**Create P & L Table**

1. Create a static table with P & L Table Row Headers.
2. Create a DAX measure to connect P&L Row Headers with respective measures by using SWITCH statement
3. Create measures for P & L LY (Last Year), YOY (Year-over-Year) and YOY % for the P & L Metrics.
4. Create a Dynamic table for P & L Table column headers.
5. Create a DAX measure where P&L column Headers respond to fiscal year slicer selection.
6. Create Final P & L table Visual.

======================================================== **Create a static table with P & L Table Row Headers** ========================================================

Created a static table by selecting ‘Enter data’ in ‘Home’ tab with name ‘P & L Row Headers‘ with columns:

* P & L Metrics Description
* Order
* P & L Row Headers

Copy paste the P & L metrics and give Order 1 to 14 and respective row headers.

========================================================== **Create a measure to connect P&L Row Headers with respective measures**

==========================================================

P & L values =

SWITCH(TRUE(),

MAX('P & L Row headers'[Order]) = 1, [GS $] / 1000000,

MAX('P & L Row headers'[Order]) = 2, [Pre-invoice deduction $] / 1000000,

MAX('P & L Row headers'[Order]) = 3, [NIS $] / 1000000,

MAX('P & L Row headers'[Order]) = 4, [Post-invoice deduction $] / 1000000,

MAX('P & L Row headers'[Order]) = 5,

[Post-invoice other deduction $] / 1000000,

MAX('P & L Row headers'[Order]) = 6,

[Post-invoice deduction $] / 1000000 +

[Post-invoice other deduction $] / 1000000,

MAX('P & L Row headers'[Order]) = 7, [NS $] / 1000000,

MAX('P & L Row headers'[Order]) = 8, [Manufacturing Cost $] / 1000000,

MAX('P & L Row headers'[Order]) = 9, [Freight Cost $] / 1000000,

MAX('P & L Row headers'[Order]) = 10, [Other Cost $] / 1000000,

MAX('P & L Row headers'[Order]) = 11, [Total COGS $] / 1000000,

MAX('P & L Row headers'[Order]) = 12, [GM $] / 1000000,

MAX('P & L Row headers'[Order]) = 13, [GM %] \* 100,

MAX('P & L Row headers'[Order]) = 14, [GM / Unit]

)

The **SWITCH** function in DAX allows for evaluating an expression against multiple conditions and returning corresponding results. It is a good alternative to avoid multiple nested IF statements.

========================================================== **Create measures for P & L LY, YOY and YOY %** ==========================================================

P & L LY = CALCULATE([P & L values],SAMEPERIODLASTYEAR(dim\_date[date]))

Last year values provide a comparative view of financial performance over time.

YOY = [P & L values] - [P & L LY]

YOY % = DIVIDE([YOY],[P & L LY],0)\*100

========================================================== **Create a Dynamic table for P & L Table column headers** ==========================================================

Created a Dynamic table by selecting ‘New table’ in ‘Modeling’ tab with DAX formula:

P & L Column Headers =

var x = ALLNOBLANKROW(fiscal\_year\_table[fy\_desc])

RETURN

UNION(

    ROW("Column Header","LY"),

    ROW("Column Header","YOY"),

    ROW("Column Header","YOY %"),

    X)

Table will look like the following:

|  |
| --- |
| **P & L Column Headers** |
| LY |
| YOY |
| YOY % |
| 2018 |
| 2019 |
| 2020 |
| 2021 |
| 2022 Est |

======================================================== **Measure where P&L column Headers respond to fiscal year slicer selection.**

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P & L Final Value =

SWITCH(TRUE(),

SELECTEDVALUE(fiscal\_year\_table[fy\_desc]) =

MAX('P & L Column Headers'[P & L Column Headers]),

[P & L values],

MAX('P & L Column Headers'[P & L Column Headers]) = "LY",

[P & L LY],

MAX('P & L Column Headers'[P & L Column Headers]) = "YOY", [YOY],

MAX('P & L Column Headers'[P & L Column Headers]) = "YOY %", [YOY %]

)

**Note:** Every measure in Power BI takes into account all external filters from user selections and internal filters set by DAX formulas.

======================================================== **Create Final P & L table Visual**

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* In report view
* select Matrix visual
* Drag ‘P & L Row headers[P & L Row Headers]’ column in Rows
* Drag ‘P & L Column Headers[P & L Column Headers]’ column in

Columns.

* Drag ‘P & L Final Value’ measure in Values.

**Note:** Sort the ‘P & L Row headers[P & L Row Headers]’ column by [Order], if the metrics order is disturbed

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