

Power BI Financial Sample - DAX Measures

This section of the document contains 5 simple **calculated measures** for the Power BI Financial Sample dataset using DAX (Data Analysis Expressions).

The first two calculations replicate existing measures. This is being done for validation purposes.

IMPORTANT

For each measure, remember to use the format ribbon at the top of the screen.

Chapter 1. How to Create Calculated Measures in Power BI

1. Go to the **Modeling** tab
2. Click **New Measure**
3. Type the DAX formula
4. Press Enter

NOTE

These measures will automatically calculate based on any filters or slicers you apply in your reports!

Total Sales

```
_Total Sales = SUM(financials[Sales])
```

Sums all sales values in the dataset.

Total Profit

```
_Total Profit = SUM(financials[Profit])
```

Calculates total profit across all transactions.

Profit Margin %

```
_Profit Margin % = DIVIDE(SUM(financials[Profit]), SUM(financials[Sales]), 0)
```

Shows profit as a percentage of sales. The DIVIDE function prevents errors if sales are zero.

Average Sale Amount

```
_Average Sale = AVERAGE(financials[Sales])
```

Calculates the average value of individual sales transactions.

Average Units Sold

```
_Average Units Sold = SUM(financials[Units Sold])
```

Sums the total number of units sold.

Chapter 2. How to Create Calculated Columns in Power BI

1. Go to the **Table** view or **Data** view
2. Select the **financials** table
3. Click **New Column** on the Modeling tab
4. Paste the DAX formula
5. Press Enter

NOTE

Calculated columns are computed row-by-row and stored in the table, unlike measures which calculate dynamically.

Profit Per Unit

```
_Profit Per Unit = financials[Profit] / financials[Units Sold]
```

Calculates the profit earned per unit sold.

Country Code

```
_Country Code = LEFT(financials[Country], 3)
```

Extracts the first 3 characters from the Country name (e.g., "Canada" becomes "CAN", "France" becomes "FRA").

Product Upper

```
_Product Upper = UPPER(financials[Product])
```

Converts the product name to all uppercase letters (e.g., "Paseo" becomes "PASEO").

Sale Description

```
_Sales Description = financials[Product] & " - " & financials[Segment]
```

Combines product and segment with a separator (e.g., "Paseo - Government").

Year

```
Year = YEAR(financials[Date])
```

Extracts the year from the date column.

Is Profitable

```
Is Profitable = IF(financials[Profit] > 0, "Yes", "No")
```

Indicates whether the transaction was profitable.

Sales Category

```
Sales Category =  
IF(financials[Sales] >= 500000, "High",  
  IF(financials[Sales] >= 100000, "Medium", "Low"))
```

Classifies sales into High, Medium, or Low categories.