## Merchant

Demo date: `  
Scoping start date: Oct 17, 2024

MSA Signature Date: Nov 15, 2024  
Onboarding Kick Off Date: Nov 25, 2024

[If Exists] Opt Out Date: NA  
Go Live Date: Jan 1, 2025

GTM POC: Sean  
Implementation POC: Jeff

ERP: NS

Tax Integration: No Tax

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### Key people at Merchant

### Accountant: Ryan Muckey

### CFO: Lawrence Chan

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills - Usage based on impressions and clicks, each contract is different, monthly, quarterly, yearly etc      * Is there any important merchant relationship information?  1) What is the merchant temperament? - Lawrence is very nice, a little bit of an ego. He also wears a lot of hats at LiveLike 2) Is there a key POC: (i.e.: who is the buyer/decision maker?) - Lawrence 3) What are the Tabs features that the key POC cares about? - Automatic contract ingestion. Automatically apply usage to invoices |
| --- |

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### Company summary *(AE to fill)*

LiveLike allows you to add interactive widgets to your content to improve engagement and provide insights into viewers behavior

Ex. Yahoo sports uses livelike during monday night football to allow people to talk about cool plays and “like” videos on their website

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

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

* A fully integrated revenue automation platform
* Ingest contracts to automate the extraction of key terms and dates
* Calculate usage within the platform and automatically apply it to invoice
* Comprehensive commercial graph acting as the source of truth to create reporting and revenue recognition

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

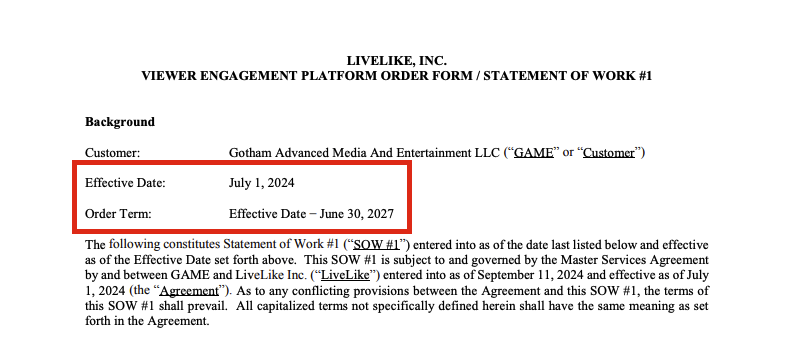
no

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

* Are there unique things about the customer creation process for this merchant? - no
* Information on how merchant bills - changes depending on the customer
* How contract is broken up - we are billing them quarterly
* One off things to know about the merchant

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

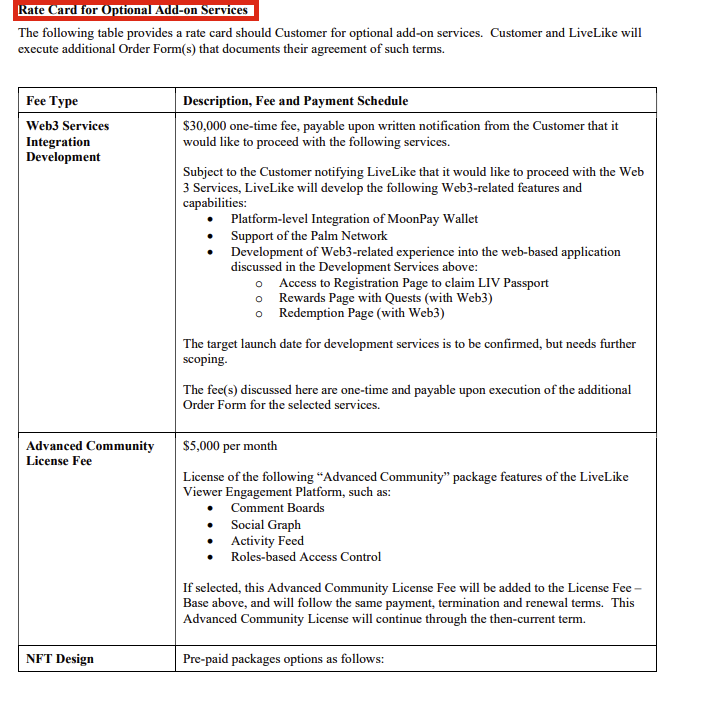
1. Steps to process
   1. Customers should all be in the system from Netsuite. If not found, create in Garage and merchant can populate billing contact info
   2. Use Contractual Term for start & end dates
      1. If no start date in Contractual Term use Effective Date



* 1. All billing terms found in “Financial Terms and Payment Schedule” section of contract along with Section 3 Support Services
  2. “Fee type” column on the left is used for item name
  3. Tier (i.e. “Silver” can be input as description where applicable)
  4. Events should all be created already for any usage based billing terms
     1. If not found, create event in merchant app

\*\* See [GOTHAM](https://garage.tabsplatform.com/prod/contracts/085801b7-bad3-449b-9ee9-40992c028c6f/terms/revenue) for example processing

1. Anything to ignore in contracts?
   1. Anything “optional” ie Optional Upgrade in [GOTHAM](https://688899763172-prod-contracts.s3.us-east-1.amazonaws.com/085801b7-bad3-449b-9ee9-40992c028c6f/Gotham%20X%20LiveLike%202024.pdf?X-Amz-Algorithm=AWS4-HMAC-SHA256&X-Amz-Content-Sha256=UNSIGNED-PAYLOAD&X-Amz-Credential=ASIA2AZNAFPSF6BJ3QXP%2F20250214%2Fus-east-1%2Fs3%2Faws4_request&X-Amz-Date=20250214T184507Z&X-Amz-Expires=300&X-Amz-Security-Token=IQoJb3JpZ2luX2VjEAcaCXVzLWVhc3QtMSJHMEUCIFhmulOY7IjYnZdjSuYq3Lz0VMiCnK%2BHb1g%2BH7hXKjsZAiEAihgnTb4k6TdtoyeAXksiNlel4%2FnJAQc0dhQbatrpheQq7wMILxACGgw2ODg4OTk3NjMxNzIiDPy%2BVLVftCpcRnD7USrMAyrKcqxry1bI2JypebC0wbr7u3pd009H%2Bvfdj2B%2BFWhWSreeAPzCo%2BJsOLgDcsFW2tdIEKRqKUgccCAF0VHF5jCJWCwClsEWFwkJPb9SQpwMhOp2738%2FvzwxPjWMwIUiwyIgRu%2BCaiKADUE1n7STKW1%2FRMRvLcZpiw6qz1A4739mnGZjXmurP1j4Tmk0%2FhXL%2BUK0Qzo%2FFNeXqqsnIfzBtn%2F5RP4SyK2NTHwZJMQgau%2BXVWUPb37WwqIH6Bjw%2FyybGIvZQ9nRNlGhubNCBIIQzt8xJZtmQeftX8%2Fg9esKM5vy7IMU%2BdnjakgLdP6w4H3X9MsQYhfBpnvSMUl8ZsxLhrlqzGFiVBJgCeipqGHsjQYeChGGDZHjRoyMq6wv4i5z8BBhP%2FH1Rwg8S4X8eRJ%2F4HcFDQlrhWfIkoOuR0SQnviH1LNCBYY8Gq%2BHeyFGPEx0vdk3auBCChOnSi%2FFoAm3sV5GTC8kj12ubj2VNG1JjY5HQZZqogrRhnxDe9f4H68bYXXi63eE2PsTytdU8V%2FEuWYXn%2BngvKq34EVjTkfQh%2F4VniUqSES%2BsehxokB0Wz2uvAfBDlH5fhdLKt1PRMZpSF%2BE%2BO1YOCm91H3xhCAwjqK9vQY6pQEklKabJ5Q7FyY3s7Of2fHaImtxF2YkJhLxFe%2FO8oDVT1IU26spsg%2B3z4PKnooZlEW2HucUVvhvRQlL7BnQAkMkzk%2F10Q2gwIITtmdvti7sl12lkRAkSFlQMJc3KE%2B8QBmJXheWqghlChmidwFARKK%2B01Cd6%2B%2FYuNEZo6gW3i0m60nvSpdb8%2FSPIdIUTXPiJlvCZTvns2XYwz8Zla%2BxRG8zOR3dzWs%3D&X-Amz-Signature=772b916b6f2a3d7a9d27ca583c1c21505a897d3a64f01d39d1a439f08755df0b&X-Amz-SignedHeaders=host&x-id=GetObject)
   2. Anything under “Rate Card for Optional Add-on Services” (See [LIV Contract](https://688899763172-prod-contracts.s3.us-east-1.amazonaws.com/d5498fc8-910e-4aa7-9d0d-c535e494c388/LIV%20Golf%20X%20LiveLike%202024.pdf?X-Amz-Algorithm=AWS4-HMAC-SHA256&X-Amz-Content-Sha256=UNSIGNED-PAYLOAD&X-Amz-Credential=ASIA2AZNAFPSOBD4HUGA%2F20250212%2Fus-east-1%2Fs3%2Faws4_request&X-Amz-Date=20250212T135615Z&X-Amz-Expires=300&X-Amz-Security-Token=IQoJb3JpZ2luX2VjENX%2F%2F%2F%2F%2F%2F%2F%2F%2F%2FwEaCXVzLWVhc3QtMSJHMEUCIDMhAAc3XfCuc3JaUm13Uswk6RQ6JYlFxyFJmCw9l85VAiEAqIDzLrROxjDzm5lYJvikt%2BSDdOmuQeyyvruhXJQJrpoq%2BAMI7f%2F%2F%2F%2F%2F%2F%2F%2F%2F%2FARACGgw2ODg4OTk3NjMxNzIiDOpeV7PtAuBoQ53BRirMAxmKU6ke4oXqmO1tIueFRGapR7BZ4D3tw%2FsFMLG5K7nYdTXUdcSLjJhmDiFpnkFDPYWs7U0mjhk27zry5idokEg6e7WcLsfrhE7gUgcWJ7qzroQBF6%2BDaLs7H%2BixvxY6SDJFQYlZ1GP7Ee78QWpZndt%2BHxHlPOQ8vkjQCfwX9zTp7H5kChKcpOGBiYIm3G%2BkbdevreFMLn9WZgZfGSHFNekeAgewHT1a1CmXMV1b%2Bn0dwcCmHsJ6WdRKdOA1xVu8GD3ESCCmziPv%2BG5pbFaXVWz1dwU%2BSTci%2BRbDkVFOpMvAg%2FGflmGfQu%2BpAmnWRolPJT2ezQVZdOc8XrJPBZKTddmciVyBXRQdxeP%2B68%2FMsYPOuBm9WkSPFipq2LBFxY4AskvQT30WJHkujYM4uqI9GOgnyDNToqYB2APWW6s6AVpt2DyzrQFs1tyyG5apbZwUzp9ZvLJMqjv14wRLy%2F1HVBN6r3xglcFIfc3m%2B3EzLh9rLg3cyVxFiuFuNJt5QmmYinu81b8xIiGmXQ3tJtz2B01ZVgiyZWx41nqx4miOCbnKHMSLoQ5V0VMkvYWw2kWPXVc4dWJwi0DI9La0LpZ6Teo5OCL6Al9IR9jH4tUwu56yvQY6pQE%2FXPdeCSSEO8G9T7%2BUG2FlvRDPrKz43GECJUNZr9id8bnSmFg1Lm2jakIwQboosF9kCPmO8Ljh3y53r%2BuyXLrRipz74NxeC%2Fjh2jDdxJ0jFVK2F1WaoOqY63Hhlde%2BfZmq8wCxkK4VuUbwIZ8ujyMhDu93VGWNK%2F%2Br%2BQjb3WGTI0334fJBFNmhYrUeXMWppabMBeMbfiAnkRhGgB7SCZvPnr%2BfQo4%3D&X-Amz-Signature=736dc8d196f21dd0ce9e927238ecf79fc9a0a54ec3283fe963bc18a53594a586&X-Amz-SignedHeaders=host&x-id=GetObject))



1. 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)
2. Default Service Term
   1. Found in “Order Term” at top of contract
   2. Tie Service period back to duration of billing term
      1. For example, if contract is 3 years with price increase each year, each RS in garage should spread revenue across 12 month period
3. Default Net Payment Terms
   1. Found in Section 4. Payment Terms. Default to 30 if not found
4. Default Billing Frequency
   1. Found within payment schedule in contract
5. 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)*

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

* What are the instructions for assigning integration items?
  + Waiting on merchant to fill out this sheet: [LiveLike | Integration Items](https://docs.google.com/spreadsheets/d/1BtVSsP2T8bQ8NxDw16fycBMjKh7PYadp3YOISsboklM/edit?gid=0#gid=0)
  + If still blank at time of processing Implementation team will handle

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

NA

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

* Rewatch by dates