

ServiceMinder Insights

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Overview

Insights®, formerly known as *Tableau as a Service*, is serviceminder's integrated **data warehouse and custom reporting platform**. It enables real-time analytics and brand-level data visualization using **Tableau**. To learn more about this add-on, speak with your Account Manager.

Insights Includes:

- A near real-time **Data Warehouse** synced from serviceminder.
 - Custom **Tableau dashboards** developed with your brand point of contact.
 - Management of all **Tableau infrastructure**, licenses, and backend services.
 - Initial setup includes **six customized dashboards**.
 - Embedded dashboard views directly within serviceminder for brand leaders and franchisees.
 - **Unlimited viewer licenses** for franchisees.
 - **Explorer licenses** for brands to build additional Tableau workbooks/dashboards.
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Operational Details

Insights® uses serviceminder's **publish-subscribe mechanism** to send data:

1. **Transactional data** is sent from Serviceminder to the **Data Warehouse**.
2. **Tableau** runs on top of this warehouse.
3. Data is **not sent directly** to Tableau — it flows through the warehouse first

Only **referenced serviceminder transactions** are pushed to the Data Warehouse. If data isn't referenced in a transaction, it won't appear in Tableau. Data updates in serviceminder are synchronized in near-real-time to the data warehouse.

Data Security

Insights® includes multiple layers of data security to ensure appropriate access and visibility:

- **Row-Level Security** is built in. Each user or franchisee sees only their organization's data.
 - Dashboards can also include and compare **brand-level metrics** where appropriate.
 - Access to dashboards is embedded and controlled through serviceminder permissions, reducing exposure risk.
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Create Brand Culture

While viewer access is unlimited, providing **Explorer licenses** to franchise owners:

- Encourages a consistent understanding of KPIs.
- Enables power users to build or modify dashboards as needed.
- Elevates your brand's data culture and internal communication. Creates a culture where the entire brand

speaks the same language.
