## Merchant

Demo date: Aug 8, 2024  
Scoping start date: Aug 8, 2024

MSA Signature Date: Aug 19, 2024  
Onboarding Kick Off Date:

[If Exists] Opt Out Date: Nov 17, 2024   
Go Live Date:

GTM POC: Daniel  
Implementation POC: Ariel

ERP: QBO

Tax Integration: QBO Hard Coded Taxes

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### Key people at Merchant

### CEO: Anis Bennaceur - [anis@attention.tech](mailto:anis@attention.tech)

### Head of Sales: Jacob Fleisher - jacob@attention.tech

* Billing POC: anis@attention.tech

### Etc.

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| AE/ Implementation Notes Sections [Ops International Team to Ignore]   * SaaS contracts based on seat usage. Do have upsells we will need to do a slight scoping on, but is a very straightforward deal. * Anis is the main contact. Jacob will be handling it in the interim. They’ll have a fractional accountant as well. |
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### Company summary

AI-powered sales agent that automatically fills out CRMs after sales calls, scores conversations and opportunities, and helps you run GPT-type search across your entire collection of customer touch-points. They currently bill on SaaS and seat-usage have 180 total contracts.

Goals (North star)

Sales team is creating invoices and managing billing through Stripe. Need a way to track their upsells (additional seat usage). Growing their sales team and need a better approach to billing. Invoicing / Ar automation / reporting is important as well.

### Billing model

* Mostly focused on annual contracts upfront. Seat usage is other key aspect (may want to

### 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)

* Will need to understand frequency of seat usage

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

* Upsells are very important to them.

### Feature Requests

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

### Rewatch Calls

* 8/8/24 - [Discovery and Demo](https://tabs.rewatch.com/autocomplete/redirect_search?terms%5B%5D=Attention&url=%252Fvideo%252Fzfzo3watdo3f3ief-tabs-attention-august-8-2024)
* 8/13/24 - [Scoping / Feedback](https://tabs.rewatch.com/video/s5qghjwhfq69ddkc-anis-bennaceur-and-daniel-guthorn-august-13-2024)
* 8/19/24 - [Proposal / Negotiation](https://tabs.rewatch.com/video/5ce2wi4z2y6s4zuy-attention-tabs-proposal-review-august-19-2024)