

How to Calculate Sums in Power BI: A Step-by-Step Guide

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Power BI is a sophisticated business intelligence tool developed by Microsoft, fundamentally designed to empower users to analyze complex data sets and transform them into actionable visualizations. A fundamental capability within any data analysis platform is the calculation of aggregates, and in Power BI, this is expertly managed through the Data Analysis Expressions (DAX) language. Specifically, calculating the sum of numerical values within a dataset is a routine and essential operation. This aggregation is achieved efficiently using the built-in DAX `SUM` function, which aggregates all numerical entries within a designated column or calculated measure. For instance, to ascertain the total revenue generated across all transactions, a user would apply the `SUM` function to the corresponding Revenue column, providing immediate total aggregation. Mastering this feature is crucial for performing essential financial calculations and deriving deep insights from the underlying data structure in Power BI.

Calculate Sum in Power BI (With Example)

The DAX SUM Function: Core Syntax

The foundation of aggregation in Power BI relies on the DAX language. When you need to create a persistent calculation, known as a measure, that determines the sum of values within a column, you utilize the `SUM` function. This function requires referencing the specific table and column containing the numerical data you wish to aggregate.

The standard syntax for creating a new summation measure follows this structural pattern:

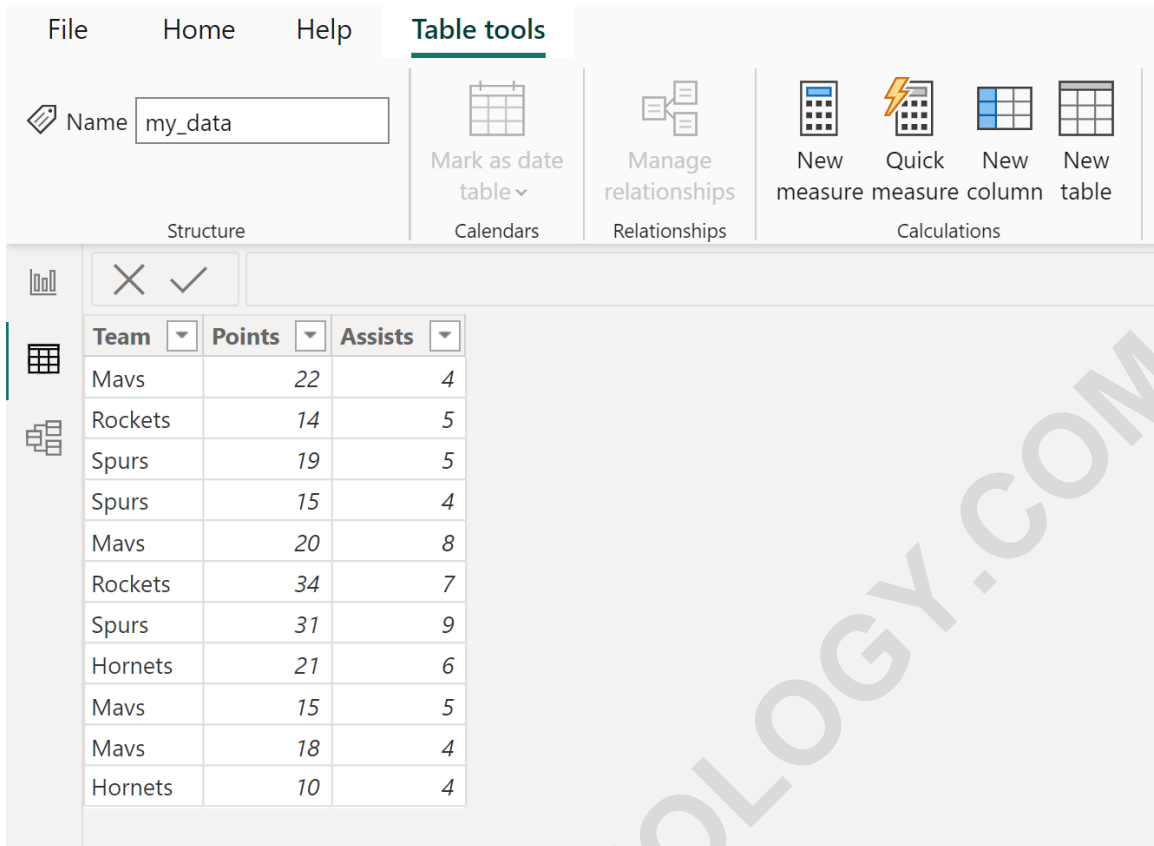
```
Sum Points = SUM('my_data')
```

This specific code snippet illustrates the creation of a new, calculated field named **Sum Points**. This measure is defined by instructing Power BI to calculate the total sum of all numerical values found exclusively within the **Points** column of the table designated as **my_data**. This capability allows analysts to create custom, reusable calculations that dynamically update with any changes to the underlying dataset.

Step-by-Step Example: Calculating Total Points

To solidify the understanding of implementing the `SUM` function, we will walk through a practical, real-world scenario within the Power BI interface. This example demonstrates how to accurately calculate the total sum of values in a specific column using the New Measure feature.

For this demonstration, assume we have imported a table into Power BI, named **my_data**, which contains essential metrics regarding points scored by basketball players across different teams. The table provides a clear visual representation of the data structure we will be working with:



Team	Points	Assists
Mavs	22	4
Rockets	14	5
Spurs	19	5
Spurs	15	4
Mavs	20	8
Rockets	34	7
Spurs	31	9
Hornets	21	6
Mavs	15	5
Mavs	18	4
Hornets	10	4

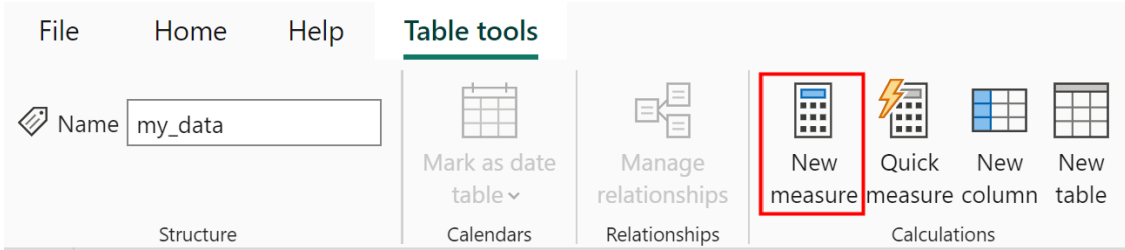
Our objective is straightforward: we intend to calculate the aggregate sum of all values presented in the **Points** column, thereby determining the total points scored across the entire visible data sample.

Creating the New Measure

To begin the calculation process, you must utilize Power BI's measure creation tools. A measure is essential because it holds the calculation formula that aggregates data across the entire table or filters applied to it.

Navigate to the **Table tools** tab located on the top ribbon of the Power BI Desktop application.

Within this tab, locate and click the **New measure** icon. This action opens the formula bar, prompting you to define your custom calculation.



In the newly activated formula bar, input the required DAX formula that defines the summation operation. Ensure the formula precisely references the table and column names as they appear in your data model:

Sum Points = SUM('my_data')

Upon confirming the entry (usually by pressing Enter or clicking the checkmark), Power BI processes the formula. This results in the creation of a new measure named **Sum Points**. This measure now contains the total aggregate sum of all values found within the **Points** column of the **my_data** table. You will observe this new measure appearing in your Fields pane, distinguished by a calculator icon, signifying its status as a calculated field.

Team	Points	Assists
Mavs	22	4
Rockets	14	5
Spurs	19	5
Spurs	15	4
Mavs	20	8
Rockets	34	7
Spurs	31	9
Hornets	21	6
Mavs	15	5
Mavs	18	4
Hornets	10	4

Visualizing the Sum using a Card

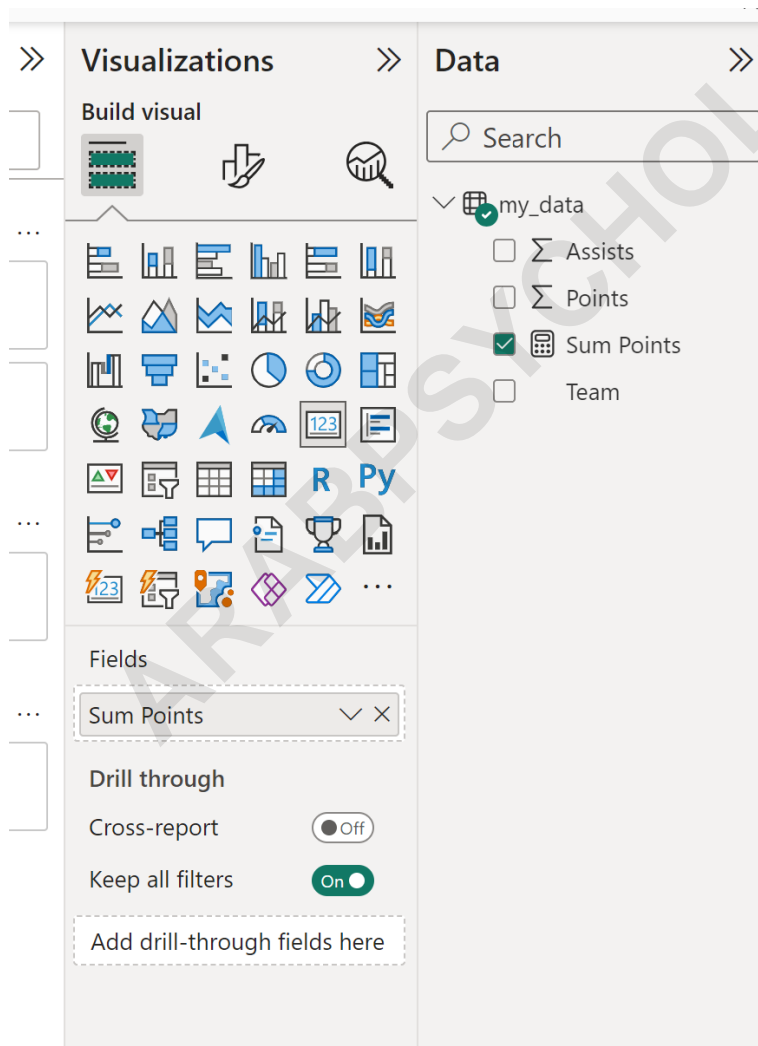
While the measure has been successfully calculated in the background, the next logical step is to visualize this aggregate value for reporting purposes. The Card visualization type is ideally suited for displaying a single, important numerical value like a total sum.

To display the calculated sum:

Switch to the **Report View** in Power BI Desktop, which is the canvas for creating visualizations.

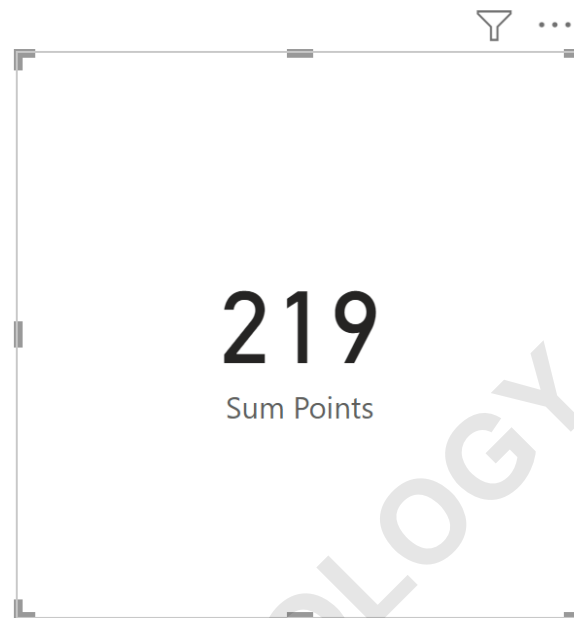
In the **Visualizations** pane, select the **Card** icon. This adds an empty Card visual to your report canvas.

From the Fields pane, drag the newly created **Sum Points** measure and drop it onto the **Fields** well of the Card visualization.



Following these steps, the Card visualization will immediately render the final aggregated value derived from the **Sum Points** measure. This provides a clear, highly visible display of the total numerical accumulation from the underlying data.

Team	Points	Assists
Hornets	10	4
Hornets	21	6
Mavs	15	5
Mavs	18	4
Mavs	20	8
Mavs	22	4
Rockets	14	5
Rockets	34	7
Spurs	15	4
Spurs	19	5
Spurs	31	9



As clearly illustrated by the resulting Card visualization, the sum of all values within the **Points** column across the entire dataset is determined to be **219**. This confirms the successful implementation and execution of the `SUM` function within Power BI.

Conclusion and Further Power BI Resources

Calculating sums is a foundational skill in Power BI, enabling accurate reporting and essential data aggregation. By leveraging the power of DAX and understanding how to define measures, analysts can easily generate highly reliable metrics from their raw data. This technique is indispensable for financial analysis, inventory management, and performance tracking across diverse industries.

For users seeking to expand their proficiency in data manipulation and analysis within the Power BI ecosystem, the following resources and tutorials provide detailed guidance on performing other common, complex tasks: