CREDIT CARD

WEEKLY STATUS REPORT

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3. Data processing & DAX
4. Dashboard & insights

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.

Download Data

GitHub:
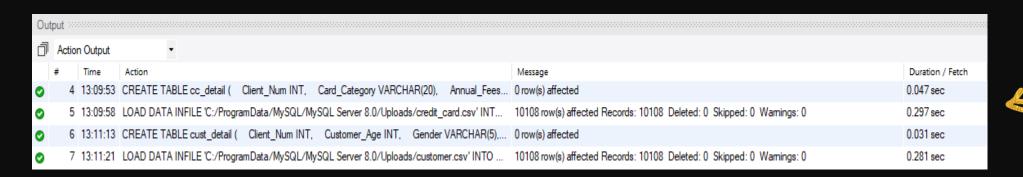**https://github.com/vineet416/Credit_Card_Financial_Dashboard**

or

Google Drive:

Click Here

Import data to SQL database

1. Prepare csv file
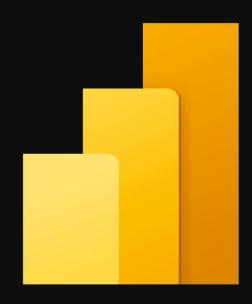
2. Create tables in SQL

3. import csv file into SQL

	#	Time	Action	Message	Duration / Fetch
✓	4	13:09:53	CREATE TABLE cc_detail (Client_Num INT, Card_Category VARCHAR(20), Annual_Fees...	0 row(s) affected	0.047 sec
✓	5	13:09:58	LOAD DATA INFILE 'C:/ProgramData/MySQL/MySQL Server 8.0/Uploads/credit_card.csv' INT...	10108 row(s) affected Records: 10108 Deleted: 0 Skipped: 0 Warnings: 0	0.297 sec
✓	6	13:11:13	CREATE TABLE cust_detail (Client_Num INT, Customer_Age INT, Gender VARCHAR(5),...	0 row(s) affected	0.031 sec
✓	7	13:11:21	LOAD DATA INFILE 'C:/ProgramData/MySQL/MySQL Server 8.0/Uploads/customer.csv' INTO ...	10108 row(s) affected Records: 10108 Deleted: 0 Skipped: 0 Warnings: 0	0.281 sec

NOTE: Find all SQL queries & project data - https://github.com/vineet416/Credit_Card_Financial_Dashboard

DAX Queries

AgeGroup = SWITCH(
   True(),
   'ccdb cust_detail'[Customer_Age] <30, "20-30",
   'ccdb cust_detail'[Customer_Age] >=30 && 'ccdb cust_detail'[Customer_Age] <40, "30-40",
   'ccdb cust_detail'[Customer_Age] >=40 && 'ccdb cust_detail'[Customer_Age] <50, "40-50",
   'ccdb cust_detail'[Customer_Age] >=50 && 'ccdb cust_detail'[Customer_Age] <60, "50-60",
   'ccdb cust_detail'[Customer_Age] >=60, "60+",
   "unknown")

IncomeGroup = SWITCH(
   TRUE(),
   'ccdb cust_detail'[Income] < 35000, "Low",
   'ccdb cust_detail'[Income] >=35000 && 'ccdb cust_detail'[Income] <75000, "Med",
   'ccdb cust_detail'[Income] >=70000, "High",
   "Unknown")

week_num2 = WEEKNUM('ccdb cc_detail'[Week_Start_Date])

Revenue = 'ccdb cc_detail'[Annual_Fees] + 'ccdb cc_detail'[Total_Trans_Amt] + 'ccdb cc_detail'[Interest_Earned]

DAX Queries

CW_Revenue = CALCULATE(
   SUM('ccdb cc_detail'[Revenue]),
   FILTER(
     ALL('ccdb cc_detail'),
     'ccdb cc_detail'[week_num2] = MAX('ccdb cc_detail'[week_num2])))

PW_Revenue = CALCULATE(
   SUM('ccdb cc_detail'[Revenue]),
   FILTER(
     ALL('ccdb cc_detail'),
     'ccdb cc_detail'[week_num2] = MAX('ccdb cc_detail'[week_num2])-1))

wow_revenue = DIVIDE(([CW_Revenue]-[PW_Revenue]),[PW_Revenue])

CW_Trans_Amt = CALCULATE(
   SUM('ccdb cc_detail'[Total_Trans_Amt]),
   FILTER(
     ALL('ccdb cc_detail'),
     'ccdb cc_detail'[week_num2] = MAX('ccdb cc_detail'[week_num2])))

DAX Queries

PW_Trans_Amt = CALCULATE(
    SUM('ccdb cc_detail'[Total_Trans_Amt]),
    FILTER(
      ALL('ccdb cc_detail'),
      'ccdb cc_detail'[week_num2] = MAX('ccdb cc_detail'[week_num2])-1))

wow_trans_amt = DIVIDE(([CW_Trans_Amt]-[PW_Trans_Amt]),[PW_Trans_Amt])

CW_Trans_cnt = CALCULATE(
    SUM('ccdb cc_detail'[Total_Trans_Ct]),
    FILTER(
      ALL('ccdb cc_detail'),
      'ccdb cc_detail'[week_num2] = MAX('ccdb cc_detail'[week_num2])))

PW_Trans_cnt = CALCULATE(
    SUM('ccdb cc_detail'[Total_Trans_Ct]),
    FILTER(
      ALL('ccdb cc_detail'),
      'ccdb cc_detail'[week_num2] = MAX('ccdb cc_detail'[week_num2])-1))

wow_trans_cnt = DIVIDE(([CW_Trans_cnt]-[PW_Trans_cnt]),[PW_Trans_cnt])

DAX Queries

CW_Cust_cnt = CALCULATE(
   DISTINCTCOUNT('ccdb cc_detail'[Client_Num]),
   FILTER(
     ALL('ccdb cc_detail'),
     'ccdb cc_detail'[week_num2] = MAX('ccdb cc_detail'[week_num2])))

PW_Cust_cnt = CALCULATE(
   Count('ccdb cust_detail'[Client_Num]),
   FILTER(
     ALL('ccdb cc_detail'),
     'ccdb cc_detail'[week_num2] = MAX('ccdb cc_detail'[week_num2])-1))

wow_cust_cnt = DIVIDE(([CW_Cust_cnt]-[PW_Cust_cnt]),[PW_Cust_cnt])
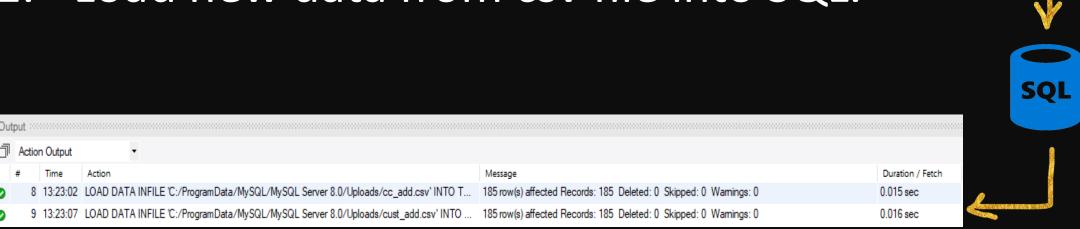
Credit Card Transaction Report - Week 52 (24th Dec)
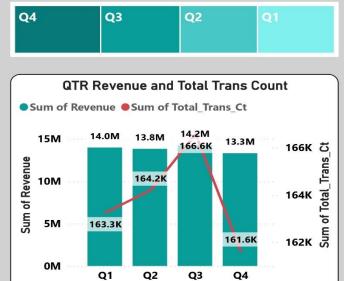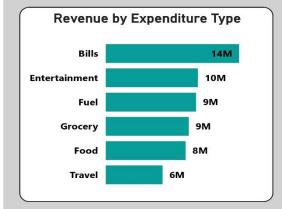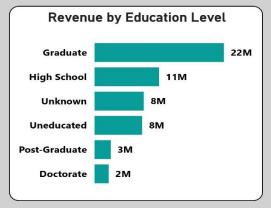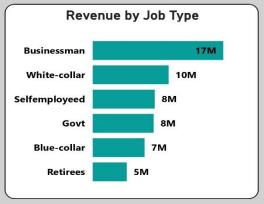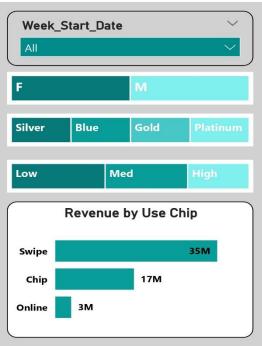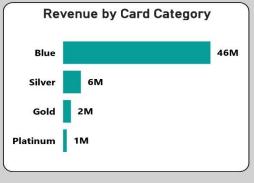
Credit Card Customer Report - Week 52 (24ᵗʰ Dec)

Import new week data to SQL database

1. Prepare csv file

2. Load new data from csv file into SQL.

	#	Time	Action	Message	Duration / Fetch
✓	8	13:23:02	LOAD DATA INFILE 'C:/ProgramData/MySQL/MySQL Server 8.0/Uploads/cc_add.csv' INTO T...	185 row(s) affected Records: 185 Deleted: 0 Skipped: 0 Warnings: 0	0.015 sec
✓	9	13:23:07	LOAD DATA INFILE 'C:/ProgramData/MySQL/MySQL Server 8.0/Uploads/cust_add.csv' INTO ...	185 row(s) affected Records: 185 Deleted: 0 Skipped: 0 Warnings: 0	0.016 sec

NOTE: Find all SQL queries & project data - https://github.com/vineet416/Credit_Card_Financial_Dashboard

Credit Card Transaction Report - Week 53 (31st Dec)
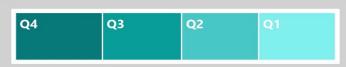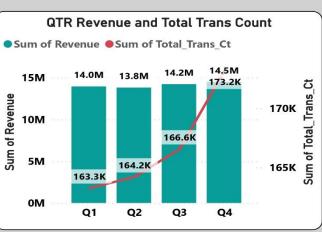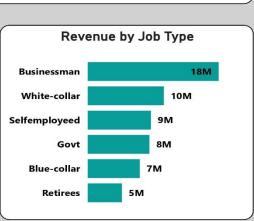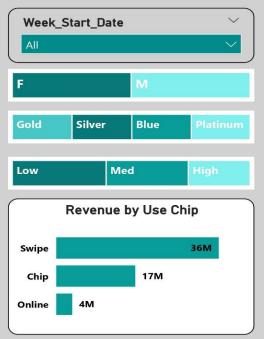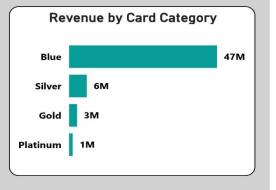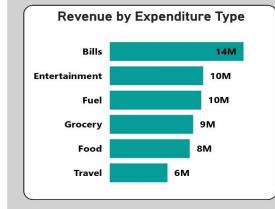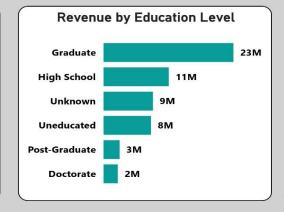
Credit Card Customer Report – Week 53 (31st Dec)

Project Insights- Week 53 (31st Dec)

WoW change:

- Revenue increased by **28.8%**
- Total Transaction Amt & Count increased by **35%** & **3.4%**
- 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 **93.5%** of overall transactions
- TX, NY & CA is contributing to **68.8%**
- Overall Activation rate is **57.5%**
- Overall Delinquent rate is **6.06%**