## Merchant

Scoping start date: Feb 28, 2024

Implementation Completed Date (Go live date): Mar 14, 2024

MSA Signature Date: Feb 9, 2024

GTM POC: Jarrett

ERP: QBO

Tax Integration: No Tax

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### Key people at Merchant

### Accountant: Trevor McGuire- Fractional Accountant and everyday user ([trevor.mcguire@coalesce.io](mailto:trevor.mcguire@coalesce.io))

### CFO: Nick Decesare ([nick.decesare@coalesce.io](mailto:nick.decesare@coalesce.io)) Buyer and Product Partner

### Senior Fiance: Tianna Tugulavioa ([tianna@coalesce.io](mailto:tianna@coalesce.io))

### Company summary: Coalesce helps you transform data your way, by making data transformations as efficient as possible. All so you can create quality data sets in a fraction of the time, maximize the impact of your team’s work, and take your data projects to new heights.

AM Notes

Nick is very bullish on Tabs. Wanted to do a 3-year contract. Believes in us and the roadmap. He’d be a great advisor.

**Billing model**

* Info on how merchant bills: Mostly annual, multi-year contracts
* How contract is broken up: SaaS
* One-off things to know about merchant: they have international contracts

### Contract Processing Steps

1. When billing platform seats, show **1 Quantity for “Coalesce Platform”**
   1. **When billing all other quantities, show the actual quantity in the BT’s quantity section**
2. **Description**
   1. For discounting, please specify the items that it’s been discounted for in the description (e.g., Platform, Additional User License, etc)
   2. In Description, add seat quantity
3. When processing Coalesce Contracts, billing date:
   1. New Contract:
      1. Default to signature date. Unless explicitly stated otherwise in contract
   2. Renewals
      1. Invoice date will *always* be written in renewal contract
4. Renewals billing starts on the date after the first term
5. For billing contact name, default on all to ([Company Name] AP Dept)
6. No need to process rev share agreements
7. Please add PO number if a PO document has been sent in addition to contract
   1. Place PO on via invoices tab in Garage and add PO to specific invoice
   2. The PO billing schedule will supercede the contract/MSA

4/19 update: If a contract shows a reseller fee, please input the subtotal as one BT and the reseller fee as a second BT with a negative value. (e.g. $1,000 subtotal with 30% reseller fee, should have 2 BTs. One for $1,000 and one for -$300.

4/30 update: Discounts: place discounts as negative billing terms separate from gross line item pricing to allow merchant visibility into discounts by line item for their ability to handle expansion on renewal conversations.

5/1 update: **Jumpstart = Onboarding** Please show ALL discounts as negative billing terms. However, if the items reads “Jumpstart Onboarding” *(or Similar)* and its $0, then there is no need to include it at BT. If Jumpstart Onboarding is *not* $0, please include

Jumpstart is one time fee typical added to first invoice. Not recurring unless noted in contract

6/10 update: Please send comms to Azmat after *any* international currency contract is processed

7/31 Update. Please send the slack message using the ellipses once a coalesce contract has been processed. Please ensure slack message is sent *only* for the next upcoming invoice in series and not all future invoices. (E.g.) if you process a 3 year contract in July 2024 with annual invoice please send slack message for July ‘24 but not for July ‘25 or ‘26

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### International Invoices:

SOP for international invoices. It's pretty extensive and let's chat about how we can turn this around to customers and set proper expectations for 24 hours turnaround: .

My process is as such

**Sending International invoices to Coalesce customer:**

1. Contracts need to be processed w/the customer name & address, review billing terms and accuracy
2. Download the PDF invoice generated for Photoshop
   1. Edit the currency across the invoice
3. Run the Google script to generate the "Tabs invoice template"
4. Make sure that we have the right customer email address + attachments (they need their Chase wire instructions)
5. That should now be ready to be send the invoice to the Coalesce customer.

**Separately, we need to get a copy of the invoice into QBO:**

1. Update the send to email address to [support@tabsplatform.com](mailto:support@tabsplatform.com)
2. Do a spot currency conversion from USD to £ (e.g, $30,000 to $38,358 dollars)
3. Edit the amount on the tabs platform
4. Edit the note to say “XXX£ to USD conversion as of XX/YY/2024“
5. Press send an invoice to get it out to QBO.

### List of invoices thus far: [Coalesce International Invoice](https://docs.google.com/spreadsheets/d/1YdqriiiY7TpfvUUg3-RujGZxHxFi91bhzL-0n35l7tU/edit#gid=0)

### Events Processing (if necessary)

* N/A

### Customer Information

* Any important information on specifics customers of this merchant
  + Special memo’s certain invoices require
  + Invoice changes due to merchant/customer relationship

### Feature Requests

* Rev Rec / Reporting
  + What is it
  + Why it's important
  + Urgency: Medium High

### Rewatch Calls

Most recent first

* <https://tabs.rewatch.com/video/8z0ppateb843jirt-tabs-coalesce-follow-up-march-6-2024>
* <https://tabs.rewatch.com/video/q2mxtoi4vt8yz6ef-coalesce-tabs-demo-march-5-2024>
* <https://tabs.rewatch.com/video/he7pbtaup7tv6k6z-coalesce-tabs-overview-february-28-2024>
* <https://tabs.rewatch.com/video/7t66meowpi7ict5w-nick-decesare-and-ali-hussain-february-2-2024>