## Merchant

Demo date: Mar 25, 2025  
Scoping start date: n/a

MSA Signature Date: Mar 26, 2025  
Onboarding Kick Off Date: Mar 28, 2025

[If Exists] Opt Out Date: none  
Go Live Date: Nov 14, 2024

GTM POC: Jarrett  
Implementation POC: Royce

ERP: QBO

Tax Integration: No Tax

### 

### Key people at Merchant

### CEO: Nick Mares

* Account Receivable POC: Harley Pasternak (SFP partner)
* Billing POC

### Etc.

### 

| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + Light Labs does food and supplement quality testing. Customers buy a # of test and are billing per test every month * Is there any important merchant relationship information?  1) What is the merchant temperament?   Collaborative, eager to move quickly. SFP is trying to streamline operations for Light Labs and sees Tabs as a strategic partner.  2) Is there a key POC: (i.e.: who is the buyer/decision maker?)  SFP is the partner, Light Labs is their client.  3) What are the Tabs features that the key POC cares about?   * Manual + automated invoice creation Usage-based billing * Customizable invoice presentation * Streamlined AR and reconciliation * Revenue recognition handled in Tabs |
| --- |

### 

### Company summary *(AE to fill)*

Summary of what company does:  
  
Light Labs is an Austin-based startup offering food and beverage safety testing. They test for things like metals and plastics in consumables. All services are usage-based (per test/sample).

Goals (North star)  
*(AE/ Implementation to fill)*

What is the merchant's goal? What pain are we solving? Why are they buying Tabs?

SFP wants to centralize and clean up Light Labs' AR and billing, which are currently fragmented across Stripe, Bill.com, and direct deposits. Tabs will help automate and scale their process, eliminate invoice chaos, and support growth.

Is there an opt out clause? If so, what is the merchant looking for so they do not exercise it?

no

### Billing model *(AE/ Implementation to fill)*

* Are there unique things about the customer creation process for this merchant?

No formal contracts, just standardized pricing per test type. Some customers are billed via Stripe API today. Invoices are itemized by test, often long.

* Information on how merchant bills
* How contract is broken up

No contracts per customer. Invoices sent post-service using standardized pricebook.

* One off things to know about the merchant

n/a

### Contract Processing Steps *(Implementation/Success to fill)*

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) *(Implementation/Success to fill)*

* Any important information on events billing

Integration Items Processing (if necessary)  
*(Implementation/Success to fill)*

* 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)  
*(Implementation/Success to fill)*

* 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 *(Implementation/Success to fill)*

* 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/Implementation/Success to fill)*

none

### Rewatch Calls *(AE/Implementation/Success to fill)*

* https://us-56595.app.gong.io/call?id=2947790193858971956