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

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| Notes Sections   *(AE to fill if they have, Implementation to be completion DRI on handoff)*  Shared internal google drive: [PlanetDDS](https://drive.google.com/drive/folders/1sb9XjkvqiPb-I_qOeFIrOrrybhRQ6vz2)   * Info on how merchant bills  Parent (DSO- dental services org), Child (location)   - software SaaS flat fee - services (some upfront, some T&M) - usage (# of submitted claims, # of providers)  1) What is the merchant temperament?  Irvine- **Christy**- Sr. Rev accounting manager- big tabs advocate. Will get you what you need to get stuff done. Has less power/influence in the org than daniel. She + her team are the ones that are doing a lot of the manual billing /editing  ATL **Daniel**- Controller- even keeled, gets stuff done. Champion Irvine **Stephen**- CFO- absolute snake– seems super nice on the surface, gets the value of automation, but savage negotiator. Document every interaction with him.  Relies on “the trio”- daniel, bobby, christy- listens to them in that order Irvine **Bobby**- Head of rev ops- understands stuff at a high level but leans on Makayla for in-the-weeds stuff. Will think about every potential edge case. Main guy for scope creep. Put your foot down with him, let him know our best practices  Irvine **Makayla**- sales ops- in the weeds. Open to process change. Executes.  Irvine **Ryan** - accounting- very junior manual edits  3) What are the Tabs features that the key POC cares about?  **Contract extraction**- today they are manually editing all the invoices related to amendments (50hrs/month) → ~$1m in misbillings  **Source of truth**- contracts and amendments live in a bunch of different places, AM visibility  **Accuracy**- ARR reporting, forecasting   **NOTE: We have articulated that export workflow is STANDARD– they are unaware that they are our first Sage customer. We have NOT mentioned that we’re building a direct integration**  **4) Solutions Notes:**  Complexities:   * SFDC configuration ([See Lucidchart for current vs future state](https://lucid.app/lucidchart/3ae59621-053c-44b2-9d4d-b3ece762b83c/edit?invitationId=inv_b2930cd2-92eb-43ac-865f-677a338db01f&page=6BZGfIns-eAQ#)) * Parent-child relationships (Parent (DSO- dental services org), Child (location)- may locations, can bill upon go-live of location which is tracked in MavenLink) * Reseller Agreements   + Renewals call: https://us-56595.app.gong.io/call?id=3520111202599455294   + Proposal call: https://us-56595.app.gong.io/call?id=1336876122491972673 * Auto-Renewals: [PlanetDDS <> Tabs: Technical Solutioning](https://docs.google.com/presentation/d/1q3VrFDszY39Xwphap0i9Z8N0UOgrek6t6CST_5e3EHE/edit?slide=id.g376297cf000_0_66#slide=id.g376297cf000_0_66) * Sage Intacct: Aligned on export/import path with them * Data Migration: Since documents are not attached historically, we will align on a cutover date- anything prior will be imported from sage (Planet is responsible for populating template provided by Tabs)   NOTE: PlanetDDS is owning VersaPay→ Stripe Migration throughout this implementation, they may need guidance mapping Stripe customers to Tabs customers to re-enable autopay. 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)*   * [[Internal Tabs] PlanetDDS Product Requests](https://docs.google.com/spreadsheets/d/1ONSnw6n3MN0a-hWBvNBIrQLdNwBH4Gse7BsELZgDSTM/edit?gid=0#gid=0) |
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### 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)*

* [[Internal Tabs] PlanetDDS Product Requests](https://docs.google.com/spreadsheets/d/1ONSnw6n3MN0a-hWBvNBIrQLdNwBH4Gse7BsELZgDSTM/edit?gid=0#gid=0)

### 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)*

Lucid Charts: <https://lucid.app/lucidchart/3ae59621-053c-44b2-9d4d-b3ece762b83c/edit?viewport_loc=-117%2C-353%2C2881%2C1445%2C6BZGfIns-eAQ&invitationId=inv_b2930cd2-92eb-43ac-865f-677a338db01f>

<https://us-56595.app.gong.io/account?id=1698202799804265374&type=ACCOUNT&workspace-id=2531298410931371606&date=2025-04-30&activity-id=9121150635338066957&filter=%7B%22accountFilter%22%3A%7B%22type%22%3A%22And%22%2C%22filters%22%3A%5B%7B%22type%22%3A%22ActivityType%22%2C%22values%22%3A%5B%22CALL%22%5D%7D%5D%7D%7D>