

Prepare for a cart-pal pilot

One merchant workflow. One fulfillment provider.

Business and catalog

Identify the merchant legal entity, product categories, geography, typical order size, and monthly volume. Review catalog and merchant eligibility with the payment provider before launch.

Storefront and data ownership

Bring storefront details, catalog/SKU mapping, source of prices, stock rules, tax/shipping needs, and example order records. Confirm which system owns each field and agree customer-data handling and retention.

Payment acceptance

Plan merchant sandbox tests for hosted card entry, approvals, declines, timeouts, duplicate requests, amount/currency mismatches, and reconciliation. Verify that repeats use the original checkout identity and uncertain outcomes do not trigger another charge.

Fulfillment acceptance

Confirm the warehouse's actual duplicate protection, lookup, acknowledgment, and tracking contract. Test outages and retained queues. Define how an uncertain handoff is investigated before retrying, and who handles manual review.

Access, audit, and operations

Validate merchant sign-in, roles, tenant isolation, and production operator identity. Review audit records, redacted logs, alerts, backups, incident response, and rollback. Name owners for refunds, disputes, fraud decisions, and support.

Measurable success

Agree acceptance criteria: one paid order per approved checkout, no fulfillment on declines, reviewed unknown outcomes, retained queues during outages, and traceable shipment events. Compare manual handoffs and exception-resolution time against a baseline.

Commercial scope and agent proposals

Agree setup, software fees, billable-order rules, provider charges, support, and cancellation. Residuals require a written agreement. Agent authorization, per-agent access/spending limits, and actor-aware controls remain proposals; do not assume they are included.

Documented go/no-go

Complete merchant/product approval, sandbox and provider acceptance, access and privacy controls, operational checks, and applicable payment approvals. The simulation is not evidence of NMI endorsement, production approval, or PCI certification. Keep live activity disabled until acceptance is documented.