## verMerchant

Demo date: Nov 25, 2024  
Scoping start date: none

MSA Signature Date: Nov 26, 2024  
Onboarding Kick Off Date: Dec 2, 2024   
Go Live Date: TBD

GTM POC: Jarrett  
Implementation POC: Jeff

ERP: QBO

Tax Integration: No Tax

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### Key people at Merchant

### CEO: Chris Light clight@veruna.com

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + Typically billed annually, monthly, or quarterly B2B SaaS. The services component is done manually today. Seats that can change and need proration. * Is there any important merchant relationship information?  1) What is the merchant temperament?   Chris will be a great partner for Tabs. He’s all business and has high expectations, abut he also understands that there is more that needs to be built out on the platform. |
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### Company summary *(AE to fill)*

Summary of what company does: Veruna is the #1 Salesforce.com-native agency management system

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

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

Chris’s number one priority is auditing the previous contracts to ensure he’s billing for the correct amount- we can be prescriptive on how we do this. He’ll want to do this as quickly as possible. He’s hiring an assistant on Monday and her first job will be to pull historic contracts.

No opt out

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

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

None. Classic signed agreement to billing. They’ve halted GTM so

* How contract is broken up

n/a

* 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)*

* FR 1
  + What is it
  + Why it's important
  + Urgency

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

* <https://tabs.rewatch.com/video/7olnqa44ejkhd6mk-jenna-and-rebecca-schwartz-tabs-september-18-2024>
* <https://tabs.rewatch.com/video/27og8dq1xoyqn1xx-tifin-tabs-demo-september-30-2024>
* <https://tabs.rewatch.com/video/o6k9234zn8l5p6mh-jenna-keenan-and-jarrett-martin-october-2-2024>
* <https://tabs.rewatch.com/video/0ca7psxn41srcnwb-tifin-tabs-proposal-october-3-2024>
* <https://tabs.rewatch.com/video/03pdw6udvz7jod2c-jenna-rebecca-check-in-october-21-2024>