## Merchant Name *Ply* Implementation POC: Jeff *(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   Very simple, flat SaaS recurring fees  Mostly US based clientele, but a small handful of CAN customers (all billed USD)  For US customers:  Tax IS being charged in a very small handful of jurisdictions  Ryan will tell us where Tax is being charged and we will include it in processing  For Canada customers:   * Very small volume * USD * No special taxes or language requirements   1) What is the merchant temperament?  Fellow primary company, very smart but slightly anxious  3) What are the Tabs features that the key POC cares about?  Ply sells to SMBs, and their sales team often needs to invoice customers immediately, sometimes without a signed contract. Our proposed solution (discussed with Vanessa) involves building an order form for their sales team to submit directly to Tabs, enabling automated invoice generation and delivery without any additional human intervention.  They also want to use our API to pull out data for their own financial modeling.  We aligned on a solution for this in scoping per Slack #Ply channel:   * During implementation Tabs will help them design a form that we can process as quickly as possible (we get to do the formatting so it is easiest for us). * "Instant" processing isn't realistic but we can do "hands-free contract processing". Once the AE sends us an order form, there is nothing more they need to do and they can trust that we will get the invoice out quickly. NO specific SLA to be provided. * Tabs will send the invoice once processed. We can add this to #product-ops-requests after the deal closes. * Ply can use out API endpoints to GET any data into their internal tool. Tabs will not own any build on this. * We cannot commit to getting data into their BI tool, but they're welcome to build against our APIs and put the data there. We don't have a "churn" metric yet but the best signal for churn is probably an obligation that ends without another obligation beginning. |
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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)*

* 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)*

* 4/25 Initial call to reconnect: <https://us-56595.app.gong.io/call?id=7774983638386825133>
* 4/29 Scoping call with Vanessa: <https://us-56595.app.gong.io/call?id=7590695297893420352>
* 5/14 Call with Scott at Primary and Ryan, walking them through the platform: <https://us-56595.app.gong.io/call?id=5664666681402284111>