



Welcome to a better Monday.

## FREQUENTLY ASKED QUESTIONS



### Is RevOptics a data warehouse?

RevOptics is not a data warehouse. We do use virtual data warehousing technology to store raw and modeled data so that our analytics engine can query for reporting and insights.

### What is the setup lift for me?

Setup is simple. You fill out our step by step guided on-boarding which includes your api credentials. That should take no more than 10 minutes of your time. We are happy for you to do it on your own or we can walk through this with you. Once that process is complete, we will give you access to RevOptics within 72 hours so that you can start exploring your metrics.

### What should I expect during the 30 day trial?

After the setup is complete we will kick off your 30 day trial with a guided tour of the application. From there, you can start digging into your metrics. Every Monday you will receive your "Welcome to a Better Monday" report with recipes to take action on throughout the week. We will have two more touch-points to make sure you are getting the most out of RevOptics before completing the trial. At that time, you will want to keep using it and we will make you an offer you can't refuse.

### What do I need to get the most out of RevOptics and to have it fully configured?

We currently support RevOptics for any combination of the following platforms Netsuite, Salesforce, Marketo, Hubspot (CRM & MAP), Pardot, and Eloqua. We're the only BI tool that is automated out of the box. We use machine learning to detect your systems and build a data warehouse that correlates the needed data for revenue analytics.

### I don't see my systems supported. When will it be available?

Sugar, Target Date = September 2022

Zoho, Target Date = October 2022

Need it sooner? Contact your Customer Success Manager or Support.

### How much data is required to benefit from RevOptics?

We typically work with companies that are north of \$5M in annual revenue. The reason, they typically have enough contact and opportunistic data to make the most of what RevOptics has to offer. If you are unsure, sign up for 30 days and we will let you know.

### When I convert to a customer of RevOptics, what functionality should I expect to receive?

You will have access to everything that you have access to in your trial and everything we develop in the future.

RevOptics is focused on making you more successful as a marketer and as a revenue team. We will never nickel and dime you on functionality. If RevOptics helps you make more money, then we are doing our job. Thus, you get an all access pass.