FSU Report Process and Usage Guidelines

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The FSU Report, created by Wayne O, serves as the source of record for monthly FSU usage and customer billing. This report should be used by Finance, Customer Success, and Account Management teams to support invoicing and customer inquiries regarding FSU usage.

Report Location

FSU Report.xlsx

Process

1. Access the Monthly Report
   - Open the FSU Report to view the previous month's usage.
2. Review Tab 1 – Billing Data / Monthly Billing
   - Tab 1 is intended for billing purposes and contains the monthly usage data required for customer invoicing.
   - Use Tab 1 to:
     - Validate monthly FSU usage totals.
     - Support invoice generation and billing reconciliation.
     - Confirm billable activity for the reporting period.

3. Review Tab 2 – User-Level Activity / Users Per Company

    - Tab 2 provides detailed usage information by user within each customer organization.
    - Use Tab 2 to:
        - Identify which users accessed or utilized FSU during the reporting month.
        - Respond to customer questions regarding FSU usage.
        - Provide customers with a detailed breakdown of user activity when requested.
        - Support Customer Success and Account Management discussions related to product adoption and usage.

Guidelines

- Tab 1 should be considered the primary source for billing and invoicing activities.
- Tab 2 should be used when additional detail is required regarding customer usage.
- Verify the reporting month before communicating usage information to customers.
- Maintain confidentiality of user-level data and share only with authorized internal personnel or customer contacts as appropriate.

Questions

For questions regarding report access, report logic, or data discrepancies, contact Wayne OKeefe, Melissa Wilson Blanchard, or the appropriate reporting owner.