## Merchant

Demo date: May 12, 2025  
Scoping start date: n/a

MSA Signature Date: Jun 30, 2025  
Onboarding Kick Off Date: Aug 1, 2025

[If Exists] Opt Out Date: none  
Go Live Date: Nov 14, 2024

GTM POC: Jarrett  
Implementation POC: Royce

ERP: NS

Tax Integration: Avalara

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### Key people at Merchant

### Accountant: Not specified

### CFO: Richard Rein

* Director of FP&A: Matt Boland

### Customer service rep who is really involved: Not specified

### Account Receivable POC: Richard Rein (currently overseeing outsourced contractor)

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + Billing is handled through NetSuite with sales orders created from Salesforce opportunities. Many renewals do not include new contracts and are managed via internal processes. Terms vary; not all are annual upfront. Contract SKUs are categorized (e.g., Platform, Services) and must be tracked accordingly. * Is there any important merchant relationship information?  1) What is the merchant temperament? * They are proactive and motivated to automate O2C. The finance and ops team is analytical and detail-oriented, with a preference for structured handoffs and documented workflows.   2) Is there a key POC: (i.e.: who is the buyer/decision maker?)   * Yes – Richard Rein (CFO) is the primary decision-maker.   3) What are the Tabs features that the key POC cares about?   * AR visibility and forecasting * Automation of collections and invoicing * Reporting by custom tags (e.g., CSM, tier) * Reconciliation with NetSuite * Daily cash summaries and usage-free revrec |
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### Company summary *(AE to fill)*

Summary of what company does:  
  
JOOR is a SaaS-based wholesale management platform that connects brands and retailers. It supports transactions, virtual showrooms, and relationship management for the B2B fashion industry.

Goals (North star)  
*(AE/ Implementation to fill)*

What is the merchant's goal? What pain are we solving? Why are they buying Tabs?

They want to fully automate their order-to-cash process. Current pain points include:

* Inefficient, manual collections
* Manual billing schedule setup  
  Limited AR visibility and disjointed Salesforce-NetSuite workflow  
   Tabs is solving this by providing automated billing, custom reporting, and AR forecasting.

Is there an opt out clause? If so, what is the merchant looking for so they do not exercise it?

### Billing model *(AE/ Implementation to fill)*

* Are there unique things about the customer creation process for this merchant?
* Yes. Customers are created in NetSuite when Salesforce opportunities are marked closed-won. Renewals often lack new contracts, so context must be inferred from internal records.
* Information on how merchant bills
* Through NetSuite with some automation via Salesforce integration. Invoices are issued on a mixed cadence—some upfront, some monthly. Many renewals are auto-billed.
* How contract is broken up
* Contracts may span multiple years with annual breakouts. SKUs include platform and services, often with tiered pricing.
* One off things to know about the merchant
* Needs support for custom tags and usage-free revenue recognition. Requests automated reporting and better internal visibility for CSMs and finance.

### Contract Processing Steps *(Implementation/Success to fill)*

1. Steps to process
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) *(Implementation/Success to fill)*

* Any important information on events billing

Integration Items Processing (if necessary)  
*(Implementation/Success to fill)*

* 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)  
*(Implementation/Success to fill)*

* 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 *(Implementation/Success to fill)*

* 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/Implementation/Success to fill)*

**FR 1:** Continue automated dunning past 30 days

**Why:** Long-tail collections challenge

**Urgency:** High

**FR 3:** Support custom tags (CSM, region, tier)  
 **Why:** For reporting and segmentation  
 **Urgency:** Medium

**FR 4:** Daily AR collection summary by bank account  
 **Why:** Internal cash tracking  
 **Urgency:** Medium

### Rewatch Calls *(AE/Implementation/Success to fill)*

* https://us-56595.app.gong.io/account?id=3157343786257911068&type=ACCOUNT&workspace-id=2531298410931371606&date=2025-06-30&activity-id=4189509623047606246.1juga1rfat1it3b4nov1jqij59@google.com