Tableau and Docusign

Pacific Solutions Users Education Seminar

What is Tableau?

- It is a way to look at data graphically
- It is a way to quickly identify data trends
- It is a way to look at several data metrics at once, vs running several reports
- It is a way to analyze data interactively

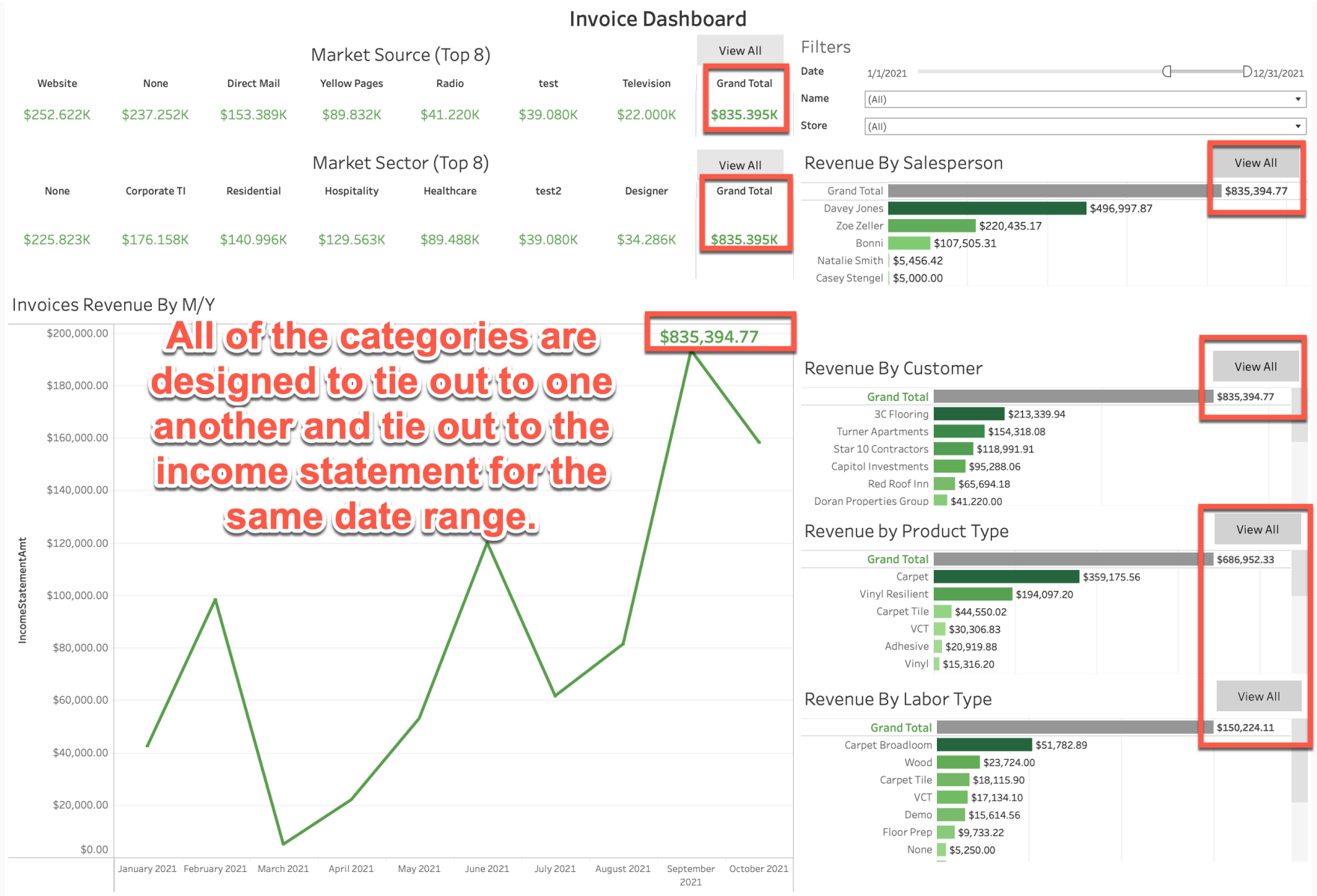
Invoice Dashboard
Market Source (Top 8)
Website
None
Direct Mail
Yellow Pages
Radio
test
Television
Grand Total
$252.622K
$237.252K
$153.389K
$89.832K
$41.220K
$39.080K
$22.000K
$835.395K
View All
Market Sector (Top 8)
None
Corporate TI
Residential
Hospitality
Healthcare
test2
Designer
Grand Total
$225.823K
$176.158K
$140.996K
$129.563K
$89.488K
$39.080K
$34.286K
$835.395K
View All
Filters
Date
1/1/2021
12/31/2021
Name
(All)
Store
(All)
Revenue By Salesperson
View All
Grand Total $835,394.77
Davey Jones $496,997.87
Zoe Zeller $220,435.17
Bonni $107,505.31
Natalie Smith $5,456.42
Casey Stengel $5,000.00
Invoices Revenue By M/Y
$835,394.77
All of the categories are designed to tie out to one another and tie out to the income statement for the same date range.
IncomeStatementAmt
$200,000.00
$180,000.00
$160,000.00
$140,000.00
$120,000.00
$100,000.00
$80,000.00
$60,000.00
$40,000.00
$20,000.00
$0.00
January 2021
February 2021
March 2021
April 2021
May 2021
June 2021
July 2021
August 2021
September 2021
October 2021
Revenue By Customer
View All
Grand Total $835,394.77
3C Flooring $213,339.94
Turner Apartments $154,318.08
Star 10 Contractors $118,991.91
Capitol Investments $95,288.06
Red Roof Inn $65,694.18
Doran Properties Group $41,220.00
Revenue by Product Type
View All
Grand Total $686,952.33
Carpet $359,175.56
Vinyl Resilient $194,097.20
Carpet Tile $44,550.02
VCT $30,306.83
Adhesive $20,919.88
Vinyl $15,316.20
Revenue By Labor Type
View All
Grand Total $150,224.11
Carpet Broadloom $51,782.89
Wood $23,724.00
Carpet Tile $18,115.90
VCT $17,134.10
Demo $15,614.56
Floor Prep $9,733.22
None $5,250.00

Tableau Live Presentation

Tableau Requirements

- The most current version of FloorManager and JobRunner.
- Since FloorManager and JobRunner communicate to the Tableau Cloud, an SSL Certificate is required.
- In a Pacific Solutions hosted environment, we separate the RDS (User Access Server) from the Data Server where JobRunner and FloorManager is installed. We did have some early adopter problems which we have overcome.

Tableau continued…

- Currently, we are only mapping to the invoice file, but other data metrics can be mapped which would require custom programming.
- There can be multiple dashboards, but each unique dashboard is its own subscription. Users can share dashboards
- Tableau Viewer vs Explorer
- UES Discounts for Tableau (subject to hardware review)