DAX CHEAT SHEET

PRAGMATIC WORKS

Sales, Cost & Profit

Total Sales Calculation

Calculated measure using SUM to aggregate a column.

Total Sales = SUM('TableName'[SalesAmount])

Total Cost Calculation

Calculated measure using SUM to aggregate a column.

Total Cost = SUM('TableName'[Cost])

Profit Calculation

Calculated measure using two previously created calculated measures to determine profit.

Profit = [Total Sales] - [Total Cost]

Transaction Count

Calculated measure that returns a count of all rows in a table, often this simple calculation is used to return transaction counts.

Transactions = COUNTROWS ('Table')

Related Table Count

Returns the total rows in a related table. For example, total transactions by Product.

Transactions = COUNTROWS(RELATEDTABLE('TABLE'))

Profit Margin

Calculated measure using two previously created calculated measures to determine profit margin, the DIVIDE function is used to perform the division.

Profit Margin = DIVIDE ([Profit], [Total Sales])

Prior Year Sales

Year Over Year Profit

Calculated measure using two previously created calculated measures to determine YoY profit.

YoY Profit = [Profit] - [Prior Year Profit]

Last Year YTD Sales

Last YTD Sales = CALCULATE ([YTD Sales], SAMEPERIODLASTYEAR('DateTable'[DateColumn]))

Prior Year Profit

Prior Year Profit = = CALCULATE ([Profit], SAMEPERIODLASTYEAR'DateTable'[DateColumn])

Total Sales for All Countries

This calculation uses calculate to return all countries in the calculation regardless of the filter context.

Total Sales All Countries = CALCULATE ([Total Sales], ALL('Geography Table'[Country]))

Percent of Total Calculation

This calculation uses two measures previously created to create a percent of total calculation.

Percent of Total = DIVIDE([Total Sales], [Total Sales All Countries])

Lookupvalue / Vlookup / Related

Vlookup with no relationship

The lookupvalue function will return a value from another table when a relationship does not exist in the data model.

Return column from another table (LookupValue) =

```
LOOKUPVALUE(
  'DestTable'[ColumnToReturn],
  'DestTable'[Key],
  'SourceTable'[Key])
```

Vlookup with relationship

The Related function will return a value from another table leveraging existing relationships in the data model.

Return column from another table (Related) = RELATED('Table'[ColumnToReturn])

Opening and Closing Balance

Opening Balance - Year

Opening Balance can be achieved using any of the three existing built-in functions which will allow you to return the closing balance for Month, Quarter or Year.

Opening Balance (Year, Month, Quarter) =

```
OPENINGBALANCEYEAR(
 [Measure],
 'Date'[Date] )
```

Closing Balance - Year

Closing Balance can be achieved using any of the three existing built-in functions which will allow you to return the closing balance for Month, Quarter or Year.

Closing Balance (Year, Month, Quarter) =

```
CLOSINGBALANCEYEAR(
 [Total Sales],
 'Date'[Date] )
```

Month and Year-to-Date Sales

MTD Sales

Calculates Total Sales for all days in the current month up to the maximum day in the selection.

MTD Sales = TOTALMTD([Total Sales], 'DateTable'[DateColumn])

3 Month Average Calculation

3 Month Average =

```
CALCULATE(
  AVERAGEX(
    SUMMARIZE('Date', 'Date'[Month]),
    [Measure]),
  DATESINPERIOD(
    'Date'[Date],
    LASTDATE('Date'[Date]),
    -3,
    MONTH))
```

YTD Sales

Calculates Total Sales for all days in the year up to the maximum day in the selection.

YTD Sales = TOTALYTD([Total Sales], 'DateTable'[DateColumn])

YTD Sales (Fiscal Calendar)

This calculation uses an optional third parameter specifying the fiscal year end date.

YTD Sales = TOTALYTD([Total Sales], 'DateTable'[DateColumn], "05/31")

Moving Totals

Rolling 12-Month Sales

Calculated measure that returns a rolling 12 months total for Profit.

Rolling 12 Months Profit =

```
CALCULATE ( [Profit],
DATESBETWEEN('DateTable'[DateColumn] ,
NEXTDAY(SAMEPERIODLASTYEAR
(LASTDATE(DateTable'[DateColumn] ))),
LASTDATE('DateTable'[DateColumn])))
```

7 Day Moving Total

7 Day Moving Total =

```
CALCULATE(
  [Measure],
  DATESINPERIOD(
    'Date'[Date],
    LASTDATE('Date'[Date]),
    -7,
    DAY) )
```

Country Rank

Calculated measure to rank a specific column in a table by a measure. In this measure Country from the geography table is being ranked by the measure [Total Sales].

Country Rank = RANKX(ALL ('GeographyTable'[Country]), [Total Sales],,,Skip)

New Category for Conditional / Logical Operations

IF Function

IF(< logical_test >, <value_if_true>, <value_if_false>)

AND Function

The AND function evaluates whether both given conditions are met. If both conditions are indeed met, it yields a TRUE result; if not, it results in FALSE.

AND function = AND(<logical1>, <logical2>)

OR Function

The OR function evaluates whether either given condition is met. If either condition is met, it yields a TRUE result; if not, it results in FALSE.

OR function = OR(<logical1>, <logical2>)

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