



# POWER QUERY TRICKS YOU'LL USE WEEKLY



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## Raw Data at Start:

Table 1: Sales Transactions

Date	Order ID	Customer ID	Product SKU	Amount \$
1/Jan	101	CUST-A	SKU-L1	1,200
1/Jan	101		SKU-M1	300
2/Jan	102	CUST-B	SKU-L1	1,250
2/Jan	102	CUST-B	SKU-L1	1,250
3/Jan	103	CUST-A	SKU-K1	75

Table 2: Products

SKU	Product Name
SKU-L1	Laptop Pro
SKU-M1	Monitor 24"
SKU-K1	Keyboard

Table 3: Customers

Customer ID	Customer Name
CUST-A	John Smith
CUST-B	Jane Doe

## Load Data in Power Query Editor

1. Select any cell in the **Sales\_Transactions** table
2. Data tab > From Table/Range to load your data
3. Perform **data cleaning and transformations**
4. Click **Close & Load To...**
5. Select **Table > New Worksheet > click OK**
6. Repeat for the **Customer & the Product** tables, but while loading, select **Create Connection Only**

**Note:** Creating connection doesn't load the data onto the Excel grid, it only creates a connection for future transformations or use in other queries.

## Transformation Objectives:

1. Remove **invisible errors** in your data
2. Fill **missing or blank values**
3. Remove **duplicates**
4. Merge data from **different tables**
5. Create **new columns** without any formula
6. **Automate** repetitive processes
7. Create simplified **one-click transformation & refresh system** that reruns the automation when new data is added



## 1 Trim and Clean: Get rid of invisible empty spaces and non-printable characters

Go to the Transform tab

Expose the Format dropdown

Select Text columns

Select Trim

Repeat steps 1-3 and then select Clean

- Notes:**
- Trim and Clean all your tables – Sales, Customers, Products
  - Facilitates accurate Query Merge.

**Tip:** Performing these transformations on non-text columns changes their data type to text.

## 2 Fill Down: Fill missing values to get the complete picture from your data

Go to the Transform tab

Expose the Fill dropdown

Select the column with blank values

Select Down to fill down

**Note:** We must sort the Order ID column before filling down the Customer ID to ensure accurate filled down values

## 3 Remove Duplicates: Remove unwanted duplicate data to prevent incorrect analysis

Go to the Home tab

Use Ctrl+a to select entire data

Identical rows will be removed

Expose the Remove Rows Dropdown

Select Remove Duplicates

## 5 Add Custom Column: Use Column from Examples to add new column without any formulas

Go to Add Column tab

Select Column from Examples

Give the first example value

Rename column

Automate Data Processing!

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Automate BORING Tasks

Give more examples till the query perfectly understands the pattern and fills remaining values automatically

## 4 Merge Queries: Perform a V/XLOOKUP, without having to write messy formulas

Go to the Home tab

Click on Merge Queries

Select the column common in both Sales & Customer tables

Select the lookup table

Select the common column

Leave this at default - Left Outer Join

- Post Merge Steps:**
1. Expand the newly merged table containing columns from the lookup table
  2. Select columns you want to keep
  3. Repeat steps for merging with the Products table
  4. **Result:** One single fact table with transactions, customer & product data

A single table with all information, a new coupon code column & can be refreshed when new data is added!  
**To Refresh: Data tab > Refresh**

## The End Result:

Date	Order ID	Customer ID	Product SKU	Amount \$	Customer Name	Product Name	Coupon Code
01/01/25	101	CUST-A	SKU-L1	1200	John Smith	Laptop Pro	SMI-L-101
01/02/25	102	CUST-B	SKU-L1	1250	Jane Doe	Laptop Pro	DOE-L-102
01/01/25	101	CUST-A	SKU-M1	300	John Smith	Monitor 24"	SMI-M-101
01/03/25	103	CUST-A	SKU-K1	75	John Smith	Keyboard	SMI-K-103



Mynda Treacy

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