

Course Description

Take our interactive, hands-on Reports Essentials course to learn basic product concepts and skills to help you easily view and track your customer data and their product usage. Classroom time includes exercises, discussion and hands-on practice with a live environment to enhance your learning experience.

Prerequisite E-Learning Videos:

- Revenue Analytics Usage Data – Foundation Part 1 (7:05)
- Revenue Analytics Demand Map – Foundation Part 2 (8:12)

Revenue Analytics Hands-On, 2 hours

Main Menu and Settings

- How to Change Local Settings and Time Zones
- How to Use the Glossary
- How to find information in the Knowledge Base
- How to send a support request
- Login/Logout
- Quick Overview of what you'll find in
 - Analyze Page
 - Search Page
 - Reports

Search Page

- How to do a string search
- How to drill through results
- Displaying brief Summaries and what you can view
- Opening details views on specific results for customers, subscriptions and users
- Navigating the search panes

Location

Training takes place online, using your own computer to access our WebEx session.

Duration

Classes may be scheduled in 1-hour to 3-hour time blocks, depending on topics covered

Class Size

Maximum of 10 learners per class for optimal time with our instructor and hands-on environment

Language

All classes are taught in English.

Scheduling

To schedule virtual training for your team, please contact your Engagement Manager.

Cancel/Reschedule

To cancel or reschedule a training, please notify your Engagement Manager 7 days prior to training.

Analytics Hands-On (continued from first page)

Reports Page

- Why use Reports
- How to customize Reports
- How to share or keep Reports private: ownership and permissions
- Viewing/selecting Reports and Categories
- Viewing Report Descriptions
- Understanding Report Categories
- How to view Filters set in Reports
- How to change Periods/Dates
- How to sort and move columns in grids
- Navigating through pages
- How to export data to Excel
- Understanding Pivots/Grouping fields
- Understanding how to add Criteria to Filters
- Understanding how to view and modify Filters
- How to edit a Report
- How to change Pivot/Grouping fields, Detail fields, sorts and aggregations
- How to save a Report in your own category

About ServiceSource

ServiceSource International, Inc. (NASDAQ: SREV) is the global leader in recurring revenue and customer success management. B2B companies use ServiceSource to drive growth and build long-standing relationships across the customer lifecycle. Through its software and services, ServiceSource delivers higher subscription, maintenance and support revenue, and improved customer retention. Headquartered in San Francisco, ServiceSource® manages approximately \$14.5 billion in revenue for the world's largest and most respected technology, industrial, healthcare and life sciences, and media and information companies. **For more information, go to www.servicesource.com.**