## Merchant - Axion Ray

Demo date: April 12 2024  
Scoping start date: Apr 12, 2023

MSA Signature Date: May 21, 2024  
Onboarding Kick Off Date: May 24, 2024  
Go Live Date: May 24, 2024

GTM POC: Ben  
Implementation POC:

ERP: QBO

Tax Integration: No Tax

### 

### Key people at Merchant

### Accountant:

### CFO: [Gabe Hoffman](mailto:gabriel.hoffman@axionray.com)

### Customer service rep who is really involved:

* Account Receivable POC
* Billing POC

### etc.

### Company summary

Axion Ray is the leading AI observability command center relied on by global manufacturing companies to detect and solve emerging quality issues affecting customers at the earliest warning signals

Goals

Today most processes are manual/in QBO and tracked in Excel spreadsheets. Billing isn’t that complicated and they don’t have super high volume yet, so consolidation, automation ahead of scale, a place to store notes for customers, and reporting (eventually rev rec) are drivers

AM Notes

Any important relationship information  
  
1) What is Merchant Temperament? Gabe is sharp and not difficult to work with.

2) Is there key POC the buyer/decision maker? Gabe Hoffman  
3) What are the Tabs features the key POC care about? Automation, centralized repository for all finance AR data including merchant notes

### Billing model

* Not very high volume
* Contract is straight Saas billing, no usage or any other things to date
* They have an opt out/renegotiation point in their contract, so it will be super important to get Gabe hooked into effectively using the product and using new tools like rev rec

### Billing model

* Are the unique things about the customer creation process for this merchant?
  + Not that I am aware of

### Contract Processing Steps

1. Steps to process
2. Anything to ignore in contracts?
   1. Descriptions are extremely long (ex: [Baxter Healthcare](https://garage.tabsplatform.com/prod/contracts/8ebe6adc-5b29-40b0-8468-608bf6722aa8/terms/billing)), so do not add them into the description field in BTs, process with no description.
3. Specifics processing things merchant has requested that may differ by contract (e.g. always back-date invoice date to final day of the month)
   1. Default to up-front billing unless there is a schedule specified in the contract (annual, Biannual, quarterly). There is 0 monthly billing
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?
  + Axion Platform

Post Processing Communications (if necessary)

* Does 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

* first call - <https://tabs.rewatch.com/video/tngcex27rqc4f82m-gabe-ali-introduction-april-3-2024>
* Custom demo - <https://tabs.rewatch.com/video/x4t3vedn64785t3q-tabs-axion-ray-custom-demo-walkthrough-april-12-2024>