

1) SWITCH function

Grouped customers by amount of balance in their account –

Balance Group =

```
SWITCH(  
    TRUE(),  
    'Total Balance per Client'[Total Balance]<=25000,"less than 25K",  
    'Total Balance per Client'[Total Balance]<=50000,"25K to 50K",  
    'Total Balance per Client'[Total Balance]<=100000,"50K to 100K",  
    "Over 100K"  
)
```

Grouped customers by age –

Age Group =

```
SWITCH(  
    TRUE(),  
    'Customer Info'[Current age]<=17,"Minor",  
    'Customer Info'[Current age]<=30,"18-30",  
    'Customer Info'[Current age]<=40,"31-40",  
    'Customer Info'[Current age]<=50,"41-50",  
    'Customer Info'[Current age]<=60,"51-60",  
    "Over 60"  
)
```

2) DATEDIFF function

Calculated current age of customers –

Current age =

```
ROUNDDOWN(  
    DATEDIFF(  
        'Customer Info'[DOB],  
        TODAY(),  
        DAY  
    )  
    /365.25,  
    0)
```

Calculated number of days to last contact made –

No. of days to last contact =

```
DATEDIFF  
    ('Last Contact'[Last contact date],  
    TODAY(),  
    DAY  
    )
```

3) Percentage calculation

Calculated percentage of monthly payments on credit card by customers –

Monthly Payment % =
DIVIDE(
 'Credit Card'[Last Payment Amt], 'Credit Card'[Balance Outstanding]
)

4) LOOKUPVALUE function

Used Lookupvalue function to retrieve the name of account from 'Account details' lookup table –

Account Type =
LOOKUPVALUE('Account details'[Account Type],
 'Account details'[Account Code],
 'Credit Card'[CC ID]
)

5) CALCULATE and FILTER function

Calculated number of clients for account type as RRSP and investment balance less than \$25000 –

RRSP clients as per Bal & Income =
CALCULATE(
 COUNT(Investments[Client ID]),
 FILTER('Customer Info',
 'Customer Info'[Income]>100000),
 FILTER(Investments,
 Investments[Account Type]="RRSP"
 && Investments[Balance]<25000
)
)