Tableau Measure Data Descriptions

Overview

What follows is a working list of all measurable data within Tableau from service**minder**.

AppointmentAdditionalAgent

Name	Description
Appointment Id	The Tableau ID of the appointment affiliated with the appointment additional agent
ServiceAgentId (AppointmentAdditionalAgent)	The Tableau ID of the service agent affiliated with the appointment additional agent
AppointmentAdditionalAgent (Count)	Number of appointment additional agents

Appointments

Name	Description
Active (ServiceAgents)	Indication on whether or not the service agent affiliated with the appointment is active (True or False)
Actual Start	Date and Time the appointment actually started
Cancel Reason	The reason the appointment was canceled
Canceled At	Date and time the appointment was canceled
Completed At	
Contact Id	The Tableau ID of the contact affiliated with the appointment
CreatedAt (Appointments)	The date and time the appointment was created
Id (Appointments)	The Appointment's Tableau ID
Id (RevenueCategories)	
Id (ServiceAgents)	The Tableau ID of the Service Agent(s) affiliated with the appointment
Id (Services)	The Tableau ID of the Service affiliated with the appointment
Invoice Id	The Tableau ID of the Invoice affiliated with the appointment
Name (ServiceAgents)	The name of the Service Agent(s) affiliated with the appointment
Name (Services)	The name of the service affiliated with the appointment
OrganizationId (Appointments)	The Tableau ID of the organization affiliated with the appointment
Original Scheduled Start	The original date and time the appointment was scheduled to start

Name	Description
Recurring	Indication on whether or not the service affiliated with the appointment is recurring (True or False)
Revenue Category Id	
Rework For Appointment Id	
Root Proposal Id	
Route Schedule	
Route Schedule Year	
Scheduled Start	The data and time the appointment is scheduled to start
Service Agent Id	The Tableau ID of the service agent(s) affiliated with the appointment
Service Id	The Tableau ID of the service affiliated with the appointment
SourceId (Appointments)	The serviceminder ID of the appointment
SourceId (ServiceAgents)	The serviceminder ID of the service agent affiliated with the appointment
Taxable	Indication on whether or not the appointment is taxable (True or False)
Actual Duration	The actual duration the appointment took to complete
Gross Subtotal	The dollar amount of the appointment's gross subtotal
Kind	
Labor	
Margin Percent	
Materials	
Prorated Subtotal	
Quantity	
Scheduled Duration	The duration of time the appointment was scheduled (expected) to take
Start Distance	The distance between where the service agent started the appointment and the actual service address of the appointment
Status	Status of the appointment (refer to 10.4.2 - Tableau Status Codes)
Subtotal	Dollar amount of the appointment's subtotal (after discounts, taxes, labor, or other expenses being applied)
Appointments (Count)	Number of Appointments

Brandings

Name	Description
Id	
Name	
Source Id	

Name	Description
Brandings (Count)	Number of brandings

Campaigns

Name	Description
Channel	Name of the channel
Id (Campaigns)	The Tableau ID of the campaign
Name (Campaigns)	Name of the campaign
Organization Id	The Tableau ID of the organization affiliated with the campaign
SourceId (Campaigns)	The serviceminder ID of the campaign
Campaigns (Count)	Number of Campaigns

CampaignSpends

Name	Description
Campaign Id	The Tableau ID of the campaign affiliated with the campaign spend
Date	
Id (CampaignSpends)	The Tableau ID of the campaign spend
Month	
Year	
Amount	The dollar amount of the campaign spend
CampaignSpends (Count)	Number of Campaign Spends

Contacts

Name	Description
Accounting Class Id	The Tableau ID of the accounting class
Active	Indication on whether or not the contact is active (True or False)
API Key	
Billing City	The city of the contact's billing address
Billing State	The state of the contact's billing address
Billing Zip	The zip code of the contact's billing address
BillingAddress1	The street address of the contact's billing address
BillingAddress2	The continued street address of the contact's billing address (i.e. unit, suite, etc.)
Campaign	The name of the campaign affiliated with the contact

Name	Description
Card On File	Indication on whether or not there is a card on file ffiliated with the contact (True or False)
Channel (Contacts)	The name of the channel affiliated with the contact
Company	The name of the company affiliated with the contact
Contact Category Id	The Tableau ID of the contact category
Created At	The date and time the contact was created
Credit Hold	Indication on whether or not there is a credit hold affiliated with the contact (True or False)
Customer Since	The date a contact has been a customer since
Do Not Email	Indication on whether or not this contact can be emailed (True or False)
Do Not Mail	
Email (Contacts)	Indication on whether or not this contact can be mailed (True or False)
Id (Accounting Classes)	The Tableau ID of the accounting class affiliated with the contact
Id (ContactCategories)	The Tableau ID of the contact category affiliated with the contact
Id (Contacts)	The Tableau ID of the contact
Is Customer	Indication on whether or not this contact is a customer (True or False)
Last Invoice Date	Date and time a contact was last invoiced
Last Service Date	Date and time a contact was last serviced
Last Touch	
Name (AccountingClasses)	The name of the accounting class affiliated with the contact
Name (ContactCategories)	The name of the contact category affiliated with the contact
Name (Contacts)	The name of the contact
Next Appointment Date	The date and time of a contact's next appointment
Next Service Date	The date and time of a contact's next service
Next Service Id	The Tableau ID of the contact's next service
OrganizationId (AccountingClasses)	The Tableau ID of the organization affiliated with the accounting class
OrganizationId (Contacts)	The Tableau ID of the organization affiliated with the contact
Phone1	The primary phone number associated with the contact
Phone1Label	The type of phone associated with the contact's primary phone number (i.e. Home, Cell, Work)
Phone2	The secondary phone number associated with the contact
Phone2Label	The type of phone associated with the contact's secondary phone number (i.e. Home, Cell, Work)
Referred By Contact Id	The referring Contact's ID in Tableau

Name	Description
Service City	The city of the contact's service address
Service State	The state of the contact's service address
Service Zip	The zip code of the contact's service address
ServiceAddress1	The street address of the contact's service address
ServiceAddress2	The continued street address of the contact's service address (i.e. unit, suite, etc.)
SourceId (AccountingClasses)	The serviceminder ID of the accounting class
SourceId (Contacts)	The serviceminder ID of the contact
Tax Rate	
Territory	
Updated At	Date and time the contact was most recently updated
Balance	Balance due for the contact
Current Year Appt Count	
Last Year Appt Count	
Latitude	
Lifetime value of the contact	
Longitude	
Prior Year Appt Count	
PriorYear3ApptCount	
PriorYear4ApptCount	
PriorYear5ApptCount	
Contacts (Count)	Number of contacts

ContactSummariesByYear

Name	Description
ContactId (ContactSummariesByYear)	The Tableau ID of the contact affiliated with the contact summaries by year
Year (ContactSummariesByYear)	
Appointment Count	
ContactSummariesByYear (Count)	Number of contact summeries by year

Forecasts

Name	Description
Date (Forecasts)	
Id (Forecasts)	
Month (Forecasts)	
OrganizationId (Forecasts)	The Tableau ID of the organization affiliated with the forecast
Year (Forecasts)	
Amount (Forecasts)	
Forecasts (Count)	

InvoiceLines

Name	Description
Category	
Exchange	
Id (InvoiceLines)	
Id (Parts)	
InvoiceId (InvoiceLines)	
Name (Parts)	
Option	
Part Id	
RevenueCategoryId (Parts)	
Taxable (InvoiceLines)	
Amount (InvoiceLines)	
Quantity (InvoiceLines)	
Rate	
Unit Cost	
InvoiceLines (Count)	

Invoices

Name	Description
ContactId (Invoices)	ID of the Invoice's contact
CreatedAt (Invoices)	Date and time the invoice was created
Date (Invoices)	Date of / on the invoice
Date Paid	Date the invoice was fully paid

Name	Description
Id (Invoices)	The Tableau ID of the invoice
Id (RevenueCategories1)	
Id (Services1)	The Tableau ID of the service(s) affiliated with the invoice
Installment Plan	
Job Number	
Name (RevenueCategories1)	
Name (Services1)	The name of the service(s) affiliated with the invoice
Number	
OrganizationId (Invoices)	The Tableau ID of the organization affiliated with the invoice
Refund Written Off	
RevenueCategoryId (Services1)	
RootProposalId (Invoices)	
RouteSchedule (Invoices)	
ServiceAgentId (Invoices)	The Tableau ID of the service agent(s) affiliated with the invoice
ServiceId (Invoices)	The Tableau ID of the service(s) affiliated with the invoice
SourceId (Invoices)	The Tableau ID of the service(s) affiliated with the invoice
Tax Rate Name	
Taxable (Invoices)	
Balance Due	Dollar amount of the balance due on the invoice
GrossSubtotal (Invoices)	Dollar amount of the invoice's gross subtotal
Status (Invoices)	Status of the proposal (refer to 10.4.2 - Tableau Status Codes)
Subtotal (Invoices)	Dollar amount of the subtotal (after discounts, taxes, labor, or other expenses being applied) on the invoice
Tax	
TaxRate (Invoices)	
Total	
Type	
Invoices (Count)	Number of Invoices

OrganizationMember

Name	Description
Active (ServiceAgents1)	Indication on whether or not the service agent is active (True or False)
Active (Users1)	Indication on whether or not the User is active (True or False)

Name	Description
Id (ServiceAgents1)	The Tableau ID of the service agent
Id (Users1)	The Tableau ID of the user
Name (ServiceAgents1)	The name of the service agent
Name (Users1)	The name of the user
OrganizationId (OrganizationMember)	The Tableau ID of the organization affiliated with the organization member
Role (Users1)	
ServiceAgentId (Users1)	The Tableau ID of the service agent
SourceId (ServiceAgents1)	The serviceminder ID of the service agent
SourceId (Users1)	The serviceminder ID of the user
User Id	The Tableau ID of the user
Kind (ServiceAgents1)	Indication for the kind of service agent (refer to 10.4.2 - Tableau Status Codes)
OrganizationMember (Count)	Number of Organization Members

OrganizationPostalCodes

Name	Description
Id (OrganizationPostalCodes)	The Tableau ID of the organization postal code
Kind (OrganizationPostalCodes)	
OrganizationId (OrganizationPostalCodes)	The Tableau ID of the organization affiliated with the organization postal code
Postal Code	
OrganizationPostalCodes (Count)	Number of Organization Postal Codes

Organizations

Name	Description
Account Manager Id	Tableau ID of the account manager affiliated with the organziation
Angies List Review Url	URL of the organization's Angies List review page
Branding Id	
Cancel Date	
Deleting	
Email	Email address of the organization

Name	Description
Facebook Review Url	URL of the organization's Facebook review page
Facebook Url	URL of the organization's Facebook page
Google Review Url	URL of the organization's Google review page
Home Advisor Review Url	URL of the organization's Home Advisor review page
Home Stars Url	URL of the organization's Home Stars page
Houzz Review Url	URL of the organization's Houzz review page
Houzz Url	URL of the organization's Houzz page
Id (AccountManagers)	Tableau ID of the account manager affiliated with the organziation
Id (Organizations)	Tableau ID of the organziation
Instagram Url	URL of the organization's Instagram page
Legal Entity Name	
Locale	
Location ID	
Name (AccountManagers)	Name of the account manager affiliated with the organziation
Name (Organizations)	(External) name of the organization
Next Door Url	URL of the organization's Next Door page
Open Since	Date the organization was opened
Pinterest Url	URL of the organization's Pinterest page
Primary Phone	Primary phone number of the organization
Region Id	
SourceId (AccountManagers)	The serviceminder ID of the account manager affiliated with the organization
SourceId (Organizations)	The serviceminder ID of the organization
Taxpayer ID	
Twitter Url	URL of the organization's Twitter page
Warehouse Address	Street address where the organization's warehouse is located
Warehouse City	City where the organization's warehouse is located
Warehouse Postal Code	Postal Code where the organization's warehouse is located
Warehouse State	State where the organization's warehouse is located
Website	URL of the organization's website
Yelp Review Url	URL of the organization's Yelp review page
Yelp Url	URL of the organization's Yelp page
You Tube Url	URL of the organization's Youtube page

Name	Description
Minimum Annual Campaign Spend	
Organizations (Count)	Number of Organizations

Payments

Name	Description
ContactId (Payments)	The Tableau ID of the contact affiliated with the proposal
Date (Payments)	Date the payment was made
Detail Type	
Id (Payments)	Tableau ID of the payment
InvoiceId (Payments)	The Tableau ID of the Invoice affiliated with the payment
Method	Payment method used for the payment
OrganizationId (Payments)	The Tableau ID of the organization affiliated with the payment
Reference	
SourceId (Payments)	The serviceminder ID of the payment
Amount (Payments)	The dollar amount of the payment
Payments (Count)	Number of Payments

Proposals

Name	Description
Accepted By User Id	ID of the user that accepted the Proposal
Accepted Date	Date the proposal was accepted
Active (Users)	Indication on whether or not the User affiliated with the proposal is active (True or False)
Bundled With Proposal Id	The Tableau ID of the proposal a given proposal is bundled with affiliated
ContactId (Proposals)	The Tableau ID of the contact affiliated with the proposal
CreatedAt (Proposals)	Date the proposal was created
Date (Proposals)	Date of / on the proposal
Id (Proposals)	The Tableau Id of the proposal
Id (RevenueCategories2)	
Id (Services2)	The Tableau ID of the service(s) affiliated with the proposal
Id (Users)	The Tableau ID of the user(s) affiliated with the proposal
Last Viewed	Date the proposal was last (most recently) viewed
Name (RevenueCategories2)	

Name	Description
Name (Services2)	Name of the service (or services) on the proposal
Name (Users)	Name of the user (or users) affiliated with the proposal
OrganizationId (Proposals)	The Tableau ID of the organization affiliated with the proposal
Owner User Id	The Tableau ID of the proposal's owner
Payment Plan	
PrintedAt	The date and time the proposal was printed
RevenueCategoryId (Services2)	
Role	
RouteSchedule (Proposals)	
RouteScheduleYear (Proposals)	
Selected Solution	
Sent At	Date and time the proposal was sent
ServiceAgentId (Users)	The Tableau ID of the Service agent(s) affiliated with the proposal
ServiceId (Proposals)	The Tableau ID of the Service(s) affiliated with the proposal
SourceId (Proposals)	The serviceminder ID of the proposal
SourceId (Users)	The serviceminder ID of the user(s) affiliated with the proposal
ChangeOrderForProposalId	
Deposit	Dollar amount of the deposit(s) on a proposal
Duration	
Invoiced Percent	
Progress Percent	
Status (Proposals)	Status of the proposal (refer to 10.4.2 - Tableau Status Codes)
Subtotal (Proposals)	Dollar amount of the proposal's subtotal
Type (Proposals)	
Value	
Visits	
Proposals (Count)	Number of Proposals