## Merchant Name: Cassidy AI Implementation POC: Royce *(IM to fill)* CX POC: *[IMP to Add]*

### 

### 

| Notes Sections   *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills * Annual upfront contracts that contain seats. They do not charge for overages and we were explicit that we would not charge for overages in Tabs. No proration or usage style billing. Only flat Saas   + Revenue for the whole contract is straightlined across the period * If a customer vastly exceeds their contracted amount, then a new contract is signed for the new amount   + Also billed upfront and annually and then straightlined across the period   1) What is the merchant temperament?  - John is relatively laid back. They are a fellow New York startup and John is wearing many hats so the more straight forward and simple something can be the better  3) What are the Tabs features that the key POC cares about?  -John will care the most about reporting. Velo handles their day to day of invoicing and billing but John (and his CEO Justin) care about the reporting |
| --- |

### Billing model *(Entire Section: Implementation to fill section)*

* Are there unique things about the customer creation process for this merchant?
* Information on how merchant bills
* How contract is broken up
* One off things to know about the merchant

### Contract Processing Steps *(Entire Section: Implementation/Success to fill Post-Go Live)*

1. Steps to process
2. Anything to ignore in contracts?
3. Specifics processing things the merchant has requested that may differ by contract (e.g. always back-date invoice date to final day of the month)
4. Default Service Term
   1. If None Listed, Ops Default is 1 Year
5. Default Net Payment Terms
   1. If None, Ops Default is 0
6. Default Billing Frequency
   1. If None Listed, Ops Default is Monthly
7. How do we handle taxes as a line item?
   1. If None Listed, Ops Default is every tax line item becomes a BT

### Events Processing (if necessary) *(Entire Section: Implementation/Success to fill Post-Go Live)*

* Any important information on events billing

Integration Items Processing (if necessary)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

* What are the instructions for assigning integration items?
* Example: All Statsig integrations items should be labeled as “Sales”
* Example: All “Pinata” integration items should be labeled as “Software Subscription Bundle” unless otherwise noted by Merchant

Post Processing Communications (if necessary)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

* Does the Ops Team need to notify anyone on the team re: completion of processing batches in Implementation or Active phase?
* Who needs to be notified and when?
  + Example:
    - Who: Customer Success [Azmat Aziz] needs to be notified
    - Where: Messari internal merchant channel
    - When: contracts are processed [Merchant Phase: Active]

### Customer Information *(Entire Section: Implementation/Success to fill Post-Go Live)*

* Any important information on specifics customers of this merchant
  + Special memo’s certain invoices require
  + Invoice changes due to merchant/customer relationship

### Feature Requests *(AE to fill for all requests prior to Imp handoff, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

* AE - NA
* FR 1
  + What is it
  + Why it's important
  + Urgency

### Merchant Calls *(AE to fill for all videos prior to Imp involvement, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

* [Intro call](https://us-56595.app.gong.io/call?id=4296997956097027521)
* [Demo for John](https://us-56595.app.gong.io/call?id=2385080431332009772)
* A demo for Justin the CEO was not recorded
* [Merchant deck](https://docs.google.com/presentation/d/1Ehw2zoD2kpFglkDIKggCNbRgRuEDUEa8hwsMgRnz7e0/edit?usp=sharing)