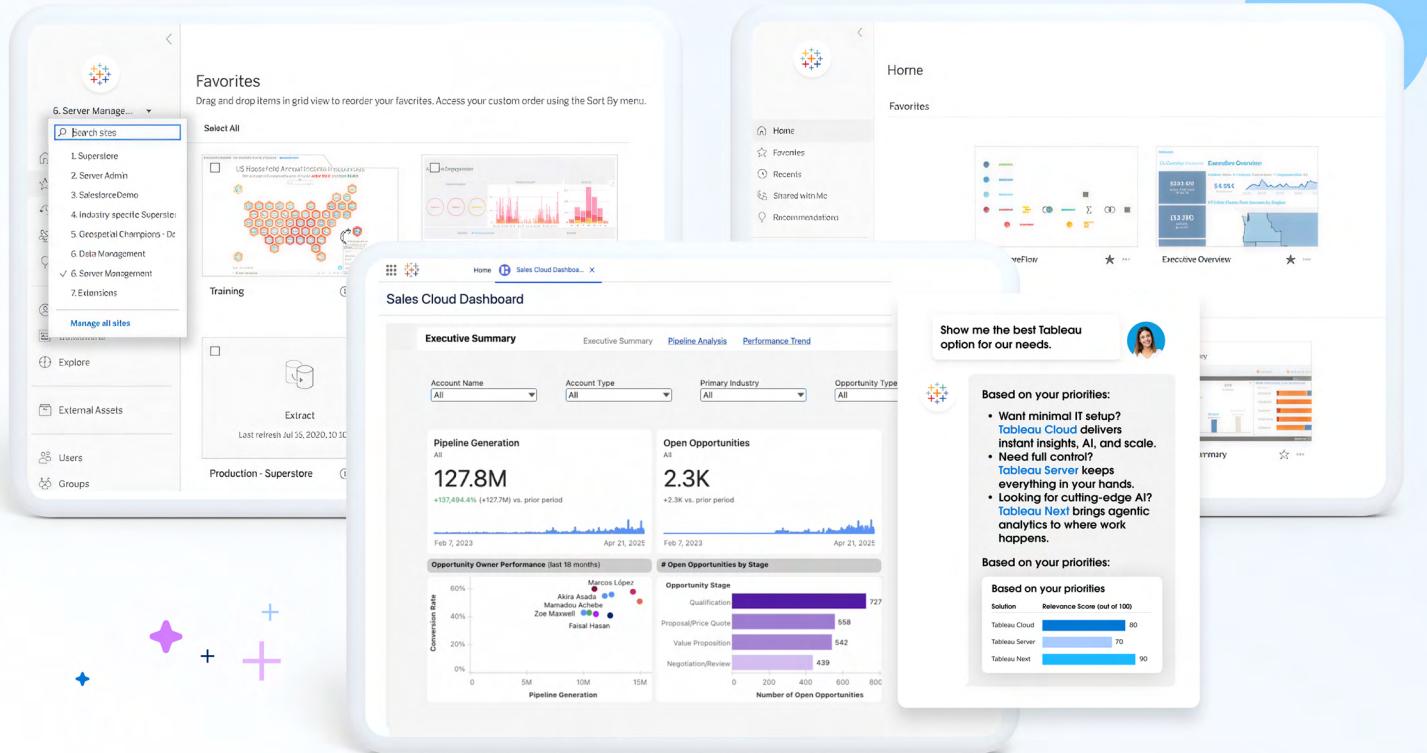


# The Choice and Flexibility of Tableau

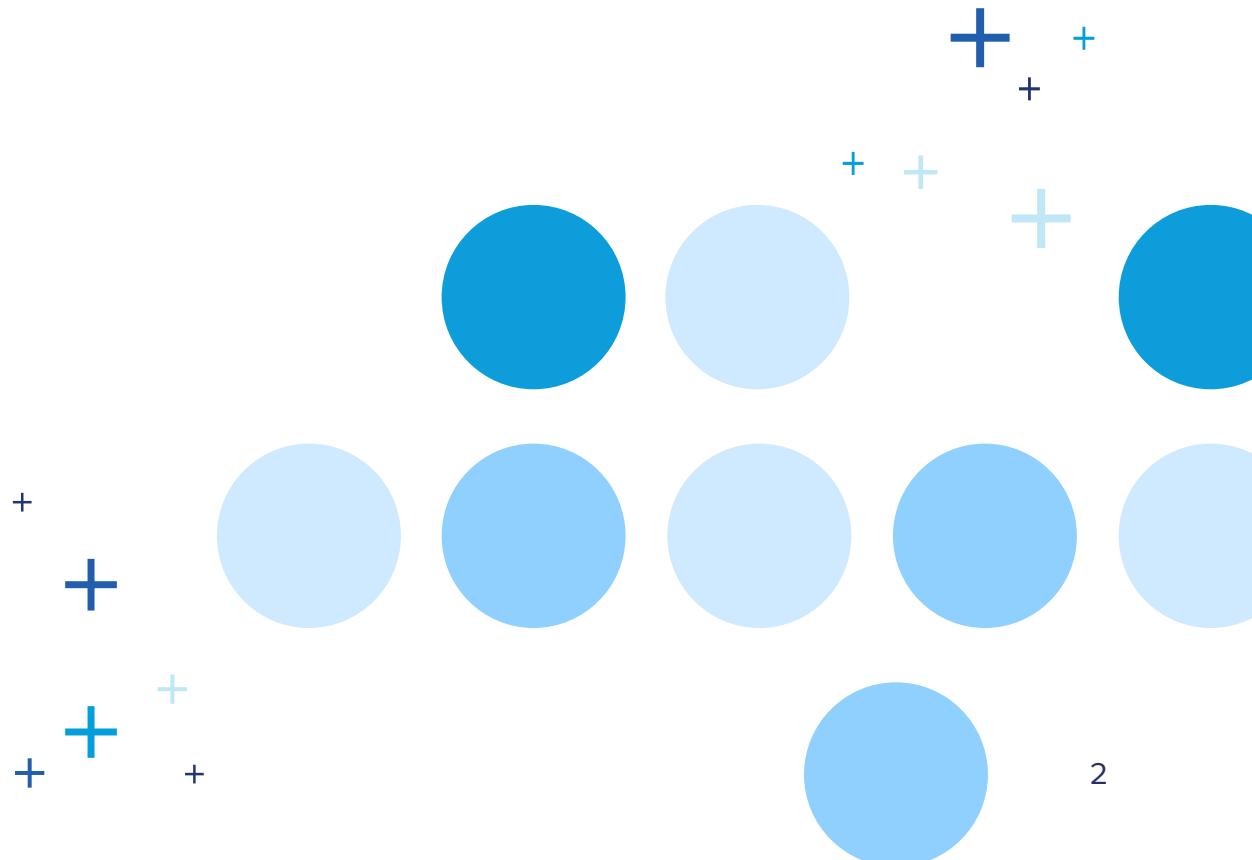
Intelligent analytics solutions to meet your business needs.



The image displays a composite view of the Tableau platform. On the left, a mobile device screen shows the 'Server Manager' interface with a sidebar for 'Manage all sites' and a 'Favorites' section. The main area displays dashboards for 'Training', 'Production - Superstore', and the 'Sales Cloud Dashboard' which includes sections for 'Executive Summary', 'Pipeline Generation' (127.8M), 'Open Opportunities' (2.3K), and 'Opportunity Owner Performance'. On the right, a larger screen shows the 'Home' page with a sidebar for 'Favorites', 'Recents', 'Shared with Me', and 'Recommendations'. It features a 'veFlow' visualization and a 'Executive Overview' dashboard. A sidebar on the right of the main screen asks 'Show me the best Tableau option for our needs.' and lists priorities for 'Tableau Cloud', 'Tableau Server', and 'Tableau Next'. Another sidebar at the bottom right shows a 'Based on your priorities' chart comparing Tableau Cloud, Tableau Server, and Tableau Next based on relevance scores (80, 70, 90).

# Table of Contents

<b>Introduction</b> .....	<b>03</b>
<b>Tableau Cloud:</b> Deliver data-driven insights at scale with a fully hosted, AI-powered analytics platform .....	<b>07</b>
<b>Tableau Server:</b> Deploy visual, self-service analytics with unmatched control and flexibility.....	<b>11</b>
<b>Tableau Next:</b> Unlock proactive, actionable insights in the flow of work with agentic analytics .....	<b>16</b>
<b>Conclusion</b> .....	<b>22</b>



# Meet Tableau: the world's leading analytics software

At [Tableau](#), our mission has been clear since 2003: to empower users to see, understand, and act on their data. Today, as the world's leading analytics software on the #1 AI CRM, we've evolved beyond just visualizations. Tableau drives businesses forward with powerful, AI-driven insights that help you make better decisions and take actions faster.

**Sixty-three percent of today's business leaders describe their organizations as very data-driven- up ten percentage points from 53% in 2023. Despite this, nearly two-thirds (63%) of technical leaders acknowledge that their companies struggle to drive business priorities with data.**

Salesforce, State of Data & Analytics, 2nd edition, 2025

Tableau is the most flexible, customizable, intelligent experience available. It stands apart from its competitors due to a combination of powerful data visualization, flexible deployment options, easy to use interface, and its ability to integrate with, and leverage, all data – including the greater Salesforce ecosystem. Unlike other solutions, Tableau is built for everyone.

This means anyone across your organization – from data analysts to business users to junior associates, and beyond – can access insights and information without needing any specific analytics expertise, technical knowledge, or coding know-how.

Tableau's inherent flexibility creates opportunities and removes limitations. It gives organizations the ability to choose what works for them and their needs whether that be deploying on a Mac or PC, self-managing or taking advantage of SaaS, using in conjunction with Salesforce (or not), or any combination of the above. Even further, Tableau is built for interoperability. This enables you to embed it where you're already working, reducing swivel-chairing, and increasing your ability to take immediate action.



# What makes Tableau unique

There are a multitude of analytics solutions on the market, including vendors who initially appear to offer “free” solutions. However, while these options may seem more affordable at first, hidden costs often follow – ranging from data storage limits and user thresholds to the need for complex, multi-language coding for ETL and analysis. Others tie you to a specific cloud provider, inflating computing costs and reducing flexibility.



Tableau, by contrast, offers the freedom to connect to and work with any data source, regardless of its location. It empowers a broader range of users with low-code or no-code capabilities without compromising on the ability to deliver sophisticated, AI-driven insights. This ease of use fosters widespread adoption and creates champions among business users, rather than IT advocating for vendor and tech consolidation. Many customers even choose to use Tableau alongside other BI tools, thanks to seamless integration with ecosystems like Google, Microsoft, and Salesforce.

**91% of business leaders believe the rise of AI makes it more important to be data-driven.**

Salesforce, State of Data & Analytics, 2nd edition, 2025

Together, these strengths make Tableau one of the most versatile, intelligent, and high-impact analytics platforms currently on the market today.

### Tableau Cloud

Agility, SaaS, less IT

### Tableau Server

Full control,  
on-prem, compliance

### Tableau Next

Agentic AI,  
proactive insights,  
innovation

## Tableau and Salesforce, Better Together But Not Required

Tableau can be used as a standalone analytics platform, regardless of whether you're a Salesforce customer. This is true of all Tableau products, including Tableau Next. That said, there is an added value of increased efficiency and deeper insights when using Tableau and Salesforce together. Tableau now benefits from the Salesforce platform advantage. This means that users can not only unlock the full potential of Tableau but also benefit from other capabilities and use cases.

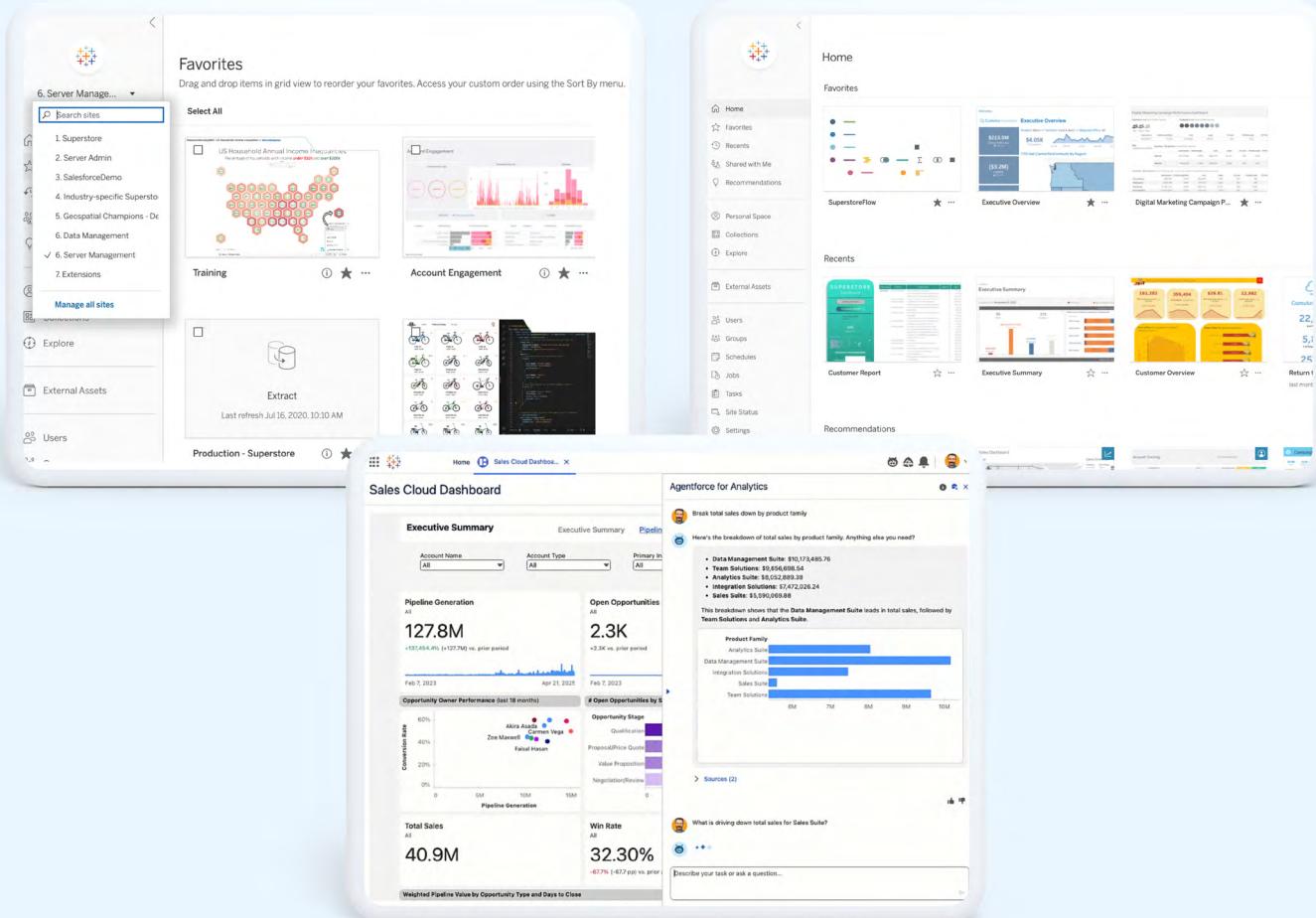
For example, Salesforce customers benefit from simplified and centralized management of semantic data models and governance, along with cross-platform agentic analytics capabilities. This enables AI agents to access and apply insights across systems rather than being limited to individual applications.

# Solutions that meet your analytics needs

There is a vast diversity of organizations, industries, and priorities across the business landscape. Naturally, not every organization has the same needs or limitations when it comes to analytics. Some want the agility of a fully hosted solution, some are more locked down, requiring full control over infrastructure, and others are intrigued by the possibilities of analytics augmented by AI. That's why, unlike many other analytics platforms on the market, Tableau offers multiple options – [Tableau Cloud](#), [Tableau Server](#), and [Tableau Next](#).

This level of choice and flexibility is incredibly unique in the analytics field. The array of solutions are designed to meet your unique needs, enabling you to access the full power and capabilities of AI-powered analytics, without having to sacrifice security, organizational priorities, or hours of setup.

Tableau Cloud and Tableau Next allow customers to take advantage of the benefits of a modern public cloud SaaS offering while Tableau Server provides the ultimate deployment flexibility. Whether you're looking for flexibility, control, or cutting-edge AI capabilities, this guide will help you understand Tableau's unique features.



The image displays three screenshots of Tableau's analytics solutions:

- Tableau Server Management:** Shows the 'Server Management' interface with a sidebar for 'Server Manager' and a main area for 'Favorites' (US Household Annual Income Frequency, Account Engagement, Extract) and 'Training' (Superstore).
- Tableau Home:** Shows the 'Home' interface with sections for 'Favorites' (Executive Overview, Superstoreflow, Digital Marketing Campaign P...), 'Recents' (Customer Report, Executive Summary, Customer Overview), and 'Recommendations'.
- Sales Cloud Dashboard:** Shows the 'Sales Cloud Dashboard' with sections for 'Executive Summary' (Pipeline Generation: 127.8M, Open Opportunities: 2.3K), 'Opportunity Owner Performance' (Feb 2, 2023 to Apr 7, 2023), and 'Opportunity Stage' (Qualifying, Proposal/Price Quote, Value Proposition, Negotiation/Review).

1

# Tableau Cloud

Deliver data-driven insights at scale with a fully-hosted, AI-powered analytics platform



# What is Tableau Cloud

Tableau Cloud offers a global solution encompassing a fully hosted analytics platform that makes it possible for organizations to share and collaborate on both data and insights without having to manage any server or infrastructure.

## Tableau Cloud on Hyperforce enables greater scalability, security, and compliance

Hyperforce is Salesforce's next-gen architecture designed specifically for the public cloud. Tableau Cloud on Hyperforce has enabled greater scalability, security, and compliance while still delivering top-notch user-experience and functionality.

Hyperforce is poised to continually unlock new possibilities for Tableau Cloud. Already it has expanded support for compliance certifications and made it possible for organizations once limited to Tableau Server (due to security reasons) to migrate over to Cloud. It's boosting resiliency by enabling a third availability zone (AZ) in each Tableau Cloud region and, it's powering geographic expansion.



## Is Tableau Cloud the right choice for my organization

Tableau Cloud is a great choice for organizations looking to reduce IT burden, increase the speed of innovation, and scale quickly. The ability to "set it and forget it" takes the onus of platform management off your IT department – updates are automatic, access to new generative AI tools and features is quick and easy, integration with IdP is seamless, and scaling and infrastructure management is built in.

# The benefits of Tableau Cloud

Tableau Cloud offers insights without the need for self managed infrastructure. It's a low-maintenance, high-innovation analytics platform that's easy to use and even easier to deploy.

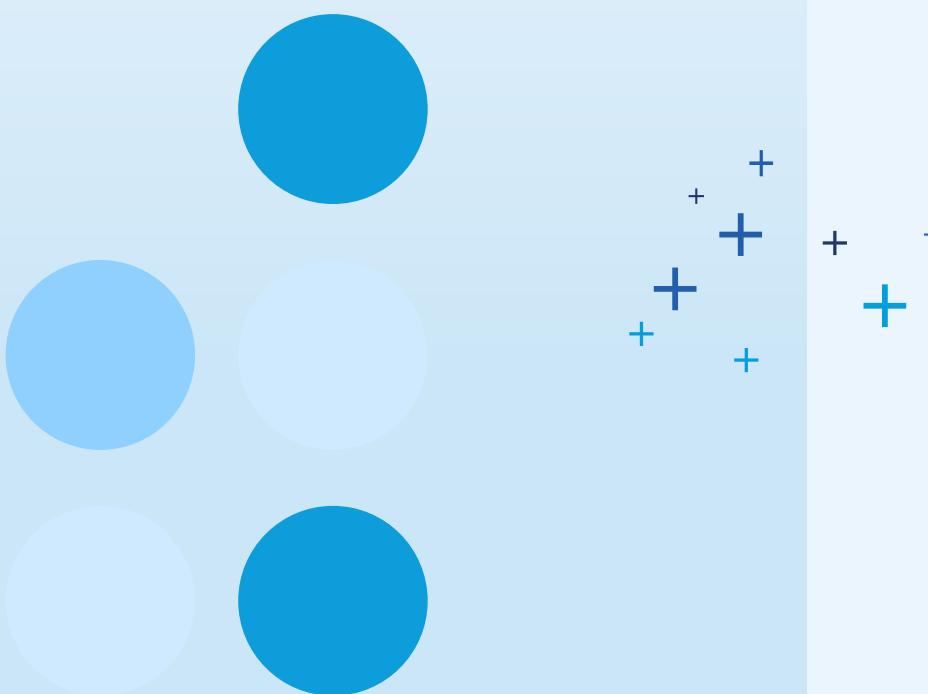
Because there's no need for IT setup and hardware provisioning, users can get started quickly – accelerating time to value. [Tableau Cloud Manager](#) makes it easy to scale across teams by simplifying administrative tasks, automating user onboarding, and centralizing control. That means you don't have to manually manage individual servers, helping you run IT operations more efficiently.

Automatic management ensures instant access to the latest features and security patches, with no manual updates required. Teams can connect from anywhere, on any device, with built-in security and compliance at every step of the way. This alongside the Hyperforce infrastructure enables Tableau Cloud customers to benefit from a modern, flexible, and highly secure access to the public cloud. Even further, [additional certifications](#), like PCI and global regional availability means customers can meet their users seamlessly regardless of security needs or location.



## Tableau Cloud

- 1 **Get started fast** with a fully hosted, low-maintenance analytics platform – no IT setup needed.
- 2 **Scale with ease** using built-in tools for automation, centralized control, and simplified admin.
- 3 **Stay secure & up to date** with automatic updates, compliance certifications, and Hyperforce infrastructure.



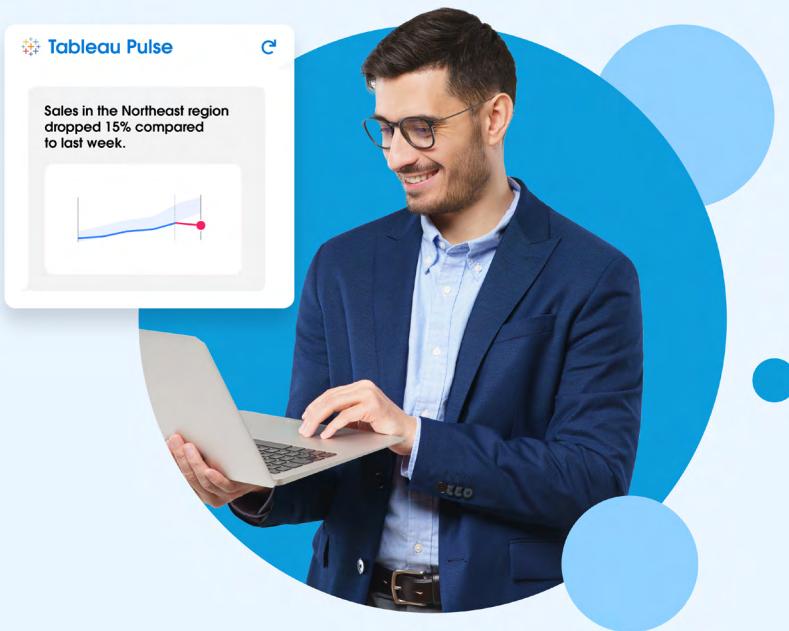
# The features of Tableau Cloud

One of Tableau Cloud's greatest advantages is how quickly and easily you can access its powerful features. Tableau Cloud is designed to support modern, scalable, and intelligent analytics.

It includes all the standard Tableau features – web based authoring, advanced alerting capabilities, and collaboration tools as well as a host of data connections and strong API integrations that allow you to embed dashboards and/or automate workflows. It also has the ability to deeply integrate with Salesforce or be connected via data connector to Tableau Next, making it possible for Tableau Cloud users to leverage Agentforce capabilities without having to fully migrate (more on this later). It should be noted that you do not need to be a Salesforce customer to use Tableau Cloud, but if you are, it's easy for them to work in tandem. Similarly, customers can embed Tableau analytics content into [Office 365 applications](#), as well as [Google Cloud applications](#).

Tableau Cloud customers have built-in access to innovative, generative AI solutions. These solutions are ready to use, helping you make smarter decisions faster and boost overall operational efficiency.

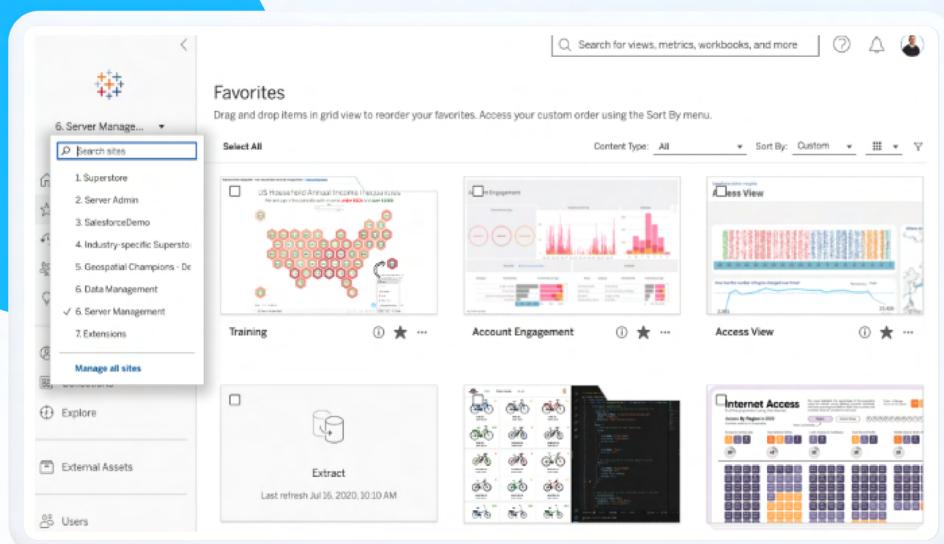
As a result, Tableau Cloud contains a few key features that are not yet available to customers using Tableau Server. The most exciting of these being [Tableau Pulse](#), which delivers proactive data alerts in natural language, informing users of important changes – in the space where they are already working. Tableau Pulse also provides access to AI-driven tools that allow you to ask questions naturally and have the system answer conversationally. This empowers users to easily and automatically understand data and garner important insights.



# 2

# Tableau Server

Deploy visual, self-service analytics with unmatched control and flexibility



# What is Tableau Server

[Tableau Server](#) is the go-to for organizations seeking to fit specific company, industry, and compliance requirements and regulations.

Tableau Server can be deployed anywhere on Windows or Linux, and functions as a self-managed solution. It brings the power of Tableau's visual, self-service analytics to large enterprise environments, enabling them to make data-driven decisions more quickly and easily.



## Is Tableau Server the right choice for my organization

Tableau Server operates entirely in your environment, either on-prem or on a public cloud, giving you full control over your data, infrastructure, and deployment. Employing Tableau Server as an analytics solution allows you to benefit from highly visual, self-service analytics, at scale, while also adhering to any necessary security needs or compliance requirements.

Tableau Server's inherent flexibility makes it an ideal choice for:

- Organizations like financial institutions, government entities, or healthcare companies that prefer to host analytics in-house or have to contend with internal policy or strict regulatory and compliance requirements that prevent them from using cloud based solutions.
- Organizations operating in countries or regions where Tableau Cloud is not yet an option or where an air-gapped environment is essential.
- Hybrid deployments – a growing trend where organizations opt for a mix of local infrastructure for some use cases and cloud solutions for others.

1

### In-house & Compliance

On-premises for strict policies and compliance.

2

### Regional Limits

Cloud not available or air-gapped required.

3

### Hybrid Deployments

Agentic AI, proactive insights, innovation

# The benefits of Tableau Server

Tableau Server puts you in the driver's seat. It offers full flexibility and control with support for multiple operating systems and architectures. You choose how and where you deploy – on your infrastructure of choice. This includes things like Windows or Linux as well as public platforms like Amazon Web Services (AWS), Google Cloud Platform (GCP), or Microsoft Azure.

Aside from just deployment, Tableau Server gives you full control over things like server configuration, data storage, and user access. And, because it provides access to [Tableau's advanced management](#) capabilities your teams can more easily manage the complexities that often accompany a dynamic analytics experience. This is highly essential to ensure that control doesn't come at the cost of scalability, security, or performance.

Ensuring the data control you need alongside the analytics power you desire enables teams to make better, more collaborative, more data-driven decisions. This is bolstered by Tableau Server's ability to integrate analytics directly in the flow of work, allowing you to customize features and use Tableau within your other enterprise systems or workflows – including Active Directory, SSO, existing identity providers, Slack, Microsoft Teams, and more. The end result is streamlined operations, friction-free integrations, and real-time analytics that drive better decision-making across your organization. (Many of these powerful capabilities are also available within Tableau Cloud, offering flexibility across deployment options.)

It's worth noting that a self-managed analytics solution is just that – self managed. Prospective users need to understand that the successful deployment of Tableau Server requires the support of a robust IT infrastructure and a strong IT department.



## Tableau Server

- 1 **Full control** over deployment, infrastructure, data storage, and user access – on-prem or cloud.
- 2 **Integrate analytics & insights** in the flow of work with Tableau's APIs and SDKs.
- 3 **Powerful self-managed analytics** that balance customization, security, and performance at scale.

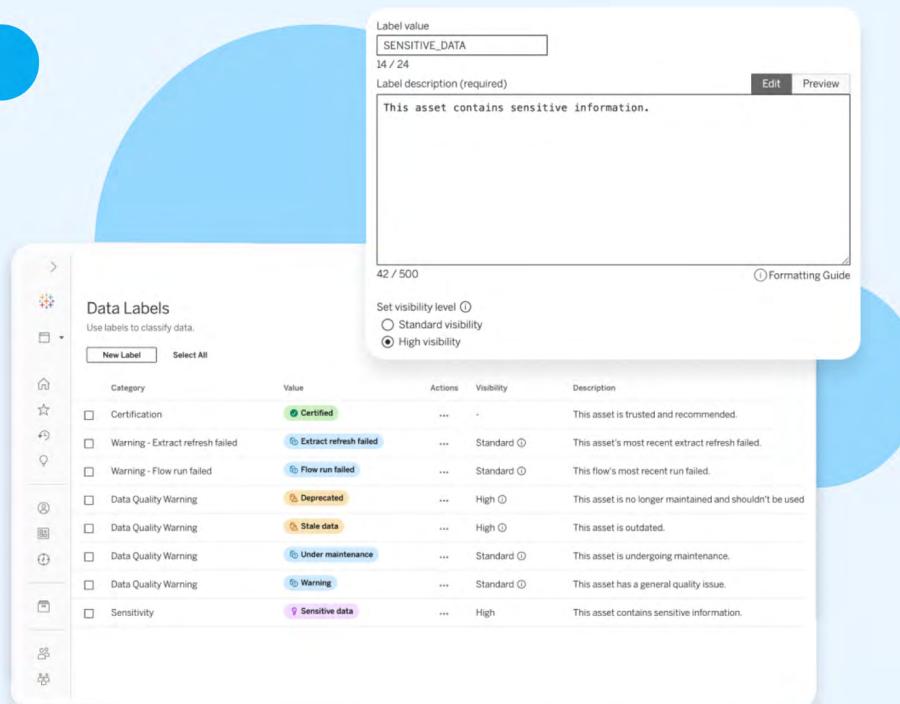
# The features of Tableau Server

Almost all of the features and capabilities in Tableau Cloud are available in Tableau Server and vice-versa. This makes the analyst experience almost identical. The key difference is on the backend: While the features may be similar, how those features are implemented and managed are different.

With Tableau Server, customers are responsible for deployment, updates, and ongoing maintenance. This brings greater control and customization, but may also limit agility compared to a fully managed solution.

When it comes to capabilities, Tableau's key differentiator (across all of its products) is its unique ability to provide a whole host of features that are easy-to-use and flexible. This covers everything from analytics and user experience to security, governance, and content organization.

Users can take advantage of things like web-based authoring, which makes it possible to build dashboards directly in their browsers without the need for any desktop software as well as advanced alerting capabilities and collaboration tools that enable them to comment on, subscribe to, and share dashboards easily across teams – all of which help teams stay aligned and data-first. Like other Tableau products, Tableau Server also offers some more targeted features that expand possibilities, streamline collaboration, and solve for user error.



**Data Labels**  
Use labels to classify data.

**Label value**  
SENSITIVE\_DATA  
14 / 24

**Label description (required)**  
This asset contains sensitive information.

**Set visibility level**  
 Standard visibility  
 High visibility

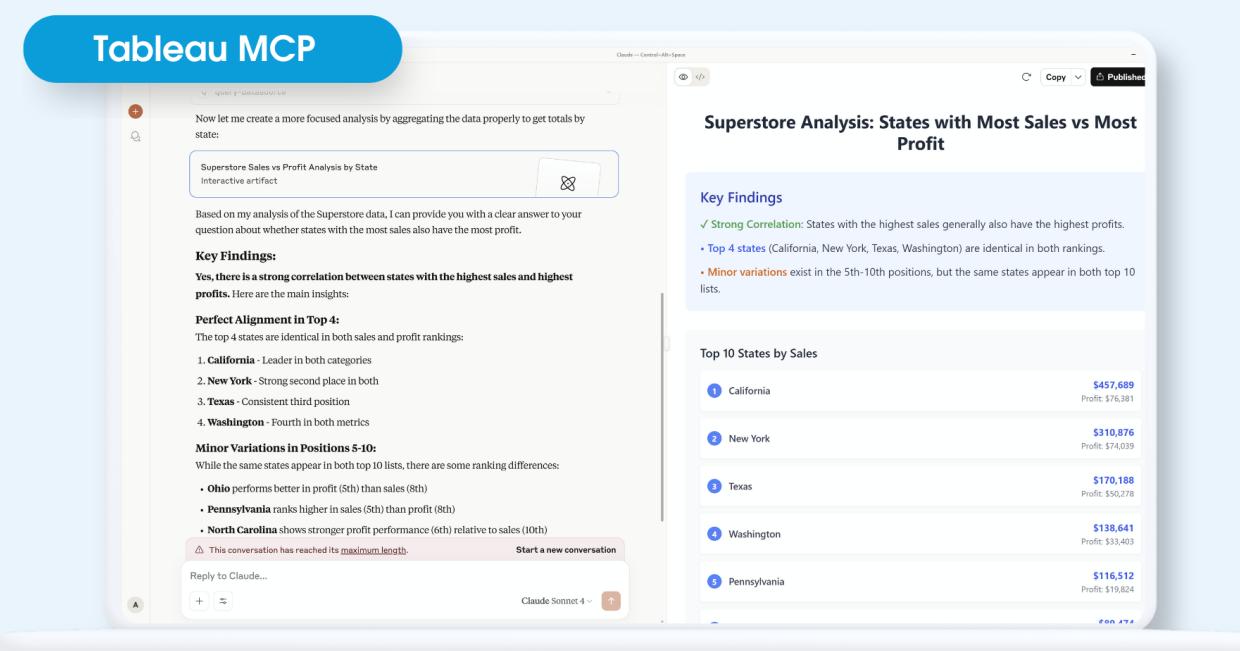
Category	Value	Actions	Visibility	Description
Certification	<span>Certified</span>	...	-	This asset is trusted and recommended.
Warning - Extract refresh failed	<span>Extract refresh failed</span>	...	Standard	This asset's most recent extract refresh failed.
Warning - Flow run failed	<span>Flow run failed</span>	...	Standard	This flow's most recent run failed.
Data Quality Warning	<span>Deprecated</span>	...	High	This asset is no longer maintained and shouldn't be used.
Data Quality Warning	<span>Obsolete</span>	...	High	This asset is outdated.
Data Quality Warning	<span>Under maintenance</span>	...	Standard	This asset is undergoing maintenance.
Data Quality Warning	<span>Warning</span>	...	Standard	This asset has a general quality issue.
Sensitivity	<span>Sensitive data</span>	...	High	This asset contains sensitive information.

It is important to note that the one area where capabilities between Tableau Server and other Tableau products differ is around generative AI. Tableau Server is designed for organizations who want local and complete control over their Tableau deployment. This architecture requires that customers self manage external large language models (LLMs). As a result, there are some differences in the newest AI-powered innovations between Tableau Server and Tableau Cloud with Tableau Agent. The Tableau Pulse functionality is only available in Tableau Cloud.

Tableau is also allowing Server customers to build their own AI solution and has already released platform components that allow customers to incorporate generative AI onto the Server platform.

## This includes Tableau MCP, an implementation of the Model Context Protocol released by Anthropic, to integrate Tableau with any AI agent or application.

Customers can leverage the MCP host of their choice (ex. Agentforce Agents, Claude, or Cursor) to perform ad-hoc data analysis that extends the semantic richness of the Tableau Server published datasource. However, customers interested in the Tableau Server solution should be aware that even as these features begin to become available they may not be as out-of-the-box or one-click as their Tableau Cloud counterparts.



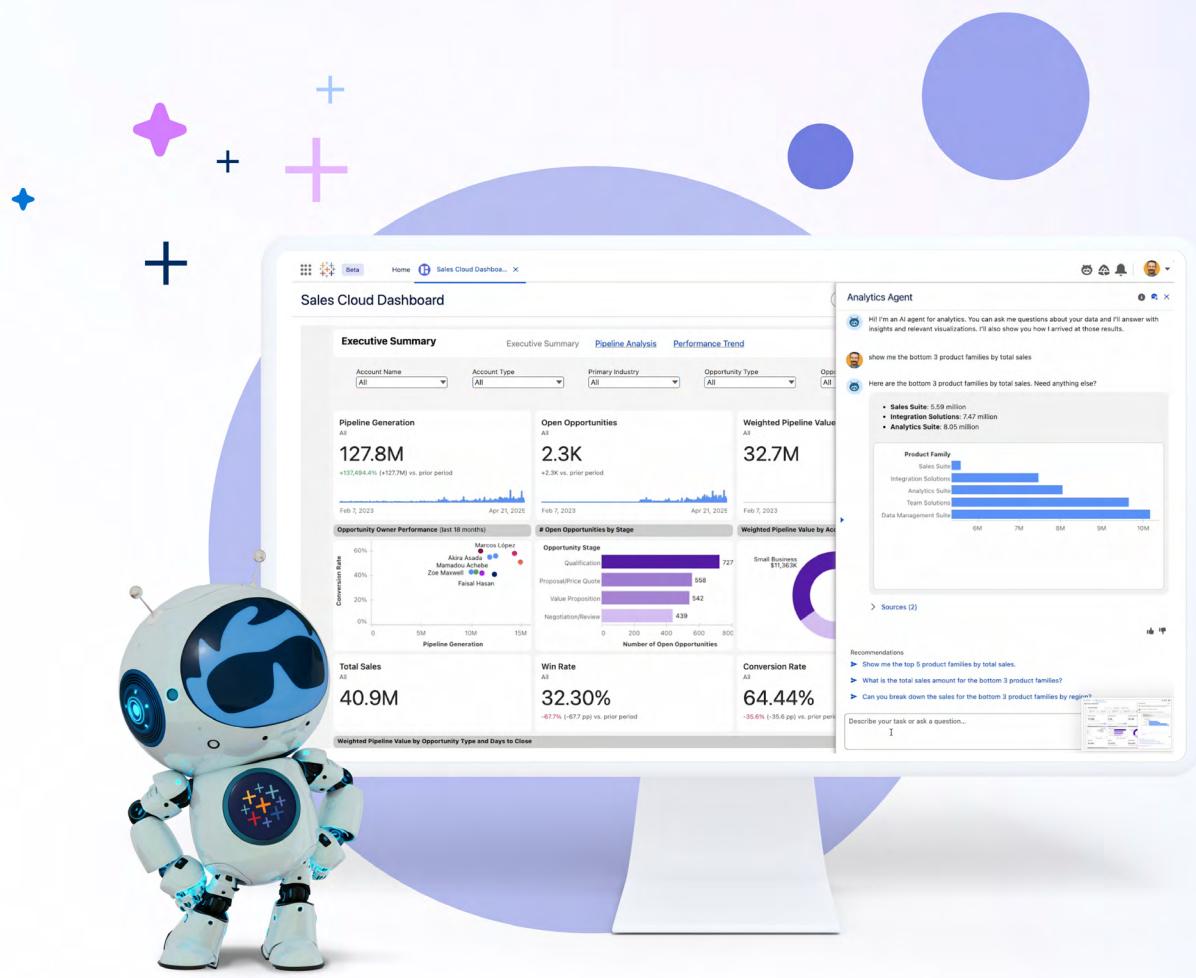
The image shows a split-screen interface. On the left, a blue header "Tableau MCP" is followed by a conversation window with Claude Sonnet 4. The text in the window discusses creating a focused analysis and provides insights about state sales and profit. On the right, a generated dashboard titled "Superstore Analysis: States with Most Sales vs Most Profit" is displayed. The dashboard includes a "Key Findings" section and a "Top 10 States by Sales" table.

Rank	State	Total Sales	Profit
1	California	\$457,689	Profit: \$76,381
2	New York	\$310,876	Profit: \$74,039
3	Texas	\$170,188	Profit: \$50,278
4	Washington	\$138,641	Profit: \$33,403
5	Pennsylvania	\$116,512	Profit: \$19,824
...			

# 3

# Tableau Next

Unlock proactive, actionable insights in the flow of work with agentic analytics



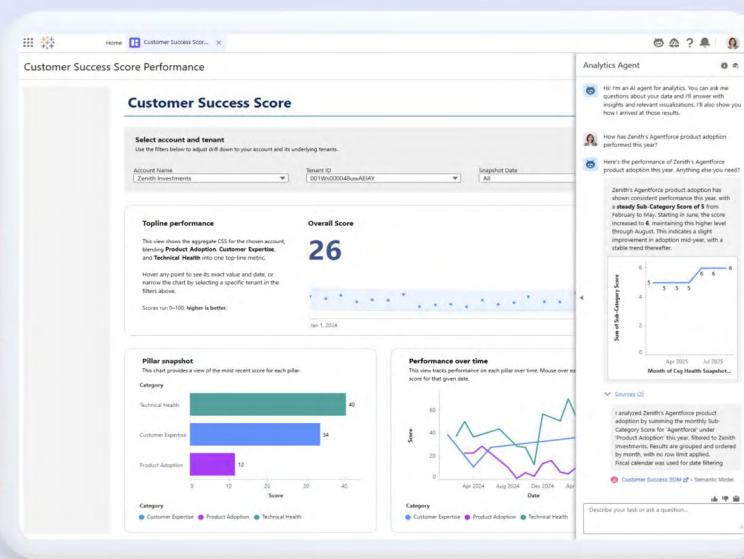
# What is Tableau Next

Tableau Next represents the ongoing evolution and continued innovation of the Tableau platform.

Tableau Next is built on Salesforce. It delivers a flexible, composable, API-first analytics experience that combines the #1 analytics platform with Agentforce – an agentic layer enabling autonomous actions that increase data activation, efficiency, data-driven decision-making, and collaboration. This allows users to tap into the power of agentic AI, whether or not they are a Salesforce CRM customer.

**Being built on the Salesforce platform, gives users the ability to leverage both Data 360 and Agentforce to contextualize data and then use it to power agentic analytics capabilities.**

This transforms your data platform from a passive tool into an intelligent partner. It allows you to interact with your data analysis – asking it to reason, respond, and take in-context actions that help you move from questions to answers to outcomes faster and more efficiently. These innovations and future-facing capabilities redefine what's possible with Tableau.





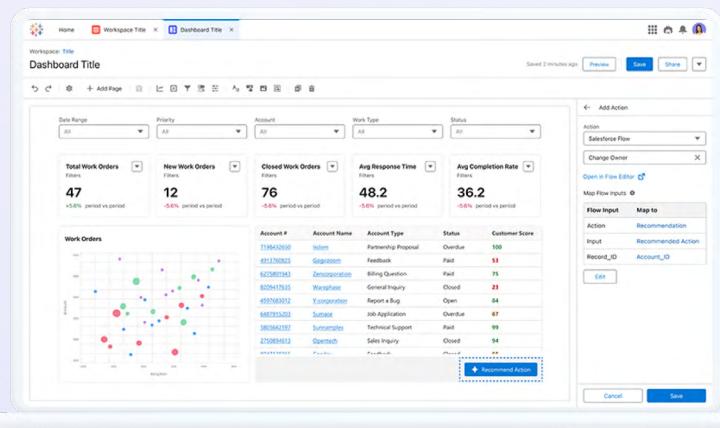
## Is Tableau Next the right choice for my organization

Tableau Next is a great fit for organizations looking to move past traditional analytics and collaborative dashboards toward an AI-driven, cutting-edge analytics experience. What's more, Tableau Next delivers intelligent, personalized, and proactive insights in the flow of work – without the need to manage infrastructure.

**“Eighty-seven percent of data and analytics leaders believe unified data is key for meeting customer expectations, not to mention internal decision-making.”**

Salesforce, State of Data & Analytics, 2nd edition, 2025

The flexibility and composability of Tableau Next makes it possible for customers to leverage agentic AI to meet their unique needs no matter where they may be in their Tableau or Salesforce journey. Organizations already on the Salesforce platform can integrate Tableau Next where they're already working, offering a unique and truly unified analytics experience. New customers can choose Tableau Next whether they're on the Salesforce platform or not. And, current Tableau Cloud customers can use a data connector to create a hybrid model that enables them to benefit from the agentic capabilities of Tableau Next without having to fully migrate all their analytics assets.



The screenshot shows a Tableau Next dashboard titled 'Dashboard Title'. The dashboard includes a scatter plot titled 'Work Orders' with 'Account' on the x-axis and 'Status' on the y-axis. Below the plot are four summary statistics: 'Total Work Orders' (47), 'New Work Orders' (12), 'Open Work Orders' (76), 'Avg Response Time' (48.2), and 'Avg Completion Rate' (36.2). To the right of the statistics is a table with columns 'Account #' and 'Account Name', and rows showing various account types and their status. A sidebar on the right is titled 'Add Action' and shows a 'Salesforce Flow' with a 'Change Owner' step. The sidebar also includes 'Map Flow Inputs' and 'Map to' sections, and a 'Record\_ID' dropdown.

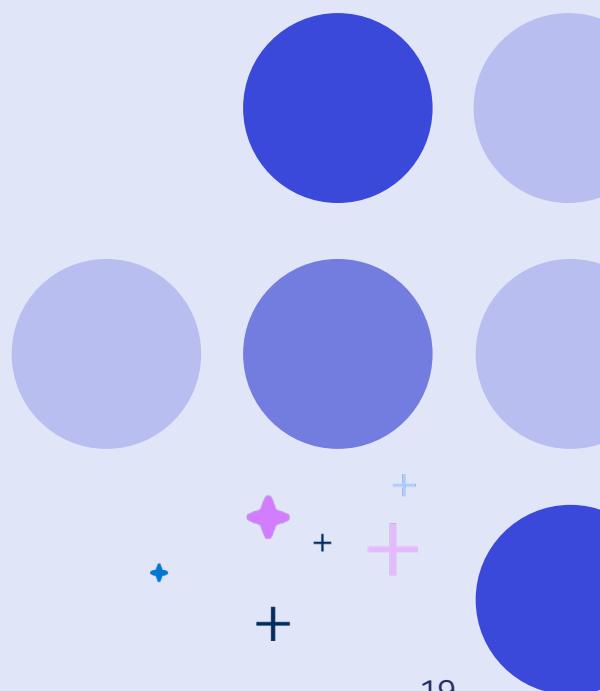
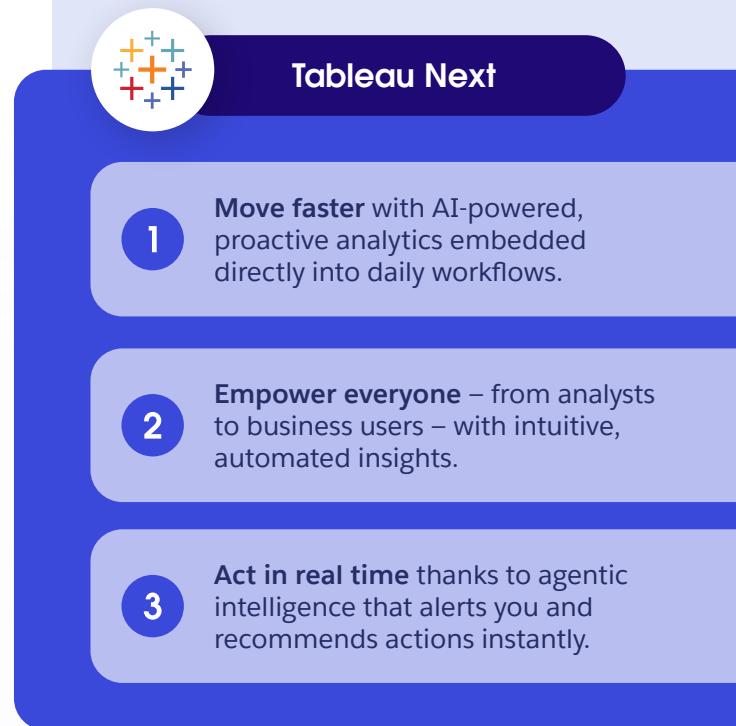
# The benefits of Tableau Next

Tableau Next isn't just about where your analytics live, it's about how you experience and interact with them.

At present, despite a high volume of data and investments aimed at combining and curating data, many organizations lack trusted insights that drive real action. Tableau Next's agentic capabilities address that gap. They shift your analytics experience from reactive to proactive, moving beyond static dashboards and embedding analytics directly into your daily workflows. This means less time sifting through data and more time acting on clear, context-aware intelligence – dramatically accelerating your data-to-action workflow. For example, when something important changes, Tableau Next can automatically alert you in your preferred channel (Slack, email, Teams, etc.) so you can take action immediately – without having to check a dashboard.

Ultimately, Tableau Next empowers your teams to scale decision-making and intuitively interact with data, simplifying complex processes and making insights more intuitive. And, thanks to AI-powered intelligence and automated workflows, Tableau Next's high-value analytics and rich visualizations are accessible to everyone, regardless of their technical or analytic background.

**The end result is a more scalable, data-driven, efficient operation.**



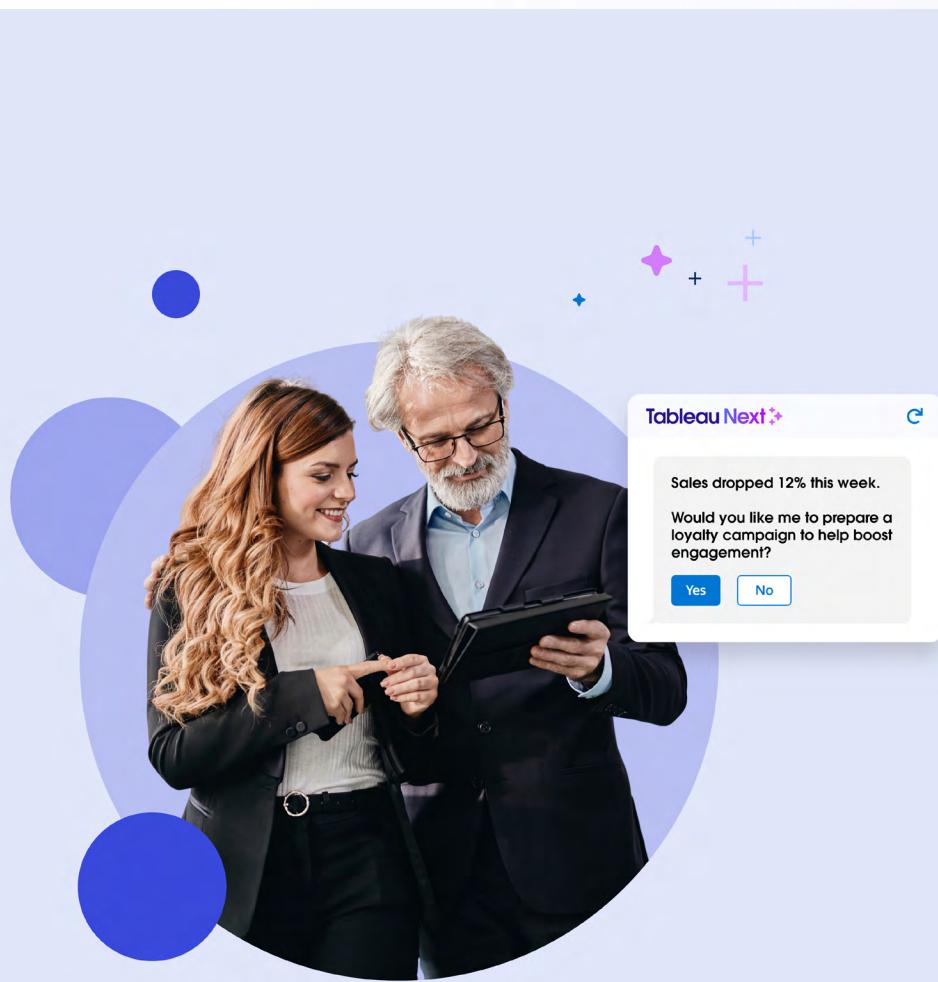
# The features of Tableau Next

Tableau Next's unique architecture leverages Data 360 and Agentforce to allow users to benefit from a host of unique agentic AI capabilities and features not available on any other Tableau platform.

[Tableau Semantics](#) – an AI-powered semantic layer, deeply integrated in Data 360, allows Tableau Next users to unify data and enrich it with business context. This is key to turning raw data into accurate, actionable insights. And its seamless interoperability and intuitive setup help you get up and running fast – so you can start making smarter decisions sooner, no matter where you are in your data journey.

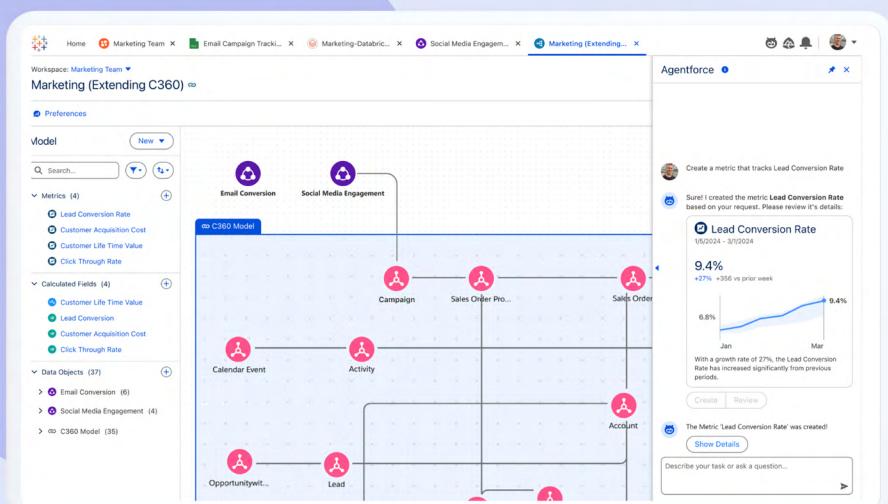
Agent understanding and accuracy are pivotal to the agentic analytics era. Tableau Semantics ensures this by enriching agents with trusted business context and providing the foundation for accurate, consistent, and relevant insights across your entire organization. Combined with Tableau Next, it powers conversational analytics and enables continuous learning of business preferences through real-time Q&A with clarification of intent and semantic learning.

Remember the issue of lots of data but not enough insight? Not anymore. With Tableau Next, users can [turn data into actionable insights](#). Tableau Next comes with pre-built analytics skills for Agentforce that help throughout the analytics lifecycle.



The Data Pro skill speeds up semantic data modeling by creating calculated fields in bulk, using natural language. The Concierge skill enables conversational analytics so users can get insights directly into the flow of work by asking questions in natural language. Agent responses are immediate and trustworthy, grounded in your semantic layer. The Inspector skill is a key skill for business users as it proactively monitors data in real time and can alert you to any changes or anomalies. This will negate the need to manually check up on data and KPIs. And should you choose to do so, you could also instruct the agent to recommend and execute predefined actions in response to certain types of data situations.

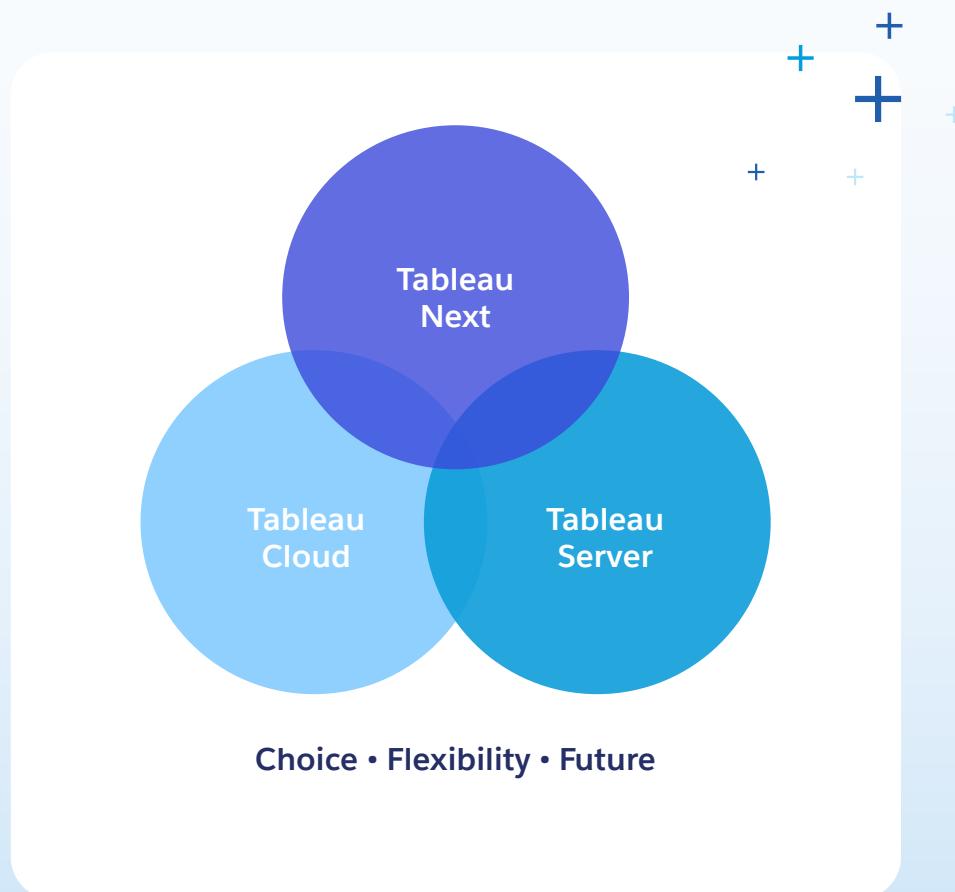
The capabilities outlined not only activate your data, they do so instantly and efficiently.



# Flexibility that fits your future

Your analytics solutions need to be tailored to fit your specific needs. Tableau's options are flexible and customizable, allowing you to choose between the scalability and innovation of Tableau Cloud, the control of Tableau Server, or the agentic, cutting-edge technology of Tableau Next. This opens up a world of possibilities.

Tableau's unprecedented flexibility and interoperability combined with its modular approach allows you to scale and shift as your needs change. This empowers you to engage with data meaningfully, wherever works for you, in whatever way you want. Tableau's unique ability to provide access for users at every skill level while also supporting strong governance and security measures allows everyone across your organization to evolve and innovate quickly with AI-driven, future-forward capabilities that redefine data and analytic experiences. This takes your analytics experience from a passive form of information to a unique asset teams can use to really move the needle.





#### About Tableau from Salesforce

Tableau is more than just a business intelligence tool—it's an AI-powered platform that turns data into action. With a suite of agentic analytics and generative AI capabilities, Tableau helps everyone, in every industry, get the insights they need, proactively and without effort.

Built on a connected and adaptable platform, Tableau gives you the freedom to choose your architecture and scale as your AI strategy evolves. With enterprise-grade security, governance, and compliance built in, you can move with agility while keeping your data trusted and secure. Backed by the industry's largest partner ecosystem and a passionate global community, Tableau helps you unlock limitless possibilities with your data.

For more information, visit [www.tableau.com](http://www.tableau.com).

