## Merchant

[Cell 1]Demo date:   
[Cell 2]Scoping start date: Nov 6, 2023

[Cell 3]MSA Signature Date: Feb 7, 2024  
[Cell 4]Onboarding Kick Off Date: Feb 7, 2024  
[Cell 5]Go Live Date: Feb 7, 2024

[Cell 6]GTM POC: Rebecca  
[Cell 7]Implementation POC:

[Cell 8]ERP: NS

[Cell 9]Tax Integration: QBO Hard Coded Taxes

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### [Cell 10]Key people at Merchant

### Accountant:

### CFO:

### Customer service rep who is really involved:

* Account Receivable POC
* Billing POC

### etc.

### [Cell 11]Company summary

Summary of what company does

Goals

[Cell 12]What is the merchant's goal? What pain are we solving? Why are they buying Tabs  
  
[Cell 13] Is there an opt out clause? If so, what is the merchant looking for so that they don’t feel the need to exercise it?  
  
AE Notes

Any important relationship information  
  
[Cell 14]1) What is Merchant Temperament?  
[Cell 15]2) Is there key POC the buyer/decision maker?  
[Cell 16]3) What are the Tabs features the key POC care about?

### [Cell 17]Billing model

* Info on how merchant bills
* How contract is broken up
* One off things to know about merchant

### Billing model

* Are the unique things about the customer creation process for this merchant?

### ]Contract Processing Steps

1. [Cell 18]Steps to process
2. [Cell 19]Anything to ignore in contracts?
3. [Cell 20]Specifics processing things merchant has requested that may differ by contract (e.g. always back-date invoice date to final day of the month)
4. [Cell 21]Default Service Term
   1. If None Listed, Ops Default is 1 Year
5. [Cell 22]Default Net Payment Terms
   1. If None, Ops Default is 0
6. [Cell 23]Default Billing Frequency
   1. If None Listed, Ops Default is Monthly

### [Cell 24]Events Processing (if necessary)

* Any important information on events billing

[Cell 25]Integration Items Processing (if necessary)

* 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

[Cell 26]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?
  + Example:
    - Who: Customer Success [Azmat Aziz] needs to be notified
    - Where: Messari internal merchant channel
    - When: contracts are processed [Merchant Phase: Active]

### [Cell 27]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

### [Cell 28]Rewatch Calls

* Rewatch by dates