Q4	13.3M	161.6K

Week_Start_Date All

F M

Low Medium High

Sum of Total Trans Ct

Silver Blue Gold Platinum

Revenue by Use Chip

Swipe	35M
Chip	17M
Online	3M

Visualizations Filters Data

Credit Card Transaction Report Credit Card Customer Report Credit Card Weekly Report +

Credit Card Customer Report

Total Revenue **55M**

Total Interest **8M**

Total Income **576M**

Satisfaction Score **3.2**

Revenue vs Gender

Date	Males (Sum of Revenue)	Females (Sum of Revenue)
Jan 2023	0.39M	0.38M
Feb 2023	0.52M	0.49M
Mar 2023	0.68M	0.56M
Apr 2023	0.72M	0.64M
May 2023	0.56M	0.41M
Jun 2023	0.52M	0.38M
Jul 2023	0.58M	0.44M
Aug 2023	0.65M	0.55M
Sep 2023	0.58M	0.52M
Oct 2023	0.67M	0.59M
Nov 2023	0.56M	0.41M

Age Group

Age Group	Count
20-30	1M
30-40	10M
40-50	24M
50-60	18M
60+	2M

Week_Start_Date **All**

Gender	Count
M	30M
F	25M

Top 5 States

State	Revenue
TX	12.8M
NY	12.7M
CA	12.6M
FL	9.7M
NJ	4.2M

Salary Group

Group	Count
High	29M
Medium	16M
Low	10M

Dependent Count

Count	Revenue
5	2.3M
4	8.7M
3	15.3M
2	15.2M
1	9.6M
0	4.1M

Marital Status

Status	Count
Married	28M
Single	23M
Unknown	4M

Education Level

Level	Count
Graduate	22M
High School	11M
Unknown	8M
Uneducated	8M
Post-Graduate	3M
Doctorate	2M



Credit Card Transaction Report

Credit Card Customer Report

Credit Card Weekly Report



Visualizations
Filters

Data