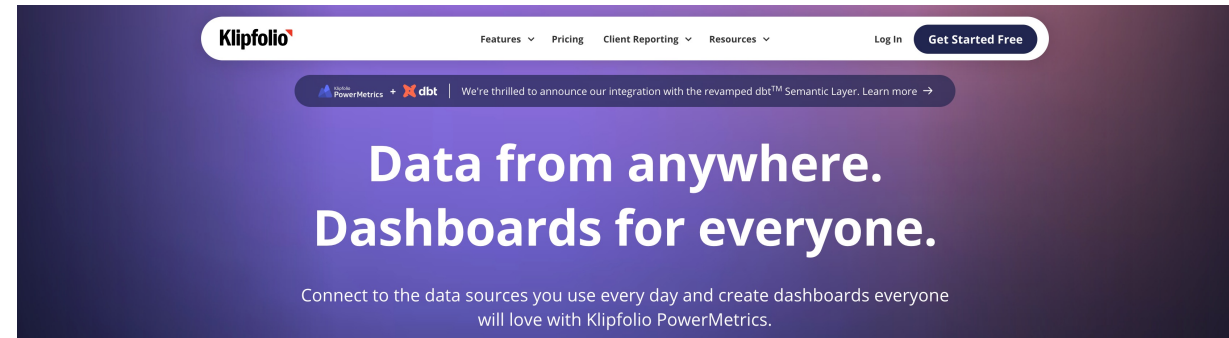


KLIPFOLIO

RYAN BROWN
IST 719



OVERVIEW

- 3 Different Pricing Options
 - Free, Standard (\$250/mo), Custom (\$800/mo)
 - Multi-user options dependent on price
- Allows exports to Excel, PDF, and website embedding
- Custom built charts can be added to a web dashboard

Succeed with Data

We help people succeed with data. With the power of business intelligence, you can transform the way you use data to make confident, data-driven decisions.

We care deeply about the success of your business.



Driven

Your growth and results matter to us.



Friendly

At its heart, our relationship matters.



Helpful

We listen and care deeply about you.

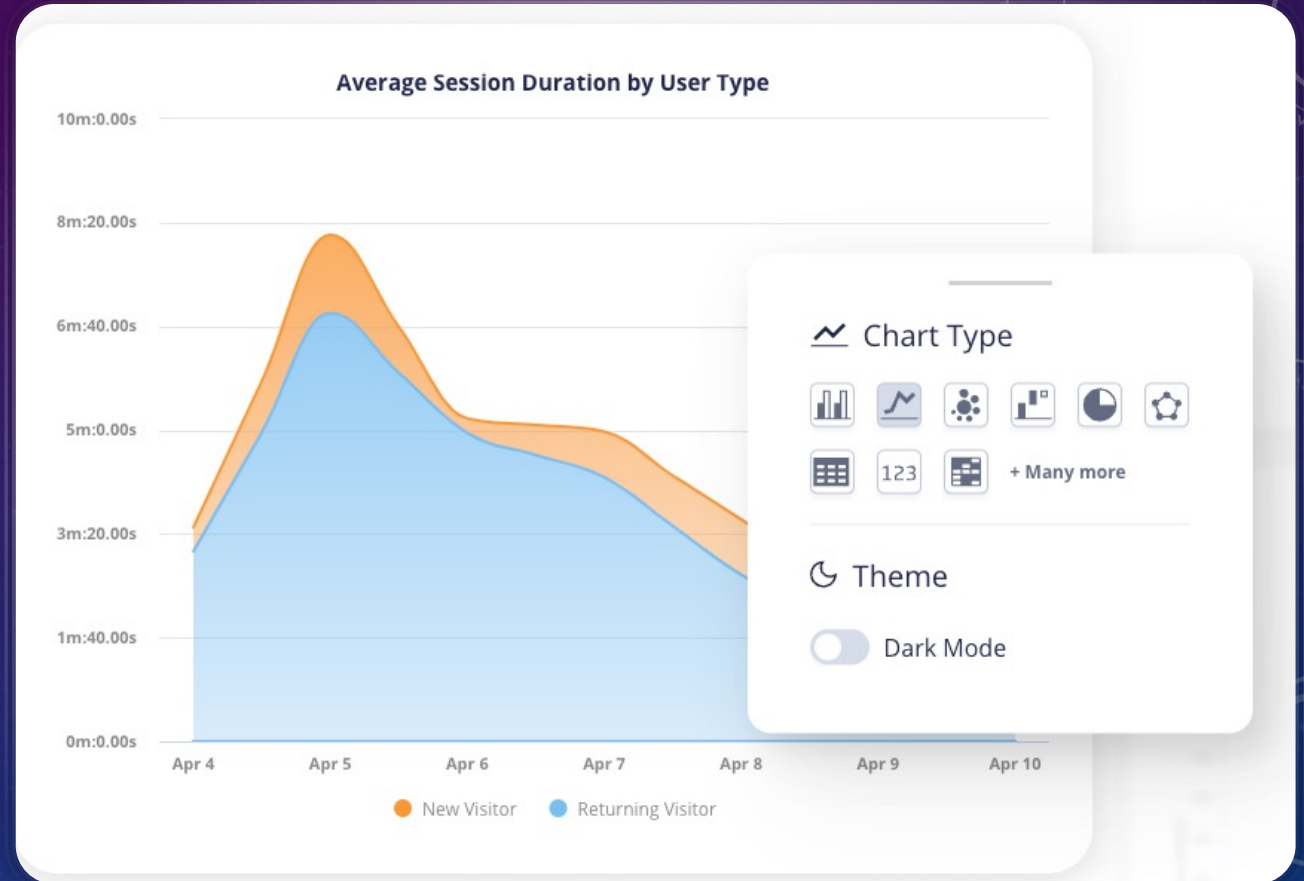


Knowledgeable

Ask us, ask anyone.

FEATURES

- Can import data via Excel, or connect to a SQL Database or JSON files
- Entire resource section for help: includes a blog, videos, user Q & A's, and real examples
- Mobile viewing of dashboards increases accessibility across a company
- Ready-to-use templates available if desired



HOW IT WORKS




1. Select a Data Feed

Select a data feed

Select a data feed that has the measure and dimensions needed for your custom metric.


Service
All


Display
All

Name	Owner	Last refreshed ↓
 Art File Upload	Ryan Brown	Nov 24, 2023
 Sales File Upload	Ryan Brown	Nov 23, 2023
 Sales File Upload	Ryan Brown	Nov 23, 2023

Where is your data?


Your Connected Data Services


File upload



2. Review Your Data

2. Review Your Data



Sales

Edit mode

+

📄

🗑️

↶

↷

🔍

🔗

📊

📈

📉

Show hidden columns

Insert ▾

fx =

Add a new column to use the formula bar.

	sales.rep	rep.sex	rep.region	rep.feedback	wine	type	cost	unit.price
	ABC	123	ABC	123	ABC	ABC	123	123
2	Clement Arias		1 North		4 Riesling	white	2.097	
3	Deloras Mcfetridge		0 West		7 Riesling	white	2.097	
4	Lolita Wass		0 Central		6 Pinot Gris	white	3.741	
5	Nilda Hypolite		0 Central		6 Riesling	white	2.097	
6	Yolando Galicia		0 North		6 Chardonnay	white	3.15	
7	Yolando Galicia		0 North		5 Pinot Gris	white	3.741	
8	Jewel Copas		1 South		6 Cabernet Sauvignon	red	3.624	
9	Deloras Mcfetridge		0 West		5 Merlot	red	2.229	
10	Aiko Hamsher		0 East		7 Pinot Gris	white	3.741	
11	Aiko Hamsher		0 East		6 Riesling	white	2.097	
12	Aiko Hamsher		0 East		7 Sauvignon Blanc	white	2.697	
13	Ben Gerry		1 East		6 Sauvignon Blanc	white	2.697	
14	Leticia Bolt		0 West		7 Sauvignon Blanc	white	2.697	

Showing 75 of 10000 rows.

Show 100 more.

Go to the last few rows

Name

Sales

Description

Data service

File Upload

Table

Last uploaded

Nov 23, 2023 12:42 PM

HOW IT WORKS

3. Select Measurable Values

Untitled

Edit mode

Save metric

X

Data

Settings

About

Data feed

:

Data is automatically retrieved and stored for this metric from the following data feed:

Sales

File Upload

Measure

?

Column in the data feed that contains the values you'll track:

Select column...

123 cost

123 expenses

123 income

123 rep.feedback

123 rep.sex

123 unit.price

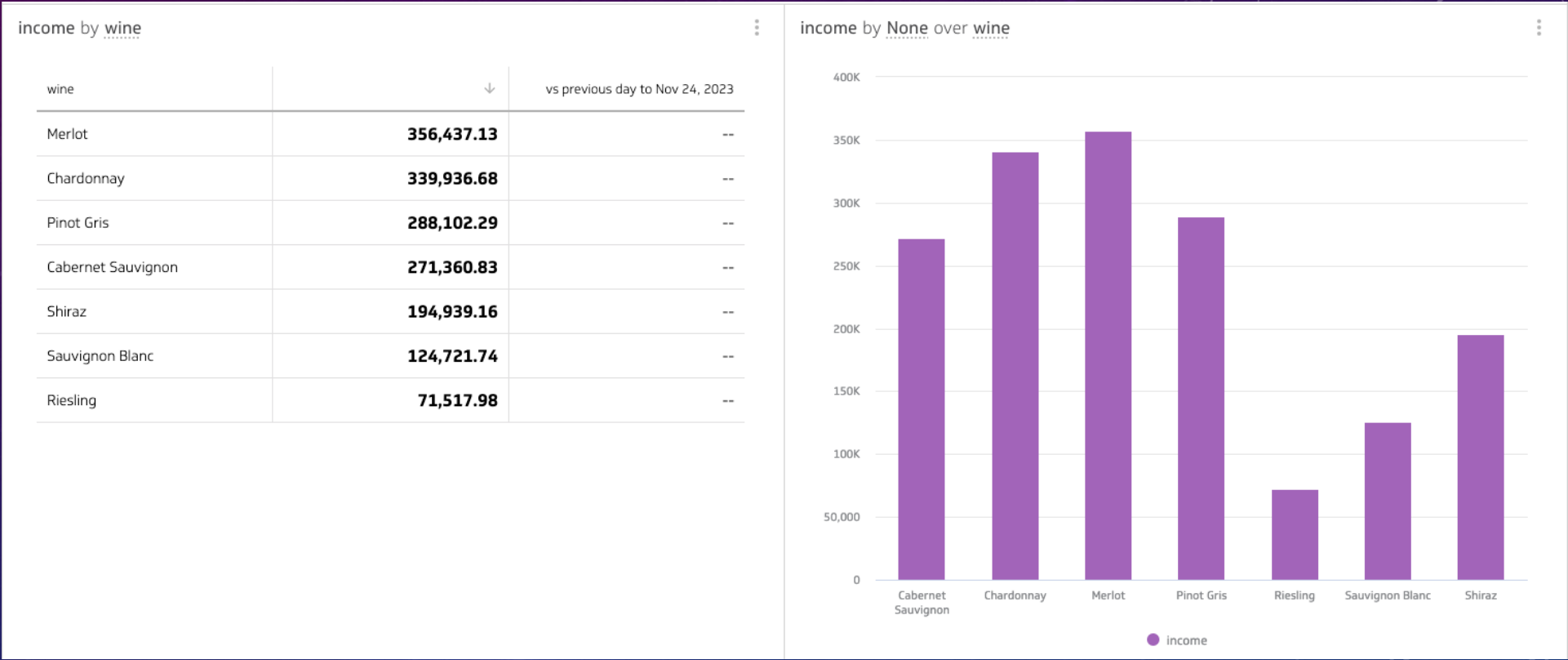
123 units.sold

ABC Count of rep.region

Select the **column** from your data feed that contains the **values** you want to measure with this metric.

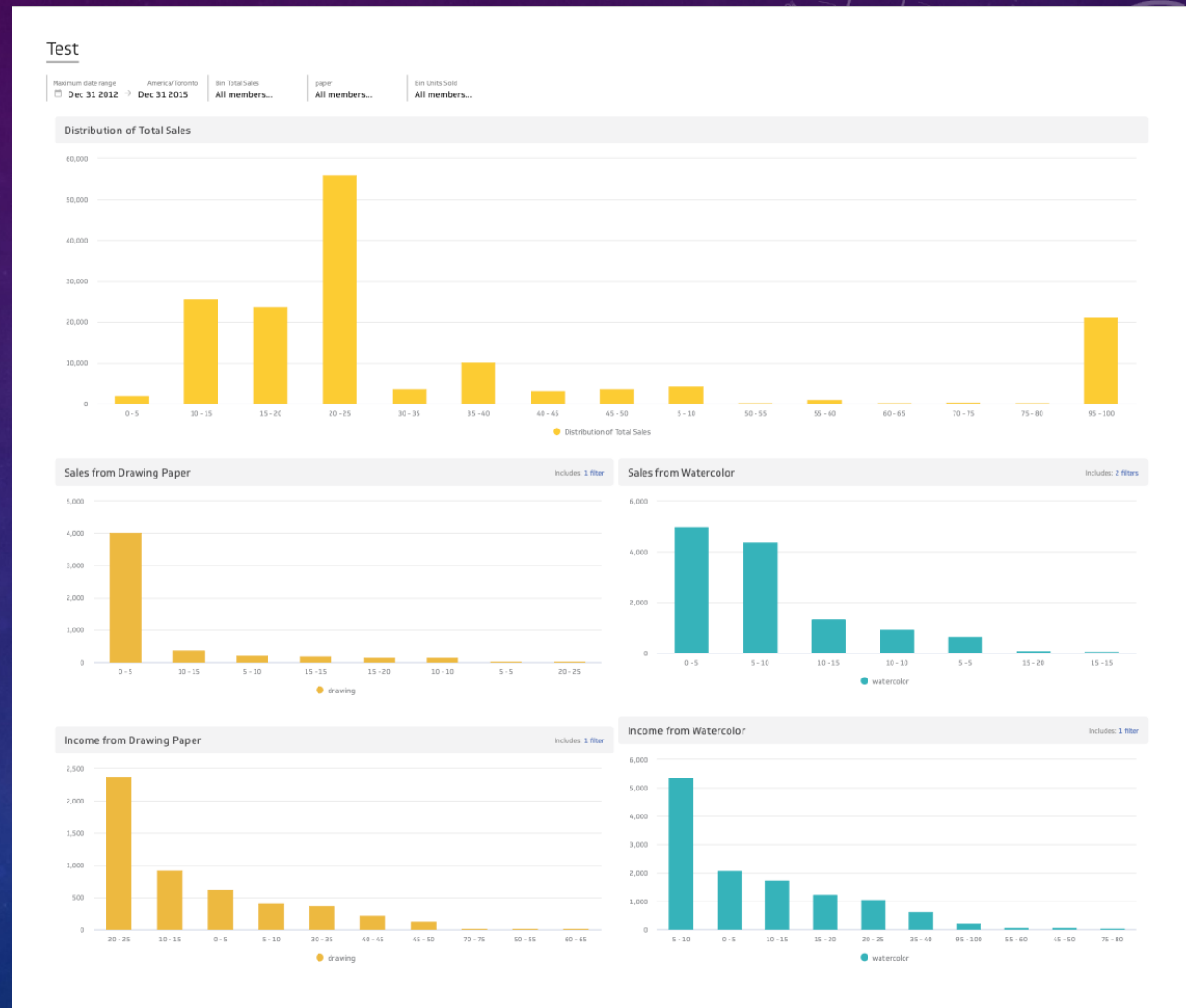
HOW IT WORKS

4. Build Your Chart



ADVANTAGES

- Extremely easy to upload data
- Intuitive when building easy charts
- Chart building is very similar in layout to Tableau
- Creation of dashboard very easy to do



DISADVANTAGES

- Very difficult to build “non-standard” charts
 - Unsure if it is because I have a free version or not
- Had to BIN data to build any type of Histogram, which required a formula to be written
 - Requires training to learn the formulas for this site
- Too difficult to use for a new user (compared to Excel)
- Limited on types of visualizations you can create
- Need to add multiple Metrics to create different charts from the same dataset

Metrics

Recent

Distribution of Total Sales

Income from Sales

Sales from Paper

The screenshot shows the 'Art' dashboard interface. At the top, there is a header with the 'Art' logo and an 'Edit mode' button. Below the header is a toolbar with various icons for chart manipulation. A red box highlights the formula bar, which contains the formula: `fx = CONCAT (NUMBERFORMAT (FLOOR (&total.sale,5)), " - ", NUMBERFORMAT (CEILING (&total.sale,5)))`. Below the formula bar is a table with 9 columns: 'paper.type', 'unit.price', 'units.sold', 'total.sale', 'Σ Bin Unit Price', 'Σ Bin Total Sales', and 'Σ Bin Units Sold'. The table contains 16 rows of data. At the bottom of the table, there is a footer that says 'Showing 75 of 10000 rows. [Show 100 more.](#) [Go to the last few rows](#)'.

		paper.type	unit.price	units.sold	total.sale	Σ Bin Unit Price	Σ Bin Total Sales	Σ Bin Units Sold
		ABC	123	123	123	ABC	ABC	ABC
2	olor	pad	12.15	1	12.15	10 - 15	10 - 15	0 - 5
3	g	roll	20.99	1	20.99	20 - 25	20 - 25	0 - 5
4	g	pads	10.26	1	10.26	10 - 15	10 - 15	0 - 5
5	olor	pad	12.15	2	24.3	10 - 15	20 - 25	0 - 5
6	g	pads	10.26	1	10.26	10 - 15	10 - 15	0 - 5
7	g	journal	24.94	1	24.94	20 - 25	20 - 25	0 - 5
8	g	sheet	0.36	16	5.76	0 - 5	5 - 10	15 - 20
9	g	pads	10.26	2	20.52	10 - 15	20 - 25	0 - 5
10	g	journal	24.94	1	24.94	20 - 25	20 - 25	0 - 5
11	olor	pad	12.15	1	12.15	10 - 15	10 - 15	0 - 5
12	olor	pad	12.15	4	48.6	10 - 15	45 - 50	0 - 5
13	g	journal	24.94	1	24.94	20 - 25	20 - 25	0 - 5
14	olor	block	10.26	1	10.26	15 - 20	15 - 20	0 - 5

PERSONAL ASSESSMENT

- I would not use this program unless I was required to
- Extremely pricy
- Lack of “ease-of-use” was frustrating when tying to learn how this program works
- If users know how to use R or Tableau, those are better options to use

DEMONSTRATION

KlipfolioTM

THANK YOU!