

# VIDEO 3: END-TO-END DASHBOARD DESIGN

## Complete Playbook - FreshMarket Executive Reporting

**Duration:** 35-40 minutes

**Industry:** Australian Grocery Retail

**Focus:** Professional dashboard design, UI/UX, interactivity, Power BI Service publishing



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# SESSION OVERVIEW & LEARNING OUTCOMES

Duration: 35-40 minutes

## What You'll Build

A production-ready, two-page Power BI dashboard featuring:

- Executive Summary (KPIs, trends, state map, top performers)
- Operational Details (drill-through, detailed tables, filtering)
- Professional UI/UX (corporate colors, consistent layout, accessibility)
- Interactive features (slicers, bookmarks, tooltips, drill-through)

## Learning Outcomes

By the end of this session, you will be able to:

- Design executive dashboards following UI/UX best practices
- Create KPI cards, trend lines, maps, and comparison visuals
- Implement drill-through pages for detailed analysis
- Apply corporate branding (colors, fonts, layouts)
- Build interactive features (slicers, bookmarks, tooltips)
- Optimize report performance (<3 second page load)
- Ensure accessibility (color contrast, alt text, keyboard navigation)
- Publish to Power BI Service with workspace organization
- Configure scheduled refresh with on-premises gateway
- Implement row-level security (RLS) for data governance
- Design mobile layouts for executive viewing

## Why This Matters

Executive dashboards are your showcase. They demonstrate:

 <b>Business acumen</b> understanding what executives need to see	 <b>Design skills</b> professional layout and visual hierarchy
 <b>Technical excellence</b> fast, responsive, accessible reports	 <b>Governance awareness</b> security, deployment, refresh automation

According to Gartner research, **70% of business intelligence projects fail** due to poor user adoption. The #1 reason? **Poorly designed dashboards that executives don't use.**

A well-designed dashboard:

- Gets used daily by executives
- Drives data-driven decision making
- Becomes the "single source of truth"
- Showcases your skills in interviews and portfolios

## Enterprise Impact

For FreshMarket, this dashboard enables:

- **Daily performance monitoring** - CFO checks YTD revenue every morning
- **State-level comparisons** - identify underperforming regions
- **Product portfolio optimization** - double down on top performers
- **Budget accountability** - track variance by category and store
- **Mobile access** - executives view KPIs on phones during travel

# BUSINESS REQUIREMENTS REVIEW

## Where We Are (After Project 2)

**✓ Star schema model** (1 fact + 5 dimensions)

**✓ 20+ DAX measures** (revenue, margins, time intelligence, budget variance)

**✓ Australian FY date table** (July 1 - June 30)

**✓ Optimized performance** (42 MB, <1 second queries)

**✓ Validated accuracy** (99.8% reconciliation)

**Current state:** Data model ready, measures validated, no visuals yet.

## Stakeholder Requirements

### CFO (Financial Performance):

"I need to see YTD revenue, gross margin %, and budget variance at a glance every morning. Show me which states are over/under budget. I want to drill into categories and stores."

### Head of Operations (Store & Product Performance):

"Show me the top 10 products and bottom 10 stores by margin. I need to identify underperformers for intervention. Give me detailed tables I can export."

### CMO (Marketing Effectiveness):

"Show me revenue trends by channel (In-Store, Online, Click & Collect). Which products are growing YoY? I need this on my phone during client meetings."

### CEO (High-Level Overview):

"One page that shows: Are we hitting budget? Are we growing? Where are the problems? I have 30 seconds to review this each morning before meetings."

## Dashboard Scope

### Page 1: Executive Summary (30-second glance)

- Large KPI cards: Revenue, Margin %, Budget Achievement, YoY Growth
- Revenue trend line (12 months with YTD vs Prior Year)
- Australia state map showing revenue by location
- Top 5 products by revenue (bar chart)
- Channel performance comparison (pie/donut chart)

### Page 2: Operational Details (deep analysis)

- Product performance table (sortable, exportable)
- Store performance matrix (drill-through enabled)
- Budget variance table by category
- Date range slicer, state filter, category filter
- Drill-through to individual store/product details

## Navigation:

- Tabs/buttons to switch between pages
- Bookmarks for quick views ("Show All", "NSW Only", "Over Budget Only")
- Tooltips showing detail on hover
- Drill-through from summary to details

# DASHBOARD DESIGN PRINCIPLES

## The 7 Golden Rules of Dashboard Design

 <h3>1. Visual Hierarchy</h3> <ul style="list-style-type: none"><li>• Most important metrics at top-left (where eyes land first)</li><li>• KPIs in large cards, supporting details below</li><li>• Use size and color to indicate importance</li></ul>	 <h3>2. Minimize Clutter</h3> <ul style="list-style-type: none"><li>• Limit to <b>8 visuals per page</b> (more = cognitive overload)</li><li>• Remove unnecessary gridlines, borders, backgrounds</li><li>• Use white space intentionally</li></ul>	
 <h3>3. Consistent Layout</h3> <ul style="list-style-type: none"><li>• Align visuals to grid (View → Snap to grid)</li><li>• Maintain consistent spacing between visuals</li><li>• Group related visuals together</li></ul>	 <h3>4. Color with Purpose</h3> <ul style="list-style-type: none"><li>• Use corporate brand colors (FreshMarket: Green #2D5016, Blue #004C97)</li><li>• Apply color meaningfully (green = positive, red = negative, neutral = gray)</li><li>• Avoid rainbow charts (use 2-3 colors maximum)</li></ul>	
 <h3>5. Interactivity</h3> <ul style="list-style-type: none"><li>• Enable cross-filtering between visuals (but control it)</li><li>• Provide slicers for key filters (date, state, category)</li><li>• Add drill-through for detailed exploration</li></ul>	 <h3>6. Performance</h3> <ul style="list-style-type: none"><li>• Target &lt;3 seconds page load time</li><li>• Limit to 8 visuals per page</li><li>• Avoid complex visuals (especially custom visuals)</li><li>• Use Performance Analyzer to identify bottlenecks</li></ul>	 <h3>7. Accessibility</h3> <ul style="list-style-type: none"><li>• Ensure color contrast meets WCAG 2.1 AA standards (4.5:1 ratio)</li><li>• Provide alt text for all visuals</li><li>• Support keyboard navigation</li><li>• Don't rely solely on color to convey information</li></ul>

## FreshMarket Brand Guidelines

### Colors:

- Primary: Fresh Green (#2D5016) - use for positive metrics, headers
- Secondary: Corporate Blue (#004C97) - use for neutral metrics, accents
- Success: Green (#27AE60) - use for over-budget, positive variance
- Warning: Orange (#F39C12) - use for neutral/on-budget
- Danger: Red (#E74C3C) - use for under-budget, negative variance
- Background: White (#FFFFFF) or Light Gray (#F5F5F5)
- Text: Dark Gray (#2C3E50) for body, Black (#000000) for headers

### Fonts:

- Headers: Segoe UI Bold, 18-20pt
- KPIs: Segoe UI Light, 36-48pt
- Body text: Segoe UI Regular, 10-12pt

### Logo:

- Place in top-left corner, 60x60 pixels
- Link logo to Page 1 (Executive Summary)

# PAGE 1: EXECUTIVE SUMMARY

## Page Layout Overview

<b>Top Row (KPIs):</b> <ul style="list-style-type: none"><li>4 large card visuals across the width</li><li>Total Revenue   Gross Margin %   Budget Achievement %   YoY Growth %</li></ul>	<b>Middle Row (Trends):</b> <ul style="list-style-type: none"><li>Left 60%: Revenue trend line (12 months, current vs prior year)</li><li>Right 40%: Australia state map (revenue by state)</li></ul>	<b>Bottom Row (Details):</b> <ul style="list-style-type: none"><li>Left 50%: Top 5 Products (horizontal bar chart)</li><li>Right 50%: Channel Performance (donut chart)</li></ul>
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**Total visuals:** 7 (within 8-visual best practice limit)

## Step-by-Step Build

### Step 1: Create Executive Summary Page

#### What to do:

- In Power BI Desktop, at bottom of canvas, right-click **Page 1** tab
- Select **Rename page**
- New name: Executive Summary
- Press Enter

**Why it matters:** Clear page names improve navigation and professionalism.

**How to validate:** Bottom tab shows "Executive Summary" instead of "Page 1".

### Step 2: Set Page Background

#### What to do:

- Click blank area of canvas (deselect all visuals)
- In **Visualizations** pane → **Format page** (paint roller icon)
- Expand **Canvas background**
- Color: #F5F5F5 (light gray)
- Transparency: 0%

**Why it matters:** Subtle background separates visuals from white workspace, easier on eyes.

**How to validate:** Canvas has light gray background.

### Step 3: Create KPI Card - Total Revenue

#### What to do:

- In **Visualizations** pane, click **Card** visual
- Drag to top-left corner of canvas
- Size: Width = 250px, Height = 120px
- In **Fields** pane, drag **[Total Revenue]** to **Fields** well
- Format the card:
  - Click **Format visual** (paint roller)
  - Callout value:**
    - Font: Segoe UI Light
    - Size: 36pt
    - Color: #2D5016 (Fresh Green)
  - Category label:**
    - Text: "Total Revenue"
    - Font: Segoe UI Bold
    - Size: 12pt
    - Color: #2C3E50 (Dark Gray)
  - Effects → Background:**
    - Color: White (#FFFFFF)
    - Transparency: 0%
  - Effects → Border:**
    - Color: #E0E0E0 (Light Gray)
    - Width: 1px
    - Radius: 5px

**Why it matters:** Large, prominent revenue figure is the first thing executives see. Green color indicates positive metric.

**How to validate:** Card displays: **\$45,234,567** (formatted as currency, green text, white background with subtle border).

### Step 4: Create KPI Card - Gross Margin %

#### What to do:

- Copy the Total Revenue card (Ctrl+C, Ctrl+V)
- Position to the right of Total Revenue (aligned horizontally)
- Remove **[Total Revenue]** from **Fields** well
- Drag **[Gross Margin %]** to **Fields** well
- Update Category label: "Gross Margin %"
- Keep same formatting (green text, white background)

**How to validate:** Card displays: **29.45%** (formatted as percentage).

### Step 5: Create KPI Card - Budget Achievement %

#### What to do:

- Copy Gross Margin % card
- Position to right of Gross Margin %
- Replace with **[Budget Achievement %]**
- Update Category label: "Budget Achievement"
- Add conditional formatting:
  - Format visual → Callout value → Conditional formatting → Color
    - Format by: Field value
    - Based on field: [Budget Achievement %]
    - Rules:
      - If value ≥ 100%: Color = Green (#27AE60)
      - If value ≥ 95% and < 100%: Color = Orange (#F39C12)
      - If value < 95%: Color = Red (#E74C3C)

**Why it matters:** Conditional color immediately shows performance status (green = good, red = problem).

**How to validate:** Card displays: **102.5%** in green (assuming over budget).

### Step 6: Create Revenue Trend Line Chart

#### What to do:

- Click **Line chart** visual
- Position below KPI cards, left 60% of canvas width
- Size: Width = 700px, Height = 300px
- Configure visual:
  - X-axis:** DimDate[MonthYear] (sorted by date)
  - Y-axis:** [Total Revenue], [Prior Year Revenue]
  - Legend:** Show (displays "Total Revenue" and "Prior Year Revenue")
- Format visual:
  - Title:** "Revenue Trend - Current vs Prior Year"
  - X-axis title:** "Month"
  - Y-axis title:** "Revenue (\$)"
  - Y-axis format:** Currency, millions (e.g., \$45M)
  - Data colors:**
    - Total Revenue: #2D5016 (Fresh Green)
    - Prior Year Revenue: #95A5A6 (Gray)
  - Data labels:** Off (clutters chart)
  - Legend position:** Top
  - Background:** White (#FFFFFF)
  - Border:** Light gray (#E0E0E0), 1px

**Why it matters:** Trend line shows momentum - are revenues growing, flat, or declining? Comparing current year to prior year shows YoY trends visually.

**How to validate:** Line chart shows 12 months (Jul-2023 to Jun-2024), green line above gray line = growth.

### Step 8: Create Australia State Map

#### What to do:

- Click **Map** visual
- Position to right of trend line (right 40% of canvas)
- Size: Width = 450px, Height = 300px
- Configure visual:
  - Location:** DimStore[State]
  - Bubble size:** [Total Revenue]
  - Toolips:** [Total Revenue], [Gross Margin %], [Budget Achievement %]

#### What to do:

- Format visual:
  - Title:** "Revenue by State"
  - Map style:** Road (default)
  - Zoom level:** Australia (auto-zoom to show all states)
  - Bubbles → Color:** #2D5016 (Fresh Green)
  - Bubbles → Transparency:** 60% (allows overlapping bubbles to show)
  - Background:** White (#FFFFFF)
  - Border:** Light gray (#E0E0E0), 1px

**Why it matters:** Geographic visualization shows state performance at a glance. Larger bubbles = higher revenue.

**How to validate:** Map shows Australia with bubbles over NSW, VIC, QLD. NSW bubble is largest (most stores/revenue).

### Step 9: Create Top 5 Products Bar Chart

#### What to do:

- Click **Clustered bar chart** visual (horizontal bars)
- Position bottom-left, below trend line
- Size: Width = 450px, Height = 250px
- Configure visual:
  - Y-axis:** DimProduct[ProductName]
  - X-axis:** [Total Revenue]
  - Data label:** Show value (e.g., \$2.5M)
- Add Top N filter:
  - Visual filters → ProductName → Filter type: **Top N**
  - Show: Top 5
  - By value: [Total Revenue]

#### What to do:

- Format visual:
  - Title:** "Top 5 Products by Revenue"
  - Bars → Color:** #2D5016 (Fresh Green)
  - Data labels:** On, white text, outside end of bars
  - Y-axis labels:** Product names
  - X-axis format:** Currency, millions
  - Background:** White (#FFFFFF)
  - Border:** Light gray, 1px

**Why it matters:** Shows channel mix. Executives track digital vs physical sales trends.

**How to validate:** Donut chart shows 3 slices. In-Store should be largest (~65-70%), Online ~20-25%, Click & Collect ~10-15%.

### Step 10: Create Channel Performance Donut Chart

#### What to do:

- Click **Donut chart** visual
- Position bottom-right, next to Top 5 Products
- Size: Width = 450px, Height = 250px
- Configure visual:
  - Legend:** DimChannel[ChannelName]
  - Values:** [Total Revenue]
  - Toolips:** [Total Revenue], [Gross Margin %]
- Format visual:
  - Title:** "Revenue by Channel"
  - Slices → Colors:**
    - In-Store: #2D5016 (Fresh Green)
    - Online: #004C97 (Corporate Blue)
    - Click & Collect: #95A5A6 (Gray)
  - Data labels:** Percentage (e.g., 65%)
  - Legend position:** Right
  - Detail labels:** Category name + percentage
  - Background:** White (#FFFFFF)
  - Border:** Light gray, 1px

**Why it matters:** Shows channel mix. Executives track digital vs physical sales trends.

**How to validate:** Donut chart shows 3 slices. In-Store should be largest (~65-70%), Online ~20-25%, Click & Collect ~10-15%.

### Step 11: Align and Distribute Visuals

#### What to do:

- Select all visuals on page (Ctrl+A or drag-select)
- Format ribbon → **Align** → **Align to grid**
- Format ribbon → **Distribute** → **Horizontally** (for KPI cards)
- Manually adjust spacing to ensure consistent gaps

**Why it matters:** Professional dashboards have precise alignment. Misaligned visuals look amateurish.

**How to validate:** All visuals aligned to grid, consistent spacing between cards and sections.

### Step 12: Add Page Title and Logo

#### What to do:

- Insert **Text box** (Insert ribbon → Text box)
- Position top-left, above KPI cards
- Text: "FreshMarket Australia - Executive Summary"
- Format:
  - Font: Segoe UI Bold
  - Size: 20pt
  - Color: #2D5016 (Fresh Green)
- Insert **Image** (Insert → Image)
- Upload FreshMarket logo (60x60px PNG)
- Position: Far left, next to title

**How to validate:** Title and logo visible at top of page.

**Why it matters:** Focuses attention on revenue drivers. Top 5 products may represent 30-40% of total revenue (Pareto principle).

**How to validate:** Bar chart shows 5 products, sorted longest to shortest. Data labels show revenue values.

### Step 9: Create Top 5 Products Bar Chart

#### What to do:

- Click **Clustered bar chart** visual (horizontal bars)
- Position bottom-left, below trend line
- Size: Width = 450px, Height = 250px
- Configure visual:
  - Y-axis:** DimProduct[ProductName]
  - X-axis:** [Total Revenue]
  - Data label:** Show value (e.g., \$2.5M)
- Add Top N filter:
  - Visual filters → ProductName → Filter type: **Top N**
  - Show: Top 5
  - By value: [Total Revenue]

#### What to do:

- Format visual:
  - Title:** "Top 5 Products by Revenue"
  - Bars → Color:** #2D5016 (Fresh Green)
  - Data labels:** On, white text, outside end of bars
  - Y-axis labels:** Product names
  - X-axis format:** Currency, millions
  - Background:** White (#FFFFFF)
  - Border:** Light gray, 1px

**Why it matters:** Shows channel mix. Executives track digital vs physical sales trends.

**How to validate:** Donut chart shows 3 slices. In-Store should be largest (~65-70%), Online ~20-25%, Click & Collect ~10-15%.

### Step 10: Create Channel Performance Donut Chart

#### What to do:

- Click **Donut chart** visual
- Position bottom-right, next to Top 5 Products
- Size: Width = 450px, Height = 250px
- Configure visual:
  - Legend:** DimChannel[ChannelName]
  - Values:** [Total Revenue]
  - Toolips:** [Total Revenue], [Gross Margin %]
- Format visual:
  - Title:** "Revenue by Channel"
  - Slices → Colors:**
    - In-Store: #2D5016 (Fresh Green)
    - Online: #004C97 (Corporate Blue)
    - Click & Collect: #95A5A6 (Gray)
  - Data labels:** Percentage (e.g., 65%)
  - Legend position:** Right
  - Detail labels:** Category name + percentage
  - Background:** White (#FFFFFF)
  - Border:** Light gray, 1px

**Why it matters:** Shows channel mix. Executives track digital vs physical sales trends.

**How to validate:** Donut chart shows 3 slices. In-Store should be largest (~65-70%), Online ~20-25%, Click & Collect ~10-15%.

### Step 11: Align and Distribute Visuals

#### What to do:

- Select all visuals on page (Ctrl+A or drag-select)
- Format ribbon → **Align** → **Align to grid**
- Format ribbon → **Distribute** → **Horizontally** (for KPI cards)
- Manually adjust spacing to ensure consistent gaps

**Why it matters:** Professional dashboards have precise alignment. Misaligned visuals look amateurish.

**How to validate:** All visuals aligned to grid, consistent spacing between cards and sections.

### Step 12: Add Page Title and Logo

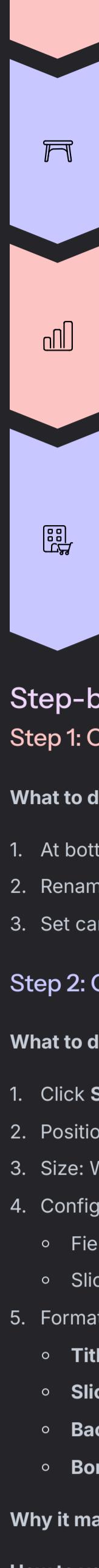
#### What to do:

- Insert **Text box** (Insert ribbon → Text box)
- Position top-left, above KPI cards
- Text: "FreshMarket Australia - Executive Summary"
- Format:
  - Font: Segoe UI Bold
  - Size: 20pt
  - Color: #2D5016 (Fresh Green)
- Insert **Image** (Insert → Image)
- Upload FreshMarket logo (60x60px PNG)
- Position: Far left, next to title

**How to validate:** Title and logo visible at top of page.

# PAGE 2: OPERATIONAL DETAILS

## Page Layout Overview



### Top Section (Filters):

- Date range slicer (Jan 2023 - Dec 2024)
- State multi-select slicer
- Category multi-select slicer
- "Reset Filters" button

### Left Section (Products):

- Product performance table (sortable, exportable)
- Columns: Product Name, Category, Revenue, Margin %, Rank
- Top 20 products shown (scrollable)

### Right Section (Budget Variance):

- Budget variance table by category
- Columns: Category, Actual, Budget, Variance \$, Variance %, Achievement %
- Conditional formatting on variance columns

### Bottom Section (Stores):

- Store performance matrix
- Rows: Store Name (grouped by State)
- Columns: Revenue, Margin %, Budget Achievement
- Drill-through enabled to detailed store page

## Step-by-Step Build

### Step 1: Create Operational Details Page

#### What to do:

1. At bottom, click **+ Add page** button
2. Rename page: Operational Details
3. Set canvas background: #F5F5F5 (same as Page 1)

### Step 2: Create Date Range Slicer

#### What to do:

1. Click **Slicer** visual
2. Position top-left of canvas
3. Size: Width = 300px, Height = 100px
4. Configure:
  - Field: DimDate[Date]
  - Slicer type: **Between** (range selector)
5. Format:
  - **Title:** "Date Range"
  - **Slicer settings** → **Style:** Between
  - **Background:** White
  - **Border:** Light gray, 1px

**Why it matters:** Allows users to focus analysis on specific time periods (e.g., Q3 FY2024).

**How to validate:** Slicer shows two date pickers (From and To) with calendar dropdowns.

### Step 3: Create State Multi-Select Slicer

#### What to do:

1. Copy date slicer
2. Position to right of date slicer
3. Replace field: DimStore[State]
4. Slicer type: **List**
5. Enable **Multi-select with Ctrl** (Format → Selection → Multi-select with Ctrl: On)
6. Update title: "State"

**How to validate:** Slicer shows list of states (NSW, VIC, QLD, WA, SA, TAS, NT, ACT). Ctrl+Click selects multiple.

### Step 4: Create Category Multi-Select Slicer

#### What to do:

1. Copy state slicer
2. Position to right of state slicer
3. Replace field: DimProduct[Category]
4. Update title: "Product Category"

**How to validate:** Slicer shows categories (Fresh Produce, Dairy & Eggs, Meat & Seafood, etc.).

### Step 5: Create Product Performance Table

#### What to do:

1. Click **Table** visual
2. Position below slicers, left 50% of canvas
3. Size: Width = 550px, Height = 550px
4. Add columns (in order):
  - DimProduct[ProductName]
  - DimProduct[Category]
  - [Total Revenue]
  - [Gross Margin %]
  - [Product Rank]
5. Add Top N filter:
  - Visual filters → ProductName → Top 20 by [Total Revenue]
6. Format visual:
  - **Title:** "Product Performance (Top 20)"
  - **Grid** → **Row headers:** Bold
  - **Values** → **Alignment:**
    - ProductName: Left
    - Numbers: Right
  - **Values** → **Conditional formatting:**
    - Gross Margin %: Data bars (green = high, red = low)
  - **Enable export:** Format → Export → Allow export: On
  - **Background:** White
  - **Border:** Light gray, 1px

**Why it matters:** Detailed product analysis. Users can sort by any column, export to Excel for further analysis.

**How to validate:** Table shows 20 products with formatted values. Click column headers to sort. Right-click table → Export data works.

### Step 6: Create Budget Variance Table

#### What to do:

1. Click **Table** visual
2. Position top-right, next to product table
3. Size: Width = 550px, Height = 300px
4. Add columns:
  - DimProduct[Category]
  - [Total Revenue] (rename column to "Actual")
  - [Budget Revenue] (rename to "Budget")
  - [Variance \$]
  - [Variance %]
  - [Budget Achievement %]
5. Format visual:
  - **Title:** "Budget Variance by Category"
  - **Conditional formatting:**
    - Variance \$: Green (positive), Red (negative)
    - Variance %: Green (>5%), Red (<-5%)
    - Budget Achievement %: Green (>100%), Orange (95-100%), Red (<95%)
  - **Values** → **Currency:** \$ format
  - **Background:** White

**Why it matters:** Shows which categories are over/under budget. Conditional colors highlight problems instantly.

**How to validate:** Table shows 8 categories with variance columns color-coded.

### Step 7: Create Store Performance Matrix

#### What to do:

1. Click **Matrix** visual
2. Position below budget variance table
3. Size: Width = 550px, Height = 550px
4. Configure:
  - **Rows:** DimStore[State] (outer), DimStore[StoreName] (inner)
  - **Values:** [Total Revenue], [Gross Margin %], [Budget Achievement %]
5. Format visual:
  - **Title:** "Store Performance by State"
  - **Row subtotals:** Show (state-level totals)
  - **Column headers:** Bold
  - **Values** → **Conditional formatting:**
    - Gross Margin %: Data bars (green)
    - Budget Achievement %: Icons (✓ green if >100%, ⚠ orange if 95-100%, ✗ red if <95%)
  - **Enable expand/collapse:** Format → Row headers → +/- icons: On
  - **Background:** White

**Why it matters:** Hierarchical view of stores grouped by state. Users can expand/collapse states to focus analysis.

**How to validate:** Matrix shows states with expandable +/- icons. Clicking + expands to show stores within that state.

### Step 8: Add "Reset Filters" Button

#### What to do:

1. Insert **Button** (Insert ribbon → Buttons → Blank)
2. Position next to slicers (top-right area)
3. Size: Width = 150px, Height = 40px
4. Configure:
  - **Button text:** "Reset Filters"
  - **Action:** Bookmark
  - **Bookmark:** Create a bookmark with all slicers cleared (see next step)

5. Format button:
  - **Fill:** #2D5016 (Fresh Green)
  - **Text:** White, Segoe UI Bold, 12pt
  - **Border:** None
  - **Hover effect:** Fill = #1E3A0E (darker green)

#### Bookmark creation:

1. Clear all slicer selections
2. View ribbon → Bookmarks → Add bookmark
3. Rename bookmark: "Clear All Filters"
4. Edit bookmark (right-click → Data: Current page)
5. Go back to button → Action → Bookmark → Select "Clear All Filters"

**Why it matters:** One-click reset saves users time vs. manually clearing each slicer.

**How to validate:** Select filters, click "Reset Filters" button, all slicers clear.

### Step 9: Create Drill-Through Page (Store Details)

#### What to do:

1. Add new page: Store Details
2. Set canvas background: #F5F5F5
3. Configure drill-through:
  - Visualizations pane → **Drill through** section
  - Add field: DimStore[StoreName]

4. Add visuals:
  - **Card:** Store Name (large, top-center)
  - **Cards:** Total Revenue, Gross Margin %, Budget Achievement (row below)
  - **Line chart:** Monthly revenue trend (12 months)
  - **Table:** Top 10 products sold at this store
  - **Bar chart:** Customer loyalty tier distribution

5. Add back button:
  - Insert → Buttons → Back
  - Position: Top-left
  - Action: Back (returns to source page)

**Why it matters:** Drill-through enables deep-dive analysis. Right-click any store in the matrix → Drill through → Store Details.

**How to validate:** From Operational Details page, right-click a store → Drill through → Store Details. Page shows filtered data for that store only. Back button returns to Operational Details.