## Merchant

Demo date: Jun 12, 2025  
Scoping start date: Jun 25, 2025

MSA Signature Date:Jun 30, 2025   
Onboarding Kick Off Date: TBD

[If Exists] Opt Out Date: none  
Go Live Date: Targeting Mid Q4 2025 (Sep–Oct)

GTM POC: Jarrett  
Implementation POC: Royce

ERP: NS

Tax Integration: Avalara

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### Key people at Merchant

### **CFO**: Marc Thomas

### **Finance Lead / Onboarding POC**: Stacey Sundal

### **Revenue Ops Lead**: Juan S. Angel

### **Customer Success**: TBD (but Juan has systems/integration oversight)

### **Billing/Accounts Receivable POC**: Juan S. Angel

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + **Self-Serve (PLG)**: ~30% of customers, <5% of revenue; signup via website, auto-billed via Recurly + Stripe/PayPal   + **Managed Services (Sales-Led)**: ~70% of customers, majority of revenue; invoiced manually from Xero   + **Partner-Led**: Monthly data received from partners; reconciled manually; billed via Xero   + Contracts are priced in USD, GBP, or EUR depending on customer   + Recurly is used for analytics and some subscription tracking, but not billing for partner deals   + Most invoices are flat-fee; few usage-based   + Tax: VAT logic applied manually (UK/EU rules); no sales tax yet   + Professional services tied to go-live dates * Is there any important merchant relationship information?  1) What is the merchant temperament?   Collaborative, eager to partner  3) What are the Tabs features that the key POC cares about? |
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### Company summary *(AE to fill)*

Summary of what company does:  
  
**Audiense** is a UK-based subscription business recently acquired by Buxton. It has operations across 70+ countries, with most revenue and customers in the U.S. and UK. It sells directly to customers as well as through self-serve and partner-led channels. Its business is SaaS-focused, with complex billing and reporting needs.

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

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

* Migrate managed services and partner-led workflows from Recurly/Xero into Tabs
* Unify billing across direct, self-serve, and partner channels into a central platform
* Automate revenue recognition (currently manual)
* Support multi-currency and VAT-compliant international invoicing
* Replace ChartMogul for ARR/MRR analytics
* Reduce dependency on Recurly (ideally retire it post-Tabs)
* Eventually consolidate self-serve stack to Stripe + Tabs

Is there an opt out clause? If so, what is the merchant looking for so they do not exercise it?

### Billing model *(AE/ Implementation to fill)*

* 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 *(Implementation/Success to fill)*

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) *(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)*

* SSP
  + Medium

### Rewatch Calls *(AE/Implementation/Success to fill)*

* https://us-56595.app.gong.io/account?id=3747326470864915057&type=ACCOUNT&workspace-id=2531298410931371606&date=2025-06-30&activity-id=7176676839006344460