## Merchant

Demo date: Mar 24, 2025  
Scoping start date: n/a

MSA Signature Date: Mar 31, 2025  
Onboarding Kick Off Date: Apr 16, 2025

[If Exists] Opt Out Date: none  
Go Live Date:

GTM POC: Paula  
Implementation POC: Royce

ERP: QBO

Tax Integration: No Tax

### 

### Key people at Merchant

### Accountant: Accounting Firm called “On the Books”

### CFO: None- COO Phil is main point of contact

* Account Receivable POC: Phil
* Billing POC: Phil

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + Flat SaaS Sometimes a non-profit discount Renewal uplift * Is there any important merchant relationship information? * 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? |
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### Company summary *(AE to fill)*

Summary of what company does:

Goals (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 *(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)*

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

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

* Rewatch by dates