## Merchant Name: Vesta 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   + Platform fees   + Usage with minimums   1) What is the merchant temperament?   * Nolan is a very easy going guy but this is likely one of (if not the) first times he has bought software. He will need very clear action items and next steps. I do not recommend trusting him to drive the process, he will need explicit instructions. * His boss Monica was not involved pre-sales.   3) What are the Tabs features that the key POC cares about?   * Integration with Quickbooks * Ability to autogenerate invoices * Ability to ingest usage data — their team will be building the API |
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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)*

* [April 17](https://us-56595.app.gong.io/call?id=3849258229718800965)th
* [April 22](https://us-56595.app.gong.io/call?id=5275177949522636676)nd
* [April 30](https://us-56595.app.gong.io/call?id=7283603584775542264)th
* [May 22](https://us-56595.app.gong.io/call?id=3038734310176656264)nd
* [July 10](https://us-56595.app.gong.io/call?id=7007989426337489612)th
* [July 17](https://us-56595.app.gong.io/call?id=8808866878446777407)th
* [July 23](https://us-56595.app.gong.io/call?id=957657665654780963)rd