## Merchant

Demo date: Jan 24, 2025  
Scoping start date:  
MSA Signature Date: Jan 28, 2025  
Onboarding Kick Off Date: Feb 10, 2025

[If Exists] Opt Out Date: None  
Go Live Date: No commitment. Rolling out QBO- should be live by 2/15

GTM POC: Paula  
Implementation POC: Jeff

ERP: Other Currently Zoho, moving to QBO

Tax Integration: No Tax

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### Key people at Merchant

### Accountant: [Devang Gunderia](https://www.linkedin.com/in/devang-gunderia-346a20/)- outsourced Accountant overseeing QBO

### CFO: None. CEO, [Jon Sherry](https://www.linkedin.com/in/jonathansherry/), is main Point of contact

### Customer service rep who is really involved: None

* Account Receivable POC: Jon
* Billing POC: Jon

### Etc.

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + Annual upfront some quarterly, some semi annual  $50k ACV 2-3 invoices/month, 30 customers * Is there any important merchant relationship information? Currently on Zoho (previously on Xero) but migrating to QBO by 2/14 We agreed to help migrate their historical invoices into Tabs  1) What is the merchant temperament? Jon gets the value, straightforward guy, fairly nice Devang- super nice, pretty hands off. Seems to have been brought in by Jon as a consultant because they are old friends   2) Is there a key POC: (i.e.: who is the buyer/decision maker?) Jon  3) What are the Tabs features that the key POC cares about? Automated invoicing  Automated dunning |
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### Company summary *(AE to fill)*

Summary of what company does:  
Alium is a platform designed to enhance enterprise software purchasing decisions. It combines unbiased interviews from a private network of technology decision-makers with AI-driven language models to generate insights about how enterprise software performs in real-world scenario

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

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

1. Automate Invoicing- Jon currently manually creating invoices in Zoho and keeping track of all invoices. Not scalable as they grow  
   - support any type of contracts. POC, Renewal
2. Automated Dunning- Jon manually following up with “alter ego” to chase down payments. No clear way to see who has paid/hasn’t
3. Reporting- today done in Google sheets

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?  
  Created in Zoho (soon to be switching to QBO
* Information on how merchant bills  
  Annual upfront  
  some quarterly, some semi annual   
  $50k ACV  
  2-3 invoices/month, 30 customers
* How contract is broken up  
  ?
* One off things to know about the merchant

Currently on Zoho (previously on Xero) but migrating to QBO by 2/14  
We agreed to help migrate their historical invoices into Tabs

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

1. Steps to process
   1. Service Start Date: Identify the "Effective Date" or "Subscription Term Start Date" in the agreement or schedule.
   2. Months of Service: Locate the initial subscription term and any renewal periods mentioned.
   3. Item Name: Look for the subscription service name (e.g., "Platform Access" or "Research Data Subscription").
   4. Item Description: Leave blank.
   5. Integration Item: Leave blank.
   6. Total Price: Identify the pricing details, including any applicable discounts, prorations, or renewal rate adjustments.
      1. Process discount in-line
   7. Quantity: Check for any specifications on the number of users, licenses, or data access limits.
   8. Start Date: Confirm the official contract commencement date.
   9. Periods: Identify whether the contract auto-renews, has a fixed term, or allows for adjustments.
   10. Frequency: Locate the invoicing schedule (e.g., upfront, monthly, annually)
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)*

* Rewatch by dates   
  1. Intro- <https://www.loom.com/share/37add23f4862406292a72e56337b04c6>   
  2. Demo for CEO 1/10- missing recording- was recorded on client’s zoom  
  3. Demo for CEO and Outsourced Accounting + Pricing <https://us-56595.app.gong.io/call?id=887712655652576505&account-id=1305341998032483486>