## Merchant

Demo date: Dec 11, 2024  
Scoping start date: Dec 20, 2024

MSA Signature Date: Dec 27, 2024  
Onboarding Kick Off Date: pending

[If Exists] Opt Out Date: none   
Go Live Date: Apr 1, 2025

GTM POC: Jarrett  
Implementation POC: Royce

ERP: NS

Tax Integration: Avalara

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### Key people at Merchant

* **Controller: Matt Pozek** ([MPozek@buxtonco.com](mailto:MPozek@buxtonco.com))- Has only been at Buxton for 4 months and has been tasked with overhauling systems at Buxton. He was suggested to Tabs by their private equity partner “PSG,” who also brought us Dosespot.
* **Netsuite Integrator: Brian Bernstein** ([Brian.Bernstein@riveron.com](mailto:Brian.Bernstein@riveron.com))- Brian was who suggested Zone billing - good to partner with him as he may bring other clients
* **Head of Accounting: Danielle Rodgers -(**[DRodgers@buxtonco.com](mailto:DRodgers@buxtonco.com)**)** has been at Buxton for 11 years, creating and managing all the ends and out of their O2C process.
* **Account Receivable POC: Melanie Mel Pierce** ([mpierce@buxtonco.com](mailto:mpierce@buxtonco.com)) Tabs Day to Day User

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * **Info on how merchant bills**   + Monthly or annual “retainers”- they act like SaaS   + Variable service hours * **Is there any important merchant relationship information?  1) What is the merchant temperament?**   + Matt is very chill, but being new to his company, he’s made it very clear that tabs HAS to work for him. He sees this as a big risk for an early company.   Danielle is a bit more tactical- they aren't “lets dig into the weeds ppl” from my experience, but they do want to make sure a few big things work for theme- voids etc.     2) Is there a key POC: (i.e.: who is the buyer/decision maker?)   * Matt is the buyer and point of contact, yet he heavily relied on Danielle for product sign-off   3) What are the Tabs features that the key POC cares about?   * Revenue Recognition first and foremost- they are heavy on milestones and need revrec adjusted for usage, milestones, etc * Contract ingest * Credit Memos   Things they need: Milestone based contracts  Variable Contracts  They have a retainer  There is a small of usage- service hours that are rendered - NetSuite usage doesnt work that well  The actual contract will have 1-2 line items  The actual invoice will have 10 different skus  **For every contract they have, a spreadsheet will be shared with the Tabs team. Should we only use the contract or the spreadsheet?**  Timeline:  Up and running on Tabs 4/1  Audit done by end of April  Have to restate- December/Janaury    Is NetSuite sales order built out- not yet. This will impact the implementation timeline. Went live on Netsuite 1/1/25  300-400 employees  600 customer count  **Product Requests:**   * When they void an invoice- ping customer that it was voided. [Arjun Gopalratnam](mailto:arjun@tabs.inc) already has this on the road map   + [Jonathan Tsay](mailto:jon@tabsplatform.com)is working on this one * Rev Rec   + Things that are milestone based, and they dont have a date. And they dont want things to show up on downstream revenue   + Status for revenue (HELD Revenue) This will come Q2   + [Dayee Leung](mailto:dayee@tabs.inc)is working on this one |
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Company summary  
*(AE to fill)*

**Summary of what company does:** Buxton gives you powerful analytics to fuel your omnichannel growth. Understand who your customers are as consumers and know where and how to reach them.

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

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

Buxton is undergoing a major transformation, moving from Great Plains to NetSuite. They’ve recently acquired Rippling, Avalara, and Ramp, and they’re working with a brand-new NetSuite instance. It might be helpful for us to be proactive in advising them on how to set up NetSuite for Tabs. Their current O2C system is heavily manual and Tabs would be a huge improvement.

One thing to note- their CPQ is not set up yet- they intend to use Tabs as described in the MIS. To recap, not all items and pricing are in the contract, so they actually will be billing off of the contract. Plus, a spreadsheet will be provided that details the item, pricing, and revenue schedules.

Once CPQ is fully set up- (they anticipate this taking a while, but I don’t have a timeline). They would want tabs to pull items, pricing (essentially replacing the spreadsheet), and contracts from the SFDC record.

This is different than SSP because while they don’t list items on the contract, they do want all of those items on the final invoice

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

No.

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

* Are there unique things about the customer creation process for this merchant?
* Yes, the customer has a contract with a single line item but actually bills off a spreadsheet that includes detailed information such as items and pricing. The detailed spreadsheet data is what they want reflected on the invoice. Take a look at the examples provided. What they bill on is the item listed in the "Standard vs Proposed" pricing tab within the spreadsheets. [here](https://drive.google.com/drive/folders/1sQmiM5xvvOvcEcFimFlaxolC5TGRRzYM)
* Information on how merchant bills
* 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)*

* **Email sent to the end customer when invoice is voided** 
  + What is it: see above
  + Why it's important: They want clear communication with their customers on what is still an active invoice.
  + Urgency: Must have before go live
* **Revrec items without a date or “pending” status for revrec on specific line items** 
  + What is it: Essentially, for items that are milestone-based, they don’t want a date associated with the revenue recognition or for it to appear in reporting until the event occurs. At that point, the revenue recognition will be updated to reflect the correct recognition period. This is a common request among milestone-based companies.
  + Why it's important: This is the sole feature they wanted zone billing for its critical for them.
  + Urgency: Must have before go live

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

* Dec 11th: <https://www.loom.com/share/13d330fdfc4647b7b54b1a5d4abd7236?sid=e0800564-5801-4840-beea-b8e2ae2594a9>
* Dec 15th
* <https://www.loom.com/share/7316754bc3aa4f369876d02bdb050a4e?sid=6ca5fb92-b355-47d9-af0f-d912127d583f>
* Dec 17th
* <https://tabs.rewatch.com/video/yzxoxccjc5z4x33e-tabs-buxton-deep-dive-december-16-2024>
* Dec 18th
* <https://www.loom.com/share/ea8ab8d262b14dcba875bfb426c9f70e?sid=2fcac654-89c7-4545-a402-648a9f225265>
* Dec 19th
* https://www.loom.com/share/5f4ae8a20cf34645931caac21fb64f14?sid=fed7c1b3-76f4-473c-b633-468856df1ab0