## Merchant Name: Fingerprint Implementation POC: Royce *(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)*   * Info on how merchant bills  1) Self Serve- Stripe 2) Contracts ($9k-$3m invoices) - payment terms - payment frequency - Commit to a bucket of API calls  - amendments for overages by CS   UBRR rev rec - rev rec based on actual usage, remainder is added to the last month   - Sigma and snowflake for usage. Ok with starting out with CSV   - external accounting team: Mystartupcfo * 160 customers   1) What is the merchant temperament?   * Bobby is easy to work with. He’s the one doing everything manual today - Jeff is EB and holds all the power   3) What are the Tabs features that the key POC cares about?  - UBRR - contract data extraction- huge spreadsheet for this today |
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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)*

**General**

* Billing address should come off the contract and be stored at the customer level for each contract processed

**Steps to process**Locate product table and process every product as a BT

**Service Start Date:**

* Use “Start Date” column

**Months of Service:**

* # of months that gets you to the date in the “End Date” column

**Item Name:**

* “Product Name” column

**Item Description:**

* “Description” column

**Integration item:**

* Should be “Contracted” for every product

**Billing Type:** Flat unless this is a usage based product

* If contract notes overage api calls are charged - please create usage BT
* Example contract: 7a01fe5a-be08-477f-b7b7-0087b13c157e

**Total Price:**

* Check for “payment frequency”, “payment schedule” or “Payment Invoice Deadlines”
* Use the total amount for each billing period e.g. if “Customer Total” column has $114,597 but the payment invoice deadlines notes 4 periods, total price would be 114,597/4 = $42,084

**Quantity:**

* “Quantity” column

**Start Date:**

* Use the first billing date in the “payment invoice deadlines” section

**# of periods:**

* Use number of billing periods

**Frequency:**

* Listed with “Payment Frequency” under “Billing Details”
* If not listed, calculate months in between each payment noted below “payment invoice deadlines” (if this is not an even, consistent cadence you will have to create separate BT)

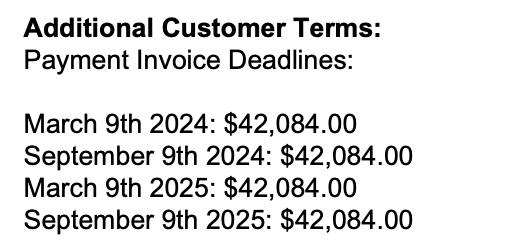
**Net terms:**

* Use “Payment Terms” stated under “Billing Details”, default net 30 if not stated

**Billing Timing:**

* Bill first of period

**Example Contracts**

* 8790712c-6fe2-4197-a379-cdc035c4ebe9
* F3ea60bd-1491-4c3b-9ca1-f7d93aff4028
  + For this contract, you can combine the two products into one BT because they are the same product and the invoicing schedule divides the total contract amount into 4 payments instead of matching the invoice amount to the product and service period
  + 



* e33a24d1-7e41-4bf2-8532-85c6691528b3

Anything to ignore in contracts?

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)

Default Service Term

* 1. If None Listed, Ops Default is 1 Year

Default Net Payment Terms

* 1. If None, Ops Default is 0

Default Billing Frequency

* 1. If None Listed, Ops Default is Monthly

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)*

* .Intro <https://us-56595.app.gong.io/call?id=1902688754138778778&account-id=7661388937693840866>
* .Demo <https://us-56595.app.gong.io/call?id=4445181161382765404&account-id=7661388937693840866>
* .Scoping + Pricing   
  <https://us-56595.app.gong.io/call?id=8281191693865243762&account-id=7661388937693840866>