GETTING STARTED WITH QUICK SUITE

Utility Customer Participation and Performance QuickSight Dashboards

Updated: 1/8/2026

focus on energy®
Partnering with Wisconsin utilities

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.
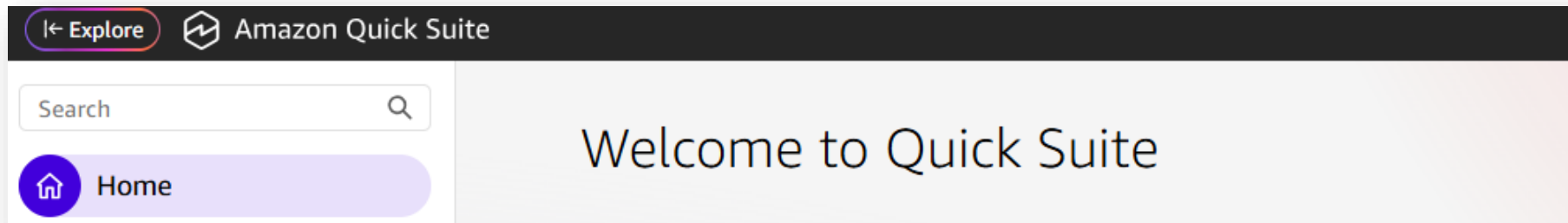
WHY SHOULD I USE IT?

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:

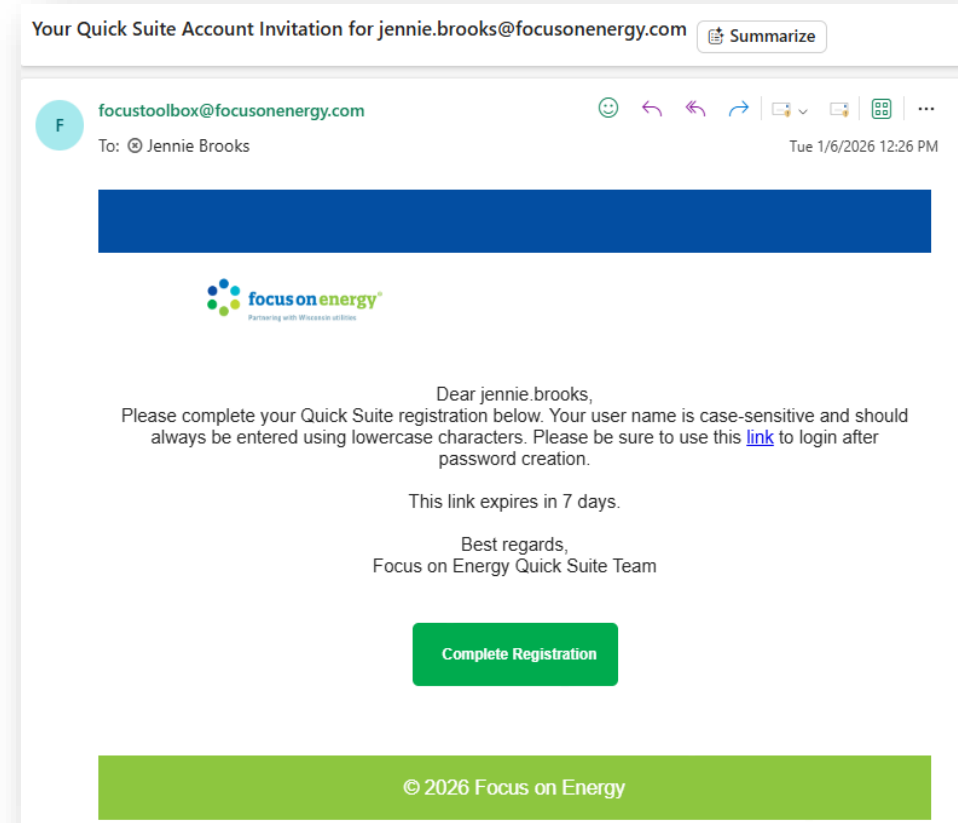## Jennie Brooks

Focus on Energy Utility Relations Manager

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📞 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.**
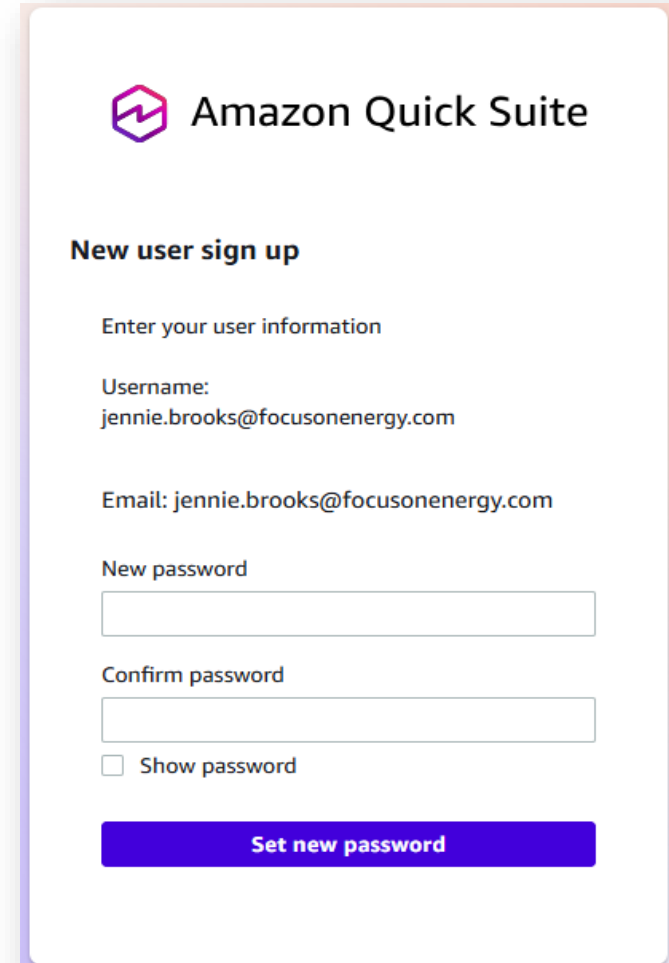
STEP 3: CREATE PASSWORD

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.

Amazon Quick Suite

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.

STEP 5: SET LOCATION

1

2

3
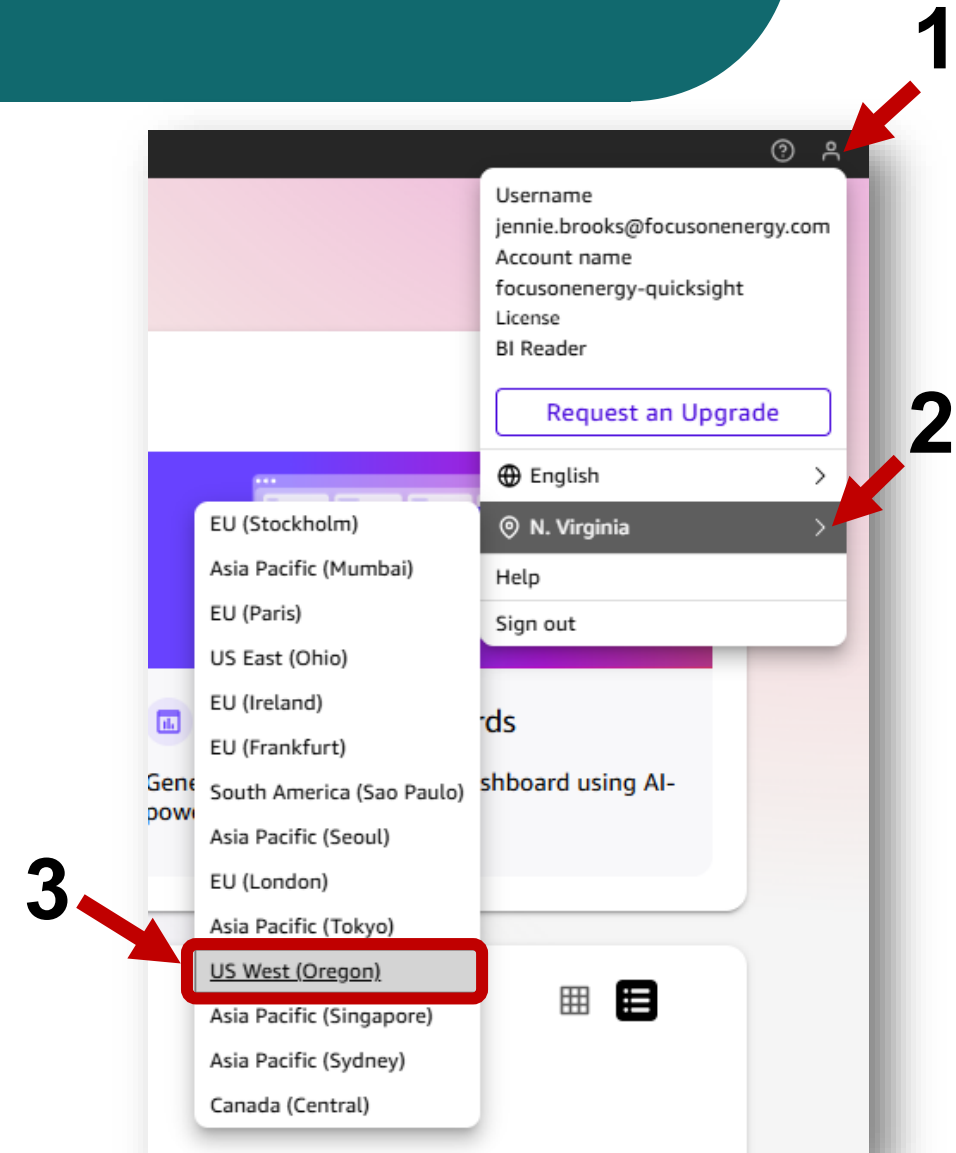
Once in Quick Suite you will see a tutorial splash screen. You are welcome to click "Show me more" or bypass by clicking the "X" in the upper right-hand corner.

In order to access the QuickSight dashboards you <u>must</u> ensure your location is set to "**US West (Oregon)**".

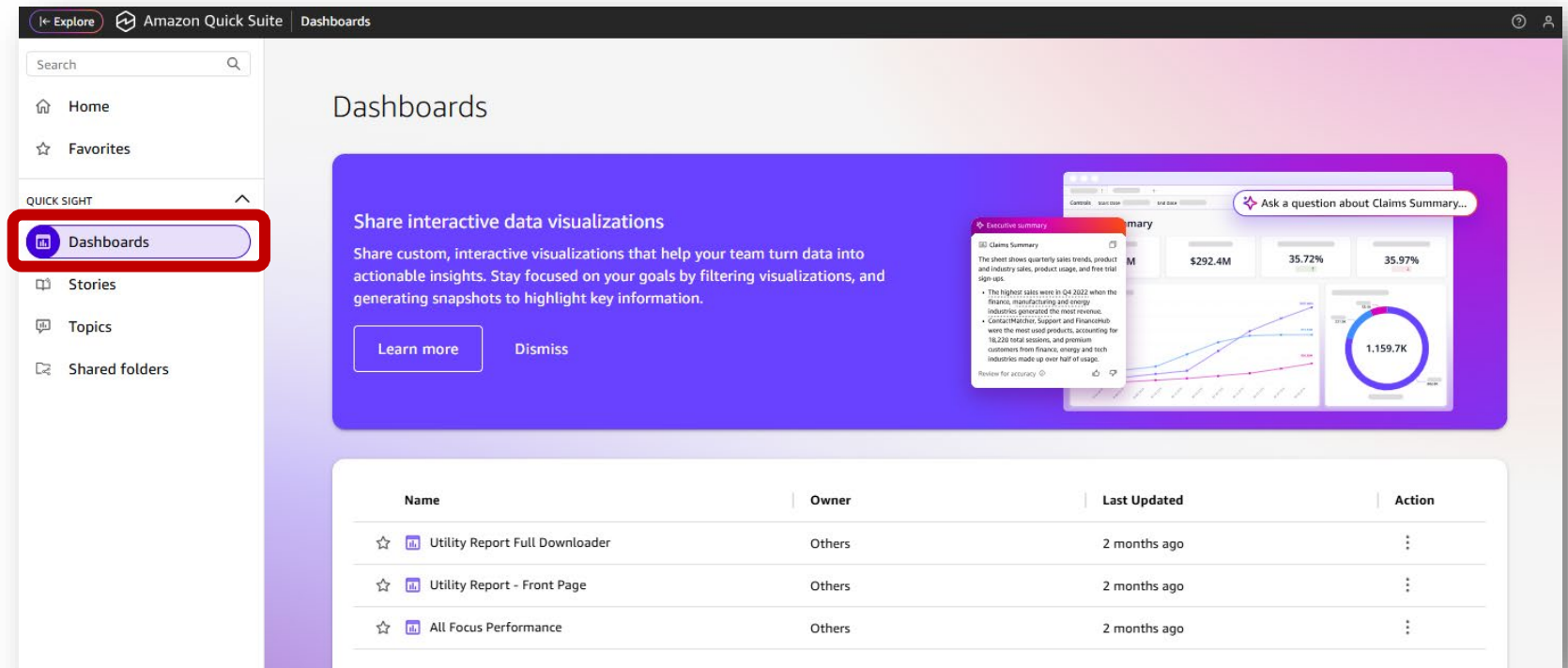**TIP: QuickSight is the only application you will have access to in Quick Suite.**

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

*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

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
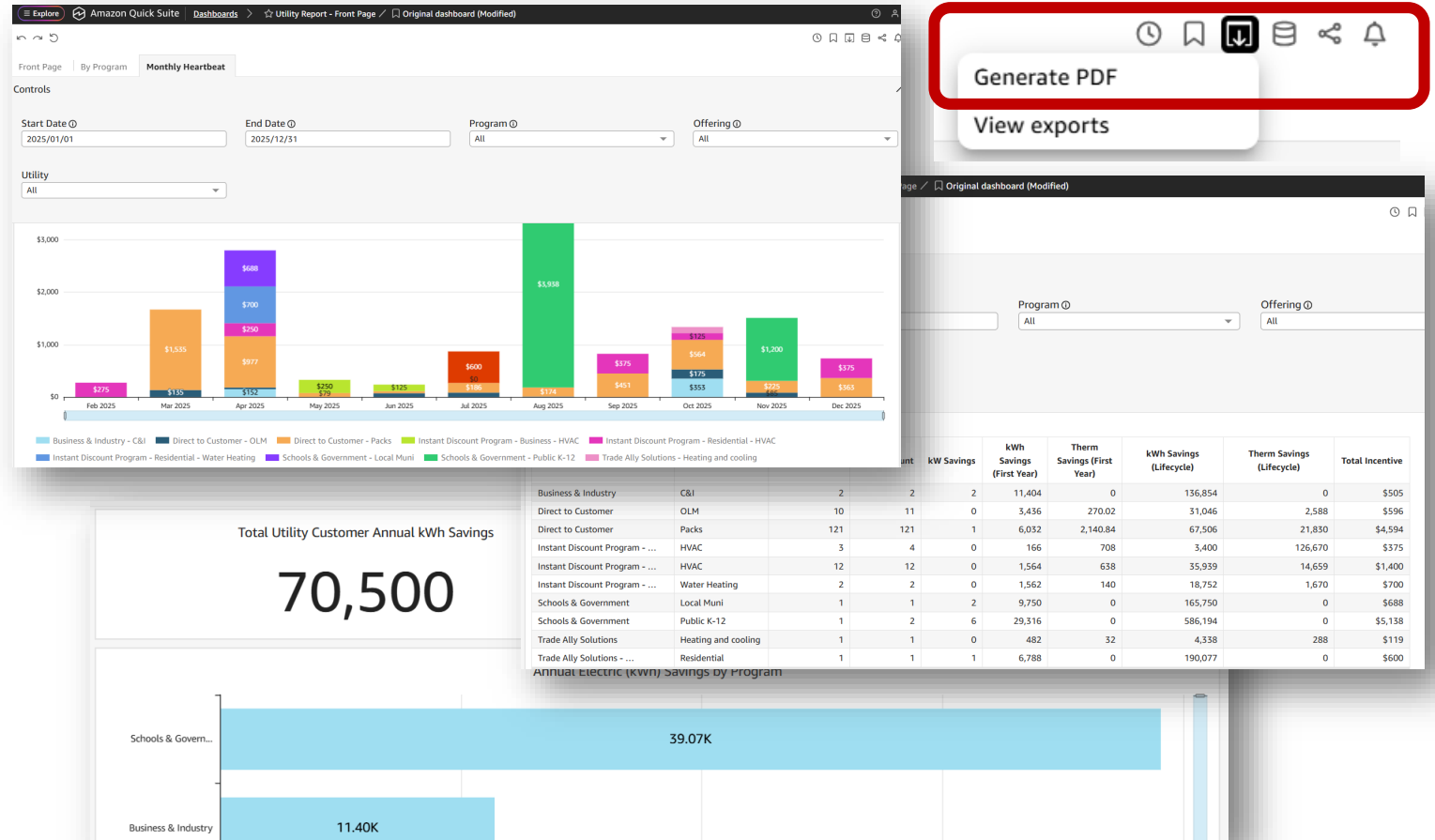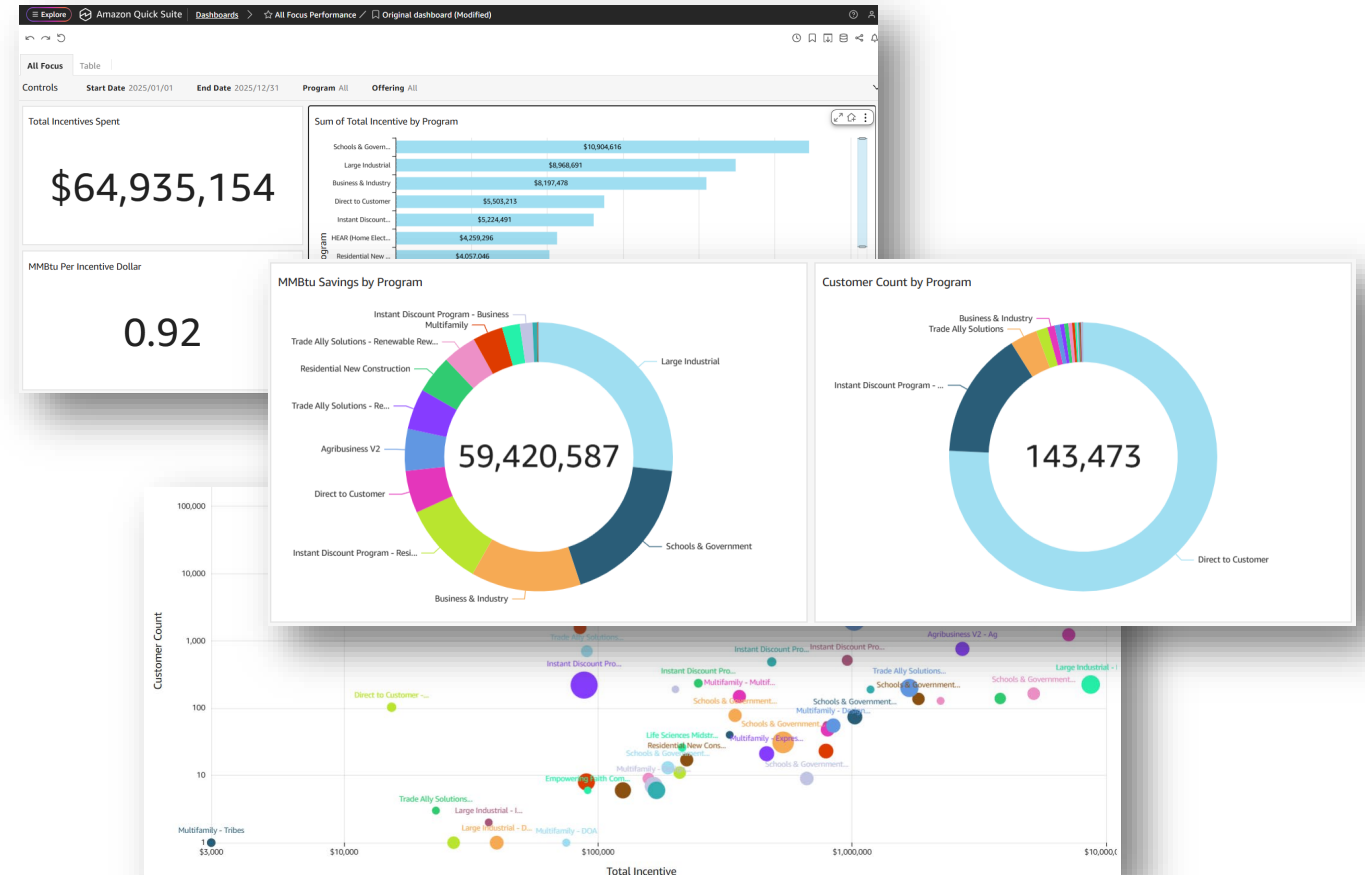- Note: Year-over-year data may not be directly comparable due to program changes

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:
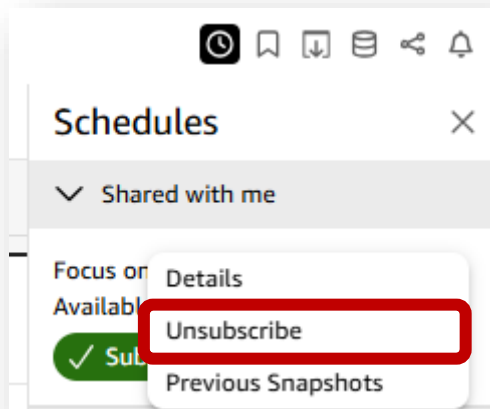
Bookmark "original dashboard": Save custom views created of a dashboard

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

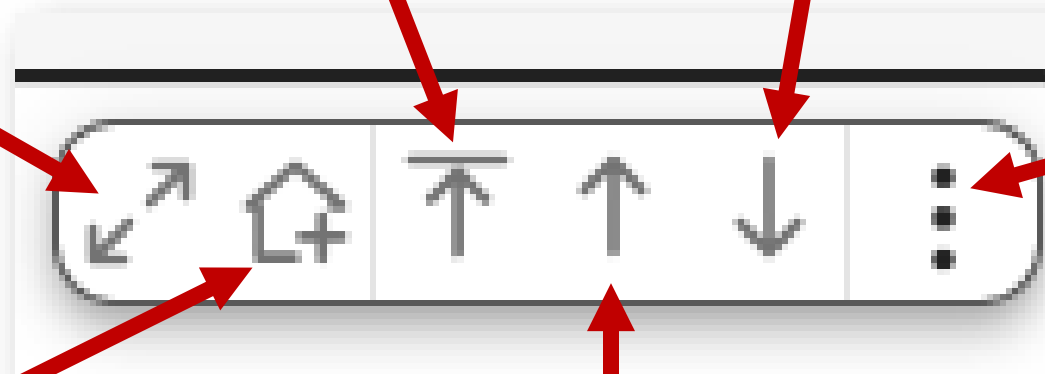**Maximize**: display data across entire screen

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

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

Drill up from: Show higher-level summary of data

Drill down from: Go deeper into detail 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

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