## Merchant Name *Arist* Implementation POC: Royce *(IM to fill)* CX POC: *[IMP to Add]*

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| Notes Sections   *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills   + Pricing is based on per seat but is flat Saas. They do not recognize the revenue as the seats are activated   + Seats are not added on an individual basis. If any new seats are added on it would be tracked via email and are invoiced once for the new amount. Merchant would provide Tabs with the prorated amount in this scenario   + Arist sells to enterprise companies so they will have smaller volume but high value contracts. * What is the merchant temperament? * Jasper is relatively easy going and wears many hats at Arist. He will also outsource some of the manual work to a contractor at times.   3) What are the Tabs features that the key POC cares about?   * Scalable solution to support their growth, Jasper is a team of 1 * Integration with Quickbooks * Automated reporting on O2C - all very manual today   ANY SORT OF NON-STANDARD DEAL CONVERSATIONS TO BE FILLED OUT BY THE SC, with documentation linked.   * [How any mid contract upgrades in seats will be treated](https://tabs-7so1666.slack.com/archives/C0963GH2KMK/p1758569982753309) |
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### Billing model *(Entire Section: Implementation to fill section)*

* 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 *(Entire Section: Implementation/Success to fill Post-Go Live)*

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) *(Entire Section: Implementation/Success to fill Post-Go Live)*

* Any important information on events billing

Integration Items Processing (if necessary)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

* 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)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

* 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 *(Entire Section: Implementation/Success to fill Post-Go Live)*

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

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### Merchant Calls *(AE to fill for all videos prior to Imp involvement, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

* [Discovery call on 8.29](https://us-56595.app.gong.io/call?id=3141379824884670973)
* [Demo on 9.4](https://us-56595.app.gong.io/call?id=4476473073101634698)
* [Implementation, CX, & pricing](https://us-56595.app.gong.io/call?id=8416192664595489843)
* [Arist sales deck](https://docs.google.com/presentation/d/1SbIHM4NIYrojkREn9lIQMTyt3SBqwcLNutA7LQjQXds/edit?usp=sharing)