## Merchant Name *Enigma* Implementation POC: Jeff *(IM to fill)* CX POC: *[IMP to Add]*

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| Notes Sections   *(AE to fill if they have, Implementation to be completion DRI on handoff)*   1. Info on how merchant bills License fee (usually billed monthly, annually) Usage - min commit, charge overages Pure Usage- billed monthly, quarterly Self serve- Stripe credit card on website 2. What is the merchant temperament? They are a very straight forward, cut-to-the-chase group. Igor is a big champion and the team greatly respects him. Although, he is leaving soon to start his own company. Bill (head of product) was the next decision maker after Igor. 3. What are the Tabs features that the key POC cares about?   - Metronome + Tabs usage billing - Metronome will calculate and meter the usage and push that to Tabs - automatic invoice creation  - rev rec - automated cash app |
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### Billing model *(Entire Section: Implementation to fill section)*

* 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 *(Entire Section: Implementation/Success to fill Post-Go Live)*

1. Steps to process
   1. Service Start Date: Use the Order Form Effective Date
      1. If not available, use the date of the last signature.
      2. The last option should be to check the file name for the contract.
      3. If effective date is 1-15 of month, start rev rec on first of month. If it is 16-31 of month, start on first of next month.
   2. Months of Service: Extract the License Term.
   3. Item Name: Look for the primary product or solution, such as "Enigma Platform Package".
   4. Item Description: Leave blank.
   5. Integration Item:
      1. flat fees: Item=deferred revenue
      2. usage: Item=unbilled revenue
   6. Billing Type: Contracts usually include both flat annual license fees and unit-based overage pricing.
   7. Total Price: Listed next to item name usually.
   8. Quantity: Default to 1.
   9. Start Date: Same as the Service Start Date, unless otherwise noted.
   10. Periods: Check License Term.
   11. Frequency: Usually annual for flat and monthly for usage, check the contract for actuals.
   12. Send slackbot notification for the first invoice.
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) *(Entire Section: Implementation/Success to fill Post-Go Live)*

* Any important information on events billing

Integration Items Processing (if necessary)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

* 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)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

* 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 *(Entire Section: Implementation/Success to fill Post-Go Live)*

* 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 to fill for all requests prior to Imp handoff, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

* FR 1- not really a FR
  + What is it: Metronome + Tabs- Arjun is aligned here that we will find a way to bring this into Tabs. Metronome will meter and calculate the invoice and send the data to Tabs
  + Why it's important usage billing
  + Urgency ASAP

### Merchant Calls *(AE to fill for all videos prior to Imp involvement, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

* Intro/demo <https://us-56595.app.gong.io/call?id=8943978209924032340&account-id=3226458571196909768>  
    
  Pricing was done via text and phone call