## Propel *(AE to fill)* 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)*   * Info on how merchant bills  1) What is the merchant temperament? - Doug is the nicest guy ever. Lives in tampa, has a golden retriever names hamilton. Really good dude   3) What are the Tabs features that the key POC cares about? - automation across the board, making live changes to invoices based off amendments, automated dunning and collections |
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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
   1. Service Start Date: Locate the campaign start date mentioned in the contract.
   2. Months of Service: Identify the total contract duration by checking the campaign end date.
   3. Item Name: Look for the name of the service being provided, such as "User Acquisition Campaign" or equivalent.
   4. Item Description: Leave blank.
   5. Integration Item: Leave blank.
   6. Billing Type: Flat.
   7. Total Price: Identify the total campaign cost, including any updates mentioned in the contract.
      1. [Min/Max amounts]
      2. [Late Fees]
   8. Quantity: Look for the pricing structure (e.g., cost per click) and unit measurement.
   9. Start Date: Confirm the effective date of the agreement or campaign launch
      1. Back date from the due date if needed.
   10. Periods: Identify if the contract is recurring, fixed-term, or subject to renewal.
   11. Frequency: Check how often invoices are issued
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)*

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

budget burn down tracking

### 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)*

* Loom recording links by dates

They are all in the slack channel