

# Report Model: Customer Profitability Sample PBIX

## Table Summary

Table Name	Total Columns	Measures	Calculated Columns
Fact	13	44	0
BU	4	0	0
Date	7	0	0
Scenario	2	0	0
Product	2	0	0
Customer	7	0	0
Industry	3	0	0
Executive	3	0	0
State	3	0	0
DateTableTemplate_fe310476-3bb5-422b-85ff-9fd23f2cad67	7	0	6
LocalDateTable_39c22ddb-27f3-4e6c-8a44-a3380850fcb4	7	0	6

## Tables and Columns (Schema)

### *Table: Fact*

Column Name	Data Type	Is Hidden
Customer Key	int64	True
Product Key	string	True
BU Key	double	True
Scenario Key	int64	True
Revenue	double	True
Material Costs	double	True
Labor Costs Variable	double	True
Taxes	double	True
Rev for Exp Travel	double	True
Travel Expenses	double	True
Cost Third Party	double	True
Subscription Revenue	double	True
YearPeriod	string	True

### *Table: BU*

Column Name	Data Type	Is Hidden
BU Key	double	True
BU	string	False
Division	string	False
Executive_id	int64	True

***Table: Date***

Column Name	Data Type	Is Hidden
YearPeriod	string	False
Year	int64	False
Period	string	False
Date	dateTime	False
Month	string	False
QtrID	string	False
Qtr	string	False

***Table: Scenario***

Column Name	Data Type	Is Hidden
Scenario Key	int64	True
Scenario	string	False

***Table: Product***

Column Name	Data Type	Is Hidden
Product Key	int64	True
Product	string	False

***Table: Customer***

Column Name	Data Type	Is Hidden
Customer	double	True
Country/Region	string	False
Name	string	False
City	string	False
Postal Code	double	False
State	string	False
Industry ID	double	True

**Table: Industry**

Column Name	Data Type	Is Hidden
ID	int64	True
Industry	string	False
Image	binary	False

**Table: Executive**

Column Name	Data Type	Is Hidden
ID	int64	True
Name	string	False
Img	binary	False

**Table: State**

Column Name	Data Type	Is Hidden
StateCode	string	False
State	string	False
Region	string	False

**Table: DataTableTemplate\_fe310476-3bb5-422b-85ff-9fd23f2cad67**

Column Name	Data Type	Is Hidden
Date	dateTime	True
Year	int64	True
MonthNo	int64	True
Month	string	True
QuarterNo	int64	True
Quarter	string	True
Day	int64	True

**Table: LocalDateTable\_39c22ddb-27f3-4e6c-8a44-a3380850fcb4**

Column Name	Data Type	Is Hidden
Date	dateTime	True
Year	int64	True
MonthNo	int64	True
Month	string	True
QuarterNo	int64	True
Quarter	string	True

Day	int64	True
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## Measures

### *Table: Fact*

**Measure:** Total Revenue

**Expression:** SUM([Revenue])

**Measure:** Sum of Material Costs

**Expression:** SUM([Material Costs])

**Measure:** Sum of Labor Costs Variable

**Expression:** SUM([Labor Costs Variable])

**Measure:** Sum of Taxes

**Expression:** SUM([Taxes])

**Measure:** Sum of Rev for Exp Travel

**Expression:** SUM([Rev for Exp Travel])

**Measure:** Sum of Travel Expenses

**Expression:** SUM([Travel Expenses])

**Measure:** Sum of Cost Third Party

**Expression:** SUM([Cost Third Party])

**Measure:** Sum of Subscription Revenue

**Expression:** SUM([Subscription Revenue])

**Measure:** Gross Margin

**Expression:** [Total Revenue]-[Total COGS]

**Measure:** GM%

**Expression:** DIVIDE([Gross Margin],[Total Revenue])

**Measure:** YTD Revenue

**Expression:** TOTALYTD(SUM([Revenue]),'Date'[Date])

**Measure:** Total COGS

**Expression:** [Sum of Material Costs]+[Sum of Labor Costs Variable]+[Sum of Taxes]+[Sum of Rev for Exp Travel]+[Sum of Travel Expenses]+[Sum of Cost Third Party]

**Measure:** YTD COGS

**Expression:** TOTALYTD([Total COGS],'Date'[Date])

**Measure:** YTD Gross Margin

**Expression:** TOTALYTD([Gross Margin],'Date'[Date])

**Measure:** Revenue SPLY

**Expression:** CALCULATE([Total Revenue],SAMEPERIODLASTYEAR('Date'[Date]))

**Measure:** Gross Margin SPLY

**Expression:** CALCULATE([Gross Margin],SAMEPERIODLASTYEAR('Date'[Date]))

**Measure:** GM% SPLY

**Expression:** [Gross Margin SPLY]/[Revenue SPLY]

**Measure:** YTD GM%

**Expression:** [YTD Gross Margin]/[YTD Revenue]

**Measure:** YTD Revenue SPLY

**Expression:** CALCULATE([YTD Revenue],SAMEPERIODLASTYEAR(DATESYTD('Date'[Date])))

**Measure:** COGS SPLY

**Expression:** CALCULATE([Total COGS],SAMEPERIODLASTYEAR('Date'[Date]))

**Measure:** YTD COGS SPLY

**Expression:** CALCULATE([YTD COGS],SAMEPERIODLASTYEAR(DATESYTD('Date'[Date])))

**Measure:** YTD GM% SPLY

**Expression:** [YTD GM SPLY]/[YTD Revenue SPLY]

**Measure:** YTD GM SPLY

**Expression:** `CALCULATE([YTD Gross Margin],SAMEPERIODLASTYEAR(DATESYTD('Date'[Date])))`  
**Measure:** YoY Rev Var  
**Expression:** `[Total Revenue]-[Revenue SPLY]`  
**Measure:** YoY GM Var  
**Expression:** `[Gross Margin]-[Gross Margin SPLY]`  
**Measure:** YoY Rev Growth  
**Expression:** `IF([Revenue SPLY],[YoY Rev Var]/[Revenue SPLY],BLANK())`  
**Measure:** YoY GM Growth  
**Expression:** `IF([Gross Margin SPLY],[YoY GM Var]/[Gross Margin SPLY],BLANK())`  
**Measure:** YoY YTD Rev Var  
**Expression:** `[YTD Revenue]-[YTD Revenue SPLY]`  
**Measure:** YoY COGS Var  
**Expression:** `[Total COGS]-[COGS SPLY]`  
**Measure:** YoY YTD COGS Var  
**Expression:** `[YTD COGS]-[YTD COGS SPLY]`  
**Measure:** YoY YTD GM% Var  
**Expression:** `[YTD GM%]-[YTD GM% SPLY]`  
**Measure:** YoY YTD GM Var  
**Expression:** `[YTD Gross Margin]-[YTD GM SPLY]`  
**Measure:** YoY GM %Var  
**Expression:** `[GM%]-[GM% SPLY]`  
**Measure:** YoY YTD Rev Growth  
**Expression:** `IF([YTD Revenue SPLY],[YoY YTD Rev Var]/[YTD Revenue SPLY],BLANK())`  
**Measure:** YoY COGS Growth  
**Expression:** `IF([COGS SPLY],[YoY COGS Var]/[COGS SPLY],BLANK())`  
**Measure:** YoY YTD COGS Growth  
**Expression:** `IF([YTD COGS SPLY],[YoY YTD COGS Var]/[YTD COGS SPLY],BLANK())`  
**Measure:** YoY YTD GM Growth  
**Expression:** `IF([YTD GM SPLY],[YoY YTD GM Var]/[YTD GM SPLY],BLANK())`  
**Measure:** # of Customers  
**Expression:** `DISTINCTCOUNT([Customer Key])`  
**Measure:** # of Products  
**Expression:** `DISTINCTCOUNT([Product Key])`  
**Measure:** Revenue Budget  
**Expression:** `CALCULATE([Total Revenue], FILTER(Scenario, Scenario[Scenario]="Budget"))`  
**Measure:** Revenue Var to Budget  
**Expression:** `[RevenueTY]-[Revenue Budget]`  
**Measure:** Revenue Var % to Budget  
**Expression:** `DIVIDE([Revenue Var to Budget], [RevenueTY])`  
**Measure:** RevenueTY  
**Expression:** `CALCULATE([Total Revenue], FILTER(Scenario, Scenario[Scenario]="Actual"))`  
**Measure:** Sum of Revenue  
**Expression:** `SUM('Fact'[Revenue])`

## Calculated Columns

**Table:** *DateTableTemplate\_fe310476-3bb5-422b-85ff-9fd23f2cad67*

**Column:** Year

**Expression:** `YEAR([Date])`

**Column:** MonthNo

**Expression:** `MONTH([Date])`

**Column:** Month  
**Expression:** `FORMAT([Date], "MMMM")`  
**Column:** QuarterNo  
**Expression:** `INT(([MonthNo] + 2) / 3)`  
**Column:** Quarter  
**Expression:** `"Qtr " & [QuarterNo]`  
**Column:** Day  
**Expression:** `DAY([Date])`

***Table: LocalDateTable\_39c22ddb-27f3-4e6c-8a44-a3380850fcb4***

**Column:** Year  
**Expression:** `YEAR([Date])`  
**Column:** MonthNo  
**Expression:** `MONTH([Date])`  
**Column:** Month  
**Expression:** `FORMAT([Date], "MMMM")`  
**Column:** QuarterNo  
**Expression:** `INT(([MonthNo] + 2) / 3)`  
**Column:** Quarter  
**Expression:** `"Qtr " & [QuarterNo]`  
**Column:** Day  
**Expression:** `DAY([Date])`

## Hierarchies

***Table: BU***

**Hierarchy:** BUHierarchy  
**Levels:** Division, BU

***Table: Date***

**Hierarchy:** YQM  
**Levels:** Year, Qtr, Month

***Table: Customer***

**Hierarchy:** CustomerHierarchy  
**Levels:** Country/Region, State, City, Postal Code, Customer

***Table: DateTableTemplate\_fe310476-3bb5-422b-85ff-9fd23f2cad67***

**Hierarchy:** Date Hierarchy  
**Levels:** Year, Quarter, Month, Day

***Table: LocalDateTable\_39c22ddb-27f3-4e6c-8a44-a3380850fcb4***

**Hierarchy:** Date Hierarchy  
**Levels:** Year, Quarter, Month, Day

## Relationships

**Relationship Name:** e8085e9d-6dc8-4c8e-a37d-a25c76158541

**From:** 'Fact'[BU Key]  
**To:** 'BU'[BU Key]  
**Cross-filter Direction:** n/a  
**Relationship Name:** e2d69975-1445-43f8-9008-c580d8b85e9d  
**From:** 'Fact'[YearPeriod]  
**To:** 'Date'[YearPeriod]  
**Cross-filter Direction:** n/a  
**Relationship Name:** ae136884-d40d-4899-942c-0668a79c7420  
**From:** 'Fact'[Scenario Key]  
**To:** 'Scenario'[Scenario Key]  
**Cross-filter Direction:** n/a  
**Relationship Name:** 996dfaa0-cf16-4f01-9fee-9f472b727b09  
**From:** 'Fact'[Product Key]  
**To:** 'Product'[Product Key]  
**Cross-filter Direction:** n/a  
**Relationship Name:** ec7a5ef0-70cf-4abe-8ac4-364a5e22f7c7  
**From:** 'Fact'[Customer Key]  
**To:** 'Customer'[Customer]  
**Cross-filter Direction:** n/a  
**Relationship Name:** 6d6ab90a-1617-476a-9783-aecb116ac11d  
**From:** 'BU'[Executive\_id]  
**To:** 'Executive'[ID]  
**Cross-filter Direction:** n/a  
**Relationship Name:** 9249475f-a768-45d9-845e-83b653ccc793  
**From:** 'Customer'[Industry ID]  
**To:** 'Industry'[ID]  
**Cross-filter Direction:** n/a  
**Relationship Name:** f433c520-c9a7-4ee0-a489-f737798ca886  
**From:** 'Customer'[State]  
**To:** 'State'[StateCode]  
**Cross-filter Direction:** n/a  
**Relationship Name:** db9c55a6-9978-4ac0-88b4-4f07ed8945a3  
**From:** 'Date'[Date]  
**To:** 'LocalDateTable\_39c22ddb-27f3-4e6c-8a44-a3380850fcb4'[Date]  
**Cross-filter Direction:** n/a