Metabase alert: Merchant Churn Alert has results

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How to Identify

Ticket Subject	Datadog Screenshot
Metabase alert: Merchant Churn Alert has results	Metabase alert: Merchant Churn Alert has results Via email **Metabase** To Bolt, Eric Karpas, Greg Greiner Show more **Merchant Churn Alert** merchant / case **Osmotics Cosmeceuticals** — Had transactions each of the last seven days but didn not have a transaction today **Knight Sound & Lighting, Inc.** — Had transactions each of the last seven days but didn not have a transaction today **JMC Automotive Equipment** — Had transactions each of the last seven days but didn not have a transaction today **SHIFTPOD** — Had transactions each of the last seven days but didn not have a transaction today **Tactical Kinetics** — Had transactions each of the last seven days but didn not have a transaction today **BudgetLockers** — No transactions in the past 72 hours but had transactions in the previous 72 hours

What to do

	Instruction Step	Screenshot
1	Copy the list of merchants showing in the Zendesk ticket. Paste the list into an internal note so you can note down your findings for each merchant.	Metabase alert: Merchant Churn Alert has results Via email **Merchant Churn Alert** merchant / case Bob's Watches — Had transactions each of the last seven days but didn not have Best Price in the Universe — No transactions in the past 72 hours but had transactions in the Ambush Skateboarding — No transactions in the past 72 hours but had transactions in the Real Money — No transactions in the past 72 hours but had transactions in the AKIRA — No transactions in the past 72 hours but had transactions in the Revival Cycles Inc. — No transactions in the past 72 hours but had transactions in the
2	The Analyst will check to ensure that none of the merchants in the ticket require an escalation to a CSM. This may require checking multiple sources.	
3	Check if Bolt checkout is on the merchant's site • Find the relevant merchant in the **Admin Dashboard → Merchant Lookup**.	nboarding Merchant Lookup Merchant Description
4	Click the first link listed under **Divisions** on the left.	Divisions Forever 21 Forever 21 Back Office

5	On the following page, open the first URL shown in **Auto-Approved Domains**.	
		Auto-Approved Domains
		Remove https://www.forever21.com
		Remove https://connect.bolt.com
		Remove https://forever21.com
		Remove https://new.forever21.com

6	On the merchant's site, create a test order and use the checkout to ensure the Bolt checkout button is on the website.	↳ Checkout
	ℹ Do not place the order. Be sure to remove the item from the shopping cart before closing the tab as this may affect the merchant's inventory numbers.	

7	✅ Note that the Bolt checkout is on the merchant's site in the Zendesk internal note. Move to the next merchant on the list.	
	⚠ If you do not see the Bolt payment button, a deeper dive is needed to see if the merchant is a churn risk. Continue with steps below.	

8	Check the Merchant Dashboard for transactions	
	Check the **Merchant Dashboard** to find the last transaction made with Bolt.	
	ℹ You may need to add yourself as an **Internal User** in the Admin Dashboard.	

9	Note the transaction date in the Zendesk internal note.	

10	Check Salesforce for merchant status and notes:	
	Launch Salesforce. This is easiest by clicking the tile in Okta.	

11	Search for the merchant's name and select the **Account**. You'll see CSM information and the customer's status (live, onboarding, churned etc.)	
	You may need to separate names for the merchant, for example "Budgetlockers vs Budget Lockers" to find the account in the dropdown.	

12	Check the **Status Notes** that might identify why Bolt is not showing up. Copy this information into Zendesk internal note and move to the next merchant on the list.	
	Continue to step #4 if there are no notes explaining why Bolt checkout is absent.	

13	✅	

If there is no information why Bolt is not showing, open a Business Escalation with the CSM by following the steps in this playbook: 🗎 Business Escalation Playbook

No further action is required from you once contact has been made.

Changelog

Version Number	Person who Made Change	Modification Date	Modification Summary
1.0.2	Ziyaad Motala	12/12/22	• Changed the process for us informing CSM
1.0.1	Ziyaad Motala	3/9/22	• Edited formatting
1.0.0	Lisa Rogalski	1/12/22	• Created Playbook

| 14 | Input all findings into the internal note and resolve the ticket. |

Category: Other

Subcategory: Internal Alerts - No Transactions

| BeckerTime, LLC | Bolt listed as payment method on website. Recent transactions in merchant dashboard. LIVE status in Salesforce. |
Intellipedic Bedding	Bolt listed as payment method on website. Recent transactions in merchant dashboard. LIVE status in Salesforce.
LifeSpan Fitness	Not seeing Bolt listed on site as payment method. Recent transactions in merchant dashboard. LIVE status in Salesforce. Contacted CSM. micah 2:23 PM
	Hey Lisa! They don't have us enabled on the consumer site but are processing via their back end. We are aware and working to offboard fully soon. Thanks for flagging!

Add Yourself as an Internal User

Find the relevant merchant in the

Admin Dashboard → **Merchant Lookup**.

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Add Yourself as an Internal User

Find the relevant merchant in the

Admin Dashboard → **Merchant Lookup**.

16	In the
	Users section, click the **Add Internal User** button.

17 Add your email address and click **Save**.

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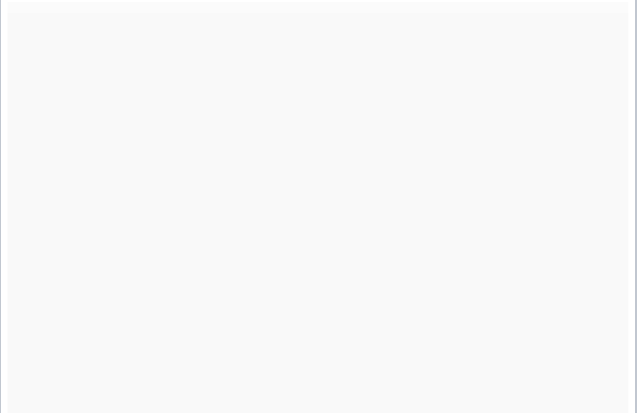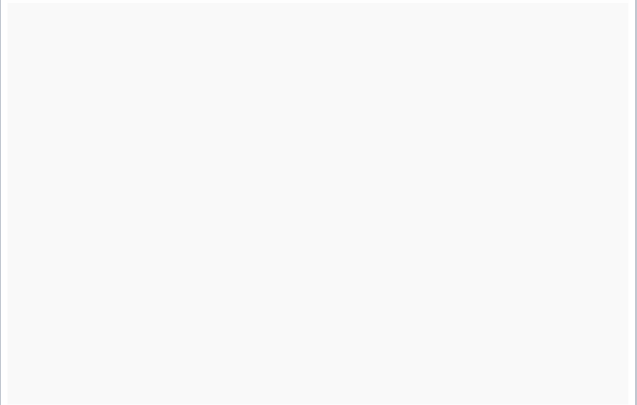
email addr

Save

18 | The merchant will appear in the top-right dropdown menu of the

Merchant Dashboard. You may need to refresh your web browser.

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