## Merchant Name *(AE to fill) : Ash Wellness* 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 Flat SaaS Subscription Fee, Sometimes Implementation/professional services, Usage for PxQ. Tiers based on “Phases” a Kit can fall into Week Invoicing on Tuesdays. Sending 30 invoices a week from QBO currently 1) What is the merchant temperament?   Kyle is Co-Founder and Head of Product. A very process oriented thinker. Very nice and comes from start up world. Will be main user until finance hire onboards. Executive Sponsor as well 3) What are the Tabs features that the key POC cares about?  Usage AI for invoicing. Automated collections to track overdue invoices and recent history. Cash forecasting for potential to raise a round in the near future. Revenue Reporting is important for recognizing real time usage. Contract Management because they work in healthcare with a ton of redlines on terms. |
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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)*

### General

* + Contract Types: These include MSAs and SOWs; only SOWs carry commercial terms used for BTs.
  + Multiple SOWs per Customer: Treat each SOW as a separate contract
  + Term: All contracts have a 12-month term
  + For Renewal contracts, we must use *the exact same event types* as the original contract. This will require opening the original contract. Please see events section for instructions
* Billing Start Date:
  + For flat-fee BTs: use the effective date.
  + For usage-based BTs: assume effective date + 90 days (this is a placeholder for launch date; merchant will change when information is available).
* Service Start Date: Match billing start date.
* Months of Service: Always default to 12 months unless otherwise specified.
* Frequency:
  + Flat-fee BTs: follow the cadence indicated in the SOW or contract (e.g., monthly, quarterly).
  + Usage-based BTs: set to weekly, following the example seen in the [Noom contract](https://garage.tabsplatform.com/prod/contracts/e4d029f6-24f5-44f6-a001-3ec68280762b/usage), where language says "aggregate weekly and invoice monthly." This is an important watch-out: even if the invoice cycle is monthly, the billing term setup should reflect the actual accrual or aggregation cadence (weekly in this case).
* Net Terms:
  + Use the terms provided in the contract (typically Net 15 or Net 30); default to Net 30 if unstated.
* Quantity: Use the stated quantity in the BT; if none is listed, default to 1.
* Waived Fees: Capture as a $0 BT with clear labeling to reflect that the item was waived
* Usage AI (for contracts with a deposit)
  + Select has threshold
  + Title it “Deposit”
  + Integration item: TABS\_Deposit
  + For the products, select all of the usage products that apply to the deposit
    - “The Deposit is only to be used for Kits.” -> this would apply to all Kit usage products
  + Threshold period is full service term
  + Amount is the deposit
  + Select “charges overages”
* Events instructions for renewals
  + When we process a new contract, we assign general events, which is correct
  + However, the merchant will create unique events for that specific customer after we process the contract. This is because they have a very specific format that we can’t know when we process the contract.
  + Because of this, we need to use those exact same event types when we process renewal contracts
  + When you see a renewal contract, find the old contract and use the same event types that the merchant selected for those specific BTs
    - They will often begin with the customers name

### Additional Considerations

* + Process zero or waived BTs - process as $0 BTs
  + Usage Invoicing Detail (Example - Noom): language is strange - in this example they send out invoices weekly and expect customers to pay monthly, thus frequency needs to be weekly for usage. Watch out for language like this
    - *Once the Deposit has been exhausted Ash shall aggregate weekly the amount of the Per Patient Pricing, as set forth below, for each calendar day and invoice such amount to Customer, which will be aggregated by Customer into a monthly amount payable within thirty (30) days of the end of the respective calendar month.*

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

### Feature Requests *(AE to fill for all requests prior to Imp handoff, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

* API Usage ingestion
  + Wants to connect via API directly to Tabs Usage ingest
  + Has internal tool to track usage - which he runs a query against to match against billing terms
  + Medium/High - Perfect state is API ingestion when he had the time to build it
* HS Integration
  + Wants to sync Contract data back to HS (products, ARR) and sync in additional fields (e.g. Provider ID) to Tabs
  + Have unique identifiers for customers based on internal naming conventions. They are in the healthcare space
  + Medium/High - Taking a crawl, walk, run approach with implementation. This is ideal future state when integration is live

### 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)*

* Disco 4/16
  + <https://us-56595.app.gong.io/call?id=857518101207101844>
* Demo AR Heroes 4/21
  + <https://us-56595.app.gong.io/call?id=3818003395387187227>
* Custom Demo 4/23 (Contracts and Usage)
  + <https://us-56595.app.gong.io/call?id=2837336306888445382>
* Implementation and Commercials 4/23
  + https://us-56595.app.gong.io/call?id=4300720398853812596