1. Import Retail_Sales_Data.xlsx into Power BI

Open Power BI Desktop.

Click Home → Get Data → Excel.

Browse and select Retail_Sales_Data.xlsx → Load.

---

2. Create a Table Visual Showing Region and Sales

Click on the Table visual in the Visualizations pane.

Drag Region and Sales from the Fields pane into the table.

---

3. Add a Slicer for Product

Click on the Slicer visual in the Visualizations pane.

Drag the Product field into the slicer.

---

4. Format the Dashboard Theme to "Dark Mode"

Go to View → Themes → Dark Mode.

---

5. Purpose of the "Data/Model" View in Power BI

Data View: Allows you to inspect and edit raw data tables.

Model View: Helps define relationships between tables, manage keys, and optimize data structure.

---

6. Build a Dashboard with Visuals
A. Bar Chart of Sales by Region

Click on the Bar Chart visual.

Drag Region to the X-axis and Sales to the Y-axis.

B. Line Chart of Sales Over Date

Click on the Line Chart visual.

Drag Date to the X-axis and Sales to the Y-axis.

C. Card Showing Total Profit

Click on the Card visual.

Drag Profit into the Fields area.

---

7. Add a Drill-Through Filter from Region to a Detailed Sales Page

Create a new page (Page 2) for detailed sales.

Right-click Region → Add to drill-through filters.

On Page 2, add visuals that show detailed sales data.

Ensure Region is in the drill-through filters field well.

---

8. Use Conditional Formatting to Highlight High-Profit Regions

Select the table visual (Region & Sales).

Click Format → Conditional formatting → Background color.

Set rules (e.g., if Profit > $10,000 → Green).

---

9. Publish the Dashboard to Power BI Service

Click File → Publish → Select a workspace → Publish.

---

10. Share the Report with a Colleague (Simulated Steps)

Go to Power BI Service (app.powerbi.com).

Open the report → Click Share → Enter colleague's email → Set permissions → Send.

---

11. Add a Custom "Sales Growth %" Measure (Using Quick Measures)

Right-click on the dataset → New quick measure.

Select Sales Growth % from the calculations list.

Configure base and comparison periods → Apply.

---

12. Optimize the Dataset for Faster Refresh

In Power Query Editor (Home → Transform Data), remove unused columns.

Use View → Column Quality to identify nulls/unused data.

Apply data type optimizations (e.g., integers instead of decimals where possible).

---

13. Troubleshoot: Slicers Not Affecting All Visuals

Check Relationships: Go to Model View and ensure tables are connected correctly.

Cross-filter direction: Set relationships to Both if needed.

Edit Interactions: Click on the slicer → Format → Edit Interactions → Ensure visuals are set to "Filter."

---

14. Embed the Dashboard into PowerPoint

In Power BI Service, open the report → Click File → Embed → PowerPoint.

Copy the embed code and paste it into PowerPoint via Insert → Online Video (or use Power BI Add-in).

---

15. Set Up a Scheduled Refresh in Power BI Service

Go to the dataset in Power BI Service → Settings → Scheduled Refresh.

Enable refresh and set frequency (Daily/Weekly).

Ensure gateway is configured if using on-premises data.