## Merchant Name: ThoroughCare Inc 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   + Flat Saas fee   + Usage with minimums   + Professional services   + Customers will typically have a combination of recurring, onetime, and usage fees   + Some legacy customers have different pricing. They are aware this will take more effort/feedback from their side then to explain the different pricing models   1) What is the merchant temperament?   * They are all relatively easy going. A bit hard to read but when we showed them multiple options for a workflow they were open minded to options, not closed minded to something having to perfectly line up. * Gail (Controller)   + Will be most engaged * Dan (CEO/Founder) * Evan (Rev ops)   + Will be most engaged * Brandon (Sales ops)   3) What are the Tabs features that the key POC cares about?   * HubSpot integration * Quickbooks integration (extending QB lifespan too) * PandaDoc integration * Avalara integration * Invoice creation automation * Usage intake * Renewals report * Cash forecast report * ARR waterfall * Email ingest of agreements |
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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. No arrears for flat
   2. Description should be the unit price ($ per unit)
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)*

* [June 2nd](https://us-56595.app.gong.io/call?id=7272611822893064524)
* [June 5th](https://us-56595.app.gong.io/call?id=7786878574297350110)
* [June 9th](https://us-56595.app.gong.io/call?id=3360120059331980096)
* [June 11](https://us-56595.app.gong.io/call?id=6127047567865790057&account-id=4945455442486366462)
* [June 12](https://us-56595.app.gong.io/call?id=4184641104652214824&account-id=4945455442486366462)