## Merchant Name *(AE to fill)* Implementation POC: Dani *(IM to fill)* CX POC: *[IMP to Add]*

### 

### 

| Notes Sections   *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills  1) What is the merchant temperament?   Laid back but highly analytical. Seeks to understand the details around functionality and ROI but in the end make the decision somewhat easily. He knows that billing could be a problem in the future and wants to get ahead of that.  3) What are the Tabs features that the key POC cares about?  Usage based billing plus end to end solution for automation with an emphasis on usage based billing |
| --- |

### Billing model *(Entire Section: Implementation to fill section)*

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

They are early-stage with ~8 customers but plan on scaling this year. They are moving towards a usage based pricing model and a large part of our conversation was focused on the negative implication on their systems if they begin to play around with the model. I would think that highlighting how Tabs helps systems accommodate different billing models seamlessly is a key driver for them.

* Information on how merchant bills

Moving towards usage based, some details are still cloudy on their side.

* How contract is broken up

One year $10,000 paid upfront

* One off things to know about the merchant

Came through the investor network

### Contract Processing Steps *(Entire Section: Implementation/Success to fill Post-Go Live)*

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) *(Entire Section: Implementation/Success to fill Post-Go Live)*

* Any important information on events billing

Integration Items Processing (if necessary)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

* 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)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

* 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 *(Entire Section: Implementation/Success to fill Post-Go Live)*

* 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 to fill for all requests prior to Imp handoff, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

* FR 1
  + What is it
  + Why it's important
  + Urgency

### Merchant Calls *(AE to fill for all videos prior to Imp involvement, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

* Loom recording links by dates

[Cake.ai closing call 2/13](https://us-56595.app.gong.io/call?id=1780744973087342859&email_type=collaborate-invitation-sent&xtid=2qgjr3vo60dsxl1q5el)