## Merchant

Demo date:   
Scoping start date:

MSA Signature Date:   
Onboarding Kick Off Date: Jun 14, 2024

[If Exists] Opt Out Date:  
Go Live Date:

GTM POC: Jarrett  
Implementation POC: Royce

ERP: NS

Tax Integration: No Tax

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### Key people at Merchant

### CFO: [rakib.azad@alkira.net](mailto:rakib.azad@alkira.net)

* Account Receivable POC: [tracie.rex@alkira.net](mailto:tracie.rex@alkira.net)
* System POC: [shoma@alkira.net](mailto:shoma@alkira.net)
* Finance POC: [colin.mccloskey@alkira.net](mailto:colin.mccloskey@alkira.net)

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| AE/ Implementation Notes Sections [Ops International Team to Ignore]  Decks for Implementations   * [Alkira - Tabs Partnership - 06.17](https://docs.google.com/presentation/d/14R5AlIlV-ohc8gOv9JPJHijimkst7LDYsl6z7pn_7Eo/edit#slide=id.g2da0f71c94e_0_0) - Implementation kickoff * [Alkira - Tabs Partnership (July 18, 2024)](https://docs.google.com/presentation/d/1wV_cmWdvZxUlvydxiW-9l8unfwFHsOAYIwg3KhKVFTs/edit#slide=id.g2da0f71c94e_0_0) - Call with Tracie & Shoma * [Alkira - July 23, 2024](https://docs.google.com/presentation/d/13vgkjzPxrPGMClhiridPahIJBKHsiCljKR-Sm9Sf3Kk/edit#slide=id.g1f40d203d58_0_623)  - Initial call with Manan * [Alkira - July 29, 2024](https://docs.google.com/presentation/d/163Gfk4TM556g8gLg-GX3TMxOQrc7_In7NG7mE9vzO5k/edit#slide=id.g1f40d203d58_0_623)  - Second call with Manan * [Alkira Business Models w\_revenue.xlsx](https://docs.google.com/spreadsheets/d/16GqDqPPt_LcZevuE7qf0Mdx_Kz8nILS5/edit?gid=91108250#gid=91108250)   + Quote files   + Usage files * [Alkira Customer sheet](https://docs.google.com/spreadsheets/d/1bFyFunF_OZQvh-FSDaoiL3UthjJ1B7vG5Fv2m9JUcOc/edit?gid=656863819#gid=656863819) - Example files for usage upload |
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### Company summary

Summary of what company does

Goals (North star)

What is the merchant's goal? What pain are we solving? Why are they buying Tabs?  
  
Is there an opt out clause? If so, what is the merchant looking for so they do not exercise it?

### Billing model (7 types and notes on each)

**Billing model 1 - PAYG**

* Quoted price for the product & family of discounted product
* Charge for what they use every month

| **How to set it up**   * Set up a price book for every new customers that are onboarded with the right pricing and discounting information * Every month, upload usage data to get the monthly invoicing   + Note: there’s one layer of mapping need to sort through with some of the usage files that they get vs. what is set up at the event   **What we need to build:**  None |
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**Billing model 2 - Commit Consume**

* Committed to XX per duration of the contract and paid either monthly or up front

| **Example Test customers #3:**   * Commitment amount: $7.2MM over 3 year period (36 months period) * Start date is 4/1/2024 and end date is 3/31/2027 * Pricing = standard price book pricing   + 60% discounting for all services   + Data charge is always $0.06 regardless of what their prices are. Right to negotiate this every 3 months. * Discounting ramp to 65% when committed spend amount is achieved   **How to set it up:**  Similar to the above, price book per customer.  In addition, we need a way to store the committed amount by contract or customers. Separately we need to be able to track how closely we are spending the amount.  **What we need to build:**  [TAB - 4617 Alkira Commit Consume Requirements](https://linear.app/tabs-platform/issue/TAB-4617/%5Balkira%5D-usage-based-customercontract-commitment-amount) |
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**Billing model 3 - Fixed Infrastructure**

* Committed to $XX total dollars for the XYZ contract period
* Pick the maximum value of the two events types
  + Committed minimum per month
  + If there’s any overage per month, charge for the overage
* Data provided is the maximum cost per product line

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### Billing model

* Are there unique things about the customer creation process for this merchant?
* Information on how merchant bills
* How contract is broken up
* One off things to know about the merchant

### Contract Processing Steps

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)

* Any important information on events billing

Integration Items Processing (if necessary)

* 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)

* 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

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

### Feature Requests

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

### Rewatch Calls

* Rewatch by dates