## Merchant Name *(AE to fill)* Implementation POC: Royce *(AE to fill)* CX POC: *Charlie*

They have QBO

| Notes Sections [Ops International Team to Ignore]  *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills  1) What is the merchant temperament?   3) What are the Tabs features that the key POC cares about? |
| --- |

### Billing model *(Entire Section: Implementation to fill section)*

* Are there unique things about the customer creation process for this merchant?
  + Not a normal B2B membership model where individual people are part of the collective.
  + They are just starting to charge membership fees
* Information on how merchant bills
  + Membership fees and sponsorships
* How contract is broken up
  + No contracts
* One off things to know about the merchant
  + Partnership with Tabs where they use Tabs for free and we are an official partner of theirs

### Contract Processing Steps *(Entire Section: Implementation/Success to fill Post-Go Live)*

1. Steps to process

About once a week, contract-ingest will receive a sheet that looks like [this sheet](https://docs.google.com/spreadsheets/d/1ug8YaSik3G2FZVV9ekP6PYVH8DyV_sXf7npVmvxMZ9Y/edit?usp=sharing). Each row on the sheet will need to be added as a new customer. To process this:

1. Add doc for each customer as a “contract”
2. Add BT according the the amount and frequency on the sheet
   1. Name: FIF Collective Membership
   2. Integration Item: Membership Fees
   3. Start date: Jan 1 2025 (for rev schedule and BT)
   4. Frequency:
      1. Annual: 1 / yearly
      2. Monthly: 12 / monthly
   5. Net terms: 0
3. Anything to ignore in contracts?
4. 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)
5. Default Service Term
   1. If None Listed, Ops Default is 1 Year
6. Default Net Payment Terms
   1. If None, Ops Default is 0
7. Default Billing Frequency
   1. If None Listed, Ops Default is Monthly
8. 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
  + What is it
  + Why it's important
  + Urgency

### 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)*

* Rewatch by dates

**Appendix** [BPOs TO IGNORE THIS SECTION]

This is an alternative way of processing their contracts that might apply in the future, but does NOT apply right now

Tabs will need to set up subscription billing for new members. We will be receiving email

notifications to contract-ingest that will contain all new member information. When we

receive one of these emails, the body of the email will contain all information needed to

add the customer and process as a contract.

**Instructions once the email is received:**

1. Add customer
   1. Customer name = Full Name/Name from the form
   2. Email/Address - should both be on the form
      1. If blank, leave blank
      2. Some addresses are international
2. Add BT
   1. Name: FIF Collective Membership
   2. Integration Item: Membership Fees
   3. Amount:
   4. Start date: Date received (for rev schedule and BT)
   5. Service term: 1 year
   6. Frequency: can be annual or monthly billing
      1. Annual: 1 / yearly
      2. Monthly: 12 / monthly

* Notes:
  + Generally, all new members will not be a customer yet, so a new customer will need to be created
  + However, on the off chance that the customer already exists, do not create a new customer. This would mean that it is a duplicate and does not need to be processed.

**Examples of what the email will look like are below. There are 3 potential formats, all with the same information.**





