

# Power BI Dashboard Project Steps

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1. Import Retail\_Sales\_Data.xlsx into Power BI:

- Home → Get Data → Excel → Select file → Load.

2. Create a table visual showing Region and Sales:

- Add Table visual → Region to Rows, Sales to Values.

3. Add a slicer for Product:

- Add Slicer visual → Drag Product field.

4. Format dashboard theme to Dark Mode:

- View → Themes → Dark.

5. Purpose of Data/Model View:

- Data View = check data row by row.

- Model View = manage relationships.

6. Build a dashboard:

- Bar chart: Sales by Region.

- Line chart: Sales over Date.

- Card: Total Profit.

7. Add drill-through filter from Region to Detail Page:

- Create new page → Drill-through filter: Region.

- Right-click Region → Drill-through → Detail Page.

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

- Bar chart → Format → Data colors → Conditional formatting by Profit.

9. Publish the dashboard:

- Home → Publish → Select Workspace → Publish.

10. Share the report:

- In Power BI Service → Share → Enter colleague's email → Send.

11. Add custom Sales Growth % measure (Quick Measure, no DAX):

- Right click measure → Quick Measures → Time Intelligence → Year over Year Growth.

12. Optimize dataset for faster refresh:

- Power Query Editor → Remove unnecessary columns.

13. Troubleshoot slicers not affecting visuals:

- Format → Edit interactions → Set slicer to filter target visuals.

14. Embed dashboard into PowerPoint:

- PowerPoint → Insert → Power BI → Select Report link.

15. Set up scheduled refresh:

- Power BI Service → Dataset Settings → Scheduled refresh → On → Choose frequency/time.