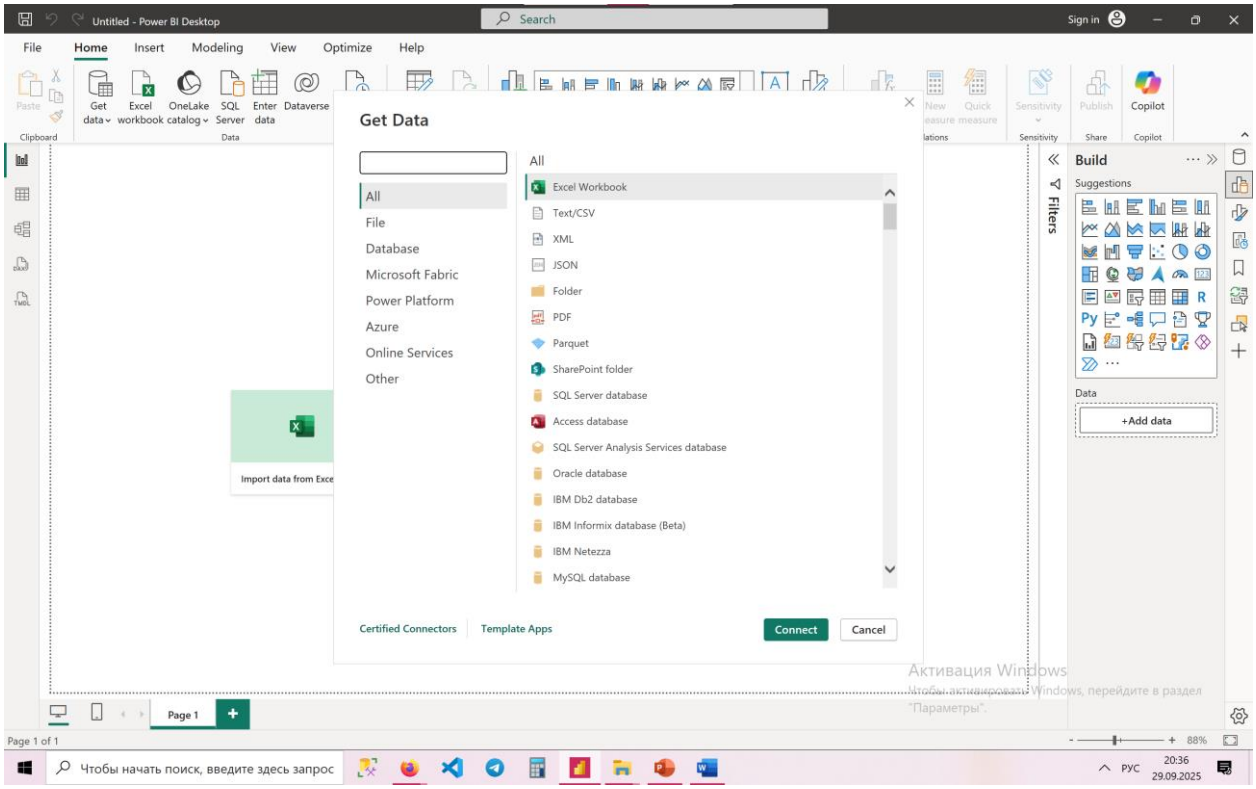
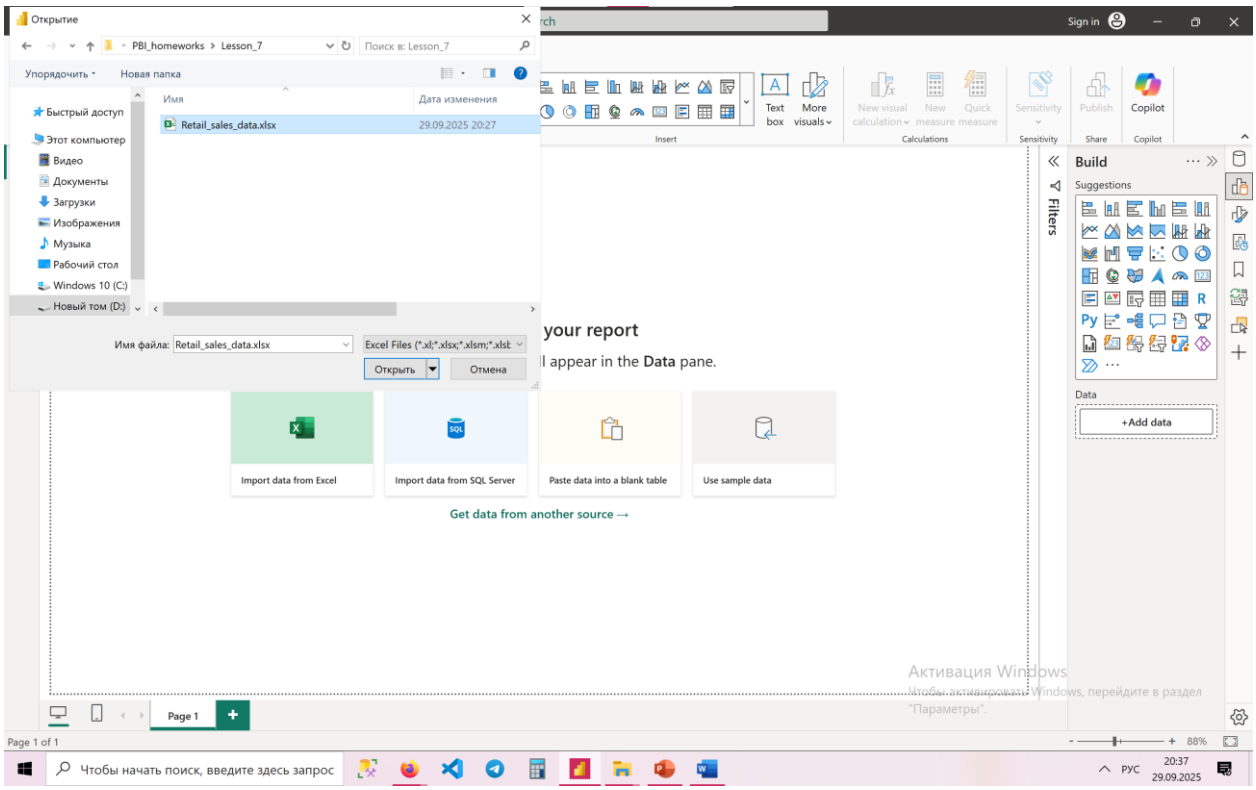
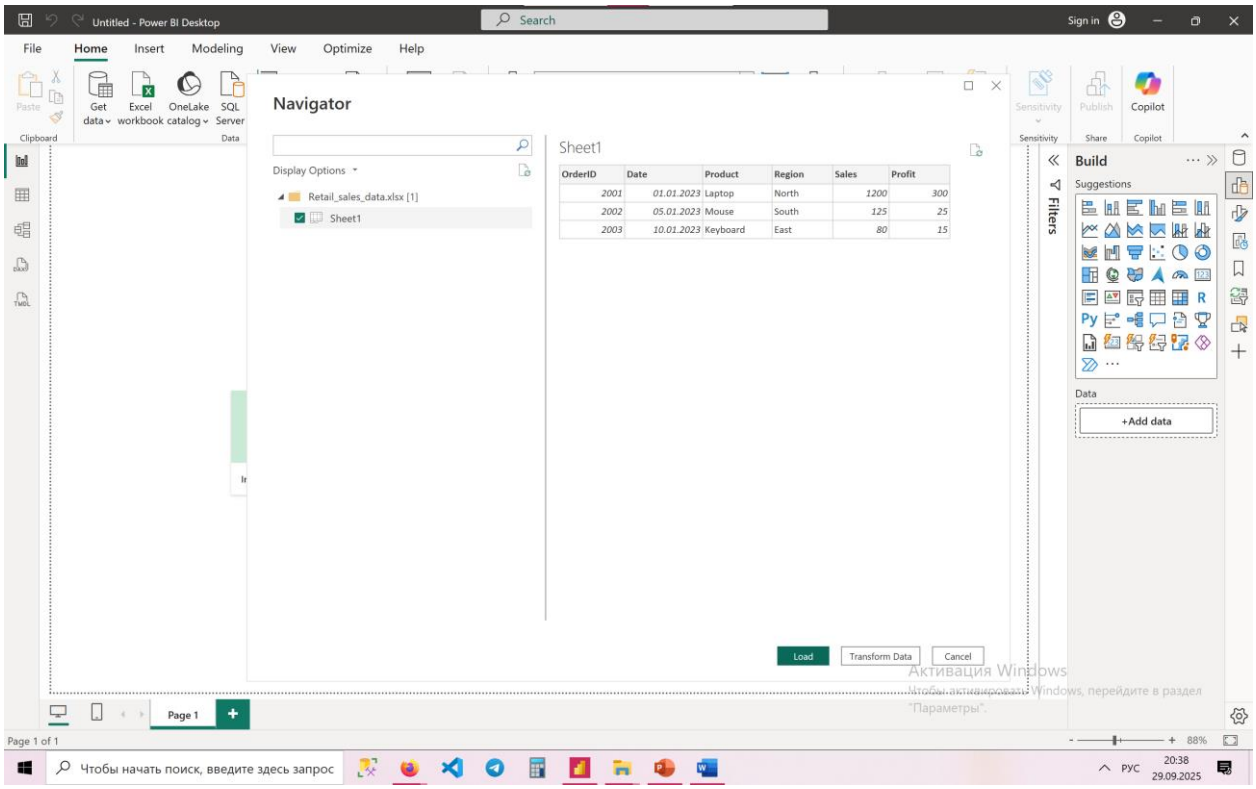
Lesson 7 – Project 1: Basic Sales Dashboard

Step 1. Import Retail_Sales_Data.xlsx into Power BI

- Open **Power BI Desktop**.
- Go to **Home → Get Data → Excel**.
- Select Retail_Sales_Data.xlsx and click **Load**.



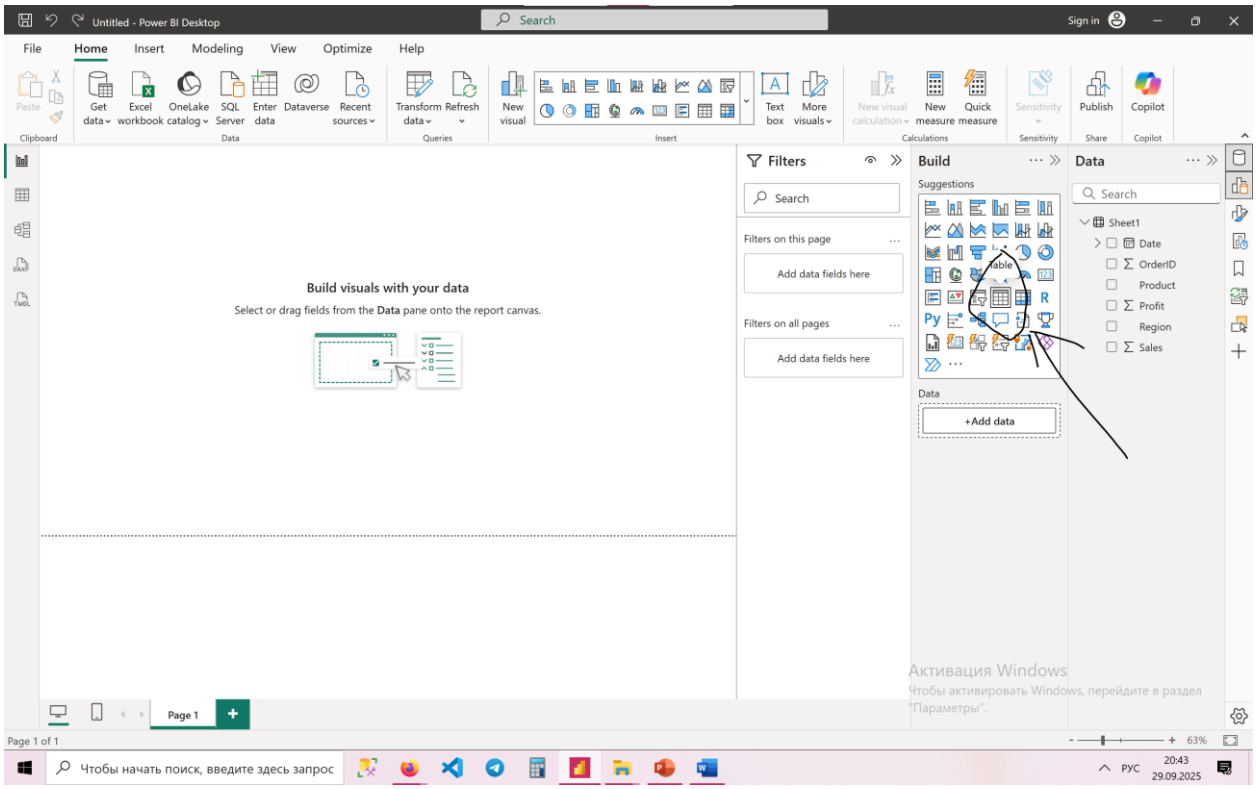


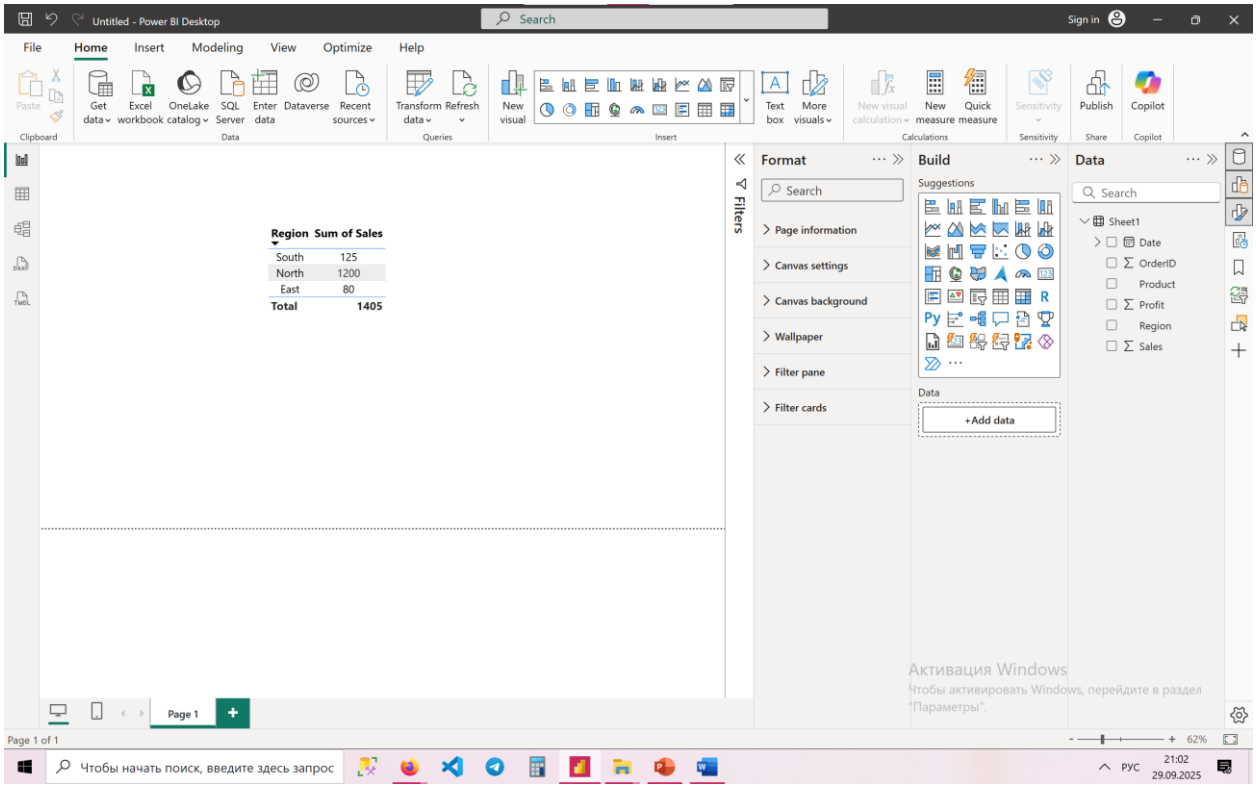


Step 2. Create a table visual showing Region and Sales

- Go to the **Report view**.

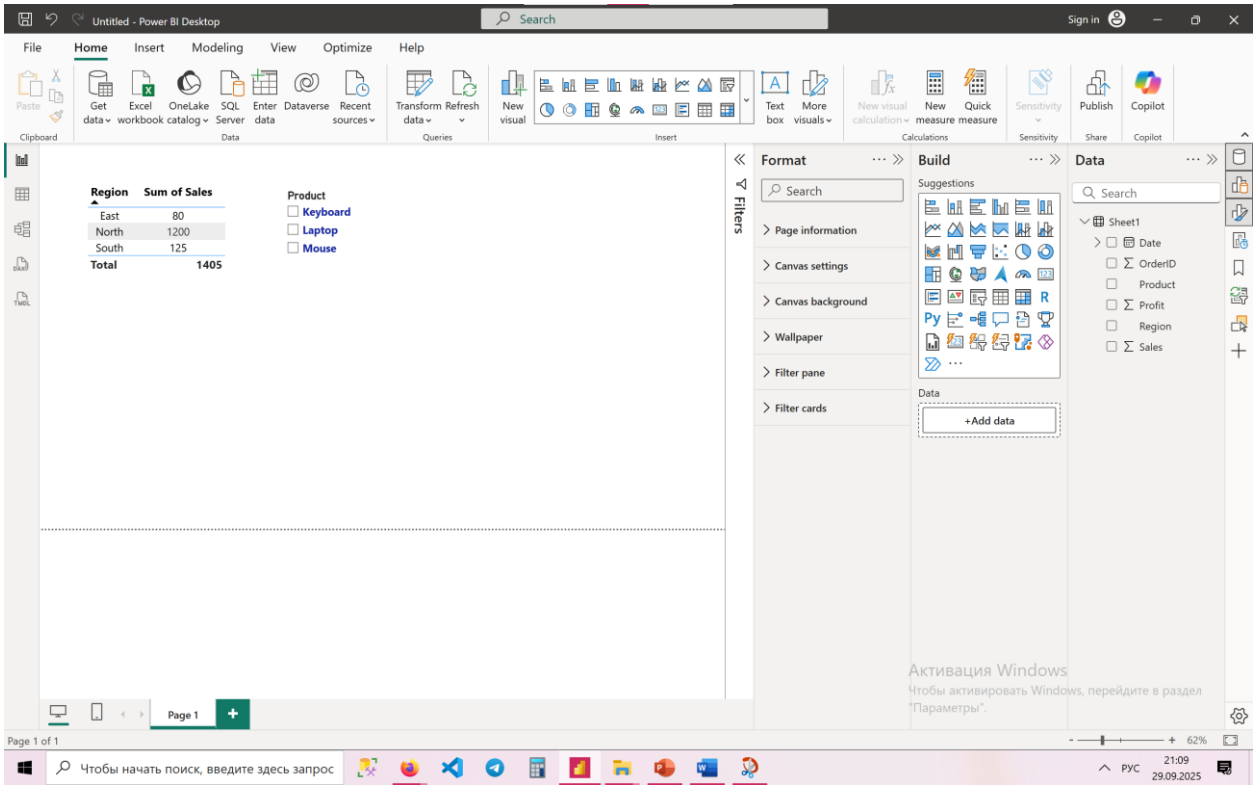
- Select **Table** from the **Visualizations** pane.
- Drag Region and Sales into the table.





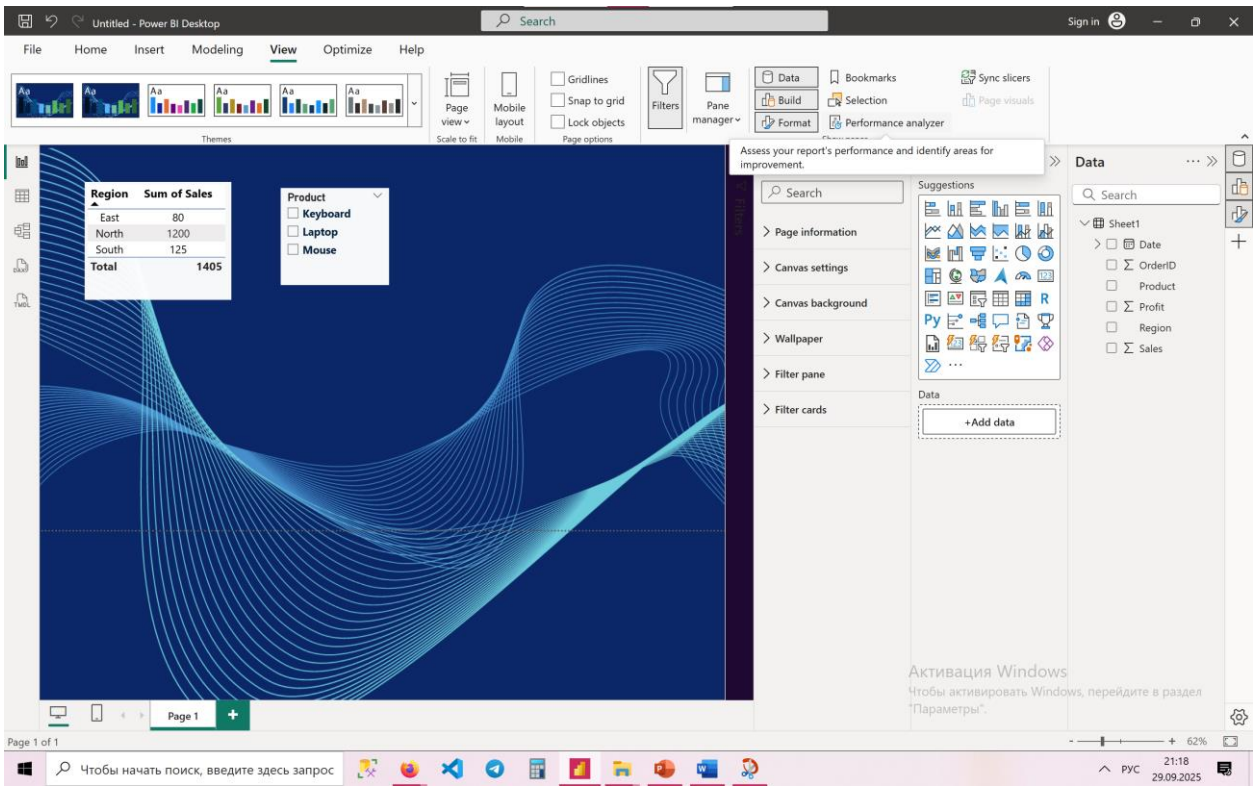
Step 3. Add a slicer for Product

- Select **Slicer** from the **Visualizations** pane.
- Drag Product into the slicer field.



Step 4. Format the dashboard theme to "Dark Mode"

- Go to **View → Themes → Dark Mode**.



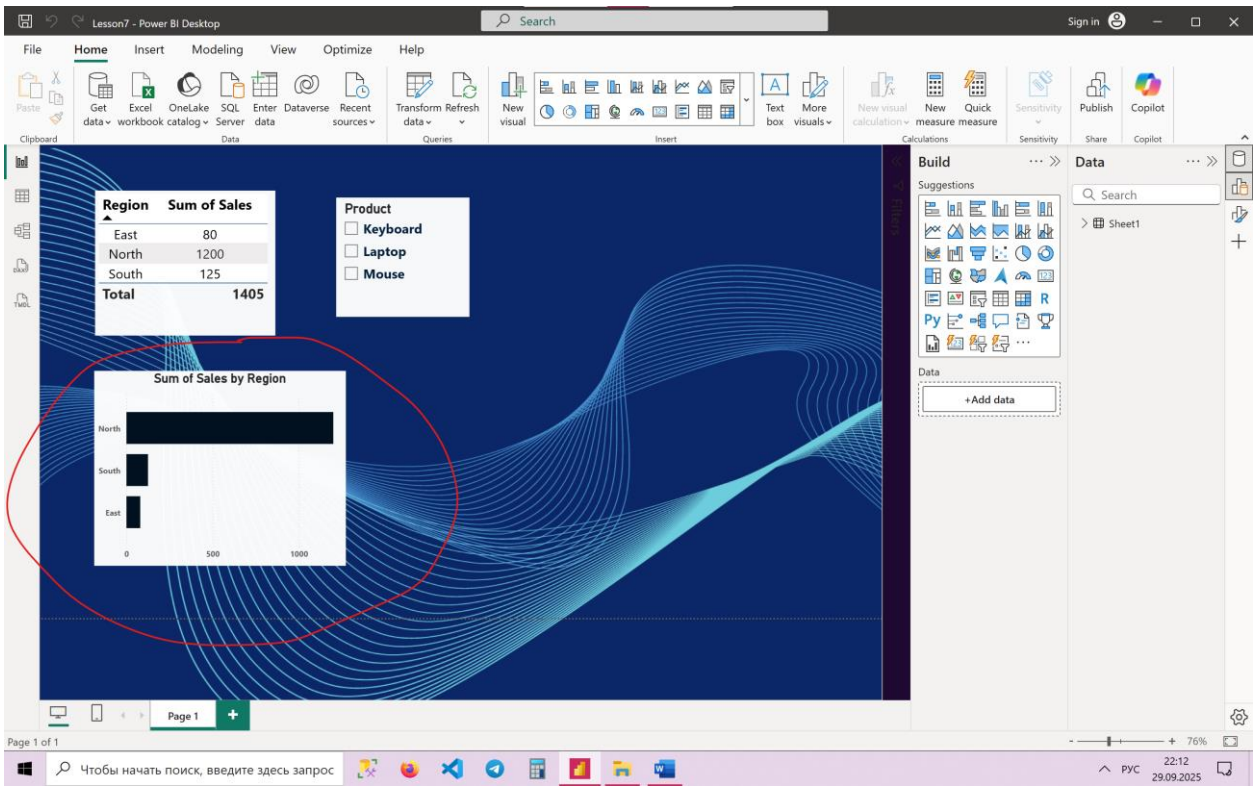
Step 5. Purpose of the Data/Model view in Power BI

- **Data view**: explore and clean the dataset.
- **Model view**: create and manage relationships between tables.

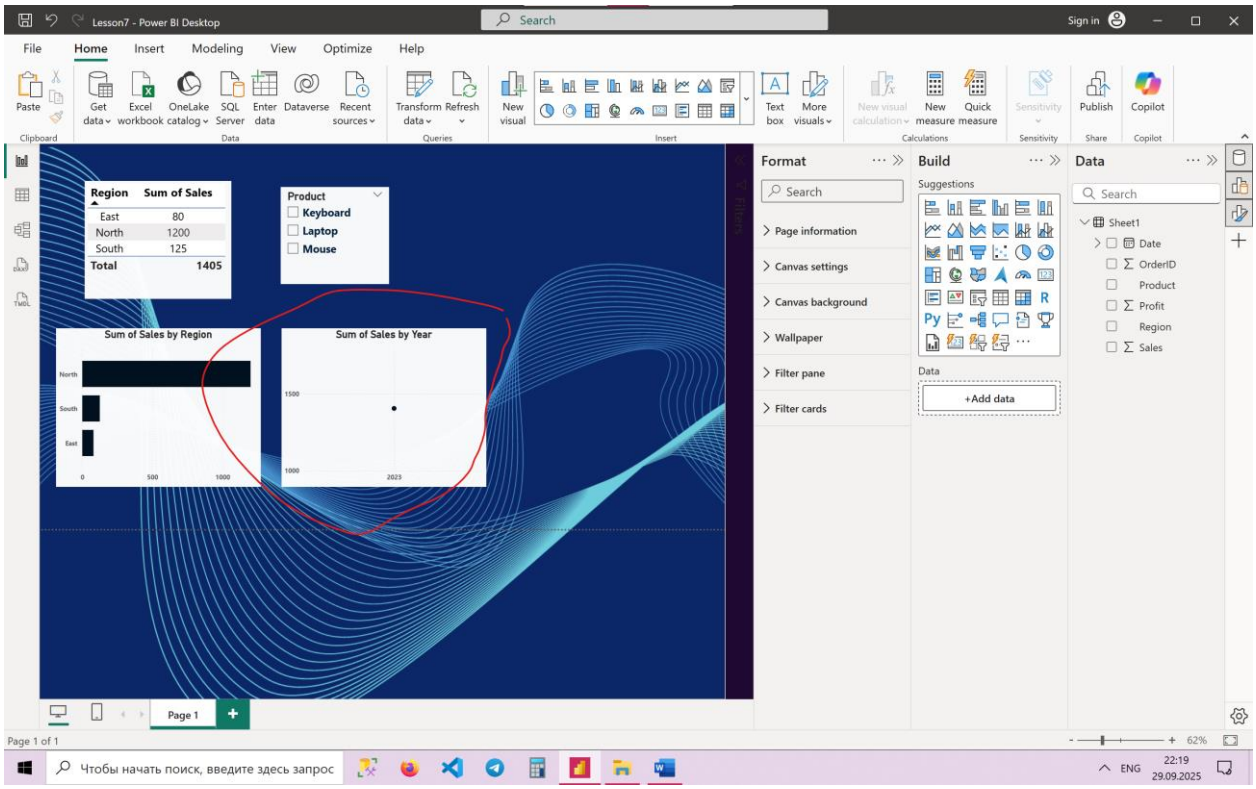
Step 6. Build a dashboard with visuals

- Add a **Bar chart**: drag Region to Axis and Sales to Values.
- Add a **Line chart**: drag Date to Axis and Sales to Values.
- Add a **Card**: drag Profit to the Card visual to show total profit.

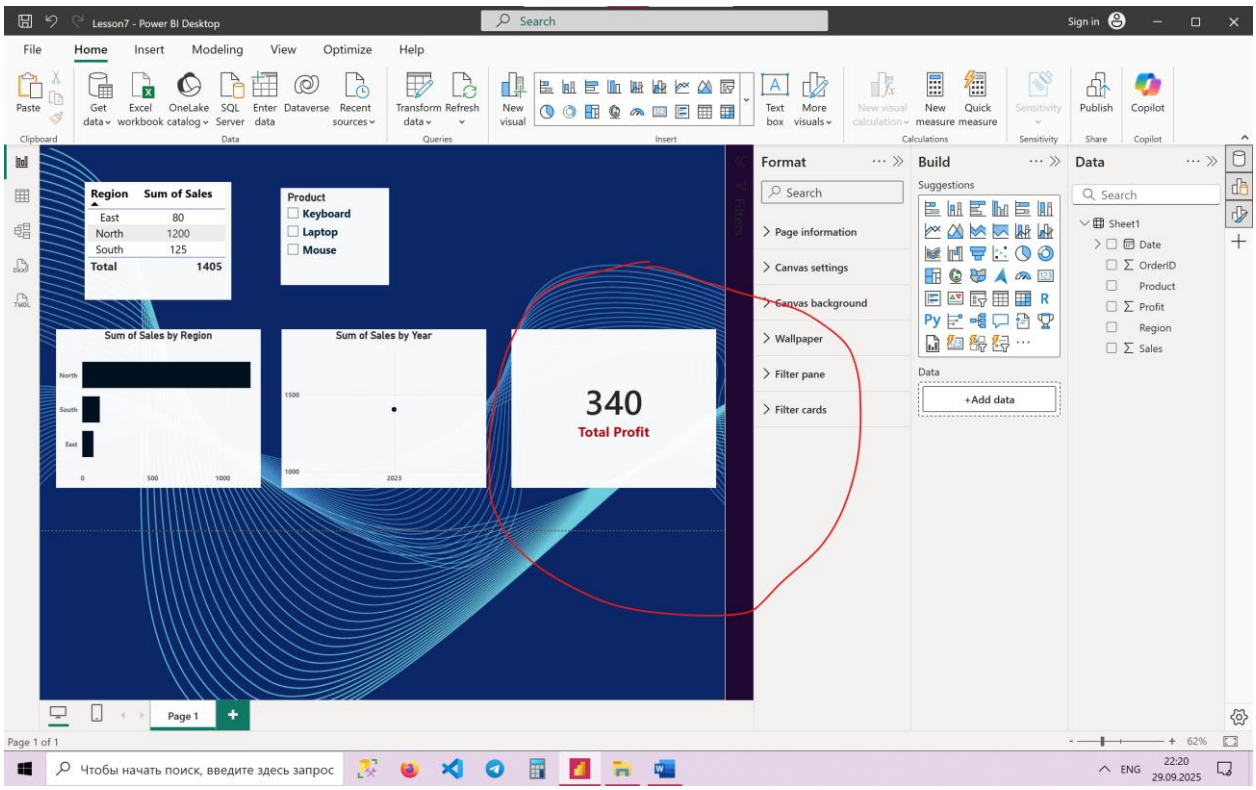
Bar chart:



Line chart:

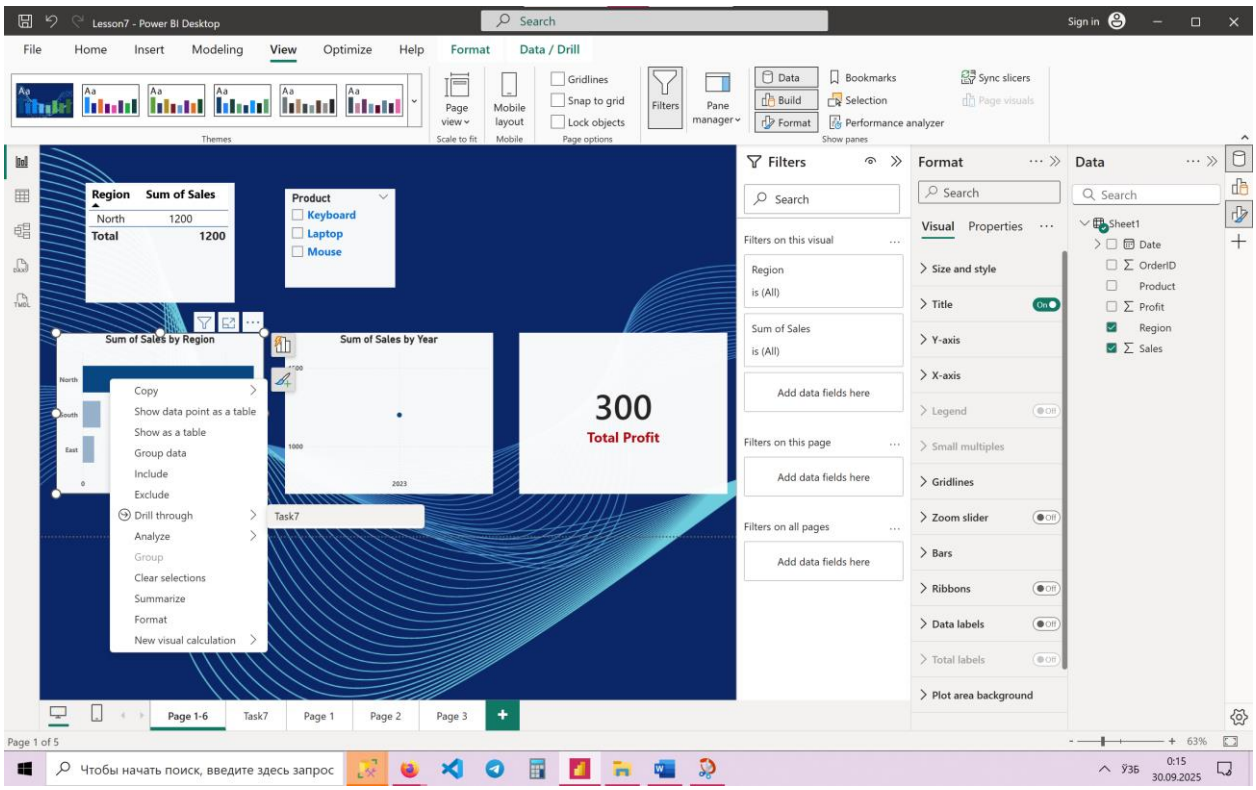


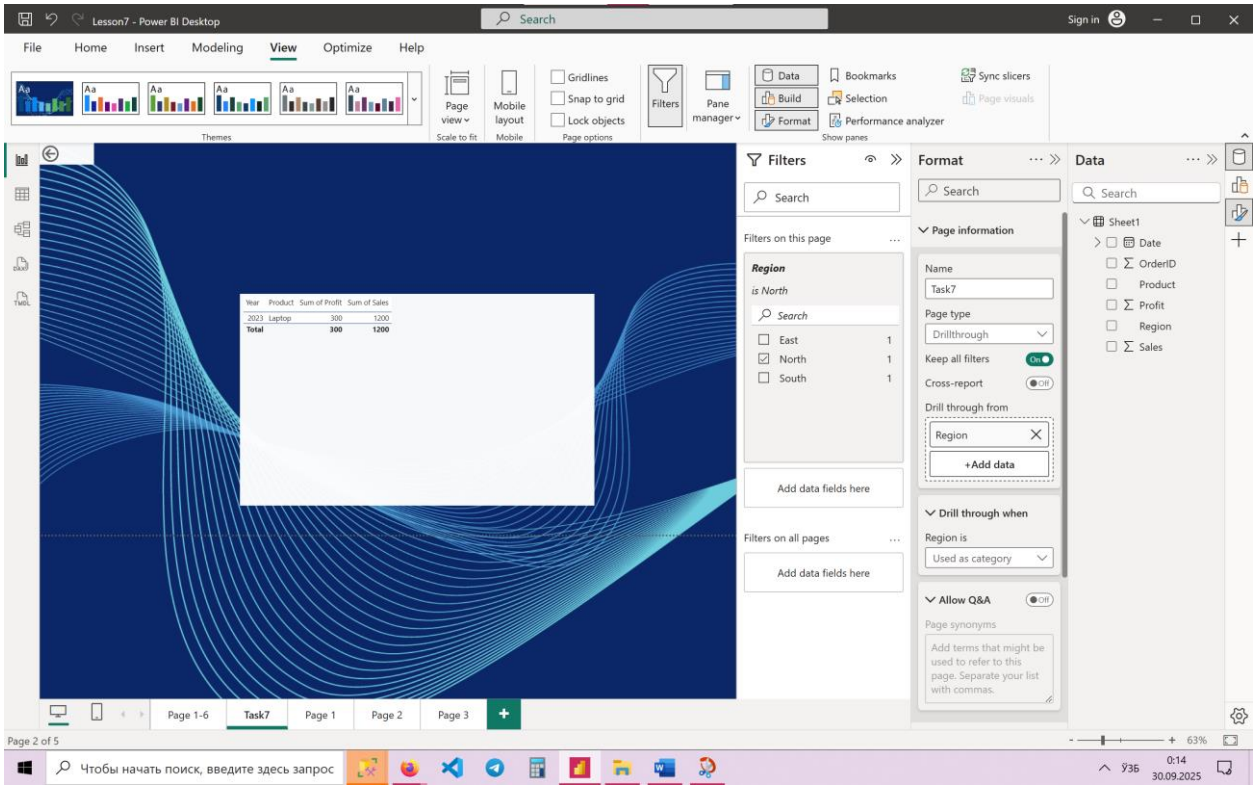
a **Card**:



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

- Create a new page.
- Add a table with detailed fields (e.g., Product, Sales, Profit).
- In **Drill-through filters**, add Region.
- Right-click on a region in the main dashboard → Drill-through.


Lesson7 - Power BI Desktop
Search
Sign in
File
Home
Insert
Modeling
View
Optimize
Help
Format
Data / Drill
Region
Sum of Sales
North
1200
Total
1200
Product
Keyboard
Laptop
Mouse
Sum of Sales by Region
Sum of Sales by Year
300
Total Profit
Copy
Show data point as a table
Show as a table
Group data
Include
Exclude
Drill through
Analyze
Group
Clear selections
Summarize
Format
New visual calculation
Task7
Filters
Filters on this visual
Region
is (All)
Sum of Sales
is (All)
Add data fields here
Filters on this page
Filters on all pages
Format
Visual
Properties
Size and style
Title
Y-axis
X-axis
Legend
Small multiples
Gridlines
Zoom slider
Bars
Ribbons
Data labels
Total labels
Plot area background
Data
Sheet1
Date
OrderID
Product
Profit
Region
Sales
Page 1-6
Task7
Page 1
Page 2
Page 3
Page 1 of 5
63%
Чтобы начать поиск, введите здесь запрос
0:15
30.09.2025


Lesson7 - Power BI Desktop
Search
Sign in
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Home
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View
Optimize
Help
Year
Product
Sum of Profit
Sum of Sales
2023
Laptop
300
1200
Total
300
1200
Filters
Filters on this page
Region
is North
East
1
North
1
South
1
Add data fields here
Filters on all pages
Format
Page information
Name
Task7
Page type
Drillthrough
Keep all filters
Cross-report
Drill through from
Region
+Add data
Drill through when
Region is
Used as category
Allow Q&A
Page synonyms
Add terms that might be used to refer to this page. Separate your list with commas.
Data
Sheet1
Date
OrderID
Product
Profit
Region
Sales
Page 1-6
Task7
Page 1
Page 2
Page 3
Page 2 of 5
63%
Чтобы начать поиск, введите здесь запрос
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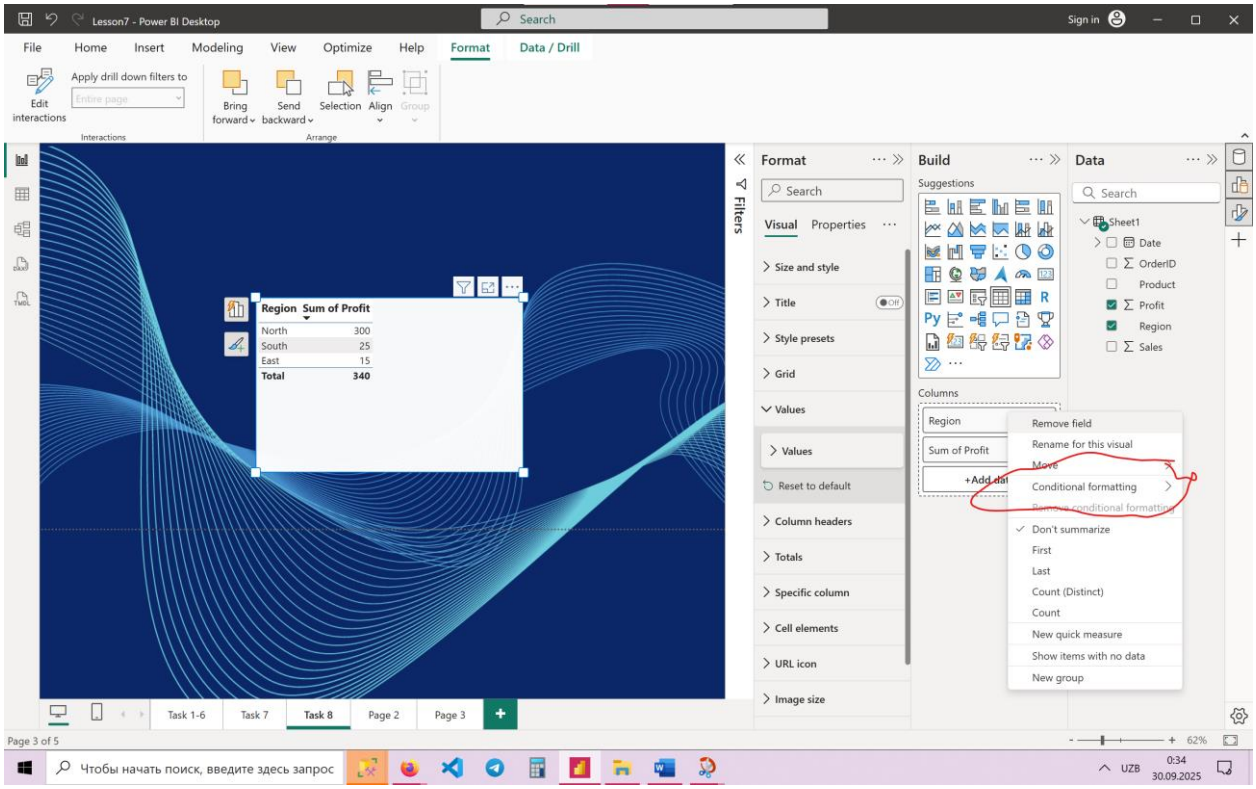
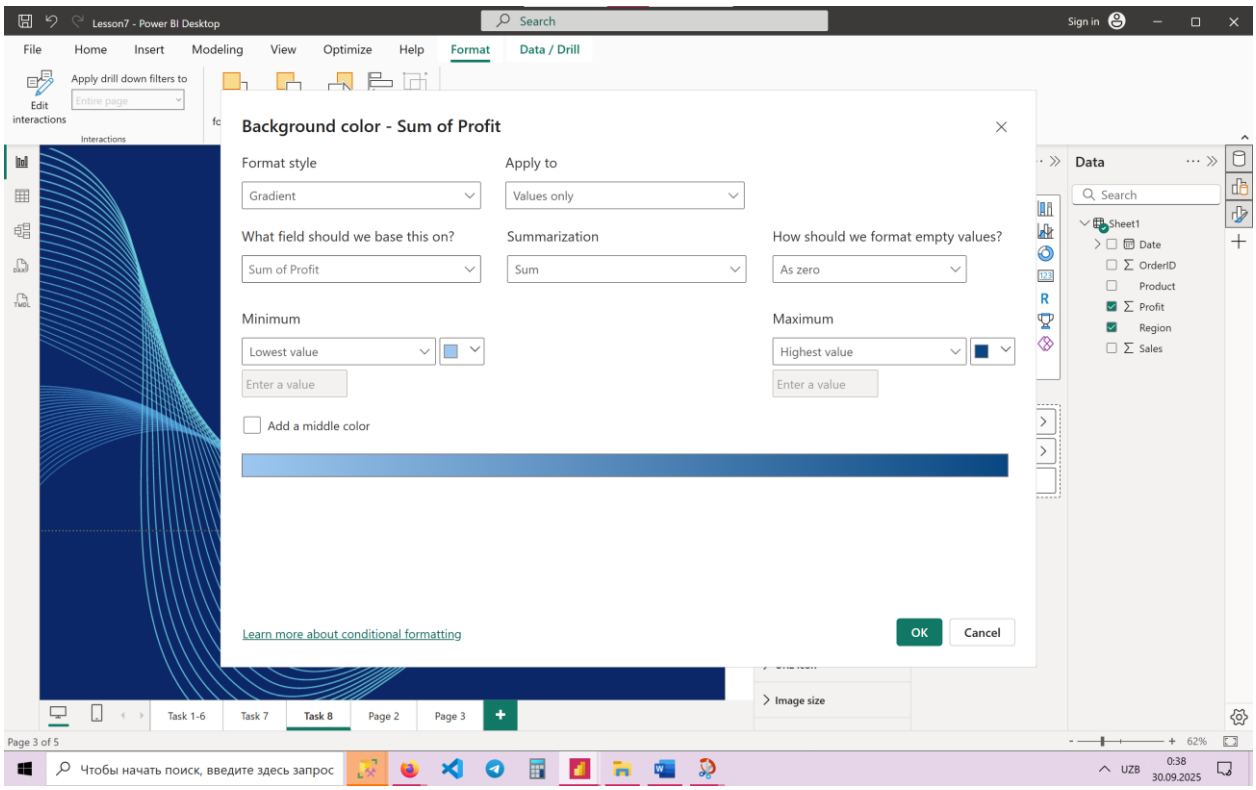
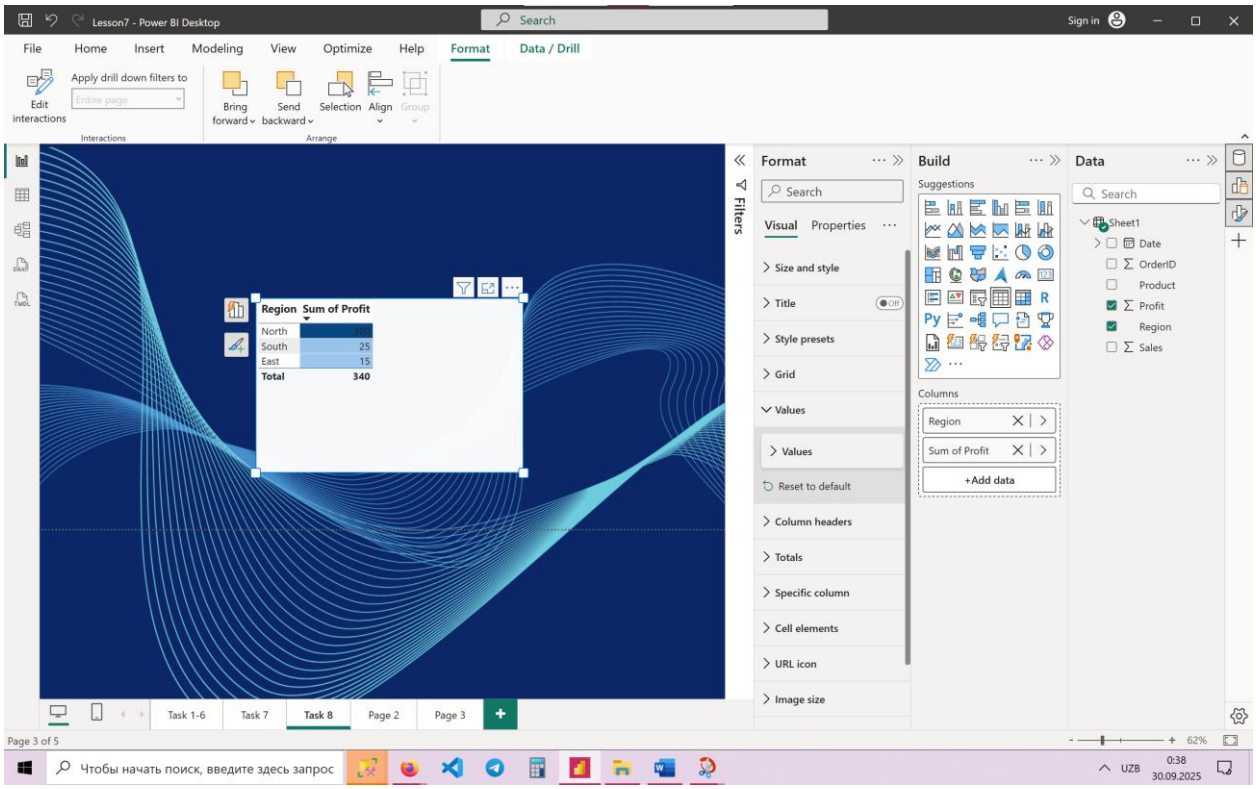
Step 8. Use conditional formatting to highlight high-profit regions

- Select the **table or bar chart** with Region and Profit.
- Go to **Format → Conditional formatting → Background color** (or Font color).
- Choose a rule to highlight regions with higher profit values.



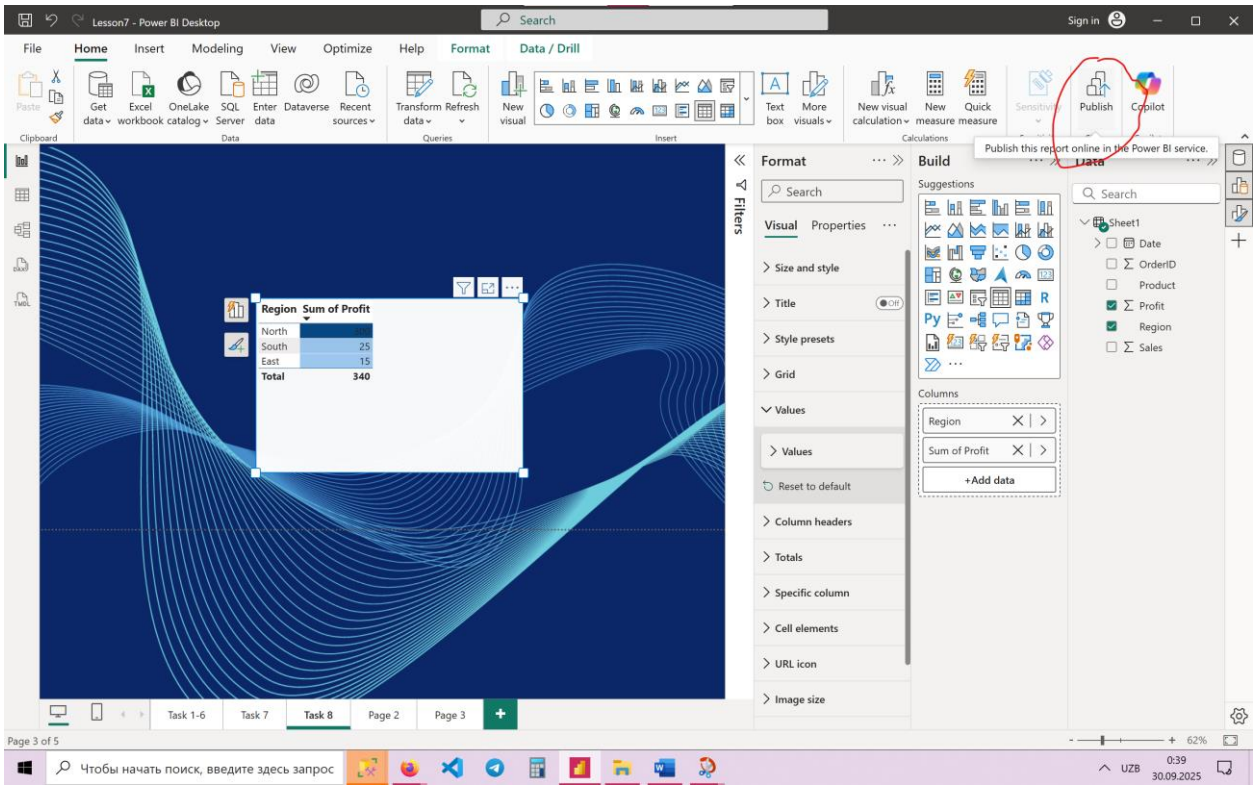




Step 9. Publish the dashboard to Power BI Service

- On the **Home** tab, click **Publish**.

- Sign in to Power BI Service.
- Select a workspace and confirm publish.

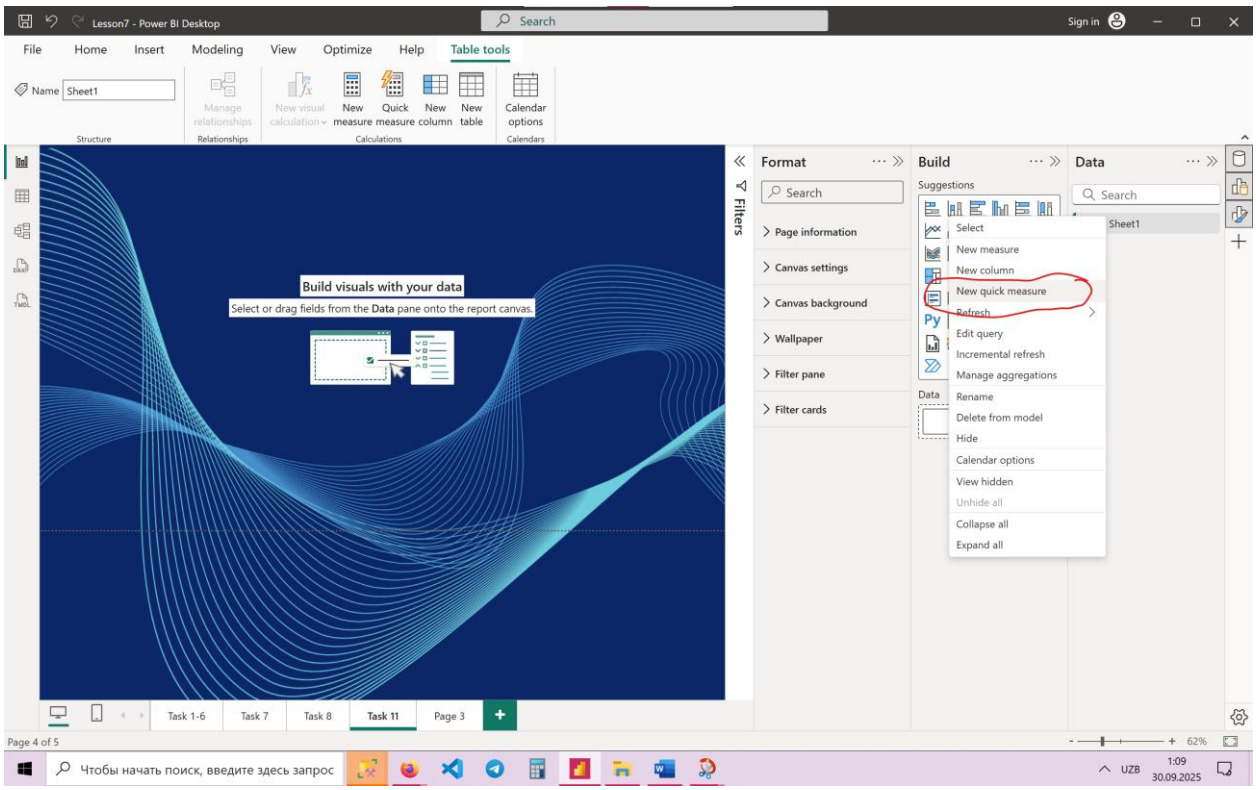


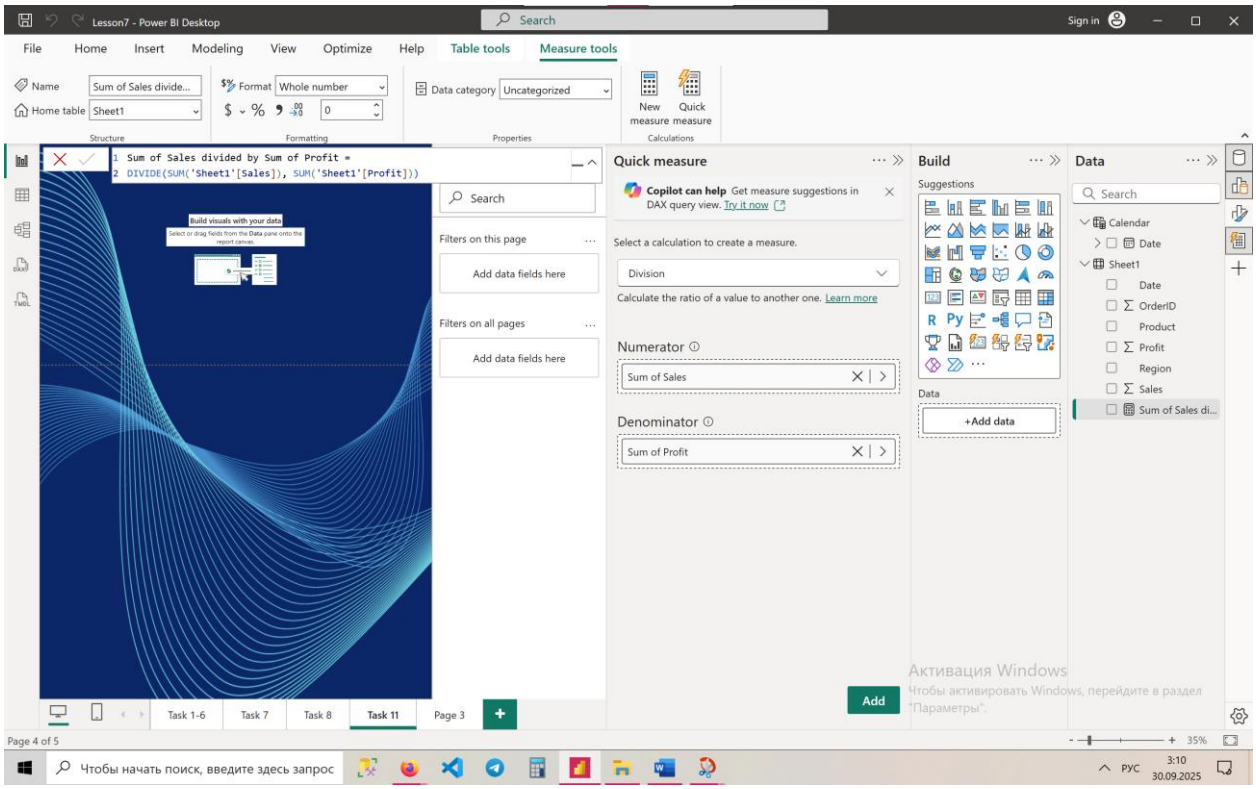
Step 10. Share the report with a colleague (simulate steps)

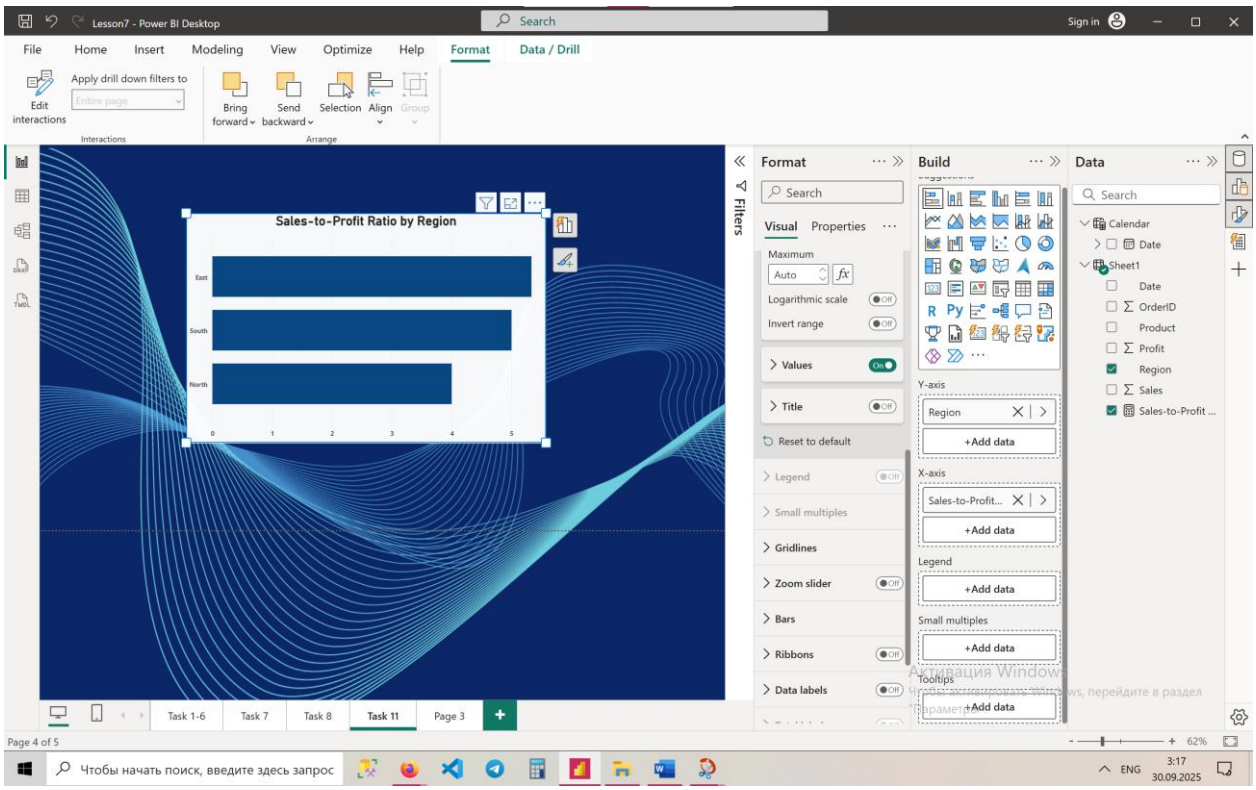
- In Power BI Service, open the report.
- Click **Share** → enter colleague's email → click **Send**.

Step 11. Add a custom "Sales Growth %" measure without DAX (Quick Measure)

- Right-click the table in **Fields pane** → **New Quick Measure**.
- Select **Calculation** → **Division** or **Month-over-month change**.
- Use Sales as the base field.


Lesson7 - Power BI Desktop
Search
Sign in
File
Home
Insert
Modeling
View
Optimize
Help
Table tools
Name
Sheet1
Manage relationships
New visual calculation
New measure
Quick measure
New column
New table
Calendar options
Structure
Relationships
Calculations
Calendars
Build visuals with your data
Select or drag fields from the Data pane onto the report canvas.
Filters
Format
Search
Page information
Canvas settings
Canvas background
Wallpaper
Filter pane
Filter cards
Build
Suggestions
Data
Select
New measure
New column
New quick measure
Refresh
Edit query
Incremental refresh
Manage aggregations
Rename
Delete from model
Hide
Calendar options
View hidden
Unhide all
Collapse all
Expand all
Sheet1
Task 1-6
Task 7
Task 8
Task 11
Page 3
Page 4 of 5
62%
Чтобы начать поиск, введите здесь запрос
UZB
1:09
30.09.2025


Lesson7 - Power BI Desktop
Search
Sign in
File
Home
Insert
Modeling
View
Optimize
Help
Table tools
Measure tools
Name
Sum of Sales divide...
Home table
Sheet1
Format
Whole number
Data category
Uncategorized
New measure
Quick measure
Structure
Formatting
Properties
Calculations
1 Sum of Sales divided by Sum of Profit =
2 DIVIDE(SUM('Sheet1'[Sales]), SUM('Sheet1'[Profit]))
Build visuals with your data
Select or drag fields from the Data pane onto the report canvas.
Search
Filters on this page
Add data fields here
Filters on all pages
Add data fields here
Quick measure
Copilot can help Get measure suggestions in DAX query view. Try it now
Select a calculation to create a measure.
Division
Calculate the ratio of a value to another one. Learn more
Numerator
Sum of Sales
Denominator
Sum of Profit
Add
Build
Suggestions
Data
+Add data
Data
Search
Calendar
Date
Sheet1
Date
OrderID
Product
Profit
Region
Sales
Sum of Sales di...
Task 1-6
Task 7
Task 8
Task 11
Page 3
Page 4 of 5
35%
Активация Windows
Чтобы активировать Windows, перейдите в раздел "Параметры".
Чтобы начать поиск, введите здесь запрос
РУС
3:10
30.09.2025



Step 12. Optimize the dataset for faster refresh

- Go to **Model view**.
- Remove unnecessary columns or fields not used in visuals.
- Delete unused tables if any.

Step 13. Troubleshoot: Slicers not affecting all visuals

- Select the slicer.
- Go to **Format → Edit Interactions**.
- Enable filtering for all visuals that should respond to the slicer.

Step 14. Embed the dashboard into a PowerPoint presentation

- In Power BI Service, open the report.
- Click **File → Export → PowerPoint → Embed live data**.
- Insert the interactive dashboard into your PowerPoint slides.

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

- Go to **Datasets → Settings** in Power BI Service.
- Expand **Scheduled refresh**.
- Turn it on, choose refresh frequency and time, then click **Apply**.