RevenuIntel – Functionality Document

Application User Roles

I. Limited Access User
II. Standard Access User
III. Account Owner
IV. Admin
V. Super Admin

Limited Access User Key Features

Intended User – Senior executives or Senior team members of RevOps, Sales, Marketing & Customer Succcess

- SMART dashboard
  - View select data & reports
  - Create & share custom reports based on preset filters
- Ideal customer Profile
  - View and share ICP

Standard Access User Key Features

Intended User – CRO, CSO, CMO, CXO, CEO, Managers of RevOps, Sales, Marketing, Customer Success

- SMART dashboard
  - view, generate and share custom reports of KPIs, Departments and time duration
  - view & share performance highlights
- Ideal customer profile
  - Build & share ICP based on presaved KPIs
- Create custom metrics
  - Create & share own KPIs and metrics from existing data
  - Add newly created KPI to client's KPI list

Admin Key Features

Intended User – An user from the Client base

- User creation, assiging roles & access maintanence
- Team creation & maintanence
- KPI list edit and update
- Automated mail generation
  - Defining mail generation time period & mail ids to deliver it
- Billing
  - Plan and invoice history management

Super Admin Key Feature

Inteded User – Merkat Itellekt Technologies Pvt Ltd

- Organization creation – Initial setup, Admin creation
- Ticket management
- Billing
  - Creating plans, pricing in stripe
  - Invoice generation
  - Invoice maintanence
- Third party integration for RevenuIntel
- User role creation apart from the one's already mentioned and defining the access
- Automated mail & reminder generation

Pages – Limited access user

1) Sign In
2) Create Password
3) Request reset password
4) Reset Password
5) SMART Dashboard
   i. View – Entire Dashboard
   ii. Access to create custome reports based on preset filters
6) Ideal Customer Profile (ICP)
   i. View and share ICP
7) Settings
   i. Profile settings – view, change/update
   ii. Security settings – Multi factor authentication – view, change/update
8) Help – FAQ, articles
9) Ticket raising
10) Logout

Pages – Standard User

1) Sign In
2) Create password
3) Request reset password
4) Reset password
5) SMART Dashboard
   i. View, custom KPI and other factor selection in dashboard
   ii. view & share performance highlights
6) Ideal Customer Profile
   i. Build & share ICP based on presaved KPIs
7) Create Own Metrics
   i. Create & share own KPIs and metrics from existing data
   ii. Adding the newly created KPI to RevenuIntel database
8) Settings
   i. Profile settings
   ii. Security settings – Multi Factor Authentication – view, change/update
9) Help – FAQ, articles
10) Ticket raising
11) Logout

Pages – Account Owner

12) Sign In
13) Create password
14) Request reset password
15) Reset password
16) SMART Dashboard
    i. View, custom KPI and other factor selection in dashboard
    ii. view & share performance highlights
17) Ideal Customer Profile
    i. Build & share ICP based on presaved KPIs
18) Create Own Metrics
    i. Create & share own KPIs and metrics from existing data
    ii. Adding the newly created KPI to RevenuIntel database
19) User menu - Settings
    i. Profile settings
    ii. Security settings – Multi Factor Authentication – view, change/update
20) Billing & Preferences
21) Help – FAQ, articles
22) Ticket raising
23) Logout

Pages – Admin

1) Sign In
2) Create Password
3) Request reset password
4) Reset Password
5) Admin Console
    i. Analytics
    ii. User
    iii. Teams
    iv. Billing
    v. Integration
    vi. Settings
    vii. Help (admin console related)
6) Settings
7) Ticket raising
8) Help – FAQ (General product Help)
9) Logout

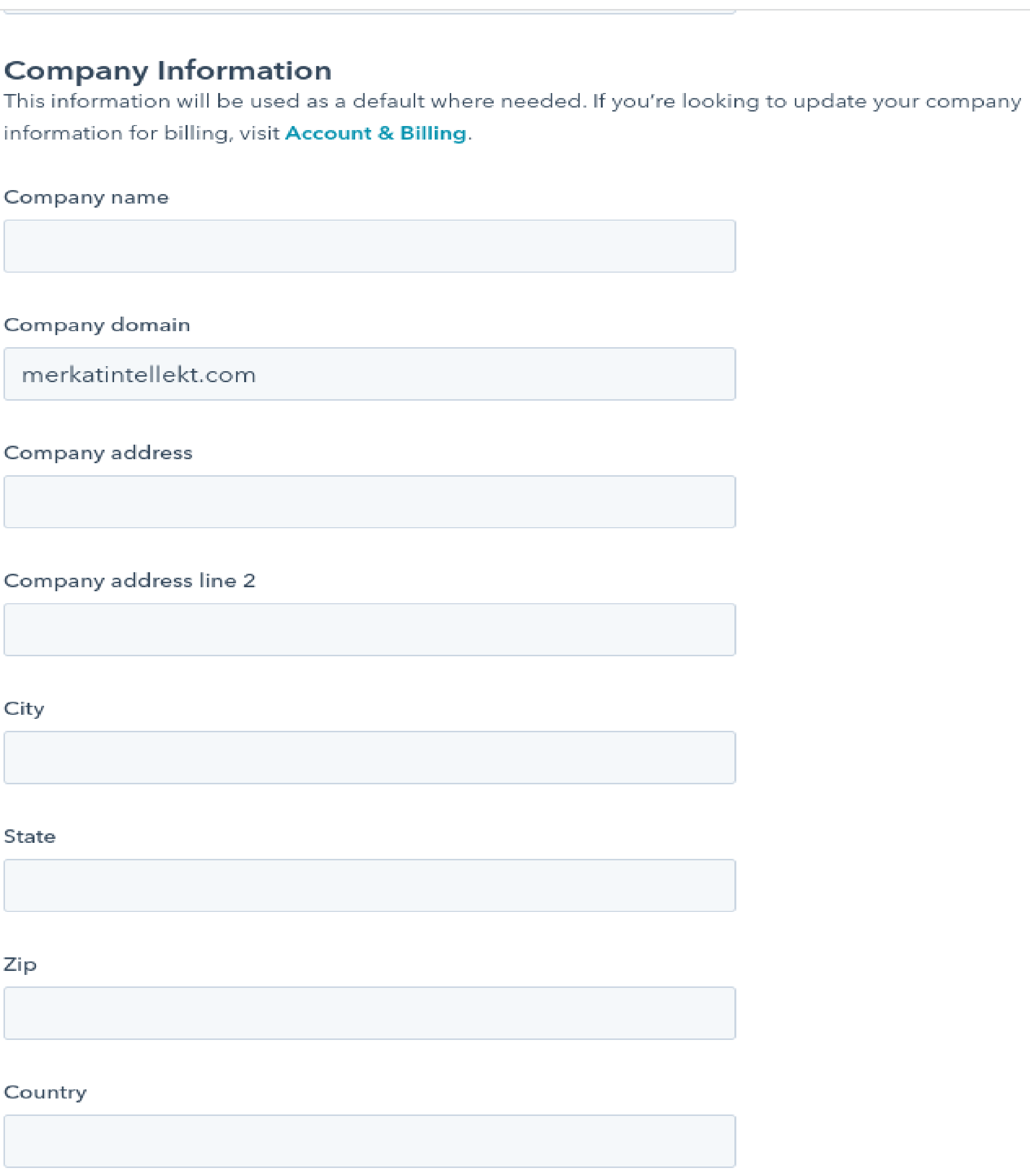
Pages – Super Admin

1) Sign In
2) Organization
    i. Organization initial setup
    ii. View, change/update organization details
    iii. Ticket Management

3) Integration
4) Billing
5) Logout

Super Admin

- Super admin console can be accessed, by signing in using the alloted credentials.
- Console has below option
  - Organization
    - Organization – a company that uses RevenuIntel
    - When a comapny starts using RevenuIntel, their details such as Organization name, address, primary contact number, email id, and address are added here
    - These details can be used for billing purpose.
    - Client Admin can update/change these details by accessing admin console options.

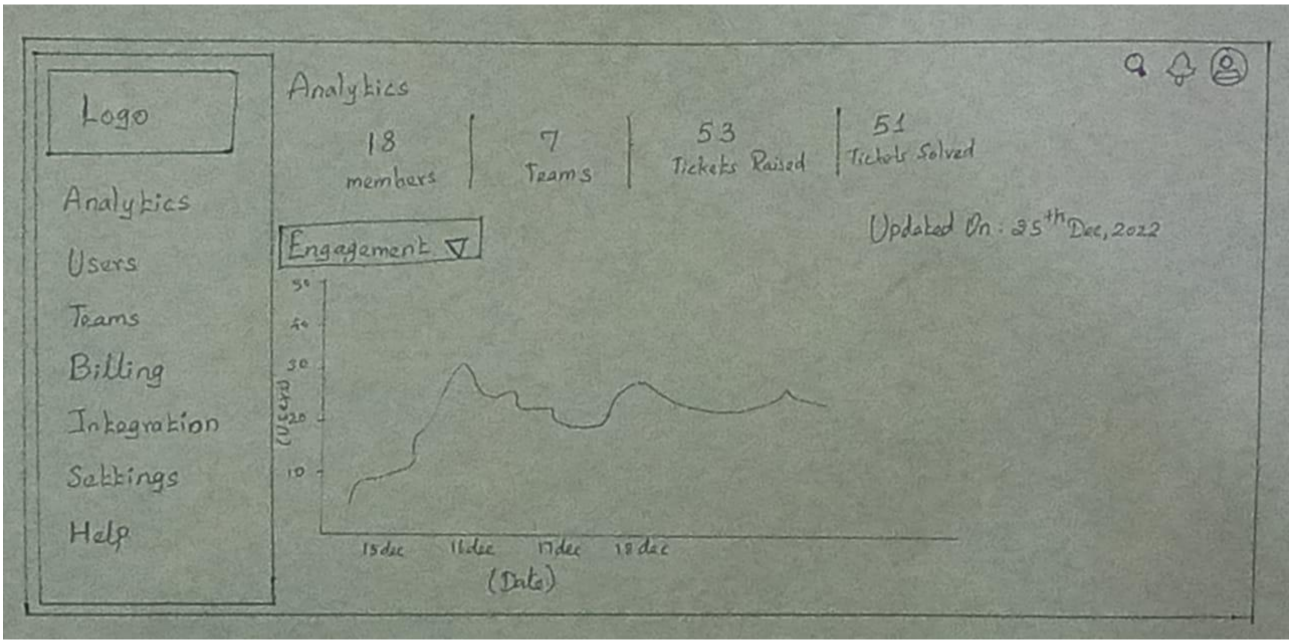


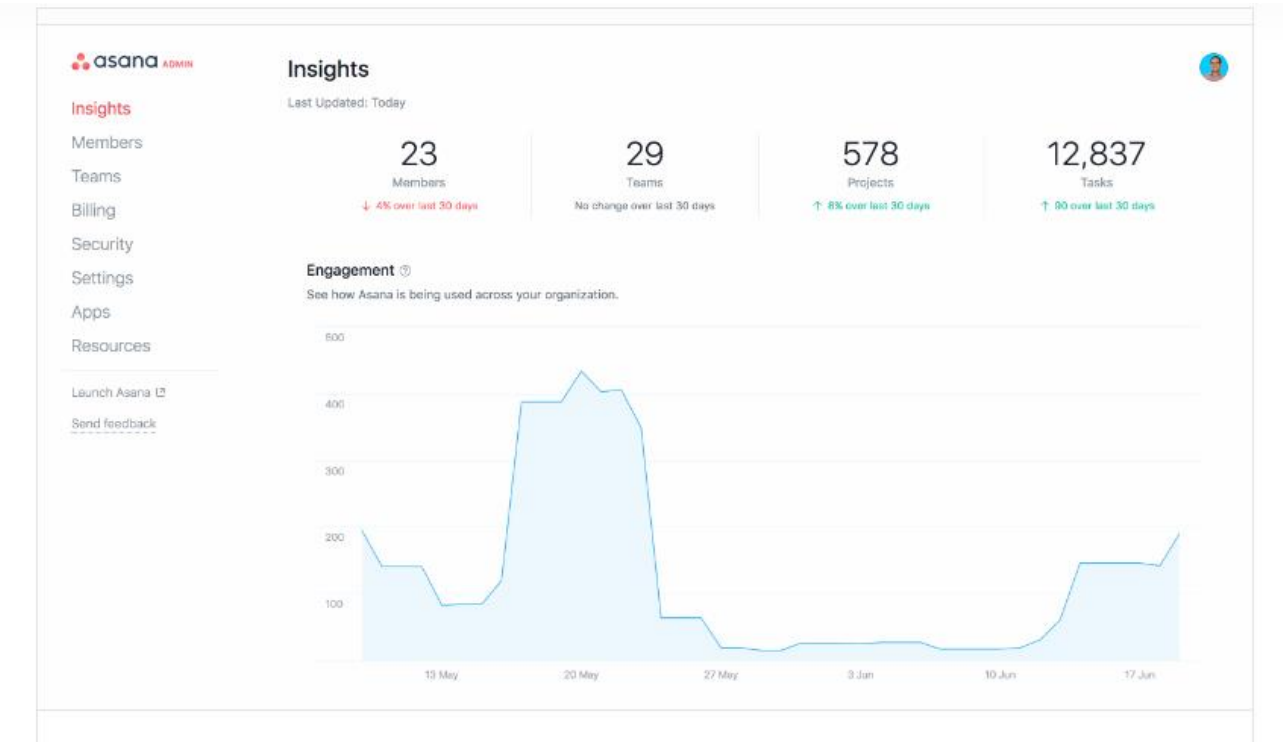
- Once added, it will be displayed in a list view

- Ticket Management
  - Freshdesk – A third party ticketing tool is integrated with RevenuIntel for addressing all user queries and issues.
  - In the organization list view, at the end of each row will have option to access the tickets raised individually by each organization.
  - Status of the tickets will be tracked and the churn rate will be displayed in admin console Analytics tab.
- Billing
  - Stripe payment gateway integration
  - Create, edit and update plan details
  - Invoice generation and history of invoice will be maintained here for each organization.
  - Automated reminder settings for invoice notification will be displayed here and in primary account holder’s notofications.

Admin Console

Analytics

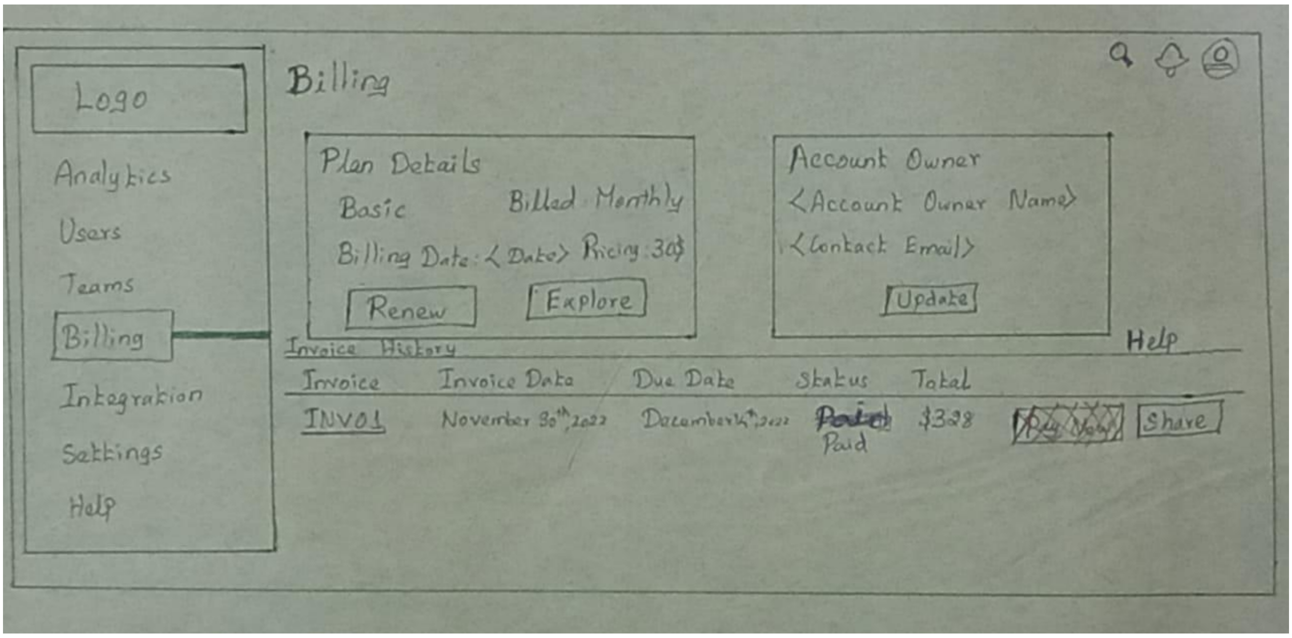


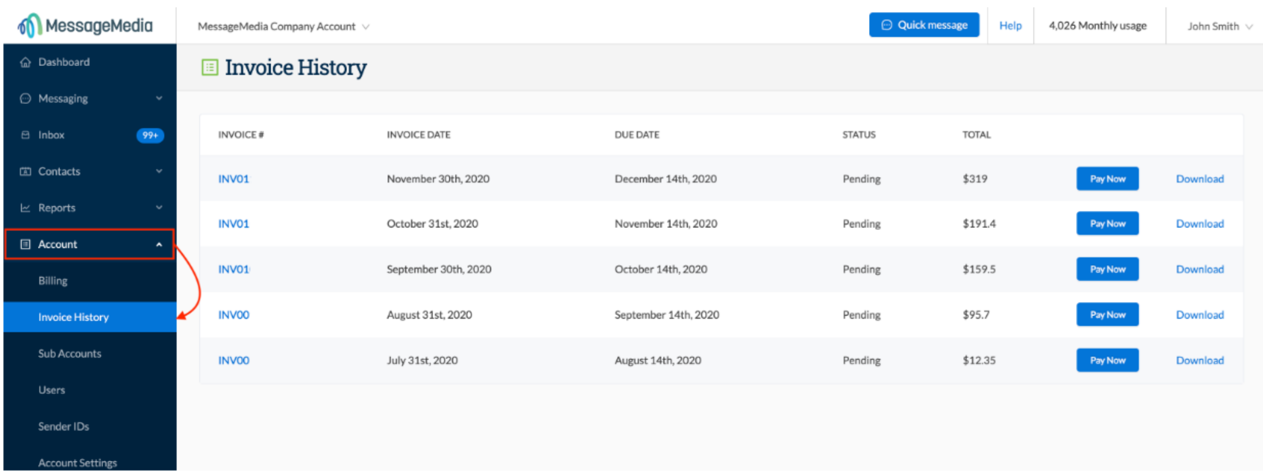


- This tab gives the overview of how an organization uses RevenuIntel.
- Top of the page has the four sections. Total number of users currently using the product, Number of teams created, Number of tickets raised by the Client to super admin, Number of tickets closed by super admin should be displayed.
- A area Chart is displayed in the bottom part of the page. This chart is to present the engagement level of users and no.of reportsgenerated in day basis.

- A drop down menu should be placed on left corner of the chart with the options Engaement and Reports generated.
  - Engagement – Usage of revenuintel by all users in day basis
  - Reports Generated – No.of reports generated by all users in day basis.

Billing





❿ Billing tab has three components.

- **Current Plan** – this compnent displays the details of the choosen current plan with plan name and billing period.
- Two options are provided to RENEW the current plan and to CHANGE PLAN.
- RENEW – If renew is selected, page redirects to checkout process and payment gateway.
- CHANGE PLAN – If change plan is selected, page redirects to different plan available to choose.

- **Account Owner** – Primary contact person name and contact details such as email and contact number will be displayed here.
- Above said details can be edited through update button in the component.
- Account owner may or may not be an admin.

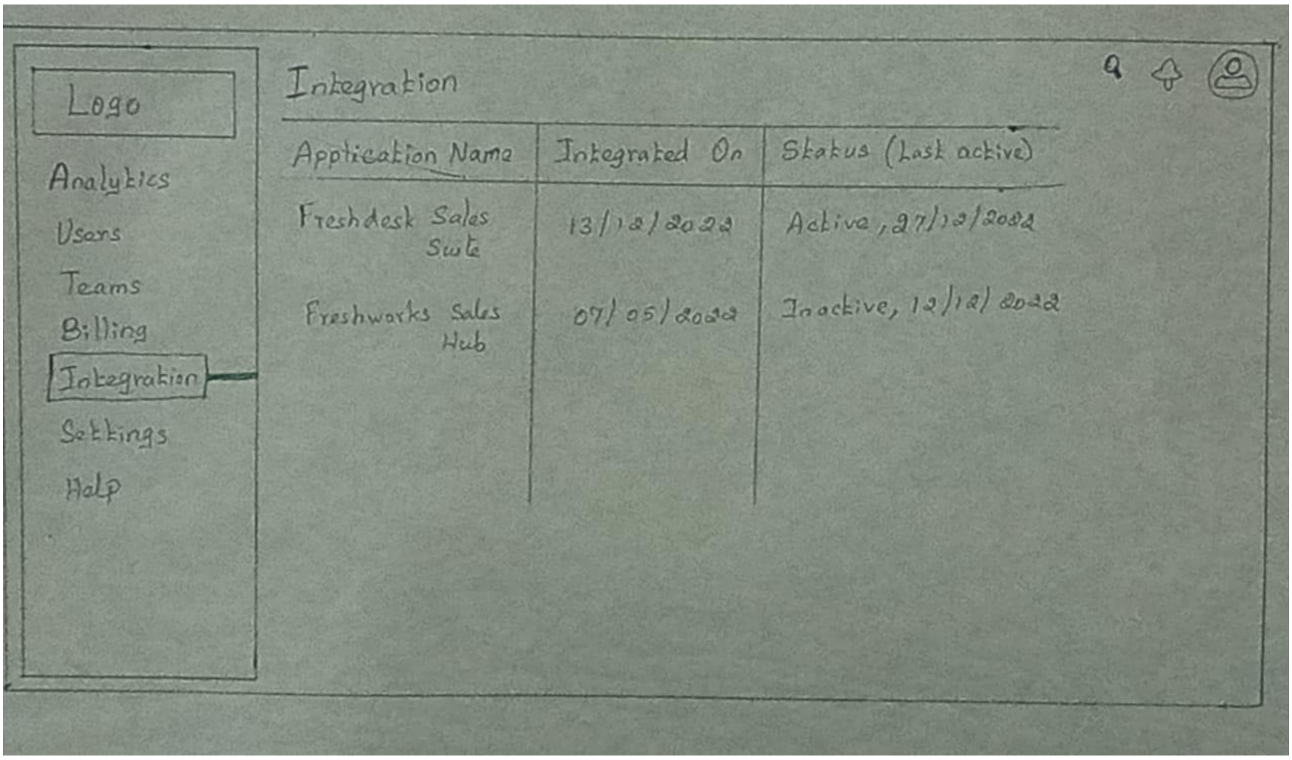
- **Invoice History** – this table has the following fields. Invoice (Invoice number), Invoice Date, Due Date, Status (Paid/Pending), Total (amount to be paid)
- In table, Invoice (Invoice number) should be a clickable link. Once clicked it should prompt to open that invoice as popup.
- Each row of the table has SHARE option to share that particular invoice through mail as an attachement in PDF format.

- **Help** – Help option is provided to raise ticket for query to be raised at the top corner of the table. Once clicked, it should redirect to the ticketing page.

<u>Integration</u>

Purpose of this tab is to maintain the history of the third party applications (Ex: CRM, Automation applications) integrated with RevenuIntel to retieve input data.

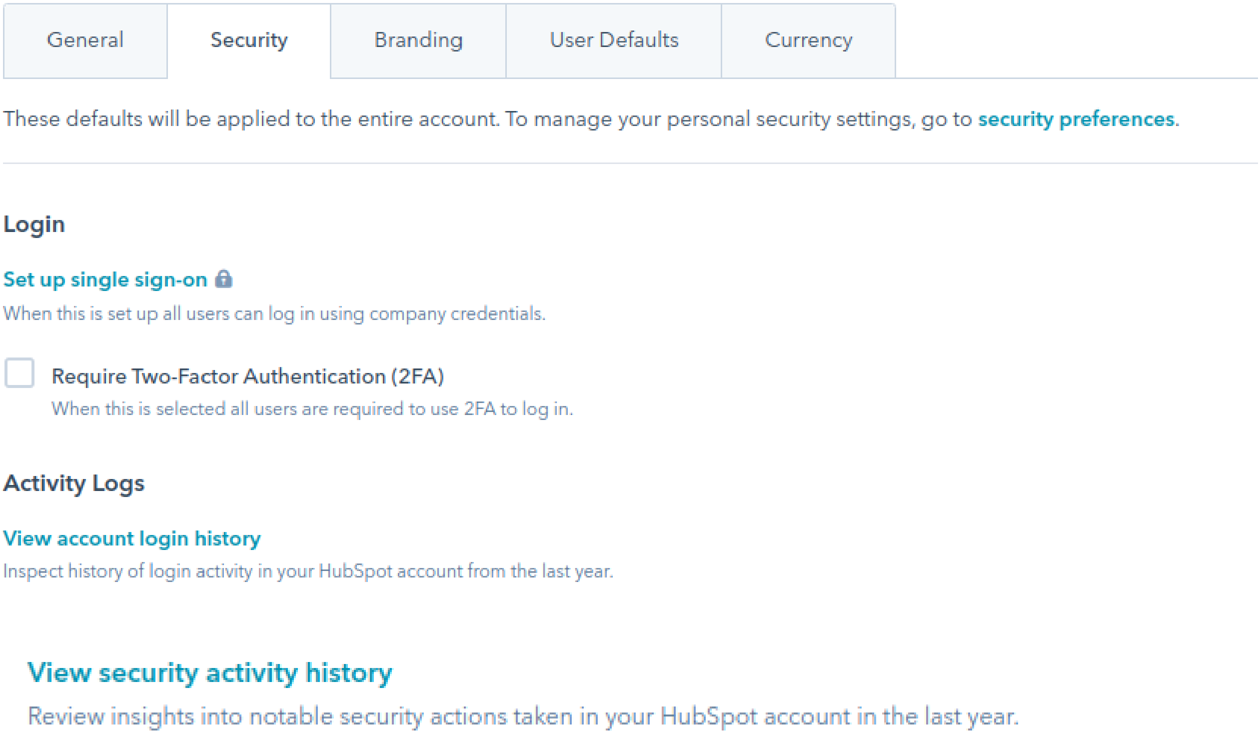
Its a list view table with fields such as Application name, Integrated on (Date), Status (Active/Inactive), active till (Date).



<u>Settings</u>

This Settings tab provides security settings, Privacy & Consent settings for the Organiztion. Admin can change/ update the settings for all the users under their organization.

Security Settings

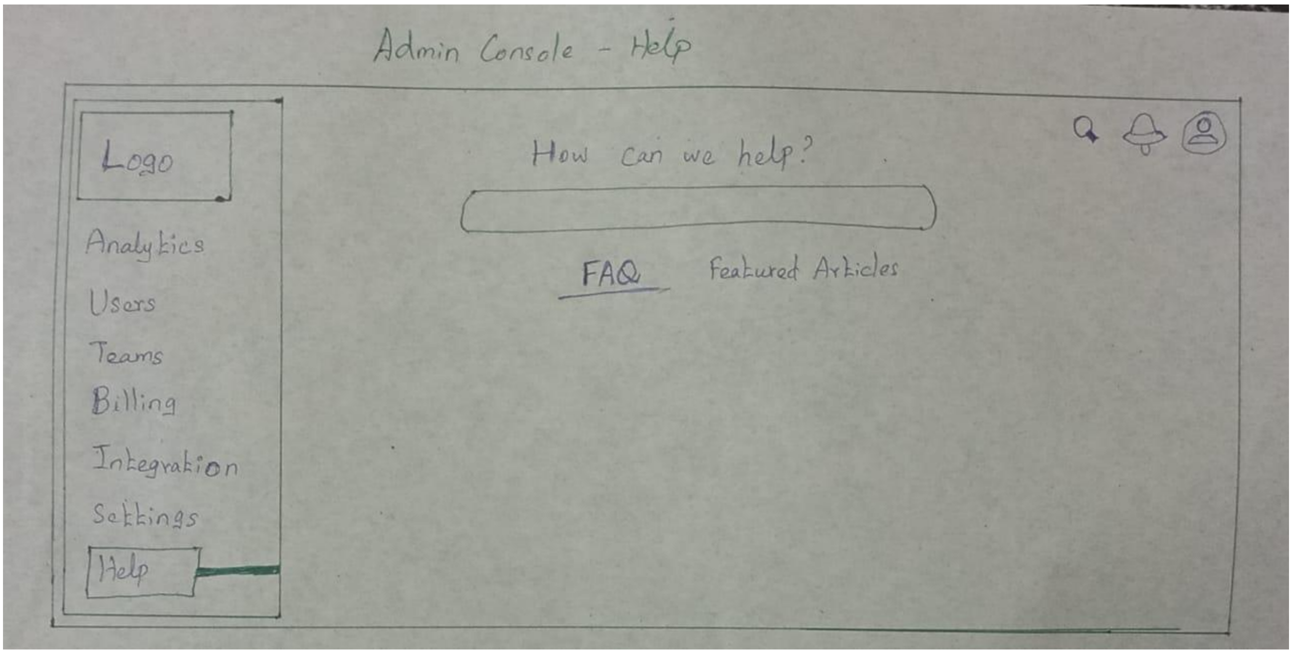


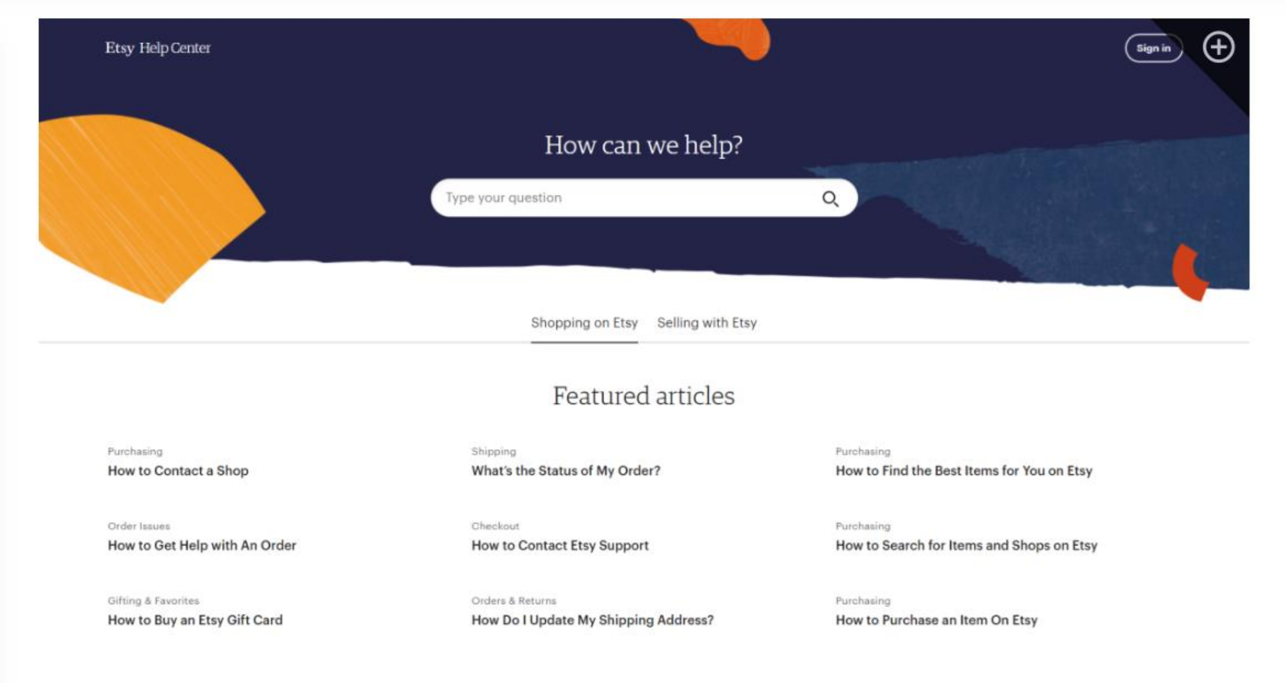
Options to be included:

(1) Single sign-on set up
(2) Enabling two factor authentication for all users
(3) View Account login history
(4) Security activity history done by super admin

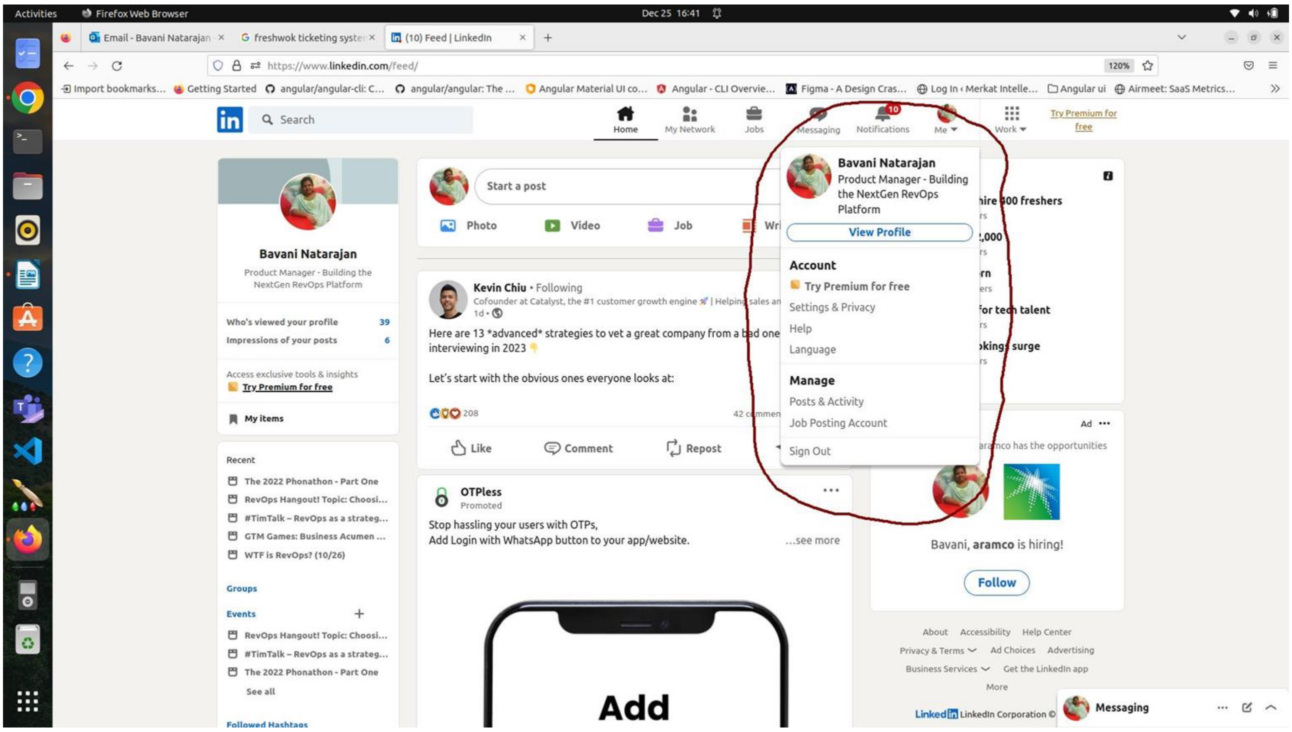
Help

- This help section provides the FAQs and related articles for all admin activities.
- ***Help section in admin console is only for admin activities, whereas the help section in User menu is for overall product help. Both serve different purposes and the content will be different in both.***





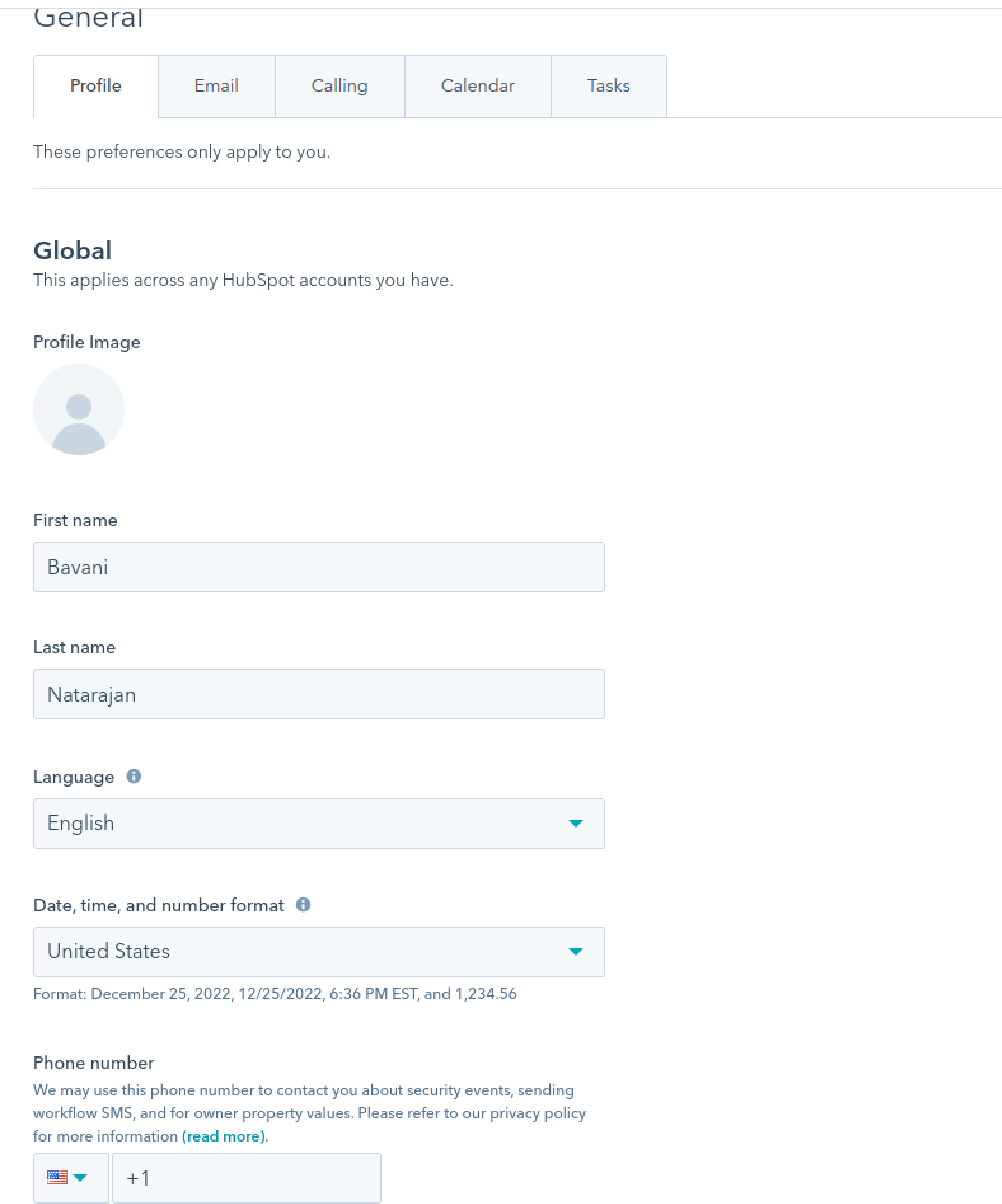
User Menu – (For all users except Account Owner)

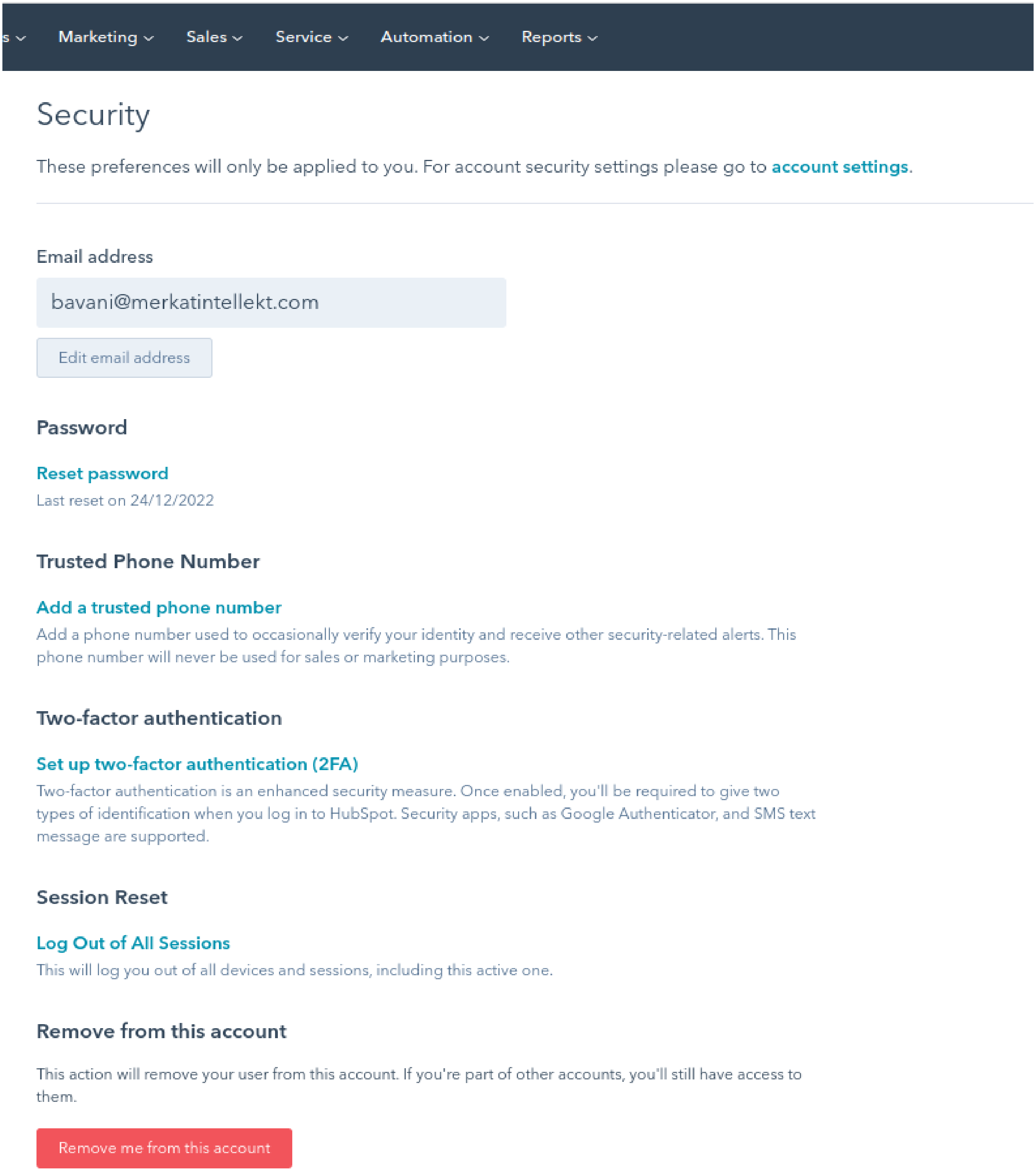


- Purpose of this user menu is to access individual user’s general settings, Ticket assistance, Help section and logout.
- This menu can be accessed in the SMART dashboard by clicking the display picture of the user.

Menu Options

(1) Settings
  - When the user clicks on settings, screen redirects to user profile’s general settings and security settings.
  - General settings – User First name, Last Name, Designation, email, contact no and product role are displayed


General
Profile
Email
Calling
Calendar
Tasks
These preferences only apply to you.
Global
This applies across any HubSpot accounts you have.
Profile Image
First name
Bavani
Last name
Natarajan
Language
English
Date, time, and number format
United States
Format: December 25, 2022, 12/25/2022, 6:36 PM EST, and 1,234.56
Phone number
We may use this phone number to contact you about security events, sending workflow SMS, and for owner property values. Please refer to our privacy policy for more information (read more).
+1



- Security settings – Multi factor authentication (MFA) options are provided.
- MFA options are Temporary password, Help question and answers, Random picture and word selection. Users can select anyone of the above as per their preference.
- **Temporary password is set default for all the users,** they can change this options by accessing this section of the menu

(2) Ticket Assistance

- When the user is facing an issue or to communicate with the super admin regading any questions they have, a ticket will be raised by accessing this option.

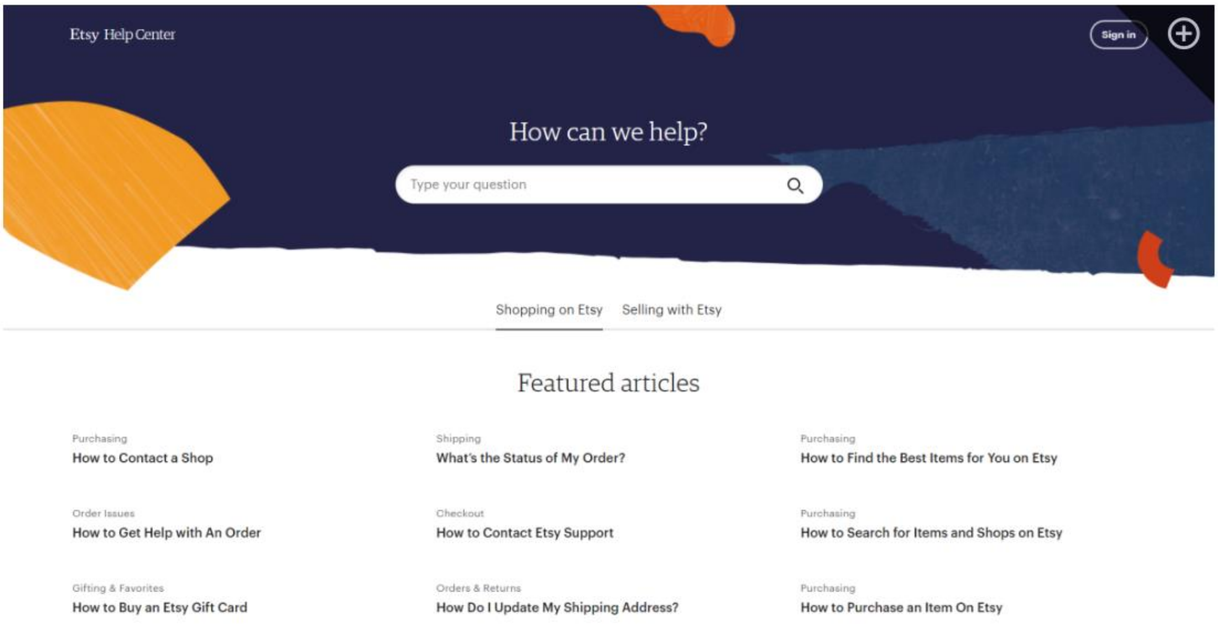
- User can see and track the status of their tickets too
- A third party ticketing tool is integrated with RevenuIntel to serve this purpose.

(3) Help

- Help section consists of FAQs on RevenuIntel and related articles to go through to answer all the queries user might have.
- If they wanna contact Super admin, can do it by raising a ticket by clicking the ticket assistance tab.

Note:

- ***Help section in User menu is for overall product, whereas the Help section in admin console is only for admin activities Both serve different purposes and the content will be different in both.***



(4) Logout

- When the user clicks log out option, a popup window appears with the question, “Do you want to Log Out?”
- By clicking Yes, user gets logged out. By clikcing No, user continues to access RevenuIntel.

User Menu – For Account Owner

- For Account Owner the user menu should have **Billing & Preferences** with all the aboive mentioned option.
- Only Account owner & Admin has access to Billing page.
- By Clicking Billing & Preferences, Billing page in admin console alone should be displayed. Other navigation options in admin console should not be displayed.