



Power BI: Field Cheat Sheet

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THE GOLDEN RULE

Clean in Power Query · Model with relationships · Calculate with measures · Design for one question.

Power Query: fix bad data

- **Dates as text / mixed**
Change Type → Date (Using Locale)
- **\$1,299.00 as text**
Replace \$ and , → Decimal
- **1,200 / N/A counts**
Replace , ; Replace Errors → null
- **" North " padded**
Trim, then Clean
- **north / EAST / Norht**
Replace Values or mapping merge
- **Exact duplicate rows**
Remove Duplicates (all columns)
- **Months as columns**
Unpivot Other Columns
- **Many orgs → HR/Other**
Duplicate col → Conditional Column
- **New file each month**
Folder connector (auto-combine)

Star schema

- Sales = fact (events + keys + numbers)
- Reps / Products / Date = dimensions
- Relate Sales[RepID] → Reps[RepID] (many→1)
- Mark a Date table for time intelligence
- One-big-flat-table = bloat + wrong totals

Pick the right visual

- **Compare categories**
Bar / Column (sorted)
- **Trend over time**
Line / area
- **Part-to-whole**
Stacked bar; pie only 2–4 slices
- **Single headline number**
Card / KPI
- **Progress to a goal**
Gauge / KPI vs target
- **Detail / lookup**
Table / Matrix

Publishing: which license?

Just me, my machine
Power BI Desktop (free)

Share with colleagues
Pro (you + each viewer)

DAX starter pack

Total Revenue
`SUM ( Sales[LineRevenue] )`

Order Count
`DISTINCTCOUNT ( Sales[OrderID] )`

Avg Order Value
`DIVIDE ( [Total Revenue], [Order Count] )`

Revenue LY
`CALCULATE ([Total Revenue],
SAMEPERIODLASTYEAR ('Date'[Date]))`

Revenue YoY %
`DIVIDE ( [Rev]-[Rev LY], [Rev LY] )`

Revenue YTD
`TOTALYTD ( [Total Revenue], 'Date'[Date] )`

Total Target
`SUM ( Targets[Target] )`

vs Target %
`DIVIDE ( [Total Revenue], [Total Target] )`

PRO TIPS

- ✓ Use DIVIDE, never / (no divide-by-zero errors)
- ✓ If you're aggregating, it's a MEASURE not a column
- ✓ CALCULATE changes filter context, master it
- ✓ Start bar/column axes at zero; sort by value

Data storytelling



Same numbers. A pie hides the ranking; a sorted bar shows it instantly, the display is the decision.