Lesson 7 - Project 1: Basic Sales Dashboard

1. Import Retail_Sales_Data.xlsx into Power BI.

Open Power BI > Home tab > Click 'Get Data' > Select 'Excel' > Choose the file and load the table.

2. Create a table visual showing Region and Sales.

Select 'Table' visual > Drag 'Region' and 'Sales' fields into the visual.

3. Add a slicer for Product.

Insert a slicer visual > Drag 'Product' field to it.

4. Format the dashboard theme to 'Dark Mode.'

Go to 'View' tab > Select 'Dark' from themes.

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

'Data' view shows raw tables; 'Model' view helps define relationships and data structure.

6. Build a dashboard with:
- A bar chart of Sales by Region.
- A line chart of Sales over Date.
- A card showing total Profit.

Add each visual, assign respective fields: Sales by Region (bar), Sales by Date (line), Profit (card).

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

Create a new page > Add fields like Product, Sales > Drag 'Region' to 'Drill-through' section.

8. Use conditional formatting to highlight high-profit regions.

Select visual > Format > Conditional formatting > Apply rules to Profit field.

9. Publish the dashboard to Power BI Service.

Go to 'File' > 'Publish' > 'My Workspace'.

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

In Power BI Service > Open report > Click 'Share' > Enter email and permissions.

11. Add a custom 'Sales Growth %' measure without DAX (use Quick Measures).

Right-click table > New Quick Measure > Select Growth calculation.

12. Optimize the dataset for faster refresh (e.g., remove unused columns).

Remove unnecessary columns in Power Query before loading data.

13. Troubleshoot: Slicers not affecting all visuals—how to fix?

Ensure visuals are on the same page and slicer interactions are enabled.

14. Embed the dashboard into a PowerPoint presentation.

In Power BI Service > File > Embed > PowerPoint > Copy the embed link.

15. Set up a scheduled refresh for the dataset in Power BI Service.

Go to 'Datasets' > Settings > Schedule Refresh > Set frequency and credentials.