1. Imported Data from Excel:
    - Opened Power BI Desktop and used “Get Data” > “Excel” to import the required datasets.
    - Selected relevant sheets and loaded them into the data model.
2. Data Transformation:
    - Opened Power Query Editor.
    - Reviewed and changed data types (e.g.,Number to date) to ensure each column was in the correct format for analysis.
3. Data Modeling:
    - Created relationships between the three tables using the Customer ID column as the key.
    - Set the cross filter direction to “Both” for all relationships so filters can flow between all connected tables.
    - Verified relationship integrity and ensured there were no circular dependencies or inactive relationships.
4. Created Measures:
    - Used DAX (Data Analysis Expressions) to build calculated measures (e.g., Total Portfolio, Total Transactions, Average ROI).
    - Ensured measures were dynamic and responded correctly to filters and slicers.
5. Data Analysis & Visualization:
    - Analyzed trends and insights from the data using filters and slicers.
    - Built visualizations like Column chart, Line graph, tables, and KPIs based on analysis results.
    - Arranged visuals in a clean, logical dashboard layout for end-user understanding and applied background color as per Fidelity requirement

Embedding:

- Embed Report: Using Power BI Embedded option with Embed token we display reports securely in the web portal.
- Authenticate Users: Setting up Azure AD for user login and generate access tokens using OAuth 2.0
- RLS: By defining roles and DAX filters in power bi Desktop and adding users under the security in power bi service published dataset
- Optimize Date: By using incremental refresh, aggregations, direct query and filters to handle large datasets efficiently

Screenshot of the dashboard: