## Insite

Scoping start date: Nov 6, 2023

Implementation Completed Date (Go live date): Feb 7, 2024

MSA Signature Date: Feb 7, 2024

GTM POC: Jarrett

ERP: QBO

Tax Integration: No Tax

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### Key people at Merchant

### CFO: Matthew Horne

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### Company summary

AI consulting for in-store food and consumer brands.   
  
AM Notes

Matthew is really down-to-earth and chill. He is likely paying more for tabs than he needs based on the # of invoices- that's the biggest churn risk. Touch base on new contracts and business growth when you chat with him

Billing model

* Milestone based billing

### Contract Processing Steps

1. Any time “Reynolds” appears in an InSite contract, customer name is “R.J. Reynolds Tobacco Co”
   1. ALL Reynolds contracts should be assigned to customer “R.J. Reynolds Tobacco Co”

### Events Processing (if necessary)

* N/A. Milestones are generally manual or stay at the predetermined date.
* Integration item should be “Recurring: Monthly SaaS for ALL contract

### Customer Information/Nuances

1. Grouping feature - **there may be some bugs**

### Feature Requests

* FR 1
  + N/S

### Rewatch Calls

* 6/11/24 - https://tabs.rewatch.com/video/09riarf1iyuqoi8d-meeting-june-11-2024
* Dec 18th https://tabs.rewatch.com/video/a0kzuqdtxlunx010-matthew-hornes-and-jarrett-martin-december-18-2023
* Dec 12th https://tabs.rewatch.com/video/qw1xzhrf4hslvzn0-matthew-horne-and-jarrett-martin-december-12-2023