Creating and Managing the Sales Performance Dashboard with Power BI

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1. Introduction.

This tutorial will help you through the process of developing and managing sales performance. Dashboard for Power BI. The dashboard provides insights into sales data, such as total sales. Sales trends and performance vary by product category and area.

2. Prerequisites.

Before you start, make sure you have the following:
• Access to Power BI Desktop and Service.
• The sales data file (available in the GitHub repository Here).
• A basic understanding of Power BI, including how to use the interface.

3. Step 1: Access Power BI.

Open Power BI Desktop.
- If not already installed, get Power BI Desktop from Microsoft's official site website.
- Once installed, open the application.
- Log into Power BI:
- Log in with your work credentials. Ensure that you have the relevant permissions to view and publish dashboards.

4.Step 2: Connecting to the Data Source.

1. Import the data.
   - Navigate to the Home tab and click Get Data.
   - Choose the file type (excel, CSV, etc.) for your sales.
   - Browse and select a data file from your local workstation or GitHub repository.

2. Load Data: Preview the data, and if everything seems good, click Load to import it into Power BI.

5. Step 3: Create the Sales Performance Dashboard.

Setting up the dashboard.

1. Create a new report:
    - In the Home tab, select New Report.
    - Choose the loaded data set from the Fields pane.

2. Enter a title:

Add a text box at the top of the report canvas with the headline "Sales Performance Dashboard".

Adding Sales Data Visualizations

1. Total Sales Cards:
- Drag the Total Sales field to the canvas.
- Change the graphic to a card by picking the card icon from the Visualizations pane

2. Sales Trend Line Chart:
- Move the Date field to the X-axis, and Total Sales to the Y-axis.
- Change the graphic to a line chart.

3. Sales By Category Pie Chart:
- Move the Product Category column to the Legend section and Total Sales to Values section.
- Change the image to a pie chart.

4. Sales By Region Bar Chart:
- Move the Region field to the X-axis, and Total Sales to the Y-axis.
- Change the image to a bar chart. Customizing the Dashboard

Customizing the dashboard

1.Formatting Visuals
- Use the Format window to adjust the colors, labels, and fonts in each visual.
- Ensure that the dashboard is visually appealing and easy to read.

2. Adding Filters:
- Create slicers to filter data by date, product category, and region.
- Move the slicers to the left side of the dashboard for easy access.

6. Step 4: Publish the Dashboard

1. Publish to Power BI Service.
- On the Home tab, click the Publish button.
- Choose the appropriate workspace in Power BI Service.

2. Access the Published Dashboard.

- Log in to Power BI Service and navigate to the workspace where the dashboard is published.
- Check the Sales Performance Dashboard to confirm it is shown appropriately.

7. Step 5: Schedule Data Refresh

1. Configure a Data Gateway (if required):

- If your data source is on-premises, configure a data gateway for scheduled refreshes.

2. Configure the Refresh Schedule.

- Open Power BI Service and navigate to the dataset required for the dashboard.
- Select Schedule Refresh and specify the refresh frequency (e.g., daily, weekly).

8. Step 6: Share the Dashboard.

1. Share with the team members:

- In Power BI Service, navigate to the dashboard.
- Click the Share option, then enter the team members' email addresses.
- Set permissions for viewing or editing

2. Generate a Dashboard Link.

- Create a link to the dashboard that can be shared by email or put to documentation.

9. Troubleshooting Common Issues

1. Data Source Errors:

- Ensure that the data source is properly connected and accessible
- If you're using a data gateway, look for any difficulties.

2. Visuals are not displaying correctly:

- Check that all fields are properly mapped in the graphics.
- Look for filters that could be impacting the display.

10. Additional resources.

- Power BI documentation.
- Power BI Community.
- GitHub repository for Sales Dashboard data and files.

11. Contact Information.

For any concerns or additional assistance, please contact the IT support staff or the admin of the power BI dashboard.