## Merchant

~~[Demo date: Nov 14, 2024] - Axe data point~~  
~~Scoping start date: Nov 14, 2024-Delete from MIS~~

~~MSA Signature Date: Nov 14, 2024-Delete from MIS~~  
~~Onboarding Kick Off Date: Nov 14, 2024-Delete from MIS~~

~~[If Exists] Opt Out Date: Oct-Delete from MIS~~  
Go Live Date: Nov 14, 2024-Delete from MIS, Need to add in Hubspot

~~GTM POC: Rebecca~~  
Implementation POC: Royce  
CX POC: [IMP to Add[

~~ERP: NS [Delete from MIS]~~

~~Tax Integration: QBO Hard Coded Taxes [delete from MIS]~~

### 

### Key people at Merchant [Every contact associated with a deal in Hubspot instead]

### ~~Accountant: -Delete from MIS~~

### ~~CFO: -Delete from MIS~~

### ~~Customer service rep who is really involved: -Delete from MIS~~

* ~~Account Receivable POC-Delete from MIS~~
* ~~Billing POC-Delete from MIS~~

### Etc.

### 

| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills (AE to fill if they have)  1) What is the merchant temperament?   ~~2) Is there a key POC: (i.e.: who is the buyer/decision maker?)~~  3) What are the Tabs features that the key POC cares about? ( |
| --- |

### 

### ~~Company summary~~ *~~(AE to fill)~~*

~~Summary of what company does:~~

G~~oals (North star)~~*~~(AE/ Implementation to fill)~~*

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

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

### Billing model *(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)*

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

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

* Rewatch by dates