Merchant

Demo date:   
Scoping start date:

MSA Signature Date:  
Onboarding Kick Off Date:

[If Exists] Opt Out Date:   
Go Live Date:

GTM POC: Kat  
Implementation POC: Royce

ERP: QBO

Tax Integration: No Tax

Key people at Merchant

Notes Sections

*(AE/ Implementation to fill)*

Info on how merchant bills

Is there any important merchant relationship information?

What is the merchant temperament?

Is there a key POC: (i.e.: who is the buyer/decision maker?)

What are the Tabs features that the key POC cares about?

Company summary  
*(AE to fill)*

Summary of what company does:

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

What is the merchant's goal?

What pain are we solving?

Why are they buying Tabs?

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?

How contract is broken up

One off things to know about the merchant

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?

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)*

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

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

Rewatch by dates