## Merchant

Scoping start date: 2023

Implementation Completed Date (Go live date): March 15, 2024

MSA Signature Date: Jan 2024

GTM POC: Rebecca

ERP: NS

Tax Integration: Avalara

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### Key people at Merchant

### Carl Rojas - “Accounting Dude” - key POC

* Joan Dunne - rev ops

### Company summary

Xeal provides electric vehicle (EV) charging solutions for businesses and public spaces. They offer a range of services including installation, maintenance, and management of EV charging infrastructure to support the growing adoption of electric vehicles.  
  
AM Notes

Long standing relationship with Carl

Highly customized implementation that was executed in conjunction with DotSolved (their Netsuite implementation partner) and Trullion (their rev rec module)

Leveraging Tabs in a slightly different way than most merchants (data feed from SFDC > NS > Tabs > NS instead of contract driven)

### Billing model

* Info on how merchant bills
* How contract is broken up
* One off things to know about merchant

### Contract Processing Steps

1. Steps to process or specifics processing things merchant has requested that may differ from contract (e.g. always back-date invoice date to final day of the month)

### Events Processing (if necessary)

* Any important information on events billing

### Customer Information

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

### Feature Requests

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

### Rewatch Calls

* Rewatch by dates