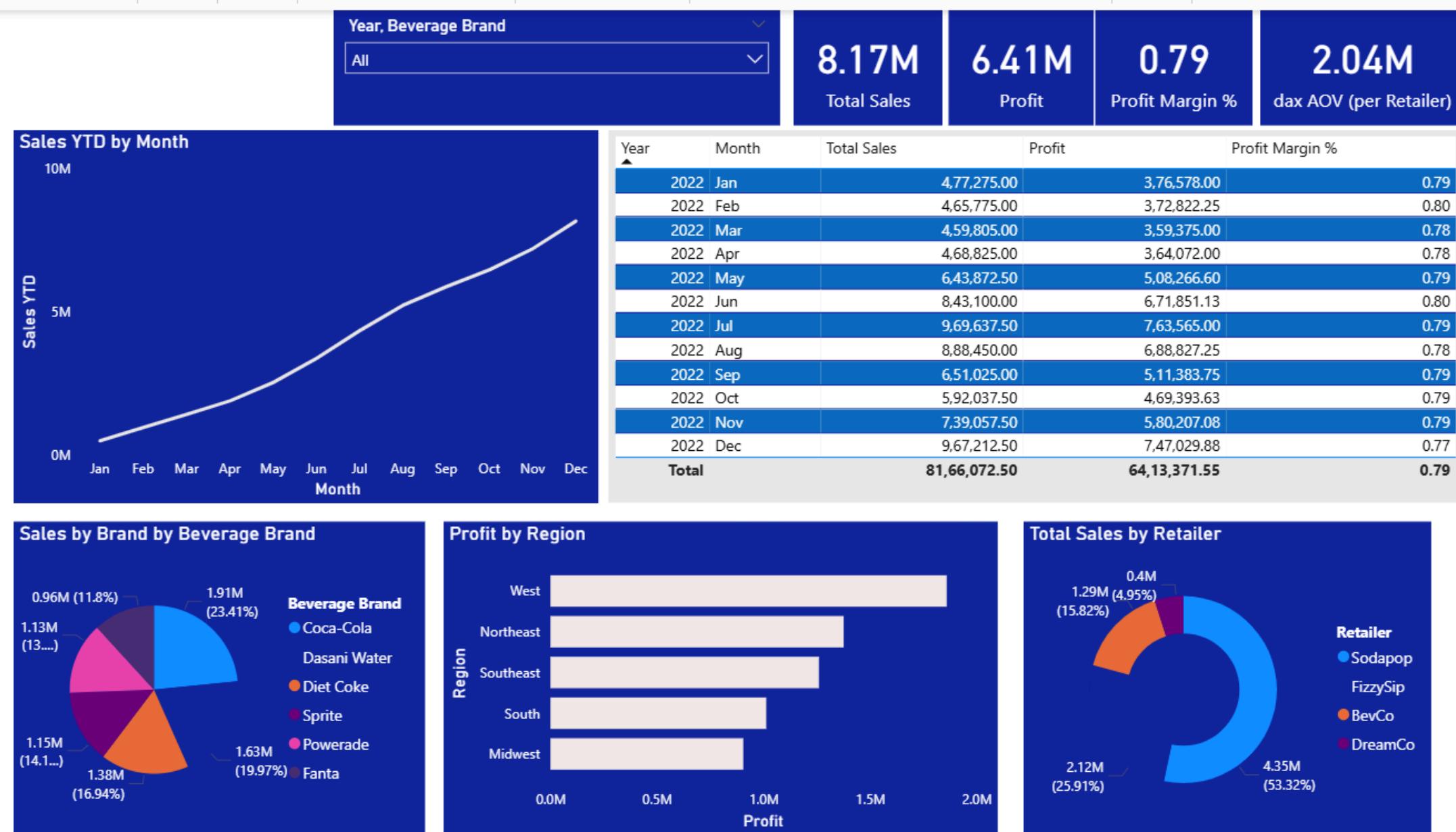


Day 3 – Building a Financial Analysis Dashboard in Power BI



Power Query | DAX | Visualization Built a complete analytical workflow – from cleaning to dashboarding – in one day.



Data Cleaning in Power Query

✓ fx = Table.RenameColumns(#"Changed Type1",{{"Sales", "Sales Value"}})

A ^B C Product Name	1.2 Sales Value	1 ² 3 Quantity	1.2 Discount
Bush Somerset Collection Bookcase	261.96	2	
Hon Deluxe Fabric Upholstered Stacking Chairs, Rounded Back	731.94	3	
Self-Adhesive Address Labels for Typewriters by Universal	14.62	2	
Bretford CR4500 Series Slim Rectangular Table	957.5775	5	
Eldon Fold 'N Roll Cart System	22.368	2	
Eldon Expressions Wood and Plastic Desk Accessories, Cherry Wood	48.86	7	
Newell 322	7.28	4	
Mitel 5320 IP Phone VoIP phone	907.152	6	
DXL Angle-View Binders with Locking Rings by Samsill	18.504	3	
Belkin F5C206VTEL 6 Outlet Surge	114.9	5	
Chromcraft Rectangular Conference Tables	1706.184	9	
Konftel 250 Conference phone - Charcoal black	911.424	4	
Xerox 1967	15.552	3	
Fellowes PB200 Plastic Comb Binding Machine	407.976	3	
Holmes Replacement Filter for HEPA Air Cleaner, Very Large Room, HE...	68.81	5	
Storex DuraTech Recycled Plastic Frosted Binders	2.544	3	
Stur-D-Stor Shelving, Vertical 5-Shelf: 72"H x 36"W x 18 1/2"D	665.88	6	
Fellowes Super Stor/Drawer	55.5	2	
Newell 341	8.56	2	
Cisco SPA 501G IP Phone	213.48	3	

profiling based on top 1000 rows PREVIEW DOWN

Query Settings

PROPERTIES

Name: superstore
All Properties

APPLIED STEPS

Source
Promoted Headers
Changed Type
Removed Columns
Changed Type1
Renamed Columns



Removed redundant columns



Fixed data types & renamed headers



Extracted Month & Year from Order Date



Clean and structured data for analytics foundation.



Raw Data Loaded

SECURITY WARNING External Data Connections have been disabled [Enable Content](#)

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Row ID	Order ID	Order Date	Ship Date	Customer ID	Customer Name	Segment	Country	City	State	Region	Product ID	Category
2	1	CA-2017-152156	11/8/2017	11/11/2017	CG-12520	Claire Gute	Consumer	United States	Henderson	Kentucky	South	FUR-BO-10001798	Furniture
3	2	CA-2017-152156	11/8/2017	11/11/2017	CG-12520	Claire Gute	Consumer	United States	Henderson	Kentucky	South	FUR-CH-10000454	Furniture
4	3	CA-2017-138688	6/12/2017	6/16/2017	DV-13045	Darrin Van Huff	Corporate	United States	Los Angeles	California	West	OFF-LA-10000240	Office
5	4	US-2016-108966	10/11/2016	10/18/2016	SO-20335	Sean O'Donnell	Consumer	United States	Fort Lauderdale	Florida	South	FUR-TA-10000577	Furniture
6	5	US-2016-108966	10/11/2016	10/18/2016	SO-20335	Sean O'Donnell	Consumer	United States	Fort Lauderdale	Florida	South	OFF-ST-10000760	Office
7	6	CA-2015-115812	6/9/2015	6/14/2015	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	West	FUR-FU-10001487	Furniture
8	7	CA-2015-115812	6/9/2015	6/14/2015	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	West	OFF-AR-10002833	Office
9	8	CA-2015-115812	6/9/2015	6/14/2015	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	West	TEC-PH-10002275	Tech
10	9	CA-2015-115812	6/9/2015	6/14/2015	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	West	OFF-BI-10003910	Office
11	10	CA-2015-115812	6/9/2015	6/14/2015	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	West	OFF-AP-10002892	Office
12	11	CA-2015-115812	6/9/2015	6/14/2015	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	West	FUR-TA-10001539	Furniture
13	12	CA-2015-115812	6/9/2015	6/14/2015	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	West	TEC-PH-10002033	Tech
14	13	CA-2018-114412	4/15/2018	4/20/2018	AA-10480	Andrew Allen	Consumer	United States	Concord	North Carolina	South	OFF-PA-10002365	Office
15	14	CA-2017-161389	12/5/2017	12/10/2017	IM-15070	Irene Maddox	Consumer	United States	Seattle	Washington	West	OFF-BI-10003656	Office
16	15	US-2016-118983	11/22/2016	11/26/2016	HP-14815	Harold Pawlan	Home Office	United States	Fort Worth	Texas	Central	OFF-AP-10002311	Office
17	16	US-2016-118983	11/22/2016	11/26/2016	HP-14815	Harold Pawlan	Home Office	United States	Fort Worth	Texas	Central	OFF-BI-10000756	Office
18	17	CA-2015-105893	11/11/2015	11/18/2015	PK-19075	Pete Kriz	Consumer	United States	Madison	Wisconsin	Central	OFF-ST-10004186	Office
19	18	CA-2015-167164	5/13/2015	5/15/2015	AG-10270	Alejandro Grove	Consumer	United States	West Jordan	Utah	West	OFF-ST-10000107	Office
20	19	CA-2015-143336	8/27/2015	9/1/2015	ZD-21925	Zuschuss Donatelli	Consumer	United States	San Francisco	California	West	OFF-AR-10003056	Office
21	20	CA-2015-143336	8/27/2015	9/1/2015	ZD-21925	Zuschuss Donatelli	Consumer	United States	San Francisco	California	West	TEC-PH-10001949	Tech
22	21	CA-2015-143336	8/27/2015	9/1/2015	ZD-21925	Zuschuss Donatelli	Consumer	United States	San Francisco	California	West	OFF-BI-10002215	Office
23	22	CA-2017-137330	12/9/2017	12/13/2017	KB-16585	Ken Black	Corporate	United States	Fremont	Nebraska	Central	OFF-AR-10000246	Office
24	23	CA-2017-137330	12/9/2017	12/13/2017	KB-16585	Ken Black	Corporate	United States	Fremont	Nebraska	Central	OFF-AP-10001492	Office
25	24	US-2018-156909	7/16/2018	7/18/2018	SF-20065	Sandra Flanagan	Consumer	United States	Philadelphia	Pennsylvania	East	FUR-CH-10002774	Furniture
26	25	CA-2016-106320	9/25/2016	9/30/2016	EB-13870	Emily Burns	Consumer	United States	Orem	Utah	West	FUR-TA-10000577	Furniture
27	26	CA-2017-121755	1/16/2017	1/20/2017	EH-13945	Eric Hoffmann	Consumer	United States	Los Angeles	California	West	OFF-BI-10001634	Office
28	27	CA-2017-121755	1/16/2017	1/20/2017	EH-13945	Eric Hoffmann	Consumer	United States	Los Angeles	California	West	TEC-PH-10002037	Tech

Imported 10,000+ Superstore sales records.

Connected to Power BI using From Folder connector.

Automatically appended monthly files for scalable analysis..



DAX Modeling & Relationships

Search

- dax AOV (per Retailer)
- Expenses
- MoM % Sales
- Price per Unit
- Profit
- Profit by Region
- Profit Margin %
- Region
- Retailer
- Retailer ID
- Revenue
- Sales by Brand
- Sales Last Month
- Sales Last Year
- Sales MTD
- Sales YTD
- State
- Test Sales
- Total Expenses

- Linked Sales & Date tables for YTD and time intelligence.

Created key measures:

- Total Sales = SUM('Table1'[Revenue])
- Profit Margin % = DIVIDE([Profit], [Revenue])
 - AOV = AVERAGE('Table1'[Revenue])
- ⚙️ Enabled dynamic filters and cross-report interactions.



Final Power BI Dashboard Insights

Refresh Sensitivity Publish Prep data for AI Copilot

Year, Beverage Brand		8.17M	6.41M	0.79	2.04M	
	All	Total Sales	Profit	Profit Margin %	dax AOV (per Retailer)	
Sales YTD by Month		Year	Month	Total Sales	Profit	Profit Margin %
10M	Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec	2022	Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec	4,77,275.00 4,65,775.00 4,59,805.00 4,68,825.00 6,43,872.50 8,43,100.00 9,69,637.50 8,88,450.00 6,51,025.00 5,92,037.50 7,39,057.50 9,67,212.50	3,76,578.00 3,72,822.25 3,59,375.00 3,64,072.00 5,08,266.60 6,71,851.13 7,63,565.00 6,88,827.25 5,11,383.75 4,69,393.63 5,80,207.08 7,47,029.88	0.79 0.80 0.78 0.78 0.79 0.80 0.79 0.78 0.79 0.79 0.79 0.77
5M		Total		81,66,072.50	64,13,371.55	0.79
0M						

Sales by Brand by Beverage Brand

Beverage Brand	Sales	Percentage
Coca-Cola	1.91M	(23.41%)
Dasani Water	1.13M	(13.11%)
Diet Coke	1.15M	(14.11%)
Sprite	1.38M	(16.94%)
Powerade	1.63M	(19.97%)
Fanta	0.96M	(11.8%)

Profit by Region

Region	Profit
West	~1.8M
Northeast	~1.5M
Southeast	~1.3M
South	~1.0M
Midwest	~0.9M

Total Sales by Retailer

Retailer	Sales	Percentage
SodaPop	4.35M	(53.32%)
FizzySip	2.12M	(25.91%)
BevCo	1.29M	(15.82%)
DreamCo	0.4M	(4.95%)

Total Sales: 8.17 M Profit: 6.41 M

Profit Margin: 0.79% Top Brand: Coca-Cola

From raw Excel → Power Query → DAX → Business-Ready Dashboard.