



Folium

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REVIEW BEFORE PRODUCTION

FOLIUM SYSTEMS

DIGITAL COMMERCE AI REVENUE OPS

Digital Commerce AI Revenue Ops

Pure digital sales businesses need AI that connects to revenue operations: product data, search, catalog quality, customer questions, abandoned carts, support, fulfillment signals, reviews, promotions, fraud signals, and staff workflows.

AUDIENCE

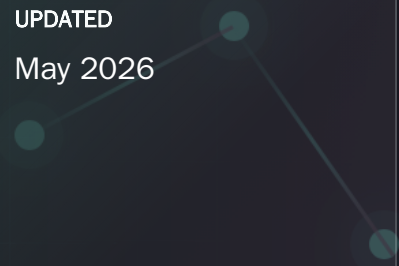
Shopify, BigCommerce, webstore, ecommerce, marketplace, and digital sales operators

PURPOSE

Show how Folium can improve digital commerce workflows with AI without losing control of brand, data, or customer trust

UPDATED

May 2026



Commerce AI should connect catalog, customer support, revenue recovery, operations, and analytics.

The first build should target one measurable revenue or support workflow.

Folium can help digital sellers connect external platforms to internal intelligence and governed AI workflows.

FOCIUM

BOUNDARY

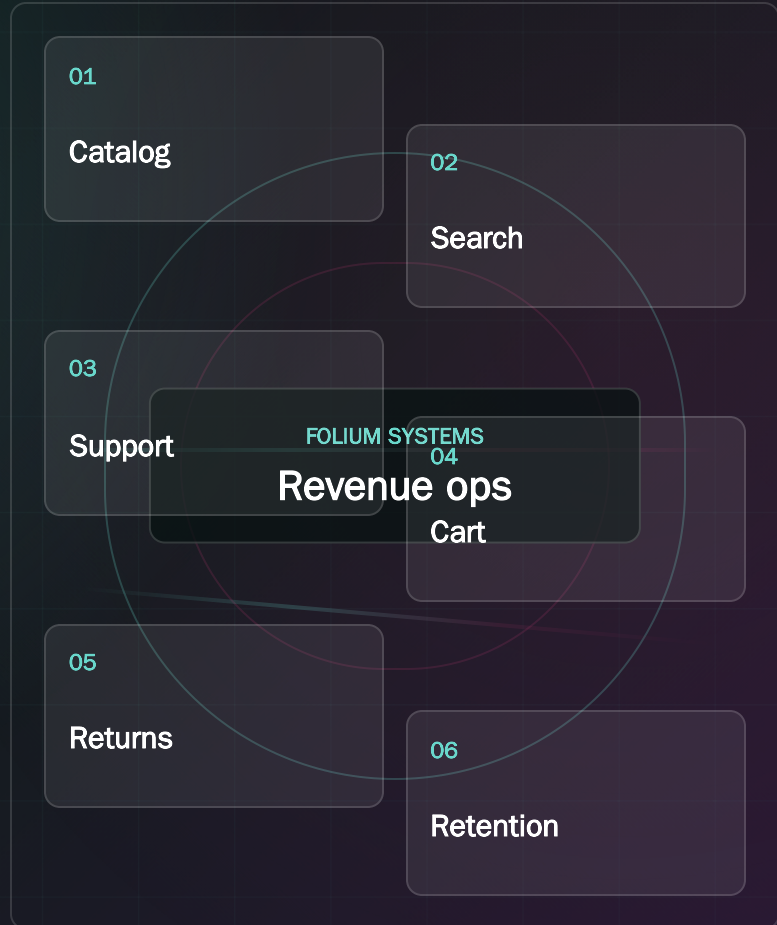
NEXT GATE

COMMERCE AI OPERATIONS

Digital sellers need AI inside revenue operations, not only chat.

The commerce packet maps catalog intelligence, product content, support, returns, abandoned carts, merchandising, retention, platform permissions, and human approval.

REVENUE OPS



01

Gives pure digital sellers a direct Folium path.

02

Connects AI to revenue operations and customer experience.

03

Shows Shopify, BigCommerce, and marketplace work without overexposing live systems.

Choose the review route before reading cover to cover.

This packet is meant to support a real decision meeting. Different reviewers should enter through different routes, then come back together around the same controlled next step.

DECISION ROUTE

EXECUTIVE ROUTE

Decision first

Start with the cover, visual summary, executive read, controls, first ninety days, and handoff. This route helps leaders decide whether the next move is education, audit, first build, pilot, or operations.

- Outcome
- Risk
- Owner
- Next gate

OPERATING ROUTE

OPERATIONS ROUTE

How the work will run

Read the workflow map, procedures, operating roles, metrics, first sprint, and buyer worksheet. This route shows whether staff can actually use, review, and improve the future process.

- Workflow
- Staff
- Support
- Improve

TRUST ROUTE

TECHNICAL AND TRUST ROUTE

Where the boundaries live

Focus on records and work products, controls, risk assumptions, reference work products, source truth, runtime placement, and launch conditions before any private access expands.

- Source
- Access
- Runtime
- Rollback

BUYER SESSION ROUTE

Turn reading into a working session

Use the discovery questions, role review route, buyer worksheet, and engagement fit ladder to prepare one process, one owner, one source map, and one next decision.

- Process
- Examples
- Questions
- Decision

Best use: bring one workflow, the people who own it, the systems it touches, the data classes involved, and the decision this packet should help leadership make.

Digital commerce AI revenue ops in plain language.

Pure digital sales businesses need AI that connects to revenue operations: product data, search, catalog quality, customer questions, abandoned carts, support, fulfillment signals, reviews, promotions, fraud signals, and staff workflows.

RECORD

BOUNDARY

ACTION

CATALOG

Product data becomes AI fuel

Titles, descriptions, attributes, images, reviews, policies, and FAQs need structure and freshness.

- Products
- Attributes
- Policies

CUSTOMER

Customer questions become workflow signals

Support, product fit, shipping, returns, and recommendations can guide AI-assisted responses and process improvements.

- Support
- Search
- Returns

REVENUE

AI can recover missed revenue

Abandoned carts, weak search, unclear product data, poor follow-up, and slow support can become targeted workflows.

- Cart
- Upsell
- Retention

OPS

Commerce operations need controls

AI should respect brand voice, pricing rules, inventory, policies, fraud risk, and human review.

- Brand
- Inventory
- Review

This packet is public-facing. It is written for serious review without exposing private infrastructure, customer data, credentials, live provider wiring, or internal project labels.

The operating path should be visible before anyone trusts the outcome.

Folium uses workflow maps to turn broad AI ambition into inspectable work. Each phase names the procedure, the visible output, and the decision gate that prevents excitement from outrunning control.

DECISION GRID

REVIEW LENS

NEXT STEP

PHASE	PROCEDURE	VISIBLE OUTPUT	DECISION GATE
Commerce audit	Inspect store platform, catalog, search, customer support, analytics, integrations, and pain points.	Commerce AI opportunity map.	The first workflow has measurable value.
Catalog quality	Review product fields, descriptions, images, attributes, variants, policies, and metadata.	Catalog improvement plan.	AI has clean source truth.
Customer question map	Cluster support questions, product-fit confusion, returns, shipping, warranty, and sizing issues.	Question and response map.	Support automation is grounded.
Revenue workflow	Choose cart recovery, product recommendation, support response, review mining, or catalog cleanup.	First revenue-ops workflow.	The path is narrow.
Integration build	Connect Shopify, BigCommerce, CRM, email, support desk, analytics, inventory, or database sources as approved.	Integration blueprint and sandbox.	Data movement is controlled.
AI behavior	Define brand voice, answer sources, allowed recommendations, blocked claims, review states, and escalation.	Commerce AI behavior spec.	Customer trust is protected.
Evaluate	Test product accuracy, policy compliance, tone, conversion path, edge cases, and support escalation.	Commerce evaluation record.	The workflow is ready to pilot or refine.
Operate	Track search misses, support deflection, cart recovery, content quality, customer feedback, and release notes.	Commerce AI operations board.	Revenue ops improves over time.

The work should leave behind material a buyer can inspect.

A serious engagement should produce more than conversation. Folium packages records, diagrams, checklists, routes, system surfaces, launch gates, and handoff material so the buyer can keep control after the first win.

DECISION GRID

REVIEW LENS

NEXT STEP

WORK PRODUCT	WHAT IT CONTAINS	HOW THE REVIEWER USES IT
Commerce opportunity map	Store pain points ranked by revenue, support cost, customer friction, and readiness.	Chooses the first workflow.
Catalog source map	Products, variants, attributes, descriptions, images, policies, reviews, and update owners.	Improves source quality.
Customer intent clusters	Repeated questions, objections, product-fit signals, return reasons, and support themes.	Connects AI to customer reality.
Integration blueprint	Shopify, BigCommerce, CRM, email, support, analytics, inventory, and database routes.	Shows external-to-internal data flow.
Brand and policy guardrails	Allowed language, blocked claims, policy sources, discount rules, escalation.	Protects trust and consistency.
Revenue operations dashboard	Search misses, cart recovery, response quality, support topics, and improvement backlog.	Turns AI into operating improvement.

The procedure is the product as much as the technology.

The goal is not to make AI look impressive for one meeting. The goal is to make the operating path repeatable, explainable, reviewable, and safe enough to improve.

CHECKLIST

OWNER PATH

RELEASE SIGNAL

- Start with measurable commerce pressure: revenue leakage, support load, catalog confusion, or slow follow-up.
- Clean product data before asking AI to explain products.
- Connect AI responses to approved policy and product sources.
- Do not let AI invent availability, pricing, claims, warranties, or discount terms.
- Define human review for refunds, disputes, sensitive support, and unusual customer cases.
- Treat abandoned cart recovery as a workflow, not only a message.
- Use customer questions to improve catalog and content.
- Route integrations through approved API scopes and data boundaries.
- Measure conversion and support quality without overclaiming causation.
- Create a release rhythm for product updates, policy changes, and AI behavior changes.

Governance, quality, and launch gates keep speed honest.

Folium keeps the buyer's next decision tied to observable gates: source truth, authority, access, testing, ownership, support, rollback, and improvement cadence.

DECISION GRID

REVIEW LENS

NEXT STEP

GATE	WHAT MUST BE TRUE	STOP OR REFINE SIGNAL
Catalog gate	Product and policy sources are clean enough to ground answers.	Data is stale, missing, or contradictory.
Brand gate	Tone, claims, discounts, and policy rules are approved.	AI can make unsupported customer promises.
Integration gate	Platform API scopes and data movement are approved.	Store access is too broad or unclear.
Revenue gate	The first workflow has a measurable outcome and baseline.	No way to assess value.
Support gate	Escalation, refunds, disputes, and sensitive cases route to humans.	AI handles high-risk customer moments alone.

The right questions expose the real project.

These prompts help a buyer and Folium decide whether the next step should be education, audit, first build, security review, pilot, or an operating support path.

CHECKLIST

OWNER PATH

RELEASE SIGNAL

- Where are customers dropping off?
- Which product questions repeat most often?
- Which product data is incomplete, inconsistent, or hard to maintain?
- Which support cases should AI never answer without review?
- Which platform owns product truth: Shopify, BigCommerce, ERP, PIM, spreadsheet, or database?
- Which abandoned-cart or post-purchase workflow would benefit from better context?
- What brand claims, regulated claims, or warranty language must be protected?
- What dashboard would help the team improve every week?

Diagrams, charts, and overlays make the work easier to review.

Dense AI work should not only be explained in paragraphs. The reviewer should be able to inspect maps, scorecards, matrices, lanes, and before-after views that reveal where the value and risk live.

RECORD

BOUNDARY

ACTION

Commerce revenue map

A map from traffic to search to product page to cart to checkout to support to retention.

- Search
- Cart
- Checkout
- Retention

Catalog quality matrix

A chart scoring products by completeness, freshness, source owner, and customer confusion.

- Complete
- Fresh
- Owned
- Clear

Customer-intent flow

A flow from question to source retrieval to response draft to human escalation or customer answer.

- Ask
- Retrieve
- Draft
- Escalate

Platform integration overlay

An overlay showing Shopify/BigCommerce, CRM, support, analytics, email, inventory, and internal systems.

- Store
- CRM
- Support
- Analytics

Every serious AI path needs named owners before it becomes dependency.

The same technology can be safe or unsafe depending on who owns the workflow, data, quality, launch authority, support, and improvement loop. Folium makes those responsibilities explicit so no buyer inherits an orphaned system.

DECISION GRID

REVIEW LENS

NEXT STEP

ROLE	OWNS	RECORD TO INSPECT
Executive sponsor	Priority, budget, risk tolerance, stop/continue decision, and expansion timing.	Decision note, value hypothesis, and approval boundary.
Business process owner	The day-to-day work, acceptance criteria, staff impact, and operational usefulness.	Workflow map, user feedback, and adoption notes.
Technical owner	Systems, APIs, databases, runtime placement, deployment, monitoring, and fallback.	Architecture map, integration log, and support route.
Knowledge owner	Source truth, document freshness, policies, retrieval scope, and correction workflow.	Source inventory, freshness cadence, and review exceptions.
Security or risk reviewer	Data classes, credentials, access, logs, retention, blocked actions, and incident path.	Boundary map, permission table, and rollback trigger.
Folium delivery lead	Build coordination, review file, known limits, quality checks, and handoff completeness.	Launch room, eval record, and improvement backlog.

A max-detail packet should tell reviewers how to judge the work.

Folium uses scorecards to make a subjective AI conversation more inspectable. The score is not a substitute for judgment; it helps leadership see whether the next step is education, repair, sandbox, pilot, or operations.

DECISION GRID

REVIEW LENS

NEXT STEP

SCORE AREA	STRONG SIGNAL	WEAK SIGNAL
Business fit	The workflow is specific, painful, owned, and tied to measurable operational improvement.	The project is framed as adding AI generally.
Source truth	Approved sources are known, fresh, classified, and connected to the answer path.	The system mixes stale, unknown, or unapproved sources.
Behavior quality	Representative tasks pass, wrong-answer behavior is known, and edge cases are recorded.	The review build only shows a polished happy path.
Authority control	AI actions are separated into draft, retrieve, recommend, route, execute, block, and escalate.	The system can act without visible permission.
Staff readiness	Users can explain the tool, correct it, escalate, and understand their role.	Staff feel replaced, confused, or unsupported.
Operations readiness	Support, monitoring, rollback, release rhythm, and source refresh are owned.	No one knows who maintains the system after launch.

The work should have a believable first ninety days.

A controlled first ninety days keeps ambition high without turning uncertainty into production risk. Folium uses the period to move from understanding into a narrow working example, then into reviewable operating rhythm.

DECISION GRID

REVIEW LENS

NEXT STEP

WINDOW	FOCUS	EXPECTED OUTPUT
First 30 days	Discovery, source inventory, first-lane selection, staff interviews, data boundary, and build plan.	Process map, owner map, first-build scope, source list, and launch blockers.
Days 31-60	Working surface, RAG or agent behavior, integration stub, evaluation cases, browser checks, and staff review.	Sandbox, evaluation file, screenshots, known limits, and repair list.
Days 61-90	Architecture review, pilot conditions, governance layer, training guide, support path, and improvement cadence.	Launch room, go/no-go record, operations guide, and next-stage recommendation.

The hidden assumptions should be visible before they become expensive.

Every AI engagement contains assumptions about data, people, systems, cost, behavior, and authority. Folium treats those assumptions as review material, not background noise.

DECISION GRID

REVIEW LENS

NEXT STEP

ASSUMPTION	WHY IT MATTERS	HOW FOLIUM REVIEWS IT
The source is authoritative	AI can only be as reliable as the sources and business rules it is allowed to use.	Source inventory, owner confirmation, retrieval tests, freshness cadence.
The process is ready	A broken process can become a faster broken process when AI is added too early.	Workflow mapping, bottleneck review, owner interview, first-lane narrowing.
The runtime fits the data	Cloud, private, local, and hybrid routes carry different privacy, cost, latency, and support tradeoffs.	Runtime matrix, data classification, provider review, fallback plan.
Staff will adopt the tool	Adoption fails when users do not understand, trust, correct, or benefit from the system.	Training notes, staff review, feedback loop, manager visibility.
Authority is clear	The system can create harm if it sends, updates, approves, or routes without permission.	Permission table, blocked actions, human review, audit trail.
The system can be supported	A useful first build becomes fragile if nobody owns incidents, source updates, or cost review.	Support guide, owner map, release rhythm, rollback trigger.

The first sprint should produce something real and reviewable.

Folium prefers a narrow first sprint that creates a working surface or review file the buyer can challenge. The first sprint is not the final system; it is the safest way to make the future visible.

CHECKLIST

OWNER PATH

RELEASE SIGNAL

- Confirm the single process and the decision the sprint must support.
- Collect approved example material, redacted review records, public references, screenshots, workflow notes, and source rules.
- Define what will be built: portal, dashboard, RAG assistant, agent route, integration adapter, audit file, or launch room.
- Create the visual workflow: intake, source, model or agent route, human review, output, record, and next gate.
- Run representative tasks, edge cases, bad input, missing data, and blocked-action tests.
- Prepare browser screenshots, known limits, support questions, and next-stage blockers.
- Review with staff and leadership before expanding data, access, authority, or dependency.
- End with a decision: stop, refine, rebuild, pilot, or prepare an operating plan.

The packet should make the invisible work tangible.

AI work often fails because the important pieces are invisible until something breaks. Folium turns those pieces into work products the buyer can open, print, challenge, and improve.

RECORD

BOUNDARY

ACTION

Process map

A before-and-after workflow showing people, systems, data, decision points, blockers, and expected output.

- Before
- After
- Owner
- Gate

Data boundary map

A map of source classes, approved use, blocked use, retention, provider exposure, and custody.

- Public
- Internal
- Private
- Blocked

Model and agent route

A path showing which model, tool, retrieval source, or agent lane is used and where humans approve.

- Route
- Tool
- Review
- Escalate

Evaluation file

A record of tasks, expected outcomes, failures, repairs, known limits, and acceptance criteria.

- Cases
- Failures
- Repairs
- Limits

Launch room

A board for owners, support, training, rollback, incidents, go/no-go, and improvement backlog.

- Owner
- Support
- Rollback
- Backlog

Handoff guide

A plain-language guide staff can use to understand what the system does, cannot do, and how to report problems.

- Use
- Limit
- Correct
- Report

The business should know how improvement will be measured.

Folium keeps measurement practical. The first goal is not a perfect dashboard; it is a clear set of signals that shows whether the process is saving time, reducing risk, strengthening staff, or improving customer outcomes.

DECISION GRID

REVIEW LENS

NEXT STEP

SIGNAL	WHAT TO WATCH	DECISION IT SUPPORTS
Time recovered	Manual steps removed, average handling time, repeated work reduced, faster routing.	Should this workflow expand to more users or adjacent processes?
Quality improved	Wrong answers, missing sources, correction rate, review exceptions, customer rework.	Is behavior strong enough for pilot or does it need repair?
Risk reduced	Blocked unsafe actions, escalations, data-boundary violations avoided, rollback readiness.	Can authority expand or should controls remain tight?
Staff confidence	Training completion, feedback volume, adoption friction, override rate, manager notes.	Does the workforce need more support before launch?
Cost and runtime	Provider cost, local infrastructure cost, latency, uptime, fallback use, subscription sprawl.	Should runtime placement change?
Customer impact	Response speed, consistency, issue resolution, conversion support, satisfaction signals.	Is the capability improving the business outcome?

Each reviewer should know what to inspect first.

A max-detail packet is only useful when different reviewers can find their lane quickly. Folium separates executive, operations, technical, security, finance, and staff questions so the buyer can bring the right people into the right part of the review.

DECISION GRID

REVIEW LENS

NEXT STEP

REVIEWER	START WITH	DECISION THEY SUPPORT
Executive sponsor	Value hypothesis, launch gate, first ninety days, and stop/refine/continue choices.	Whether the process deserves a controlled engagement.
Operations lead	Workflow map, operating roles, support rhythm, and staff feedback loop.	Whether the future process can be run by the team.
Technical lead	Runtime placement, data path, integration surface, monitoring, and fallback.	Whether the architecture can be supported safely.
Security or risk reviewer	Data classes, permissions, blocked actions, logs, retention, and rollback.	Whether access can expand beyond public review.
Finance or owner	Cost signals, subscription overlap, runtime tradeoffs, labor impact, and support burden.	Whether the first build has a practical business case.
Staff user	Plain-language use, limits, escalation, correction path, and training expectations.	Whether the tool strengthens the job instead of confusing it.

The packet should turn into a working session, not only reading material.

Before a call, Folium wants the buyer to gather the real operating pieces that make the review useful. The worksheet keeps the conversation grounded in one process, one owner, one source map, and one next decision.

CHECKLIST

OWNER PATH

RELEASE SIGNAL

- Bring one workflow that is slow, risky, expensive, repetitive, customer-visible, or staff-heavy.
- Name the systems touched by the workflow: store, CRM, ERP, inbox, spreadsheet, database, portal, document folder, or legacy application.
- Separate approved public material from internal, customer, regulated, confidential, credential, and blocked material.
- Write down who owns the work today, who reviews exceptions, and who will own the AI-assisted version.
- List the decisions AI may draft, retrieve, recommend, route, block, or escalate, and the decisions that stay human-owned.
- Bring examples of good output, bad output, common exceptions, missing data, and customer-facing risk.
- Name the first useful working surface: dashboard, portal, assistant, queue, control room, commerce lane, integration, or review file.
- Decide what record would make leadership comfortable with the next stage.

The next step should match the maturity of the record.

Folium does not need every buyer to start at the same altitude. The right offer depends on how much process clarity, source truth, owner alignment, and launch readiness already exists.

DECISION GRID

REVIEW LENS

NEXT STEP

IF THE BUYER HAS	BEST NEXT FOLIUM MOVE	OUTPUT TO EXPECT
AI interest but no clear process	AI systems audit or first workflow finder.	Pressure map, source inventory, first-lane recommendation, and risk view.
A clear process but no working surface	Forward engineering first sprint.	Clickable surface, route map, known limits, and next-stage blockers.
A tool that works in parts but not in operations	Architecture and launch readiness review.	Permission map, runtime decision, support model, and go/no-go record.
A failed or frightening rollout	AI recovery and staff enablement path.	Issue register, staff training plan, repair roadmap, and confidence loop.
Sensitive data or cost pressure	Local, private, or hybrid AI placement review.	Runtime matrix, data custody plan, fallback route, and vendor-exit view.
A useful pilot that needs care	AI operations support.	Monitoring rhythm, source refresh, release notes, incident path, and improvement backlog.

The last page of a packet should create the next controlled move.

Folium's handoff view separates what can be done now, what needs customer records, what needs approval, and what should wait until the review file is stronger.

DECISION GRID

REVIEW LENS

NEXT STEP

HANDOFF LANE	OWNER	NEXT RECORD
Commerce owner	Store operator	Opportunity map and first revenue workflow.
Catalog owner	Merchandising or product lead	Source map and cleanup backlog.
Support owner	Customer operations	Question clusters and escalation guide.
Technical owner	Folium and customer technical lead	Integration blueprint and launch guide.

The strongest next step is narrow: one process, one owner, one source map, one working surface, one review file, and one decision gate.

Commerce AI should improve revenue operations, not just add a chat widget.

Use this packet to choose one store workflow Folium can audit, build, test, and operate with your team.

Bring the process

Name the business process, the systems involved, the people affected, and the decision this PDF should support.

Separate review from production

Keep public examples, sandbox review, pilot access, and production dependency in separate stages with clear owners.

Ask for the record

Request screenshots, browser checks, known limits, launch blockers, support plans, and the next approval path.