## Merchant

Demo date: 4/16  
Scoping start date: Apr 16, 2024

MSA Signature Date: May 20, 2024  
Onboarding Kick Off Date: May 23, 2024  
Go Live Date: Jun 1, 2024

GTM POC: Ben  
Implementation POC:

ERP: Other

Tax Integration: No Tax

### 

### Key people at Merchant

### Accountant:

### CFO: [Richard Jacroux](mailto:richard@impactsolve.com) Fractional CFO

### Customer service rep who is really involved:

* Account Receivable POC
* Billing POC

### etc.

### Company summary

iUNU- Harware/software - - technology for autonomous crop growing (serving agriculture) - “using computer vision/AI’. Growers using LUNA AI optimize crop strategies with automated comprehensive data collection for every plant in the greenhouse.

AM Notes

1) What is Merchant Tempermant?  
2) Is there key POC the buyer/decision maker?

3) What are the Tabs features the key POC care about?

1 - Richard is a great guy, very funny but a little scatterbrained in responding outside of calls (usually focused when on calls). He primarily cares that he is taught how to set up the system, add contracts, add users, and add notes to users, etc

2 - Richard

3 - Having a single database of the contracts for his team to collaborate from (think Finance CRM functionality) - he thinks this will add immense value to their processes to have one place to operate from. Big note is that they are using Xero as their ERP today, and are aware that it’s not as optimal as it will be in the future.

### Billing model

* Info on how merchant bills - Flat service fees
* How contract is broken up - long lists of terms, then billing sheet
* One off things to know about merchant - contracts tend to be bespoke, but the billing type is fairly simple, just different rates.

### Billing model

* Are the unique things about the customer creation process for this merchant? No, other than they use Xero for their ERP

### Contract Processing Steps

1. Steps to process
   1. Most information will be found at the end of the contract in Exhibit C
   2. Effective Date = Sign date if not otherwise specified
   3. Fees:
      1. Provisioning - 1 time fee sent out on the effective/sign date
      2. Service Fees - recurring fees for service term duration
         1. Service fees will reference starting either on or before a **“Ready Date” or “Service Start Date” - assume this to be 45 days after the effective date**
         2. Trial period is often mentioned, which account for the period between effective date and service start/ready date referenced above
   4. Installation - if this is listed, process this as a billing term as 30 days after the effective date with the price identified
   5. Shipping - if this is listed, process as a billing terms as 30 days after the effective date as $0.00
2. Anything to ignore in contracts?
3. Specifics processing things merchant has requested that may differ by contract (e.g. always back-date invoice date to final day of the month)
   1. None
4. Default Service Term
   1. If None Listed, Ops Default is 1 Year
5. Default Net Payment Terms
   1. If None, Ops Default is 30
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)

* None today

Integration Items Processing (if necessary)

* What are the instructions for assigning integration items?
  + None for now, as they use an unsupported GL and will not get be invoicing in Tabs

Post Processing Communications (if necessary)

* Does 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?

### Customer Information

* Any important information on specifics customers of this merchant
  + Special memo’s certain invoices require
  + Invoice changes due to merchant/customer relationship

### Feature Requests

* FR 1
  + What is it
  + Why it's important
  + Urgency

### Rewatch Calls

* <https://tabs.rewatch.com/video/wzwwg1j51fwzqzxh-richard-ali-ben-tabs-custom-demo-april-16-2024>