

Data Transformation Document Sales Financial Analysis Project

1 OBJECTIVE

This Power Query script was developed to prepare financial sales data before analysis in Power BI. The goal is to ensure consistency, quality, and create additional metrics that support business insights.

2 DATA SOURCE

File: Sample_Raw.xlsx

Source: Data/Sample_Raw.xlsx

Table used: financials

3 STAGES OF TRANSFORMATION

Import: Loading the financials table from Excel.

Data type adjustment: Converting columns to the correct types (text, number, date, percentage), ensuring consistency for subsequent calculations.

Cleanup: Removing blank or null rows and standardizing text (using text.proper to capitalize each word).

Creation of a calculated column: Profit Margin = Profit / Sales (Percentage indicator showing the profit margin per sale).

Column reordering: Organizing columns in a logical order.

Rounding values: Rounding to 2 decimal places in numeric columns (Manufacturing Price, Sales Price, Gross Sales, Discounts, Sales, COGS, and Profit).

4 FINAL RESULT

Clean, standardized dataset ready for analysis;

Inclusion of the Profit Margin metric as a percentage;

Consistent data for visualizations in Power BI.