

Level (1-10)

- Concatenate First and Last Name

Power Query Editor interface showing the 'Merge Columns' dialog box. The dialog is open over a table with columns: GeographyKey, CustomerAlternateKey, Title, FirstName, MiddleName, and LastName. The 'Merge Columns' dialog has 'Separator' set to 'Space' and 'New column name (optional)' set to 'Merged'. The background table shows customer data with names like Jon V Yang, Eugene L Huang, and Ruben Torres.

- Convert Email Address to Uppercase

Power Query Editor interface showing the 'Transform' tab. The 'EmailAddress' column is selected, and the 'Uppercase' option is chosen from the 'Transform' dropdown menu. The background table shows customer data with email addresses like JON24@ADVENTURE-WORKS.COM and EUGENE10@ADVENTURE-WORKS.COM.

- Extract First 3 Characters from First Name

Untitled - Power Query Editor

File Home Transform Add Column View Tools Help

Column From Custom Examples Column Invoke Custom Function Duplicate Column General

Conditional Column Index Column Format Merge Columns Extract Parse From Text From Number Statistics Standard Scientific Rounding Date Time Duration Text Analytics Vision Azure Machine Learning AI Insights

Queries [1] DimCustomer

Table.AddColumn(#"Uppercased Text", "Full Name", each Text.Combine([LastName], [FirstName], " "), type text)

Insert First Characters

Enter how many starting characters to keep.

Count

3

OK Cancel

Query Settings

PROPERTIES

Name

DimCustomer

APPLIED STEPS

Source

Navigation

Uppercased Text

Inserted Merged Column

CustomerKey	GeographyKey	CustomerAlternateKey	Title	FirstName	MiddleName	LastName
1	11000	26 AW00011000	null	Jon	V	Yang
2	11001	37 AW00011001	null	Eugene	L	Huang
3	11002	31 AW00011002	null	Ruben	null	Torres
4	11003	11 AW00011003	null	Christy	null	Zhu
5	11004	19 AW00011004	null	Elizabeth	null	Johnson
6	11005	22 AW00011005	null	Julio	null	Ruiz
7	11006	8 AW00011006	null	Janet	G	Alvarez
8	11007	40 AW00011007	null	Marco	null	Mehta
9	11008	32 AW00011008	null	Rob	null	Verhoff
10	11009	25 AW00011009	null	Shannon	C	Carlson
11	11010	22 AW00011010	null	Jacquelyn	C	Suarez
12	11011	22 AW00011011	null	Curtis	null	Lu
13	11012	611 AW00011012	null	Lauren	M	Walker
14	11013	543 AW00011013	null	Ian	M	Jenkins
15	11014	634 AW00011014	null	Sydney	null	Bennett
16	11015	301 AW00011015	null	Chloe	null	Young
17	11016	329 AW00011016	null	Wyatt	L	Hill
18	11017	39 AW00011017	null	Shannon	null	Wang
19	11018	32 AW00011018	null	Clarence	D	Rai
20	11019	52 AW00011019	null	Luke	L	Lai
21	11020	53 AW00011020	null	Jordan	C	King
22	11021	536 AW00011021	null	Destiny	null	Wilson
23	11022	609 AW00011022	null	Ethan	G	Zhang
24	11023	298 AW00011023	null	Seth	M	Edwards
25	11024	311 AW00011024	null	Russell	null	Xie
26	11025	24 AW00011025	null	Alejandro	null	Beck
27	11026	4 AW00011026	null	Harold	null	Sai

- Count Characters in Last Name

Untitled - Power Query Editor

File Home Transform Add Column View Tools Help

Column From Custom Examples Column Invoke Custom Function Duplicate Column General

Conditional Column Index Column Format Merge Columns Extract Parse From Number Statistics Standard Scientific Rounding Date Time Duration Text Analytics Vision Azure Machine Learning AI Insights

Queries [1] DimCustomer

Table.AddColumn(#"Uppercased Text", "Full Name", each Text.Combine([LastName], [FirstName], " "), type text)

Table.AddColumn(#"Full Name", "Length", each Text.Length([LastName]), Int64.Type)

First Characters

Last Characters

Range

Text Before Delimiter

Text After Delimiter

Text Between Delimiters

Query Settings

PROPERTIES

Name

DimCustomer

APPLIED STEPS

Source

Navigation

Uppercased Text

Inserted Merged Column

Inserted First Characters

Inserted Text Length

CustomerKey	GeographyKey	CustomerAlternateKey	Title	FirstName	MiddleName	LastName	Length
1	11000	26 AW00011000	null	Jon	V	Yang	5
2	11001	37 AW00011001	null	Eugene	L	Huang	6
3	11002	31 AW00011002	null	Ruben	null	Torres	6
4	11003	11 AW00011003	null	Christy	null	Zhu	5
5	11004	19 AW00011004	null	Elizabeth	null	Johnson	10
6	11005	22 AW00011005	null	Julio	null	Ruiz	5
7	11006	8 AW00011006	null	Janet	G	Alvarez	7
8	11007	40 AW00011007	null	Marco	null	Mehta	6
9	11008	32 AW00011008	null	Rob	null	Verhoff	6
10	11009	25 AW00011009	null	Shannon	C	Carlson	7
11	11010	22 AW00011010	null	Jacquelyn	C	Suarez	7
12	11011	22 AW00011011	null	Curtis	null	Lu	4
13	11012	611 AW00011012	null	Lauren	M	Walker	7
14	11013	543 AW00011013	null	Ian	M	Jenkins	6
15	11014	634 AW00011014	null	Sydney	null	Bennett	7
16	11015	301 AW00011015	null	Chloe	null	Young	6
17	11016	329 AW00011016	null	Wyatt	L	Hill	5
18	11017	39 AW00011017	null	Shannon	null	Wang	5
19	11018	32 AW00011018	null	Clarence	D	Rai	5
20	11019	52 AW00011019	null	Luke	L	Lai	4
21	11020	53 AW00011020	null	Jordan	C	King	5
22	11021	536 AW00011021	null	Destiny	null	Wilson	7
23	11022	609 AW00011022	null	Ethan	G	Zhang	5
24	11023	298 AW00011023	null	Seth	M	Edwards	6
25	11024	311 AW00011024	null	Russell	null	Xie	4
26	11025	24 AW00011025	null	Alejandro	null	Beck	6
27	11026	4 AW00011026	null	Harold	null	Sai	4

35 COLUMNS, 999+ ROWS Column profiling based on top 1000 rows

PREVIEW DOWNLOADED AT 6:35 AM

SL - BAN Game score

Search

6:35 AM 7/9/2025

- Convert First Name to Lowercase

Power Query Editor - DimCustomer

Table: DimCustomer

Columns: CustomerKey, GeographyKey, Custome...

Applied Steps: Inserted Text Length

CustomerKey	GeographyKey	Custome...
1	11000	AW00011
2	11001	AW00011
3	11002	AW00011
4	11003	AW00011003
5	11004	AW00011004
6	11005	AW00011005
7	11006	AW00011006
8	11007	AW00011007
9	11008	AW00011008
10	11009	AW00011009
11	11010	AW00011010
12	11011	AW00011011
13	11012	AW00011012
14	11013	AW00011013
15	11014	AW00011014
16	11015	AW00011015
17	11016	AW00011016
18	11017	AW00011017
19	11018	AW00011018
20	11019	AW00011019
21	11020	AW00011020
22	11021	AW00011021
23	11022	AW00011022
24	11023	AW00011023
25	11024	AW00011024
26	11025	AW00011025
27	11026	AW00011026

- Trim Spaces in EnglishEducation

Power Query Editor - DimCustomer

Table: DimCustomer

Columns: EmailAddress, YearlyIncome, 12 NumberChildrenAtHome, EnglishEducation, SpanishEducation

Applied Steps: Lowercased Text

EmailAddress	YearlyIncome	12 NumberChildrenAtHome	EnglishEducation	SpanishEducation
JON24@ADVENTURE-WORKS.COM	96	0	Bachelors	Licenciatura
EUGENE10@ADVENTURE-WORKS.COM	66	3	Bachelors	Licenciatura
RUBEN35@ADVENTURE-WORKS.COM	66	3	Bachelors	Licenciatura
CHRISTY12@ADVENTURE-WORKS.COM	70,000.00	0	Bachelors	Licenciatura
ELIZABETH5@ADVENTURE-WORKS.COM	80,000.00	5	Bachelors	Licenciatura
JULIO1@ADVENTURE-WORKS.COM	70,000.00	0	Bachelors	Licenciatura
JANET9@ADVENTURE-WORKS.COM	70,000.00	0	Bachelors	Licenciatura
MARCO14@ADVENTURE-WORKS.COM	60,000.00	3	Bachelors	Licenciatura
ROBA4@ADVENTURE-WORKS.COM	60,000.00	4	Bachelors	Licenciatura
SHANNON38@ADVENTURE-WORKS.COM	70,000.00	0	Bachelors	Licenciatura
JACQUELYN20@ADVENTURE-WORKS.COM	70,000.00	0	Bachelors	Licenciatura
CURTIS9@ADVENTURE-WORKS.COM	60,000.00	4	Bachelors	Licenciatura
LAUREN41@ADVENTURE-WORKS.COM	100,000.00	2	Bachelors	Licenciatura
IAN47@ADVENTURE-WORKS.COM	100,000.00	2	Bachelors	Licenciatura
SYDNEY23@ADVENTURE-WORKS.COM	100,000.00	3	Bachelors	Licenciatura
CHLOE23@ADVENTURE-WORKS.COM	30,000.00	0	Partial College	Estudios universitarios (e
WYATT32@ADVENTURE-WORKS.COM	30,000.00	0	Partial College	Estudios universitarios (e
SHANNON1@ADVENTURE-WORKS.COM	20,000.00	4	High School	Educación secundaria
CLARENCE32@ADVENTURE-WORKS.COM	30,000.00	2	Partial College	Estudios universitarios (e
LUKE18@ADVENTURE-WORKS.COM	40,000.00	0	High School	Educación secundaria
JORDAN73@ADVENTURE-WORKS.COM	40,000.00	0	High School	Educación secundaria
DESTINY7@ADVENTURE-WORKS.COM	40,000.00	0	Partial College	Estudios universitarios (e
ETHAN20@ADVENTURE-WORKS.COM	40,000.00	0	Partial College	Estudios universitarios (e
SETH46@ADVENTURE-WORKS.COM	40,000.00	0	Partial College	Estudios universitarios (e
RUSSELL7@ADVENTURE-WORKS.COM	60,000.00	0	Partial College	Estudios universitarios (e
ALEJANDRO45@ADVENTURE-WORKS.COM	10,000.00	2	Partial High School	Educación secundaria (e

- Repeat '*' Character Equal to Length of First Name

Untitled - Power Query Editor

File Home Transform Add Column View Tools Help

Query Settings: Formula Bar, Monospaced, Column distribution, Show whitespace, Column quality, Go to Column, Always allow, Advanced Editor, Query Dependencies

Queries [1]: DimCustomer

Table: FactInternetSales

Columns: Full Name, First Characters, Length, Stars

Formula Bar: `= Table.AddColumn(#"Changed Type", "Stars", each Text.Repeat(" ", Text.Length([FirstName])), type text)`

Index	Full Name	First Characters	Length	Stars
1	Yang Jon	Jon	4	***
2	Huang Eugene	Eug	5	*****
3	Torres Ruben	Rub	6	*****
4	Zhu Christy	Chr	3	*****
5	Johnson Elizabeth	Eli	7	*****
6	Ruiz Julio	Jul	4	*****
7	Alvarez Janet	Jan	7	*****
8	Mehra Marco	Mar	5	*****
9	Verhoff Rob	Rob	7	*****
10	Carlson Shannon	Sha	7	*****
11	Suarez Jacquelyn	Jac	6	*****
12	Lu Curtis	Cur	2	*****
13	Walker Lauren	Lau	6	*****
14	Jenkins Ian	Ian	7	*****
15	Bennett Sydney	Syd	7	*****
16	Young Chloe	Chi	5	*****
17	Hill Wyatt	Wya	4	*****
18	Wang Shannon	Sha	4	*****
19	Rai Clarence	Cla	3	*****
20	Lal Luke	Luk	3	*****
21	King Jordan	Jor	4	*****
22	Wilson Destiny	Des	6	*****
23	Zhang Ethan	Eth	5	*****
24	Edwards Seth	Set	7	*****
25	Xie Russell	Rus	3	*****
26	Beck Alejandro	Ale	4	*****

Query Settings: Name: DimCustomer

APPLIED STEPS: Source, Navigation, Uppercased Text, Inserted Merged Column, Inserted First Characters, Inserted Text Length, Lowercased Text, Trimmed Text, Changed Type, AddStars

- Get Last 4 Characters of Phone Number

Untitled - Power Query Editor

File Home Transform Add Column View Tools Help

Query Settings: Name: DimCustomer

APPLIED STEPS: Source, Navigation, Uppercased Text, Inserted Merged Column, Inserted First Characters, Inserted Text Length, Lowercased Text, Trimmed Text, Changed Type, AddStars

Table: DimGeography

Columns: AddressLine1, AddressLine2, Phone, DateFirstPurchase, CommuteDistance, Value

Formula Bar: `= Table.AddColumn(#"Changed Type", "Stars", each Text.Repeat(" ", Text.Length([FirstName])), type text)`

Extract Last Characters dialog: Enter how many ending characters to keep. Count: 4

Index	AddressLine1	AddressLine2	Phone	DateFirstPurchase	CommuteDistance	Value
1	0 3761 N. 14th St		null	1/15/2011	1-2 Miles	Value
2	1 2243 W St.		null	1/15/2011	0-1 Miles	Value
3	1 5844 Linden Land		null	1/7/2011	2-5 Miles	Value
4	1 1825 Village Pl.		null	12/29/2010	5-10 Miles	Value
5	4 7553 Harness Circle		null	1/29/2011	1-5 Miles	Value
6	1 7305 Humphrey Drive		null	1/29/2011	1-5 Miles	Value
7	1 2612 Berry Dr		null	1/29/2011	1-5 Miles	Value
8	2 942 Brook Street		null	1/29/2011	1-5 Miles	Value
9	3 624 Peabody Road		null	1/29/2011	1-5 Miles	Value
10	1 3839 Northgate Road		null	1/29/2011	1-5 Miles	Value
11	1 7800 Corrinne Court		null	1/29/2011	1-5 Miles	Value
12	4 1224 Shoenic		null	1/29/2011	1-5 Miles	Value
13	2 4785 Scott Street		null	1/29/2011	1-5 Miles	Value
14	3 7902 Hudson Ave.		null	1/29/2011	1-5 Miles	Value
15	3 9011 Tank Drive		null	1/29/2011	1-5 Miles	Value
16	1 244 Willow Pass Road		null	1/29/2011	1-5 Miles	Value
17	1 9666 Northridge Ct.		null	2/9/2013	5-10 Miles	Value
18	2 7330 Saddlehill Lane		null	1/12/2011	5-10 Miles	Value
19	2 244 Riverview		null	1/17/2011	5-10 Miles	Value
20	2 7832 Landing Dr		null	2/12/2013	5-10 Miles	Value
21	2 7156 Rose Dr.		null	12/29/2012	1-2 Miles	Value
22	1 8148 W. Lake Dr.		null	1/23/2013	1-2 Miles	Value
23	1 1769 Nicholas Drive		null	1/20/2013	5-10 Miles	Value
24	1 4499 Valley Crest		null	2/17/2013	1-2 Miles	Value
25	2 8734 Oxford Place		null	6/17/2013	5-10 Miles	Value
26	2 2596 Franklin Canyon Road		null	1/6/2011	1-2 Miles	Value
27	2 8211 Leeds Ct.		null	1/23/2011	1-2 Miles	Value

- Format YearlyIncome to Currency with 2 Decimals

Untitled - Power Query Editor

File Home Transform Add Column View Tools Help

Table

Queries [1]

Table.TransformColumnTypes(#"Trimmed Text",{{"YearlyIncome", Currency.Type}})

	EmailAddress	YearlyIncome	TotalChildren	NumberChildrenAtHome	EnglishEducation	SpanishEducation
1	JON24@ADVENTURE-WORKS.COM	90,000.00	2	0	Bachelors	Licenciatura
2	EUGENE10@ADVENTURE-WORKS.C...	60,000.00	3	3	Bachelors	Licenciatura
3	RUBEN35@ADVENTURE-WORKS.C...	60,000.00	3	3	Bachelors	Licenciatura
4	CHRISTY12@ADVENTURE-WORKS.C...	70,000.00	0	0	Bachelors	Licenciatura
5	ELIZABETH5@ADVENTURE-WORKS...	80,000.00	5	5	Bachelors	Licenciatura
6	JULIO1@ADVENTURE-WORKS.COM	70,000.00	0	0	Bachelors	Licenciatura
7	JANE19@ADVENTURE-WORKS.COM	70,000.00	0	0	Bachelors	Licenciatura
8	MARCO14@ADVENTURE-WORKS.C...	60,000.00	3	3	Bachelors	Licenciatura
9	ROB4@ADVENTURE-WORKS.COM	60,000.00	4	4	Bachelors	Licenciatura
10	SHANNON38@ADVENTURE-WORK...	70,000.00	0	0	Bachelors	Licenciatura
11	JACQUELYN20@ADVENTURE-WOR...	70,000.00	0	0	Bachelors	Licenciatura
12	CURTIS9@ADVENTURE-WORKS.COM	60,000.00	4	4	Bachelors	Licenciatura
13	LAUREN41@ADVENTURE-WORKS.C...	100,000.00	2	0	Bachelors	Licenciatura
14	IAN47@ADVENTURE-WORKS.COM	100,000.00	2	0	Bachelors	Licenciatura
15	SYDNEY23@ADVENTURE-WORKS.C...	100,000.00	3	0	Bachelors	Licenciatura
16	CHLOE23@ADVENTURE-WORKS.CO...	30,000.00	0	0	Partial College	Estudios universitarios
17	WYATT32@ADVENTURE-WORKS.C...	30,000.00	0	0	Partial College	Estudios universitarios
18	SHANNON1@ADVENTURE-WORKS...	20,000.00	4	0	High School	Educación secundaria
19	CLARENCE32@ADVENTURE-WORK...	30,000.00	2	0	Partial College	Estudios universitarios
20	LUKE18@ADVENTURE-WORKS.COM	40,000.00	0	0	High School	Educación secundaria
21	JORDAN73@ADVENTURE-WORKS.C...	40,000.00	0	0	High School	Educación secundaria
22	DESTINY7@ADVENTURE-WORKS.C...	40,000.00	0	0	Partial College	Estudios universitarios
23	ETHAN20@ADVENTURE-WORKS.C...	40,000.00	0	0	Partial College	Estudios universitarios
24	SETH46@ADVENTURE-WORKS.COM	40,000.00	0	0	Partial College	Estudios universitarios
25	RUSSELL7@ADVENTURE-WORKS.C...	60,000.00	0	0	Partial College	Estudios universitarios
26	ALEJANDRO45@ADVENTURE-WOR...	10,000.00	2	1	Partial High School	Educación secundaria
27	HAROLD3@ADVENTURE-WORKS.C...	30,000.00	2	0	Partial College	Estudios universitarios

Query Settings

PROPERTIES

Name: DimCustomer

APPLIED STEPS

Source

Navigation

Uppercased Text

Inserted Merged Column

Inserted First Characters

Inserted Text Length

Lowercased Text

Trimmed Text

Changed Type

- Check If FirstName and LastName Are Exactly the Same

Untitled - Power Query Editor

File Home Transform Add Column View Tools Help

Table

Queries [1]

Table.AddColumn(#"Extracted Last Characters", "Custom", each if [FirstName] = [LastName] then "Same" else "Different")

	FactSurveyResponse	Custom
1	Table	
2	Table	
3	Table	
4	Table	
5	Table	
6	Table	
7	Table	
8	Table	
9	Table	
10	Table	
11	Table	
12	Table	
13	Table	
14	Table	
15	Table	
16	Table	
17	Table	
18	Table	
19	Table	
20	Table	

Custom Column

Add a column that is computed from the other columns.

New column name: Custom.1

Custom column formula: = if [FirstName] = [LastName] then "Same" else "Different"

Available columns: CustomerKey, GeographyKey, CustomerAlternateKey, Title, FirstName, MiddleName, LastName

Learn about Power Query formulas

✓ No syntax errors have been detected.

OK Cancel

Intermediate Level (11-20)

- Find If 'Manager' Appears in Occupation (Case Sensitive)
-
- Search for 'graduate' in EnglishEducation (Case Insensitive)

Untitled - Power Query Editor

File Home Transform Add Column View Tools Help

Column From Custom Examples • Column Function General

Conditional Column Index Column Duplicate Column

Format ABC Extract Parse

From Text From Number From Date & Time

Statistics Standard Scientific Information

Trigonometry Rounding

Date Time Duration Text Analytics Vision Azure Machine Learning AI Insights

Queries [1] DimCustomer

Table.AddColumn(#"Added Custom", "HasGraduate", each if Text.Contains([EnglishEducation], "Graduate degree", Comparer.OrdinalIgnoreCase) then "Yes" else "No")

	Full Name	First Characters	Length	Stars	Custom	HasGraduate
290	Carter Maria	Mar		6	Different	No
291	Sanchez Katelyn	Kat		7	Different	No
292	Wright Jenna	Jen		6	Different	No
293	Phillips Seth	Set		8	Different	No
294	Long Luke	Luk		4	Different	No
295	Clark Dalton	Dal		5	Different	No
296	Lewis Taylor	Tay		5	Different	No
297	Richardson Haley	Hal		10	Different	Yes
298	Coleman Noah	Noa		7	Different	Yes
299	Luo Jon	Jon		3	Different	Yes
300	Vazquez Orlando	Ori		7	Different	Yes
301	Barnes Fernando	Fer		6	Different	No
302	Rodriguez Cameron	Cam		9	Different	No
303	Russell Spencer	Spe		7	Different	No
304	Coleman Julia	Jul		7	Different	No
305	Garcia Julia	Jul		6	Different	No
306	Evans Sean	Sea		5	Different	No
307	Zhou Micah	Mic		4	Different	No
308	Rodriguez Hunter	Hun		9	Different	No
309	Gonzales Ian	Ian		8	Different	No

Query Settings

PROPERTIES

Name DimCustomer

APPLIED STEPS

- Source
- Navigation
- Uppercased Text
- Inserted Merged Column
- Inserted First Characters
- Inserted Text Length
- Lowercased Text
- Trimmed Text
- Changed Type
- AddStars
- Extracted Last Characters
- Added Custom
- Added Custom1

- Extract Characters 3-7 from First Name

Untitled - Power Query Editor

File Home Transform Add Column View Tools Help

Column From Custom Examples • Column Function General

Conditional Column Index Column Duplicate Column

Format ABC Extract Parse

From Text From Number From Date & Time

Statistics Standard Scientific Information

Trigonometry Rounding

Date Time Duration Text Analytics Vision Azure Machine Learning AI Insights

Queries [1] DimCustomer

Table.AddColumn(#"Added Custom1", "Text Range", each Text.Middle([FirstName], 3, 4), type text)

	First Characters	Length	Stars	Custom	HasGraduate	Text Range	
1	Jon		4	***	Different	No	ene
2	Eug		5	*****	Different	No	en
3	Rub		6	*****	Different	No	isty
4	Chr		3	*****	Different	No	zabe
5	Eli		7	*****	Different	No	io
6	Jul		4	*****	Different	No	et
7	Jan		7	*****	Different	No	co
8	Mar		5	*****	Different	No	nnon
9	Rob		7	***	Different	No	quel
10	Sha		7	*****	Different	No	tis
11	Jac		6	*****	Different	No	ren
12	Cur		2	*****	Different	No	ney
13	Lau		6	*****	Different	No	oe
14	Ian		7	***	Different	No	tt
15	Syd		7	*****	Different	No	nnon
16	Chi		5	*****	Different	No	renc
17	Wya		4	*****	Different	No	e
18	Sha		4	*****	Different	No	dan
19	Cla		3	*****	Different	No	tiny
20	Luk		3	*****	Different	No	an
21	Jor		4	*****	Different	No	h
22	Des		6	*****	Different	No	
23	Eth		5	*****	Different	No	
24	For		7	*****	Different	No	

Query Settings

PROPERTIES

Name DimCustomer

APPLIED STEPS

- Source
- Navigation
- Uppercased Text
- Inserted Merged Column
- Inserted First Characters
- Inserted Text Length
- Lowercased Text
- Trimmed Text
- Changed Type
- AddStars
- Extracted Last Characters
- Added Custom
- Added Custom1
- Inserted Text Range

- Replace Area Code in Phone Number with 'XXX'

Table.ReplaceValue(#Replaced Value2,""," ",Replacer.ReplaceText,{"Phone"})

Extract First Characters

Enter how many starting characters to keep.

Count: 3

OK Cancel

Query Settings

PROPERTIES

Name: DimCustomer

APPLIED STEPS

- Source
- Navigation
- Uppercased Text
- Inserted Merged Column
- Extract First Characters
- Inserted Text Length
- Lowercased Text
- Trimmed Text
- Changed Type
- AddStars
- Added Custom
- Added Custom1
- Inserted Text Range
- Inserted Last Characters
- Cleaned Text
- Replaced Value
- Replaced Value1
- Replaced Value2
- Replaced Value3

- Format BirthDate as 'DD-MM-YYYY'

1 Birth Date = FORMAT(DimCustomer[BirthDate], "DD-MM-YYYY")

Data

Search

- DimCustomer
- AddressLine1
- AddressLine2
- Birth Date
- CommuteDistance
- Custom
- CustomerAlternateKey
- CustomerKey
- DateFirstPurchase
- EmailAddress
- EnglishEducation
- EnglishOccupation
- First Characters
- First Name
- FrenchEducation
- FrenchOccupation
- Full Name
- Gender
- GeographyKey
- HasGraduate

- Create Initial + Last Name Format (e.g. J.Smith)
- Capitalize First Letter of FirstName, Lowercase the Rest

Untitled - Power Query Editor

File Home Transform Add Column View Tools Help

Table

Queries [1]

DimCustomer

Table.TransformColumns(#"Changed Type1",{"First Name", Text.Proper, type text})

CustomerKey	GeographyKey	CustomerAlternateKey	Title	First Name	Middle Name	Last Name
1	11000	26 AW00011000	null	Jon	V	Yang
2	11001	37 AW00011001	null	Eugene	L	Huang
3	11002	31 AW00011002	null	Ruben	null	Torres
4	11003	11 AW00011003	null	Christy	null	Zhu
5	11004	19 AW00011004	null	Elizabeth	null	Johnson
6	11005	22 AW00011005	null	Julio	null	Rutiz
7	11006	8 AW00011006	null	Janet	G	Alvarez
8	11007	40 AW00011007	null	Marco	null	Mehta
9	11008	32 AW00011008	null	Rob	null	Verhoff
10	11009	25 AW00011009	null	Shannon	C	Carlson
11	11010	22 AW00011010	null	Jacquelyn	C	Suarez
12	11011	22 AW00011011	null	Curtis	null	Lu
13	11012	611 AW00011012	null	Lauren	M	Walker
14	11013	543 AW00011013	null	Ian	M	Jenkins
15	11014	634 AW00011014	null	Sydney	null	Bennett
16	11015	301 AW00011015	null	Chloe	null	Young
17	11016	329 AW00011016	null	Wyatt	L	Hill
18	11017	39 AW00011017	null	Shannon	null	Wang
19	11018	32 AW00011018	null	Clarence	D	Rai
20	11019	52 AW00011019	null	Luke	L	Lai
21	11020	53 AW00011020	null	Jordan	C	King
22	11021	536 AW00011021	null	Destiny	null	Wilson
23	11022	609 AW00011022	null	Ethan	G	Zhang
24	11023	298 AW00011023	null	Seth	M	Edwards
25	11024	311 AW00011024	null	Russell	null	Xie
26	11025	24 AW00011025	null	Alejandro	null	Beck

Query Settings

PROPERTIES

Name

DimCustomer

APPLIED STEPS

Source

Navigation

Uppercased Text

Inserted Merged Column

Inserted First Characters

Inserted Text Length

Lowercased Text

Trimmed Text

Changed Type

AddStars

Add Custom

Add Custom1

Inserted Text Range

Inserted Last Characters

Cleaned Text

Replaced Value

Replaced Value1

Replaced Value2

Replaced Value3

Extracted First Characters

Changed Type1

Capitalized Each Word

- Substitute Dashes with Spaces in Phone

Untitled - Power Query Editor

File Home Transform Add Column View Tools Help

Table

Queries [1]

DimCustomer

Table.TransformColumns(#"Changed Type1",{"First Name", Text.Proper, type text})

CustomerKey	GeographyKey	CustomerAlternateKey	Title	First Name	Middle Name	Last Name
1	11000	26 AW00011000	null	Jon	V	Yang
2	11001	37 AW00011001	null	Eugene	L	Huang
3	11002	31 AW00011002	null	Ruben	null	Torres
4	11003	11 AW00011003	null	Christy	null	Zhu
5	11004	19 AW00011004	null	Elizabeth	null	Johnson
6	11005	22 AW00011005	null	Julio	null	Rutiz
7	11006	8 AW00011006	null	Janet	G	Alvarez
8	11007	40 AW00011007	null	Marco	null	Mehta
9	11008	32 AW00011008	null	Rob	null	Verhoff
10	11009	25 AW00011009	null	Shannon	C	Carlson
11	11010	22 AW00011010	null	Jacquelyn	C	Suarez
12	11011	22 AW00011011	null	Curtis	null	Lu
13	11012	611 AW00011012	null	Lauren	M	Walker
14	11013	543 AW00011013	null	Ian	M	Jenkins
15	11014	634 AW00011014	null	Sydney	null	Bennett
16	11015	301 AW00011015	null	Chloe	null	Young
17	11016	329 AW00011016	null	Wyatt	L	Hill
18	11017	39 AW00011017	null	Shannon	null	Wang
19	11018	32 AW00011018	null	Clarence	D	Rai
20	11019	52 AW00011019	null	Luke	L	Lai
21	11020	53 AW00011020	null	Jordan	C	King
22	11021	536 AW00011021	null	Destiny	null	Wilson
23	11022	609 AW00011022	null	Ethan	G	Zhang
24	11023	298 AW00011023	null	Seth	M	Edwards
25	11024	311 AW00011024	null	Russell	null	Xie
26	11025	24 AW00011025	null	Alejandro	null	Beck

Query Settings

PROPERTIES

Name

DimCustomer

APPLIED STEPS

Source

Navigation

Uppercased Text

Inserted Merged Column

Inserted First Characters

Inserted Text Length

Lowercased Text

Trimmed Text

Changed Type

AddStars

Add Custom

Add Custom1

Inserted Text Range

Inserted Last Characters

Cleaned Text

Replaced Value

Replaced Value1

Replaced Value2

Replaced Value3

Extracted First Characters

Changed Type1

Capitalized Each Word

- Convert BirthDate Year to Numeric Using VALUE

Untitled - Power BI Desktop

File Home Help Table tools Column tools

Name BirthYear Format Whole number Summarization Sum Data type Whole number Data category Uncategorized

1 BirthYear = DimCustomer[BirthDate].[Year]

DateFirstPurchase	CommuteDistance	Full Name	First Characters	Length	Stars	Custom	HasGraduate	Text Range	Last Characters	Birth Date	BirthYear
Friday, January 18, 2013	5-10 Miles	Young Chloe	Chl	5	*****	Different	No	oe	0142	26-08-1984	1984
Wednesday, January 23, 2013	1-2 Miles	Wilson Destiny	Des	6	*****	Different	No	tiny	0158	02-03-1984	1984
Tuesday, January 8, 2013	1-2 Miles	Roberts Maria	Mar	7	*****	Different	No	ia	0199	06-08-1981	1981
Saturday, June 1, 2013	1-2 Miles	Wood Emily	Emi	4	*****	Different	No	ly	0114	20-10-1979	1979
Saturday, September 10, 2011	5-10 Miles	Howard Taylor	Tay	6	*****	Different	No	lor	0131	02-11-1969	1969
Tuesday, June 28, 2011	0-1 Miles	Malhotra Cynthia	Cyn	8	*****	Different	No	thia	0187	10-05-1984	1984
Saturday, July 20, 2013	0-1 Miles	Garcia Jillian	Jil	6	*****	Different	No	lian	0159	10-07-1978	1978
Sunday, February 17, 2013	1-2 Miles	Cook Alexa	Ale	4	*****	Different	No	xa	0153	15-01-1980	1980
Thursday, May 2, 2013	1-2 Miles	Davis Alexandra	Ale	5	*****	Different	No	xand	0185	22-09-1979	1979
Friday, December 16, 2011	0-1 Miles	Sandberg Kristine	Kri	8	*****	Different	No	stin	0182	05-05-1985	1985
Saturday, December 24, 2011	2-5 Miles	Rubio Kristy	Kri	5	*****	Different	No	sty	0180	15-11-1985	1985
Saturday, August 19, 2013	2-5 Miles	Watson Alexa	Ale	6	*****	Different	No	xa	0191	22-02-1983	1983
Thursday, August 1, 2013	2-5 Miles	Dominguez Jacquelyn	Jac	9	*****	Different	No	quel	0134	27-03-1983	1983
Sunday, January 22, 2012	2-5 Miles	Chander Alisha	Ali	7	*****	Different	No	sha	0176	24-11-1985	1985
Monday, May 20, 2013	0-1 Miles	Tang Kelsey	Kel	4	*****	Different	No	sey	0160	08-10-1980	1980
Friday, July 19, 2013	2-5 Miles	Lu Colleen	Col	2	*****	Different	No	leen	0174	14-01-1979	1979
Saturday, November 9, 2013	2-5 Miles	Li Leah	Lea	2	****	Different	No	h	0122	05-04-1982	1982
Friday, January 20, 2012	1-2 Miles	Foster Jennifer	Jen	6	*****	Different	No	nife	0149	05-03-1983	1983
Friday, February 10, 2012	10+ Miles	Rodriguez Hannah	Han	9	*****	Different	No	nah	0118	06-10-1974	1974
Wednesday, November 6, 2013	0-1 Miles	He Candice	Can	2	*****	Different	No	dice	0114	25-05-1983	1983
Wednesday, December 11, 2013	2-5 Miles	Cox Andrea	And	3	*****	Different	No	rea	0136	31-01-1983	1983
Wednesday, September 11, 2013	2-5 Miles	Rubio Jill	Jil	5	****	Different	No	i	0160	25-12-1981	1981
Thursday, April 26, 2012	1-2 Miles	Hughes Melissa	Mel	6	*****	Different	No	issa	0182	12-07-1981	1981
Saturday, June 1, 2013	2-5 Miles	Sanz Natasha	Nat	4	*****	Different	No	asha	0115	15-11-1982	1982
Thursday, February 21, 2013	2-5 Miles	Zhu Autumn	Aut	3	*****	Different	No	umn	0193	22-04-1983	1983
Monday, October 22, 2012	0-1 Miles	Alvarez Tabitha	Tab	7	*****	Different	No	itha	0164	07-09-1985	1985
Sunday, May 5, 2013	2-5 Miles	Barnes Jessica	Jes	6	*****	Different	No	sica	0123	13-02-1981	1981

Data

Search

DimCustomer

AddressLine1

AddressLine2

Birth Date

BirthDate

BirthYear

CommuteDistance

Customer

CustomerAlternateKey

CustomerKey

DateFirstPurchase

EmailAddress

EnglishEducation

EnglishOccupation

First Characters

FirstName

FrenchEducation

FrenchOccupation

Full Name

Gender

GeographyKey

HasGraduate

HouseOwnerFlag

- Show YearlyIncome Rounded to 1 Decimal Without Commas

Untitled - Power Query Editor

File Home Transform Add Column View Tools Help

Table

Queries [1]

DimCustomer

Gender	EmailAddress	1.2 YearlyIncome	1.2 TotalChildren	1.2 NumberChildrenAtHome	EnglishEducation
M	JON24@ADVENTURE-WORKS.COM	90000	2	0	Bachelors
M	EUGENE10@ADVENTURE-WORKS.C...	60000	3	3	Bachelors
M	RUBEN35@ADVENTURE-WORKS.C...	60000	3	3	Bachelors
F	CHRISTY12@ADVENTURE-WORKS.C...	70000	0	0	Bachelors
F	ELIZABETH5@ADVENTURE-WORKS...	80000	5	5	Bachelors
M	JULIO1@ADVENTURE-WORKS.COM	70000	0	0	Bachelors
F	JANET9@ADVENTURE-WORKS.COM	70000	0	0	Bachelors
M	MARCO14@ADVENTURE-WORKS.C...	60000	3	3	Bachelors
F	ROB4@ADVENTURE-WORKS.COM	60000	4	4	Bachelors
M	SHANNON38@ADVENTURE-WORK...	70000	0	0	Bachelors
F	JACQUELYN20@ADVENTURE-WOR...	70000	0	0	Bachelors
M	CURTIS9@ADVENTURE-WORKS.COM	60000	4	4	Bachelors
F	LAUREN41@ADVENTURE-WORKS.C...	100000	2	0	Bachelors
M	IAN47@ADVENTURE-WORKS.COM	100000	2	0	Bachelors
F	SYDNEY23@ADVENTURE-WORKS.C...	100000	3	0	Bachelors
F	CHLOE2@ADVENTURE-WORKS.CO...	30000	0	0	Partial College
M	WYATT32@ADVENTURE-WORKS.C...	30000	0	0	Partial College
F	SHANNON1@ADVENTURE-WORKS...	20000	4	0	High School
M	CLARENCE32@ADVENTURE-WORK...	30000	2	0	Partial College
M	LUKE18@ADVENTURE-WORKS.COM	40000	0	0	High School
M	JORDAN79@ADVENTURE-WORKS.C...	40000	0	0	High School
F	DESTINY7@ADVENTURE-WORKS.C...	40000	0	0	Partial College
M	ETHAN25@ADVENTURE-WORKS.C...	40000	0	0	Partial College
M	SETH46@ADVENTURE-WORKS.COM	40000	0	0	Partial College
M	RUSSELL7@ADVENTURE-WORKS.C...	60000	0	0	Partial College
M	ALEJANDRO45@ADVENTURE-WOR...	20000	2	1	Partial High School
M	HAROLD3@ADVENTURE-WORKS.C...	30000	2	0	Partial College

Query Settings

PROPERTIES

Name

DimCustomer

APPLIED STEPS

Source

Navigation

Uppercased Text

Inserted Merged Column

Inserted First Characters

Inserted Text Length

Lowercased Text

Trimmed Text

Changed Type

AddStars

Added Custom

Added Custom1

Inserted Text Range

Inserted Last Characters

Cleaned Text

Changed Type1

Capitalized Each Word

Replaced Value

Changed Type2

Advanced Level (21-30)

- Customer Code: First 2 Letters of LastName + Last 2 of CustomerKey
- Validate Email Ends with '.com' and Contains '@p
- Extract Domain Name from EmailAddress
- Mask Phone Number Except Last 4 Digits

- Proper Casing of Last Name (simulate manually)
- Replace Multiple Spaces in EnglishOccupation with Single Space
- Generate Custom ID: Initials + Birth Year (e.g., JD_1985)
- Remove Hyphens and Convert Phone to Number
- Create a measure or calculated column that categorizes customers into segments using both EnglishEducation and YearlyIncome.
If the education is "Graduate Degree" and income > 90000 → "Elite"
If education is "Bachelors" and income between 60000-90000 → "Professional"
If education is "High School" → "Basic"
Otherwise → "Other"

Power BI Desktop interface showing a calculated column formula and a data table.

Formula Bar:

```
1 Customer Segments = SWITCH(TRUE(), AND(DimCustomer[EnglishEducation] = "Graduate Degree", DimCustomer[YearlyIncome] > 90000), "Elite", AND(DimCustomer[EnglishEducation] = "Bachelors", DimCustomer[YearlyIncome] > 60000), "Professional", DimCustomer[EnglishEducation] = "High School", "Basic", "Other")
```

Data Table:

Full Name	First Characters	Length	Stars	Custom	HasGraduate	Text Range	Last Characters	Birth Date	BirthYear	Column	Customer Segments
Bell Adrian	Adri	4	*****	Different	No	ian	0175	06-03-1978	1978		Other
Russell Ashley	Ash	7	*****	Different	No	ley	0158	09-09-1970	1970		Professional
Miller Jill	Jil	6	****	Different	No	l	0113	05-10-1983	1983		Other
Wilson Megan	Meg	6	*****	Different	No	an	0164	01-01-1976	1976		Other
Sanchez Isaiah	Isa	7	*****	Different	No	iah	0137	16-08-1969	1969		Other
Simmons Blake	Bla	7	*****	Different	No	ke	0126	02-12-1974	1974		Other
Ortega Anne	Ann	6	****	Different	No	e	0122	01-11-1970	1970		Professional
Raji Brendan	Bre	4	*****	Different	No	ndan	0147	29-01-1969	1969		Professional
Zhang Claudia	Cla	5	*****	Different	No	udia	0126	29-10-1971	1971		Professional
Guo Jaclyn	Jac	3	*****	Different	No	lyn	0115	10-05-1971	1971		Professional
Vance Marco	Mar	5	*****	Different	No	co	0163	29-08-1969	1969		Professional
Hu Alejandro	Ale	2	*****	Different	No	jand	0196	05-07-1975	1975		Professional
Suri Lydia	Lyd	4	****	Different	No	ia	0114	03-08-1969	1969		Professional
Ramos Joy	Joy	5	***	Different	No		0176	29-11-1969	1969		Professional
Russell Mariah	Mar	7	*****	Different	No	iah	0138	14-04-1973	1973		Other
Lal Brandon	Bra	3	*****	Different	No	ndon	0135	14-10-1972	1972		Other
Rogers Jada	Jad	6	****	Different	No	a	0112	28-11-1972	1972		Other
Bell Abigail	Abi	4	*****	Different	No	gail	0155	22-04-1970	1970		Other
Hall Hannah	Han	4	*****	Different	No	nah	0116	10-03-1979	1979		Other
Liang Eugene	Eug	5	*****	Different	No	ene	0194	30-09-1970	1970		Professional
Anand Johnny	Joh	5	*****	Different	No	nny	0132	10-06-1976	1976		Professional
Li Stacey	Sta	2	*****	Different	No	cey	0124	07-12-1969	1969		Professional
Diaz Samuel	Sam	4	*****	Different	No	uel	0127	23-01-1969	1969		Professional
Chander Carl	Car	7	****	Different	No	l	0131	01-01-1970	1970		Professional
Diaz Kyle	Kyl	4	****	Different	No	e	0151	13-03-1978	1978		Other
Flores Aaron	Aar	6	*****	Different	No	on	0184	02-08-1968	1968		Other
Chandira Veronira	Ver	7	*****	Different	No	rnir	0193	30-09-1979	1979		Professional

- Create a measure that returns:
Total Customers if no selection
Customer count for selected Gender
If more than one gender is selected, return "Multiple Values Selected"