



Using Tableau - KPI Table Dashboard

The KPI Table Dashboard in Tableau gives you a table view of all of your KPIs (compared to prior periods), Targets, and Budgets. This Dashboard is available to ADs, RDs and Support Team Members.

Access

1. To access the KPI Dashboard browse to <https://tableau.whitewatercw.com> and login using your WhiteWater email address and email password.
2. From the Tableau landing page menu select KPI Table Dashboard



Navigation

1. At the top of the KPI Table Dashboard you have several Tabs to view your data



- a. **KPI** - This tab shows all of your key KPIs. Adjust the date ranges at the top of the page to view across different periods.
 - b. **KPI+Budget** - This tab shows all of your key KPIs compared to the store's Budgets and Targets to show how you are tracking your goals. The available date range for budgets and targets data is 1/1/24 - present.
 - c. **Growth** - This tab compares your KPIs to previous month and year stats to show how you are tracking over time.
 - d. **Product Mix** - This tab shows your Drive Up and Membership Sold wash mix KPIs. *We will be adding the active member mix in an upcoming release.*
 - e. **Markets** - This tab shows Market KPIs as a total to view how Markets are performing.
 - f. **RD Dashboard** - This tab shows the RD Dashboard and these reports will be integrated into Tableau over time.
2. Below the Tabs you have several filters to choose from to show the dataset you are looking for. Once you edit your filter click the Apply button located at the bottom of the dropdown list

Tip: By default all dropdown options are selected, but if you check "All" then uncheck "All" this will quickly remove all stores so you can select only your stores. This works on all dropdown menu options.

- a. **Start Date and End Date** - The current month to date range is selected by default. You can adjust this date range to view different points in time of the data.

Tip: The KPI Table Dashboard has 1 year of data loaded so you can go back as far as 1/1/2024.


- b. **Store** - Here you can adjust which store(s) you want to view then click the Apply button at the bottom of the dropdown menu. Uncheck the "All" button to remove all of the stores and select only the ones you want.
- c. **Market** - This will filter all stores by their Market.
- d. **Regional Director** - Use this filter to view stores by assigned Regional Director.
- e. **Area Director** - This filter will show all stores by their assigned Area Director.

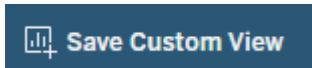
Tableau Features

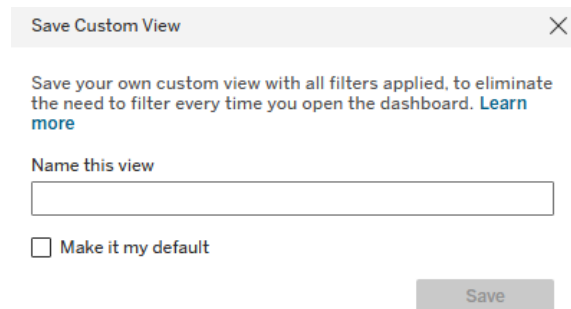
1. At the top of the screen you will see the built-in Tableau Menu. From here you can refresh your view, save your filtered view or export Tableau data.



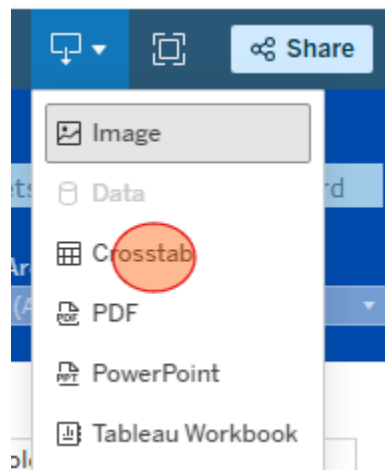
Here are some of key features in the Tableau Menu

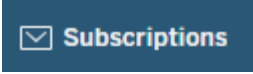
- a. **Refresh** - The third button from the left  is the refresh button. This will clear any filters you have set to get you back to a default dashboard view.

- b. **Save View** - The Save Custom View button  is shown once you edit the filters on the dashboard. This allows you to save your set filters to reuse and you can also set the view as your default view. The table will open to this view if you select “Make it my default”

A screenshot of the 'Save Custom View' dialog box. It has a title bar with 'Save Custom View' and a close button. The main text says: 'Save your own custom view with all filters applied, to eliminate the need to filter every time you open the dashboard. [Learn more](#)'. Below this is a text input field labeled 'Name this view'. At the bottom, there is a checkbox labeled 'Make it my default' and a 'Save' button.

- c. **Download** - This allows you to download the data that is currently displayed in Excel. Make sure to download the data using the “Crosstab” option.



- d. **Subscriptions** - From here  you can set up an automated email view of the KPI data. After you click Subscriptions you will be able to select what data you would like to include in the email, “This View” which will send what you currently see on your screen or “Entire Workbook” which includes all the tabs in this dashboard default view. It is recommended to only use the “This View” option.

Subscribe

×

Subscribe Users

Type to add users or groups

☐ Subscribe me

Include

This View

▼

☐ Don't send if view is empty

Format

Image

▼

Subject

KPI

Message (Optional)

Add a custom message

Frequency

On Selected Schedule

▼

Schedule

> 1 day a week, at 17:25

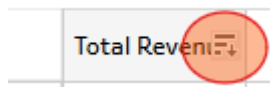
[Manage Subscriptions](#)

Cancel

Subscribe

2. Tableau also has some additional features when you click on the data points.

- a. Sorting
- i. When you hover your mouse over the column you can click the sort icon to sort those values

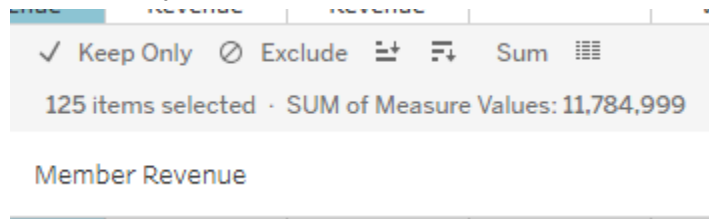


- b. Custom View
- i. Click on the column or row header to highlight the entire row or column. Do this while holding your CTRL button to select multiple rows or

columns.

Store	Total Revenue	Member Revenue
101 - Tomball	\$125,483	\$103,623
102 - Fairfield	\$159,066	\$135,004
103 - Telge	\$75,416	\$66,048
104 - Huntsville	\$104,783	\$85,510
105 - SpringWoods	\$93,933	\$81,421
106 - Katy	\$50,743	\$41,044
107 - Porter	\$97,949	\$81,758
108 - Channelview	\$98,388	\$78,034
109 - Katy Mills	\$55,740	\$45,227
110 - Crosby	\$120,995	\$100,603
111 - Atascocita	\$72,542	\$60,724

- ii. Then hover your mouse over the row and a menu will appear



- iii. Click on “Keep Only” to show only the column(s) and row(s) highlighted

KPI Table

Store	Drive Up Volume	Plans Sold
101 - Tomball	1,769	81
102 - Fairfield	2,229	134
Grand Total	3,998	215

- iv. Or you can also click “Exclude” to remove the highlighted row(s) or column(s) from your view.

DATE	REVENUE	REVENUE	...
<div> ✓ Keep Only ⊗ Exclude ⇅ ⇅ Sum ☰ </div> <div>125 items selected · SUM of Measure Values: 11,784,999</div>			
Member Revenue			

- v. To reset your view click the Refresh button

