## Merchant Name: Tailorbird Implementation POC: Dani *(AE to fill)* CX POC: *[IMP to Add]*

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| Notes Sections [Ops International Team to Ignore]  *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills * Annual upfront usage fee and onboarding fee. Variable usage based on property onboarding volume, which is typically sent via email when a new property “goes live”  1) What is the merchant temperament? * Friendly, straightforward, empathetic and excited about what Tabs is building   3) What are the Tabs features that the key POC cares about?  QBO integration, invoice automation, payment portal to collect payments faster, parent/child structures, cash forecasting, rev rec and revenue reporting |
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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: MRR/GDR in Reporting
  + Why it's important: a metric they report to their board
  + Urgency: low
* FR 2
  + What is it: AP Portal submissions
  + Why it's important: their customers sometimes require payment via their own AP Portal
  + Urgency: medium, Ops team supporting at this time

### 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)*

* Demo: [11/19] <https://www.loom.com/share/230f3e71149440c3b4b38e737fbab781?sid=7b7107a4-6f61-4621-bac5-26fddf9703fe>
* Proposal review [11/22] <https://www.loom.com/share/a4282c9a6a7a4dce9a108b4aee9ec765?sid=15190a1e-de0f-4201-8eaa-4db8b188a16c>
* Custom demo [12/6] <https://www.loom.com/share/653f14e4cfb94a819a428b004a3a2973?sid=e63bc5e5-e42e-47bc-bf1e-b2857545b1b0>
* Eval check in [12/12] https://www.loom.com/share/f1a199a9f0a44cf3a7ee9cd3a46fd7ca?sid=e83a64f4-6450-453c-a3a9-934b7dff45a6