## Merchant

Demo date: Apr 2, 2025  
Scoping start date: n/a

MSA Signature Date: Apr 16, 2025  
Onboarding Kick Off Date: n/a

[If Exists] Opt Out Date: none  
Go Live Date: n/a

GTM POC: Jarrett  
Implementation POC: Royce

ERP: QBO

Tax Integration: No Tax

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### Key people at Merchant

### CEO: [Payman Samadi](mailto:samadi@eino.ai)https://www.linkedin.com/in/payman-samadi/

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| Notes Sections [Ops International Team to Ignore] (AE/ Implementation to fill)   * Info on how merchant bills   + Very small operator. Today he is using Stripe and QBO for invoicing. * Is there any important merchant relationship information?  1) What is the merchant temperament? * Collaborative, very nice and easy going 2) Is there a key POC: (i.e.: who is the buyer/decision maker?) * CEO is currently running the finances.  3) What are the Tabs features that the key POC cares about? * Reporting and stripe free pass through- he's a simple guy |
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### Company summary *(AE to fill)*

Summary of what company does:  
  
 Eino is an AI-powered connectivity planning platform that holistically designs and simulates solution architecture for public and private WiFi/Cellular networks. Our SaaS platform enables network providers, systems integrators, and enterprises to automatically and efficiently plan new networks or test and expand existing ones for growth and new use-cases with a digital twin

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

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

He has a pretty narrow pain point: currently, he doesn’t have non-GAAP metrics and wants to stop paying Stripe fees.

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

* Are there unique things about the customer creation process for this merchant?
  + Just not starting to use contracts, historically has used emails but knows contracts are needed for tabs.
* Information on how merchant bills
  + Flat recurring saas fees and one-offs

### Contract Processing Steps *(Implementation/Success to fill)*

Steps to process

* Each invoice line item should be treated as a separate Billing Term (BT)
* **Billing Start Date**: Use the invoice date as the billing start date
* **Service Start Date**: Same as Billing Start Date unless otherwise specified
* **Months of Service**:
  + For annual licenses or subscriptions, use 12 months
  + For specific project-based or one-time items (e.g., clutter data per site), use 0 months
* **Frequency**:
  + For annual or subscription items: Frequency = Annual
  + For one-time services: Frequency = Annual
    - Ensure there are non-recurring products
* **Net Terms**:
  + Use the "TERMS" field on each invoice
  + If "Due on receipt" → Net Terms = 0
  + If "Net 45" → Net Terms = 45
* **Total Price**: Use the "Amount" for each line item
* **Discounts:** Process as a negative BT
* **Quantity**: Use the quantity listed per line item
  + If not listed, default to 1
* **Item Name**: Use the "SERVICE DESCRIPTION" from each line item
* **Item Description**: Leave blank unless specific context needed

1. Anything to ignore in contracts?
2. 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)
3. Default Service Term
   1. If None Listed, Ops Default is 1 Year
4. Default Net Payment Terms
   1. If None, Ops Default is 0
5. Default Billing Frequency
   1. If None Listed, Ops Default is Monthly
6. 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
  + None

### Feature Requests (AE/Implementation/Success to fill)

* None

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

* <https://us-56595.app.gong.io/call?id=4025946868595269773&account-id=5915176439641318721>