Import Retail_Sales_Data.xlsx into Power BI

- Open **Power BI Desktop → Home → Get Data → Excel**.
- Browse and select `Retail_Sales_Data.xlsx`.
- Select the sheet/table you need → click **Load** (or **Transform** first if cleaning).

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2. Create a table visual showing Region and Sales

- Go to **Visualizations pane** → select **Table** visual.
- Drag **Region** to Rows (or Values).
- Drag **Sales** to Values → it will show a table with Region and Sales numbers.

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3. Add a slicer for Product

- From **Visualizations pane**, select **Slicer**.
- Drag the **Product** field into the slicer.
- Now you can filter all visuals by Product selection.

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4. Format the dashboard theme to "Dark Mode"

- Go to **View tab → Themes**.
- Choose **Dark** (or customize colors).
- This changes the entire report's look and feel.

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5. Purpose of the "Data/Model" view in Power BI

- **Data View**: lets you inspect tables, columns, and values. You can add calculated columns and check raw data.
- **Model View**: shows relationships between tables (like a schema). You can create/manage relationships, set cardinality, and define hierarchies.

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6. Bar chart of Sales by Region

- Insert **Clustered Bar Chart** visual.
- Drag **Region** → Axis.
- Drag **Sales** → Values.
- This shows horizontal bars comparing sales per region.

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7. Line chart of Sales over Date

- Insert **Line Chart** visual.
- Drag **Date** → Axis.
- Drag **Sales** → Values.
- This will show sales trends over time.

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8. Card showing total Profit

- Insert **Card** visual.
- Drag **Profit** measure/column to Values.
- Card shows the total Profit figure as a single number.

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

- Add a **new page** → design detailed sales visuals (table, charts).
- In **Drill-through filters pane**, drag **Region** field.
- On the main page, right-click on a Region → **Drill-through** → **Sales detail page**.

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10. Use conditional formatting to highlight high-profit regions

- Select your visual (Table or Bar).
- Go to **Format pane** → **Data colors** → **Conditional formatting**.
- Set rules (e.g., Profit > 100,000 = green; else red).
- Regions with higher profit get highlighted.

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11. Publish the dashboard to Power BI Service

- In Power BI Desktop → **Home** → **Publish**.
- Choose your **Power BI workspace** (My workspace or shared one).
- Report will be uploaded to Power BI Service.

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

- In **Power BI Service**, open your report.
- Click **Share** (top-right).
- Enter your colleague's email.
- Set permissions (View/Edit).
- Click **Send** → colleague gets a link.

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13. Add a custom "Sales Growth %" measure without DAX (Quick Measures)

- Right-click your field list → **New Quick Measure**.
- Choose **% Difference from previous period**.
- Select `Sales` as the base field.
- Power BI auto-generates the DAX for Sales Growth %.

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

- Open **Transform Data (Power Query Editor)**.
- Remove unused columns and tables.
- Set correct **Data Types**.
- Disable **Auto Date/Time** in Options (to reduce hidden date tables).
- Keep model lean for faster refresh and smaller file size.

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

- Check if tables are related in **Model View** (slicer must connect to the same data model).
- Select slicer → Format tab → **Edit Interactions** → make sure slicer filters the intended visuals.
- Ensure visuals use fields from related tables.

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16. Embed the dashboard into a PowerPoint presentation

- In Power BI Service → open report → **File → Export → PowerPoint → Embed Live**.
- Or in PowerPoint → **Insert → Power BI → choose report** → it embeds as a live, interactive visual.

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

- In Power BI Service → Workspace → **Datasets** → Settings.
- Under **Scheduled refresh**, enable it.
- Set frequency (daily/weekly, time slots).
- Configure data source credentials (and gateway if on-prem).