## Proof.io

Scoping start date: Apr 5, 2024

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

MSA Signature Date: Apr 12, 2024

GTM POC: Nick

ERP: QBO

Tax Integration: No Tax

### 

### Key people at Merchant

### Accountant: Leadra Jarvis ([leandra@decimal.com](mailto:leandra@decimal.com)), Sara Builes (sara@decimal.com)

### CFO: Ty Boshyan (ty@proof.io)

### Company summary

[Proof](https://proof.io/) is a B2B Saas platform that aims to lead the next evolution of business intelligence through verified ESG & Impact Data. They believe that all future decisions, whether it be business decisions, investment decisions, or broad consumer behavior, will be influenced by their effect on people and the planet. This can only be achieved through real-time access to verified impact data. Thus, they are building the digital infrastructure that will drive that transformation in the market.  
  
AM Notes

Ty is CFO and primary user. Leandra and Sara are his outsourced accountants who help him close the books every month. Leandra and Sara want to bring tabs to 4-5 other clients post implementation. They use QBO as the general ledger and send invoices through Stripe today.

### Billing model

* 22 total contracts. 3-5 have usage based billing, the others are standard recurring terms.
* Sending invoices through Stripe and tracking payments in QBO/Google Sheets

### Contract Processing Steps

1. Default to 1 year contract term if not specified
2. Default to Net 30 if not specified
3. Default to quarterly billing if not specified
4. Auto extend contract to 3 months past end date unless canceled
5. If not contact emails, they will add manually in Tabs
6. Link all BTs to the following 2 integration items:
   1. Implementation - SaaS: Implementation
   2. Everything else - SaaS:Subscription
7. Ignore all optional terms like “upgrade to Pro for $x”Events Processing (if necessary)

* Ignore any events-based terms and escalate to #proof-io if needed

### Customer Information

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

### Rewatch Calls

* 4/5/24 - Discovery
  + <https://tabs.rewatch.com/video/m4wuufwpnfdw0lkg-benjamin-nicholas-april-5-2024>
* 4/8/24 - Scoping call
  + <https://tabs.rewatch.com/video/hkpw48ap4pdghsoy-ty-nicholas-sync-on-path-forward-april-8-2024>
* 4/11/24 - Additional Demo with outsourced accountants
  + <https://tabs.rewatch.com/video/7flqz6vysygcjmkw-ty-nick-april-11-2024>