

# **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.