

## 1 Import Retail\_Sales\_Data.xlsx into Power BI

### Steps:

- Open **Power BI Desktop** → **Home** tab → **Get Data** → **Excel**
- Browse and select **Retail\_Sales\_Data.xlsx**
- Select the relevant sheets → click **Load**

☒ **Purpose:** Load data into the Power BI data model for transformation and reporting.

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## 2 Create a table visual showing Region and Sales

### Steps:

- Go to **Report View**
- Insert a **Table visual**
- Drag **Region** and **Sales** fields into the **Values** section

☒ Shows sales totals per region in a tabular format.

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## 3 Add a slicer for Product

### Steps:

- Insert a **Slicer visual**
  - Drag **Product** column into **Field**
  - Users can now filter all visuals by product.
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## 4 Format the dashboard theme to "Dark Mode"

### Steps:

- Go to **View** → **Themes** → **Dark Mode**
- OR choose **Customize current theme** → **Background color: black / dark gray**

☒ Gives the dashboard a dark aesthetic, improves contrast for visuals.

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## 5 What is the purpose of the “Data/Model” view in Power BI?

- **Data View:** lets you preview and clean your data (like Excel table view).
- **Model View:** shows relationships between tables — you can create, edit, or delete relationships here.

- ☒ **Purpose:** Manage relationships and ensure the model is logically connected for accurate DAX calculations.
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## 6 Build a dashboard with:

### a) Bar chart – *Sales by Region*

- Insert **Bar Chart** visual
- Axis: Region
- Values: Sales

### b) Line chart – *Sales over Date*

- Insert **Line Chart** visual
- Axis: Date
- Values: Sales

### c) Card visual – *Total Profit*

- Insert **Card** visual
- Value: Profit (or measure `SUM(Profit)`)

- ☒ These three visuals together show performance trends and totals.
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## 7 Add a drill-through filter from Region to a detailed sales page

### Steps:

- Create a **new page**
- Add detail visuals (e.g., Product-level table)
- Drag **Region** into the **Drill-through** field well
- Go back to main page → right-click a Region → **Drill-through** → **Detailed Sales Page**

- ☒ Allows users to navigate from high-level region view → detailed breakdown.
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## 8 Use conditional formatting to highlight high-profit regions

### Steps:

- Select the **table** visual
- Click dropdown next to **Profit** → **Conditional formatting** → **Background color**
- Choose **Color scale**: e.g., Green = High Profit, Red = Low Profit

- ☒ Quickly identifies strong and weak performing regions visually.

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## 9 Publish the dashboard to Power BI Service

### Steps:

- Save your report
- Go to **Home** → **Publish** → **Select Workspace**
- After publishing, view in **Power BI Service** (app.powerbi.com)

☒ Makes your dashboard shareable and accessible online.

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## 10 Share the report with a colleague (simulate steps)

### Steps (in Power BI Service):

1. Open the report → click **Share**
2. Enter colleague's email address
3. Choose permissions (view/edit)
4. Optionally include a message
5. Click **Send**

☒ Shares dashboard securely via Power BI cloud.

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## 11 Add a custom “Sales Growth %” measure without DAX (Quick Measure)

### Steps:

- Select **Modeling** → **New Quick Measure**
- Choose **Calculation: Year-over-year change**
- Base value: **Sales**
- Field: **Date**

☒ Power BI auto-generates the DAX formula behind the measure.

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## 12 Optimize the dataset for faster refresh

### Tips:

- Remove unused columns/tables in **Power Query**
- Disable auto date/time for fields not used
- Filter out unnecessary rows early in **Power Query**
- Use numeric data types where possible

- ☒ Reduces model size and refresh time.
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### **13 Troubleshoot: Slicers not affecting all visuals — how to fix?**

#### **Solutions:**

- Check **Visual interactions**:  
→ Select slicer → **Format** → **Edit interactions** → **ensure filter icons active**
- Ensure visuals come from the same table/model relationship
- Confirm **relationship direction** is correct (usually single, one-to-many)

- ☒ Ensures slicers propagate filters to other visuals.
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### **14 Embed the dashboard into a PowerPoint presentation**

#### **Steps:**

- In Power BI Service → open report
- Click **File** → **Export** → **PowerPoint (Live Report)**
- Or in PowerPoint → **Insert** → **Power BI** → **choose your report**

- ☒ Allows interactive dashboard display inside your presentation.
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### **15 Set up a scheduled refresh for the dataset in Power BI Service**

#### **Steps:**

- Go to **Datasets** → **Settings**
- Expand **Scheduled refresh**
- Turn it **On**, set **Frequency & Time zone**
- Ensure **Gateway** is configured if data is local

- ☒ Automates dataset updates (daily/weekly).