

CREDIT CARD

Insights Weekly
Dashboard



Content in this tutorial video

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2. Data from SQL
3. Dataprocessing & DAX
Dashboard & insights
4. Export & share project



Project Objective

- Build an interactive Power BI dashboard
- Provide weekly insights into credit card usage
- Track customer behavior, revenue, transactions, and risk factors.
- Enable quick decision-making for stakeholders



Import data to SQL database

1. Prepare csv file
2. Create tables in SQL
3. import csv file into SQL



Data Output	Messages	Notifications
COPY 10108		
Query returned successfully in 82 msec.		

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



DAX Queries

```
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:

- Revenue increased by 28.8%,
- Total Transaction Amt & Count increased by 35.04% & 3.39%
- Customer count increased by 12.8%

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%

