

CUSTOMERS

Every day I received several requests like "I need the contact of customer x" or "I need a list of customers with filters x, y and z".

With that in mind, this Power BI was made to meeting these needs

Painel de Pesquisa
Clientes Habilitados e A.M.

Contatos dos clientes e/ou A.M.

Nome do Cliente	CPF	Data de Nascimento	Sexo	Estado	Cidade
...

Clientes Habilitados

Nome	CPF	Data de Nascimento	Sexo	Estado	Cidade
...

Total
30543

Total
31/03/2023

An interesting part of Power BI is this tab below. Daily, operations analysts need to send standard emails to customers, demanding certain documentation, but it was very complicated to find the customer's contact, attach a standard file and write the email.

By filtering the table with the customer's account and pressing the yellow button, Power BI automatically send the email to that customer, using an integration with Power Automate.



TECHNICAL

To make this Power BI happen, it was necessary to link a database in Microsoft SQL Server with an Excel database in SharePoint. It is important to mention that the SharePoint base is supplemented daily with data from an API, through a python code run in my virtual machine.

To make the automatic email send button, it was necessary to link the database contained in the Power BI table with an automation in Power Automate

RESULTS

Precise data generated daily for self-consumption by backoffice analysts, as well as a button that automates part of the process, generating gains in time and quality