Title: Connecting to Smartsheet

Scenario: Business Overview for Regional Sales

You are a newly hired Business Analyst at **Contoso Electronics**, a consumer electronics distributor operating across Europe. Your manager has asked you to prepare a quick **sales performance dashboard** using historical data. This dashboard will serve as a base for upcoming team meetings and should give key insights into sales volume, revenue, and margin performance by country and product.

You are expected to use Power BI to build a visually clean, interactive report that can be filtered by year or product category.

Data Description

All the sales data is located in Smartsheet, in a sheet called **SalesData**.

This sheet includes the following columns:

- OrderID (text): unique identifier for each transaction

- Date (date): transaction date

- Country (text): the market where the sale occurred

- ProductCategory (text): type of product sold (e.g., Laptops, Phones, Accessories)

- ProductName (text): name of the product

- Quantity (number): units sold

- Revenue (currency): revenue generated

- Margin (currency): profit margin for that transaction

Goal

Connect to the data from Smartsheet with the two different ways (direct connection and scheduled exports).

Design and build your **first Power BI dashboard** that provides a clear, interactive snapshot of sales performance across countries and products. The report should help a manager quickly understand where revenue is coming from, what products perform best, and allow filtering by year and product category.

Key Steps

- Load the dataset into Power BI and explore the data structure.
- Identify and select relevant fields for key metrics (Revenue, Margin, Quantity).
- Create visualizations such as bar charts, line charts, cards, and tables to display:
    - Revenue by country
    - Revenue trends over time
    - Product-level performance (quantity, revenue, margin)
- Add interactivity through slicers for product category and year.
- Format visuals for clarity and add meaningful titles and labels.

Key Takeaways

- Learn how to connect to Smartsheet with Power BI
- Learn how to build a basic Power BI report layout.
- Understand how to select and visualize key performance indicators (KPIs).
- Practice using filters and slicers to make reports interactive.
- Get familiar with formatting and organizing a report page.