## Merchant Name: Further 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   + Annual contracts, most of which are on monthly billing cycles.   + There is a usage component for most contracts:     1. Their customers are based on the number of communities they have at any given month. So if they start with 10 communities, but then next month they drop one, they will only get invoiced for 9 for the upcoming month. This is a very manual process and one of the biggest selling points for Tabs.     2. We plan to get this usage data by connecting our API to their platform’s API. Have already spoken to an ENG at Further about this and sent API docs. He mentioned this should be fine, and would include in future sprint.   + The contracts also often include a 5% or a certain percentage increase annually, which is a manual process for Further to review and update the invoices.     1. Might not actually go through with the increase if it’s a risky client. Requires communication with Sales.   + Parent / Child relationship:     1. Sometimes they send 1 invoice but get 30 checks (from each community). Sometimes they need to invoice each community individually. This will be a Product Ops workflow for the time being until Product releases a more native solution in the platform.   + WE WILL NOT BE SENDING OUT INVOICES FOR FURTHER. WE WILL INSTEAD CREATE THEM, SEND THEM TO QBO, WHICH THEN GETS SENT TO UPFLOW. WE WILL DO “BILL TO MERCHANT” SO THAT WE CAN POPULATE REV REC REPORTS. * Key Stakeholders:   + [Stephanie Rhodes](https://www.linkedin.com/in/stephanie-rhodes-mba-cma-b961705b/), CFO   + [Dillon Casados](https://www.linkedin.com/in/dilloncasados/), Director of Business Operations   + [Julia Lundgren](https://www.linkedin.com/in/julia-lundgren-17a5709/), Accounting Manager   + [Arnad Voljevica](https://www.linkedin.com/in/arnadvoljevica/), ENG   1) What is the merchant temperament?   * Very communicative. Dillon in particular will “confirm receipt” every time I send follow ups / resources * Stephanie is communicative as well and was a great exec sponsor in the deal. * They are all very down to earth * They were very cautious and diligent in the buying process, largely because they were burned by Maxio in the past. They tried bringing Maxio and onboarding took 6 months before they pulled the plug and treated it as a sunk cost. Spent many late nights up trying to get it to work, and it never did.   + As such, they tried to get an opt out / termination for convenience – we shut that down and offered a thorough SOW instead. Also included a “meet the implementation call” in the sales process so they can hear about onboarding directly from the implementation team.   3) What are the Tabs features that the key POC cares about?   * Usage AI, Usage API, Invoice Creation * Rev Rec * They were not very impressed with our collections and payment portals. Thought Upflow was much better and will continue using them until we have a more robust functionality built out. |
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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
  + Locate BTs – Use the *Key Terms* table on page 1 of each Services Agreement. Section C lists the Products & Services that are checked ✔, and Section D lists the associated cost (monthly or annual) per Covered Location.
* Item Name – Enter exactly as shown in Section C (e.g., “Web & Data Platform”, “Messaging Assistant Platform”, “Pricing Assistant Platform”, “Home Care”).
* Quantity – Use the number of initial Covered Locations shown in Section E. If blank, default to 1.
* Unit Price – Use the rate selected in Section D:
  + If a *per‑month* rate is checked (e.g., “$300 per month per Covered Location”), set
* Frequency = Monthly.
  + If the optional *annual* rate is checked (e.g., “$3,575 annually per Covered Location”), set Frequency = Annual.
* Total Price – Garage will calculate automatically (Unit Price × Quantity). No manual multiplication needed.
* Billing Start Date
  + If a Free Trial Period is stated, set Billing Start to the *Effective Date*, which per Key Terms is one day after the trial ends (e.g., 60‑day trial language).
  + If no trial, use the Effective Date in Section B.
* Service Start Date – Match the Billing Start Date.
* Months of Service
  + Use the product’s Initial Term in Section B (default 12).
  + If a product has a shorter term (e.g., Pricing Assistant 6 months) record that value.
* Net Terms – Use payment‑terms wording if present; otherwise default 30.
* Scheduled price changes / conditional increases
  + When Key Terms include future pricing (e.g., Messaging Assistant increases on May 1 2025 if PA not renewed and Pricing Assistant increase on Jan 1 2025):
  + End the original BT the day before the increase.
  + Create a new BT starting on the stated date with the new price.
* Additional Covered Locations – If the customer adds locations later (via email per Section E note), create incremental BTs dated from the add‑date for the added quantity.
* Ignore
  + Any products not checked in Section C.
  + Integration items, one‑time implementation language, or tax/finance charge clauses.
* Free Trial periods
  + Do not create $0 BTs for the trial. Only enter paid BTs starting on Billing Start Date.
* Annual escalator (5% or WSJ Prime)
  + No BT setup required at inception. Ops will revise BTs at renewal.
* Price Options (Monthly vs. Annual)
  + Only one rate is ever checked. Use the checked option; do not enter the unchecked alternative.

### 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: Parent / Child Invoicing
  + **What is it.** Ability to invoice to parent company and individual children. They need full flexibility as sometimes they want to send 1 invoice to the parent, sometimes they want to send all invoices individually to the children, sometimes they want to have all invoices broken out separately, but still billed to the parent. It can be very custom / unique depending on their relationship with their customer.
  + **Why it's important.** They have unique billing relationships with their customers.
  + **Urgency.** Further needed this in order to go live. Solutions and Product agreed that we will do a Product Ops workflow for the meantime, and then build it out natively in the platform. [See Slack here.](https://tabs-7so1666.slack.com/archives/C08RCJ94B27/p1749567873662689)

### 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)*

* Full Gong call library: <https://us-56595.app.gong.io/account?id=2695543458306551173&type=ACCOUNT&workspace-id=2531298410931371606&date=2025-06-12&activity-id=3702702427665814361&filter=%7B%22accountFilter%22%3A%7B%22type%22%3A%22And%22%2C%22filters%22%3A%5B%7B%22type%22%3A%22ActivityType%22%2C%22values%22%3A%5B%22CALL%22%5D%7D%5D%7D%7D>   
  + Intro Call:
    - <https://us-56595.app.gong.io/call?id=3045810162520500231&account-id=2695543458306551173>
  + Scoping Call:
    - <https://us-56595.app.gong.io/call?id=2550196296455721583&account-id=2695543458306551173>
  + Custom Demo:
    - <https://us-56595.app.gong.io/call?id=8994496341088577827&account-id=2695543458306551173>
  + More Scoping:
    - <https://us-56595.app.gong.io/call?id=3003736306929905182&account-id=2695543458306551173>
  + More Scoping:
    - <https://us-56595.app.gong.io/call?id=8773977409699309915&account-id=2695543458306551173>
  + Executive alignment:
    - <https://us-56595.app.gong.io/call?id=3049300449573648633&account-id=2695543458306551173>
  + API Scoping:
    - <https://us-56595.app.gong.io/call?id=7194517527503315012&account-id=2695543458306551173>
  + Meet the Implementation Team:
    - <https://us-56595.app.gong.io/call?id=3702702427665814361&account-id=2695543458306551173>