## Merchant

Demo date: August  
Scoping start date: August

MSA Signature Date:   
Onboarding Kick Off Date:

[If Exists] Opt Out Date: N/A  
Go Live Date:

GTM POC: Rebecca  
Implementation POC: Jeff

ERP: QBO

Tax Integration: No Tax

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### Key people at Merchant

### Head of Operations: Sam Hong

### CEO: Arjun Mendhi

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   Flat SaaS and usage-based fees (some tiering, some volume based). Some add-ons that get billed occasionally as extras.   * Is there any important merchant relationship information?   Head of Ops (Sam Hong) was my bschool classmate. Should be easy to work with. CEO can be a bit persnickety.   1) What is the merchant's temperament?  Startup friendly, excited to partner, leans technical (they have written scripts to help with billing historically. This is the first time they are leveraging any outside finance software.)  2) Is there a key POC: (i.e.: who is the buyer/decision maker?)  Sam is the key POC from a day-to-day standpoint, will run point on implementation. Arjun is likely to be involved, wants to review invoices before they go out, etc.  3) What are the Tabs features that the key POC cares about?  Usage uploads - open Q on how much they want to use their existing usage data template vs. adopting our template.  They want a once-a-month export (CSV file) of all invoice line items to be able to review it in the format they are used to before CEO approves (instead of going one-by-one through the bills). Agreed that having us export this for them once a month will do the trick. |
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### Company summary *(AE to fill)*

Summary of what company does:

Molten Cloud is a cloud-based platform that streamlines digital media operations for the entertainment industry. The company focuses on simplifying rights management, content distribution, and financial operations for media organizations.

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

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

Automate usage-based calculations for invoicing (they track 5 or so different usage events; contracts are very enterprise-leaning and bespoke)

Enable a more scalable process for invoicing

Speed up invoicing (so that invoices can go out on the first of the month)

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

N/A

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

* 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 *(Implementation/Success to fill)*

1. Steps to process
   1. Service Start Date: Use the “Effective Date” listed in the Order Form (usually found on the first page).
   2. Months of Service: Refer to the “Order Term”
   3. Item Name: Extract the names of software modules and services from Exhibit A (e.g., “Content Delivery Management System”, “Invoicing Module”).
      1. For Customization Services Fee, only create 1 product called “Custom Development” with a net total amount of the entire table.
   4. Item Description: Include feature summaries (e.g., unlimited users, storage limits, delivery methods). Also, note any usage-based pricing structures (e.g., per GB managed/delivered).
   5. Integration Item: Map to item name.
   6. Billing Type: Identify whether pricing is flat, usage-based, or tiered.
   7. Total Price: Look under Exhibit A for yearly licensing fees and onboarding fees. Include all per-tier pricing (e.g., $24,000/year for up to 500 entities). Also available under description.
      1. ignore royalties management system
   8. Quantity: GB to be converted to TB
   9. Start Date: Use the Effective Date (ignore the validate until date)
   10. **Closest First of month for both**
   11. **Convert gb to tb x 1000** 
       1. **Storage**
       2. **Delivery**
       3. **description : usage pricing with TB**
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
  + What is it
  + Why it's important
  + Urgency

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

* Rewatch by dates