

# GETTING STARTED WITH QUICK SUITE

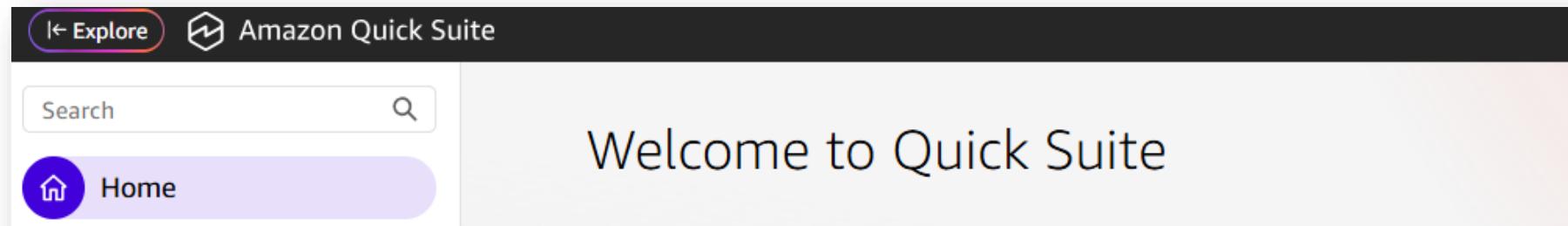
Utility Customer Participation and  
Performance QuickSight Dashboards



# WHAT ARE QUICK SUITE & QUICKSIGHT?

**Quick Suite** is a set of online tools provided by Amazon Web Services (AWS) for managing and analyzing data. Upon log in, you'll see Quick Suite branding as QuickSight is part of this suite.

**QuickSight** is a dashboard application that shows near real-time information about utility customer participation in the Focus on Energy program. It also lets you search and analyze past participation data.



# WHY SHOULD I USE IT?

Gain **secure** access to **customizable** data related to customers' participation in Focus!

- Customer name
- Address
- equipment/measures
- Focus program
- energy savings (annual and lifecycle)
- incentive amount
- Trade Ally



**TIP:** QuickSight data is perfect for internal reporting and tracking marketing success!

# STEP 1: REQUEST ACCESS

To request access to your utility's Quick Suite dashboards, please reach out to:

**Jennie Brooks**

*Focus on Energy Utility Relations Manager*

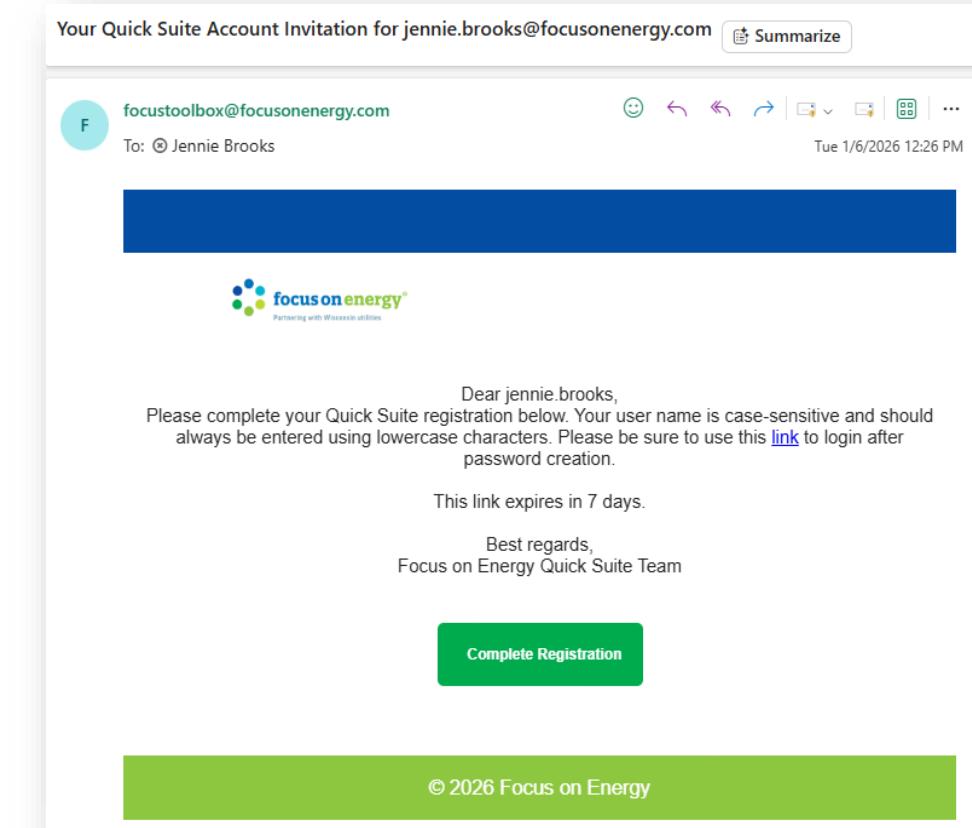
✉ [Jennie.Brooks@focusonenergy.com](mailto:Jennie.Brooks@focusonenergy.com)

📞 608.716.8383



# STEP 2: COMPLETE REGISTRATION

When Focus on Energy has added you as a user, you will receive an email from **focustoolbox@focusonenergy.com** with instructions to complete your registration.



**TIP: Check your SPAM or promotions folders if you do not see the email in your inbox. The link to register is only valid for seven (7) days.**

# STEP 3: CREATE PASSWORD

Password must:

- Be between 8-64 characters
- Use upper and lower case letters
- Use a number
- Use a symbol



**Confirm that your browser shows the correct URL. If the URL starts with us-east-1, you must change that portion of the URL to us-west-2.**

New user sign up

Enter your user information

Username:  
jennie.brooks@focusonenergy.com

Email: jennie.brooks@focusonenergy.com

New password

Confirm password

Show password

Set new password

# STEP 4: SIGN IN

1. Enter Quick Suite account name: **focusonenergy-quicksight**
2. Enter Username: the email address that was used to register
3. Enter the password created in the previous step
4. Click “Sign in”



**TIP:** The sign in fields are case sensitive. The Quick Suite account name and username must be entered in LOWERCASE.

The image displays three sequential screenshots of the Amazon Quick Suite sign-in interface. The first screenshot shows the 'Sign in' page with a 'Quick Suite account name' field containing 'focusonenergy-quicksight' and a 'Next' button. The second screenshot shows the 'Sign in to focusonenergy-quicksight' page with a 'Username' field containing 'jennie.brooks@focusonenergy.com' and a 'Next' button. The third screenshot shows the final sign-in page with a 'Username' field containing 'jennie.brooks@focusonenergy.com', a 'Password' field, a 'Show password' checkbox, a 'Forgot password?' link, and 'Sign in' and 'Cancel' buttons.

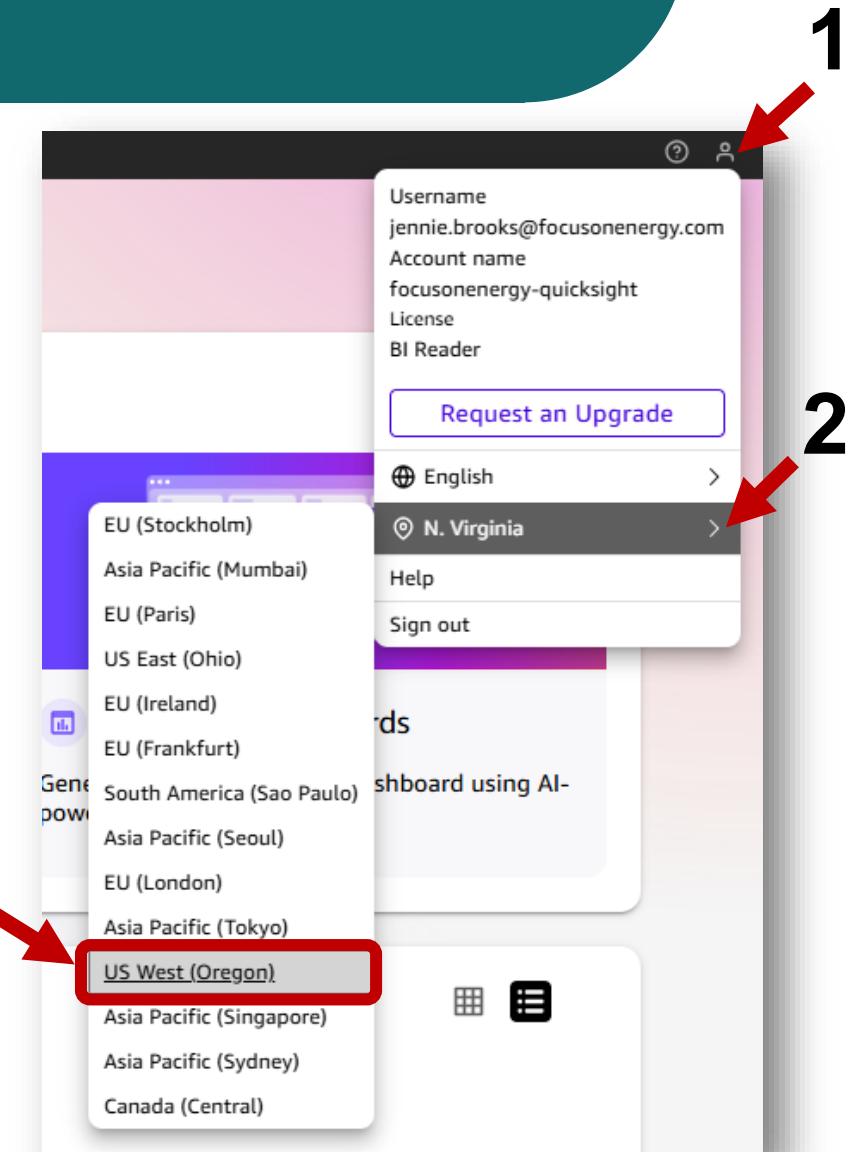
# STEP 5: SET LOCATION

Once in Quick Suite you will see a tutorial splash screen. You are welcome to click “Show me more” or bypass by clicking the “X” in the upper right-hand corner.

In order to access the QuickSight dashboards you must ensure your location is set to “**US West (Oregon)**”.



**TIP:** QuickSight is the only application you will have access to in Quick Suite.



# STEP 6: ACCESS DASHBOARDS

Click “Dashboards” on the left sidebar. You will see three\* options:

- Utility Report Full Downloader
- Utility Report – Front Page
- All Focus Performance

Search

Home

Favorites

QUICK SIGHT

Dashboards

Stories

Topics

Shared folders

Dashboards

Share interactive data visualizations

Share custom, interactive visualizations that help your team turn data into actionable insights. Stay focused on your goals by filtering visualizations, and generating snapshots to highlight key information.

Learn more

Dismiss

Executive summary

Claims Summary

Ask a question about Claims Summary...

Name	Owner	Last Updated	Action
Utility Report Full Downloader	Others	2 months ago	⋮
Utility Report - Front Page	Others	2 months ago	⋮
All Focus Performance	Others	2 months ago	⋮

\*Some utilities may have access to additional dashboards.

# DASHBOARD: UTILITY REPORT FULL DOWNLOADER

## The deep dive.

- Filter data to customize your view
  - Hover over the ⓘ next to the filter name for a description
- See all rebate/incentive details in one spreadsheet
- Export easily to CSV or Excel

The screenshot shows the Amazon Quick Suite interface for a 'Utility Report Full Downloader'. At the top, a tooltip for the 'Portfolio ⓘ' filter is displayed, stating 'Associated with a specific funding source or budget.' Below the tooltip are various filter controls: Start Date (2025/01/01), End Date (2025/12/30), Program (All), Offering (All), Customer Sector (All), Measure Group (All), Measure Category (All), Customer Name (All), Measure Master Name (All), Fuel Type Saved (All), Utility Name (All), Site Street (All). Below the filters is a table titled 'Utility Report Download - Click Top Right Corner of this table and select 'Export to CSV''. The table contains three rows of data: Program: Direct to Customer, Offering: Packs, Measure Master Name: Weatherization Pack. In the bottom right corner of the table, there is a red box highlighting the 'Export to CSV' and 'Export to Excel' buttons. At the very bottom of the dashboard, there is a 'Reset to original dashboard' button with a red arrow pointing to it.

Program	Offering	Measure Master Name
Direct to Customer	Packs	Weatherization Pack
Direct to Customer	Packs	Weatherization Pack
Direct to Customer	Packs	Weatherization Pack
Direct to Customer	Packs	Weatherization Pack

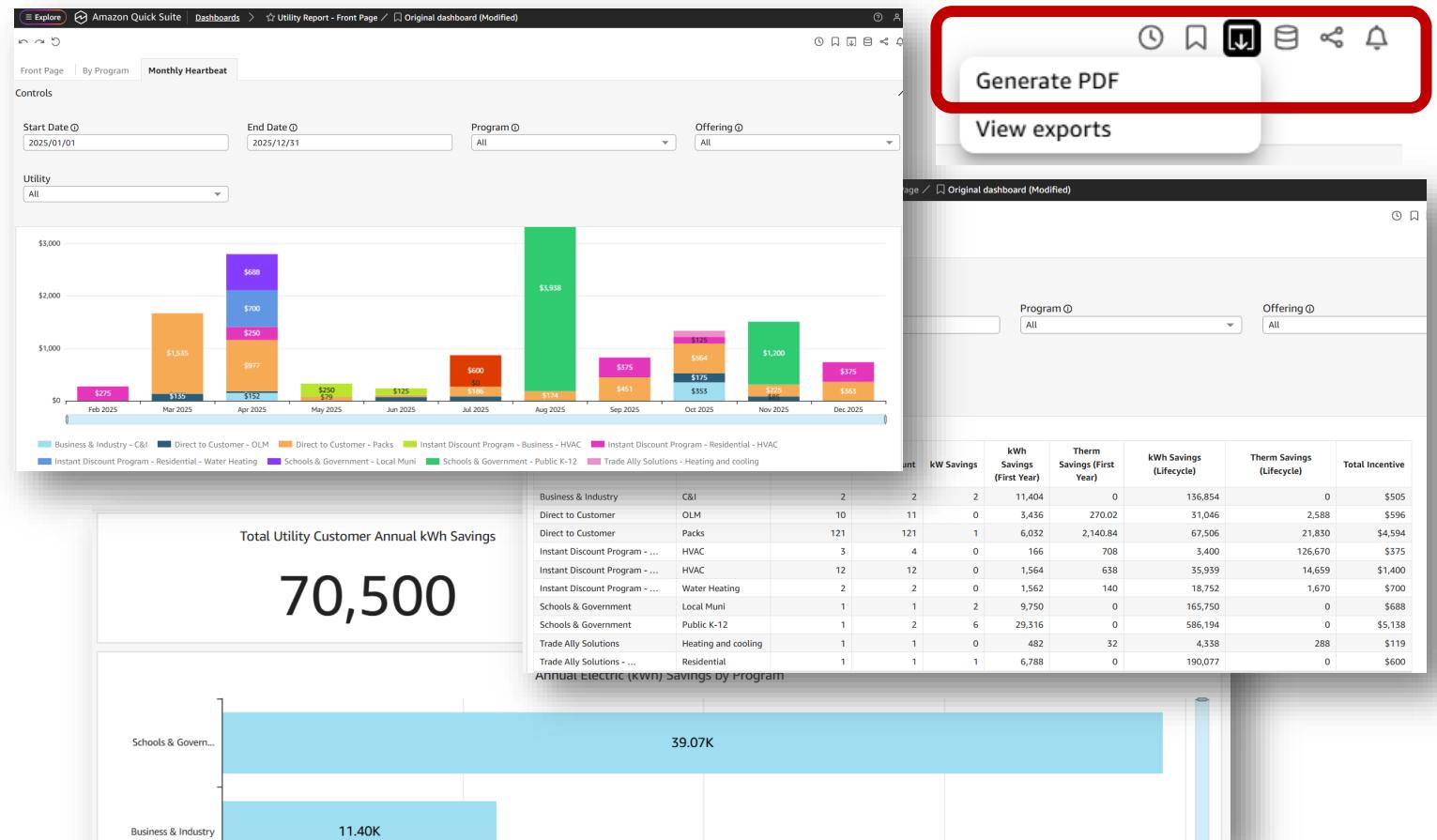


**TIP: Filters automatically save, even if you leave the dashboard. Click the “Reset to original dashboard” button in the upper left-hand corner to start fresh.**

# DASHBOARD: UTILITY REPORT – FRONT PAGE

## The snapshot.

- Cumulative view of your utility's customer participation across programs
- Uses charts and graphs to display data
- Export visuals to PDF using download icon in upper right-hand corner



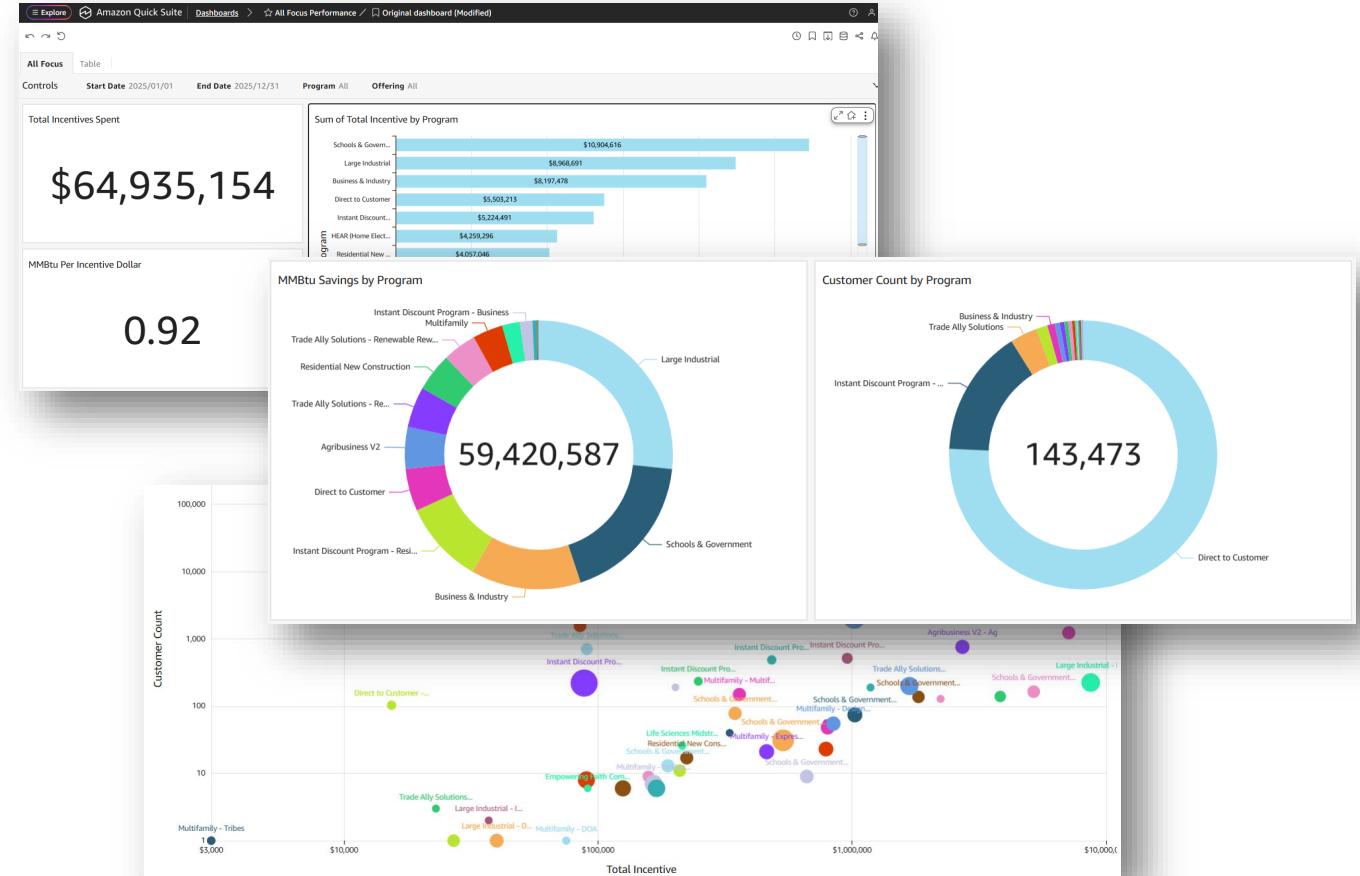
**TIP: Filters automatically save, even if you leave the dashboard. Click the “Reset to original dashboard” button in the upper left-hand corner to start fresh.**



# DASHBOARD: ALL FOCUS PERFORMANCE

## The big picture.

- Cumulative view of **ALL** customer participation across programs
- Compare utility participation vs. overall participation
- Note: Year-over-year data may not be directly comparable due to program changes

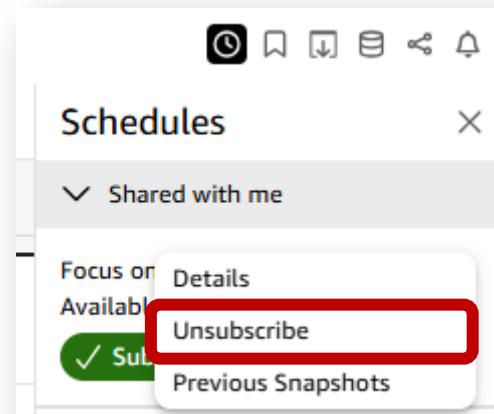


**TIP: Filters automatically save, even if you leave the dashboard. Click the “Reset to original dashboard” button in the upper left-hand corner to start fresh.**



# DASHBOARD FUNCTIONS

**Scheduling:** You will automatically receive an email with a dashboard report on the first day of the month. You can unsubscribe here:



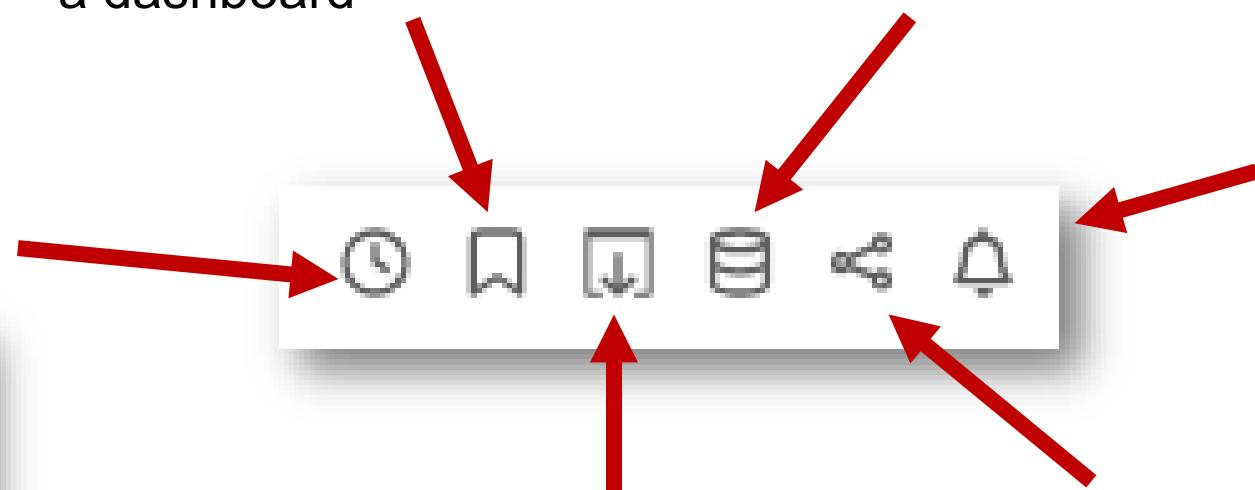
**Bookmark “original dashboard”:** Save custom views created of a dashboard

**Data:** Displays what datasets are being pulled into dashboard

**Alerts:** Set up automatic alerts to monitor your data, includes existing filters

**Export:** Generate a PDF of the dashboard and view previous exports

**Share:** Share a link to a dashboard view with other users who have access to Quick Suite



# DATA FUNCTIONS

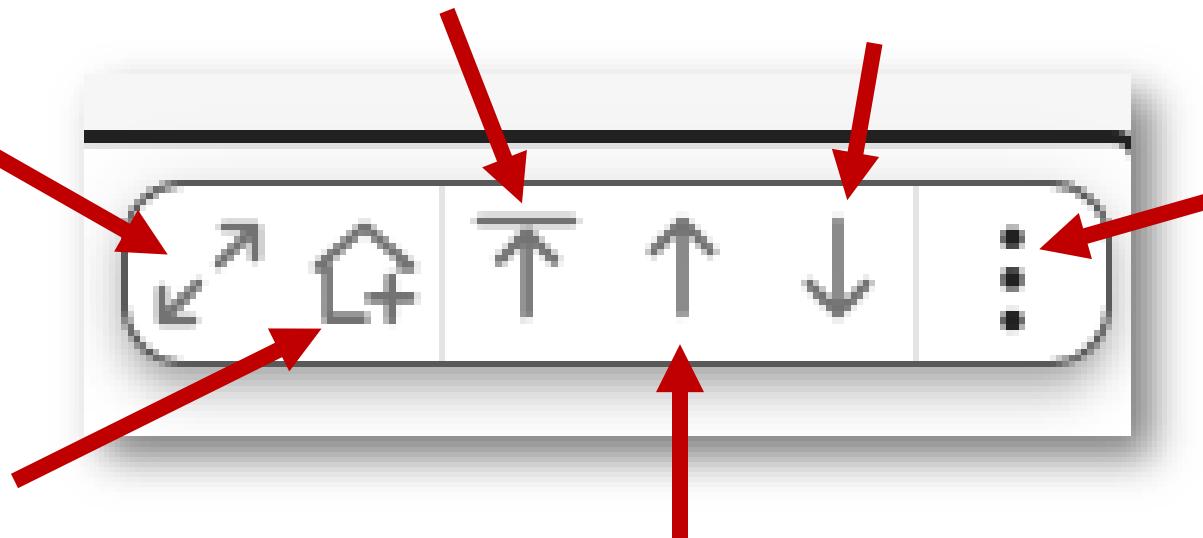
**Maximize:** display data across entire screen

**Drill up to top:** Show highest-level summary view of data

**Drill down from:** Go deeper into detail of data

**Add visual to home screen:** Create a custom dashboard by combining data and charts from multiple dashboards on home page

**Drill up from:** Show higher-level summary of data



## Menu options:

- **View summary data:** shows a summary of the data columns being pulled into data/chart
- **Export to CSV:** Download data to CSV format
- **See contributors:** See what fields are being used in data/chart

# PROGRAM NAME CHEAT SHEET

QuickSight program name:	→	You may know it as:
Direct to Customer		Free packs & marketplace
Instant Discount Program		HVAC & water heater rebates (as of July 2024)
Trade Ally Solutions		Insulation, air sealing, and renewables rebates

# CONTACT INFORMATION

**Jennie Brooks**

*Utility Relations Manager*

 [Jennie.Brooks@focusonenergy.com](mailto:Jennie.Brooks@focusonenergy.com)

 608.716.8383