Power Platform and Python in CCU Recoveries

# Introduction to Power Platform and Python

## Power Platform Overview

Power Platform is a suite of tools from Microsoft that allows businesses to automate workflows, analyze data, and build applications without requiring advanced technical skills. The platform consists of several key components, each designed to make different aspects of work more efficient.

### Power Automate

Power Automate is designed to help users automate workflows and repetitive tasks. It integrates with various applications to allow for seamless automation, reducing manual work and minimizing errors. Power Automate has both an online and desktop version, each providing unique capabilities for handling different kinds of automation.

### Power BI

Power BI is Microsoft's data visualization and business intelligence tool. It allows businesses to connect to different data sources, create real-time dashboards, and generate insights that are easy to understand through visual reports. With Power BI, businesses can track performance, customer data, and trends in a clear and user-friendly way.

### Power Apps

Power Apps enables the creation of custom applications without needing a background in coding. These applications can integrate with existing data sources like Excel, SharePoint, or other Microsoft tools, allowing businesses to create tailored apps for managing data and processes specific to their needs.

### Python

Python is a versatile programming language that can be used to automate more complex tasks, analyze large datasets, and integrate with existing systems. It is widely used for data processing, generating reports, and handling automation tasks that require more advanced logic than tools like Power Automate might offer.

# Applying Power Platform and Python to CCU Recoveries

## CCU Recoveries Overview

The Centralized Credit Union (CCU) team, specifically the A19A Recoveries team under Republic Bank's Shared Services Division (SSD), handles accounts that have been written off after customers have failed to pay credit card and loan balances for over three months. The team is responsible for manually tracking and updating customer data, following up on payment plans, and managing the status of accounts. There are several manual processes currently in place that could be optimized using tools from the Power Platform and Python.

## Power Automate and Python for Automation

Power Automate and Python can help automate many of the repetitive and manual tasks performed by the CCU Recoveries team, particularly in tasks like caution checks and daily updates.

### Automating Caution Checks

Caution checks involve manually searching through 16 databases to verify customer information. Power Automate Desktop can be used to automate the process of opening each database and performing the search, while Python can assist by scripting more complex interactions with databases, ensuring all information is collected efficiently. Together, these tools can significantly reduce the time and effort needed for caution checks, allowing the team to focus on more critical tasks.

### Other Automation Tasks

For tasks such as copying data between Excel workbooks, generating follow-up reminders, or updating account statuses (repaid, discontinued, sent to debt collection), Power Automate can handle these processes automatically. For example, when an account is moved to the 'repaid' status, Power Automate can trigger a workflow that moves the customer's data to the appropriate workbook and updates relevant records.

## Power Apps and Power BI for Customer Data and Follow-ups

### Power Apps for Managing Customer Data

Power Apps can replace manual data entry by providing a user-friendly interface for managing customer data. The team can input data directly into an app built with Power Apps, which can then automatically update the underlying Excel sheets or databases. This app could also include features to record notes from follow-up calls, set reminders for future follow-ups, and store all relevant customer information in one place.

### Power BI for Visualizing Trends

Power BI can be used to visualize the status of customer accounts, payment trends, and the performance of the recoveries process. Instead of manually tracking these metrics across various Excel sheets, Power BI can generate live dashboards that show overdue accounts, repayment trends, and the progress of accounts sent to Avknowles. These insights can help both the team and supervisors monitor progress and make informed decisions.

# Conclusion

By leveraging Power Automate, Power BI, Power Apps, and Python, the CCU Recoveries team can automate time-consuming tasks, improve the accuracy of data entry, and gain valuable insights into their processes. These tools will free up the team’s time to focus on more important work, such as customer interactions, while ensuring that data is managed efficiently and effectively.