Lesson 7

1. Import `Retail_Sales_Data.xlsx` into Power BI

- Open Power BI Desktop
- Click **Home > Get Data > Excel**
- Select `Retail_Sales_Data.xlsx` → Click **Open**
- Select relevant sheets/tables → Click **Load**

☑ 2. Create a table visual showing Region and Sales

- From **Visualizations**, choose the **Table** visual
- Drag `Region` and `Sales` fields into **Values**

☑ 3. Add a slicer for Product

- From **Visualizations**, choose the **Slicer** icon
- Drag `Product` into the slicer field
- Resize and position as needed

☑ 4. Format the dashboard theme to "Dark Mode"

- Go to **View** tab
- In **Themes**, select **"Dark"** or **"Dark Mode"** from the dropdown

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☑ 5. What is the purpose of the Data/Model view in Power BI?

View	Purpose
Data view	View and inspect raw data in loaded tables
Model view	Create relationships between tables, manage table structure and metadata

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☑ 6. Build a dashboard with:

🔹 A Bar Chart of Sales by Region:

- Insert **Clustered Bar Chart**

- Axis: `Region`, Values: `Sales`

🔹 **A Line Chart of Sales over Date:**

- Insert **Line Chart**
- Axis: `Date`, Values: `Sales`

🔹 **A Card showing Total Profit:**

- Insert **Card** visual
- Drag `Profit` (or create a measure like `SUM(Profit)`) into it

☑ 7. Add a Drill-through filter from Region to a detailed sales page

1. Create a new page → name it **"Sales Details"**
2. Add a **Drill-through field** pane to this page
3. Drag `Region` into the **Drill-through fields**
4. Add detail visuals (e.g., sales by product, transaction)
5. Now, right-click any Region in a visual → Drill through → Sales Details

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☑ 8. Use Conditional Formatting to highlight high-profit regions

1. Go to your **Bar/Column chart**
2. Click the dropdown on `Data colors` in **Visual Format pane**
3. Turn on **Conditional Formatting**
4. Format by **Field value** or **rules**, using `Profit` as the field
5. Set colors (e.g., red for low, green for high)

☑ 9. Publish the dashboard to Power BI Service

1. Click **Home > Publish**
2. Sign in if needed
3. Select your **Workspace** (e.g., "My Workspace")
4. Wait for upload confirmation

☑ 10. Share the report with a colleague (simulate steps)

- Open Power BI Service (https://app.powerbi.com)
- Go to your report → Click **Share** (top-right)
- Enter your colleague's email → Add message (optional)
- Click **Send**

🛑 Requires Pro license or content in a shared workspace.

☑ 11. Add a custom "Sales Growth %" measure using Quick Measures

1. Right-click your table → **New quick measure**
2. Choose **"Percent difference from previous value"**
3. Select `Sales` as the base value and `Date` as the axis
4. Power BI will create the DAX for Sales Growth %

☑ 12. Optimize dataset for faster refresh

- Go to **Power Query Editor**
- Remove **unused columns** (right-click → Remove)
- Filter unnecessary rows if needed
- Disable auto date/time in **File > Options > Data Load**
- Reduce model size by changing column types from text to whole number where possible

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☑ 13. Troubleshoot: Slicers not affecting all visuals

- Select the slicer
- Click **Format > Edit Interactions**
- Make sure all visuals are set to be **filtered** (not ignored)
- Also check if visuals use **different tables** → Ensure proper **relationships exist** in Model view

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☑ 14. Embed dashboard into a PowerPoint presentation

1. Open the report in **Power BI Service**
2. Click **File > Embed report > PowerPoint (Preview)**
3. Copy the embed link OR click **Export > PowerPoint > Embed Live Data**
4. You can also use **Insert > Power BI** from PowerPoint (with add-in)

☑ 15. Set up a scheduled refresh for the dataset

1. Go to Power BI Service → **Workspace > Datasets**
2. Click . . . next to your dataset → **Settings**
3. Under **Scheduled refresh**:
    - Turn **On**
    - Set **time**, **frequency**, and **timezone**
4. Add **credentials** if needed (e.g., Windows, OAuth, etc.)