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

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| Notes Sections   *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills   Monthly flat subscription. Usage-Based Revenue:  Many clients have contracts with variable components:  % of ad/media spend (e.g., 10% of $20K = $2K invoice line).  % of client contract value (for referrals).  Tiered ramps (e.g., 5% on the first $10K, 15% above that).  1) What is the merchant temperament?  Kevin is our Champion and CoFounder. Has always worked in start up world and very easy to work with. Doesn’t expect perfection and will work together towards a solution. No finance background.  Dean is the other cofounder and will be involved but Kevin is the main POC. Also very nice  3) What are the Tabs features that the key POC cares about?  1. 📑 Contract Ingestion & Billing Logic Extraction  Why it matters:  Kevin wants to move away from spreadsheets and memory-driven billing. Many of FlyTech’s contracts contain custom pricing logic (e.g. rev share tiers, ramps, intro discounts) that are easy to forget or mishandle.  2. 📈 Usage-Based Billing Engine (Ad Spend / Rev Share)  Why it matters:  FlyTech’s newer contracts are tied to monthly ad spend and % of customer revenue, but they lack a system to automate this.  3. 💳 Stripe Integration + Credit Card Fee Controls  Why it matters:  FlyTech gets hit with 3.4%+ Stripe fees and has no ability to route or offset those costs.  4. 🧾 Automated Invoicing + Collections Dashboard  Why it matters:  Kevin manually tracks overdue customers across Stripe and two spreadsheets.  5. 🔁 QuickBooks Integration (QBO)  Why it matters:  Their bookkeeper uses QBO to close the books, but there’s no structured handoff from billing to accounting. |
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### Billing model *(Entire Section: Implementation to fill section)*

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

1. **If customer does not exist -> create new customer**
2. **Process with no BTs -> merchants wants to populate themselves for the time being**

### **General Guidance**

* + Most contracts have a monthly flat platform fee and a performance-based % usage fee
* **Item Name**:
  + “Monthly Fee” for the flat services fee
  + “Additional Fee” or “Performance-Based” fee for the % fee
* **Total Price**:
  + For flat monthly service fees, use the exact amount stated in the payment terms section.
    - Sometimes there can be 2 monthly fees throughout the contracts
  + For performance-based or percentage-of-spend fees, use the % listed
* **Events:** should already exist – % fees are generally of contract value or of ad spend
* **Service Start Date**: Effective date of the contract
* **Billing Start Date**: Same as Service Start Date unless otherwise stated.
* **Months of Service**:
  + Use the same range is the billing period
    - If there are 2 monthly fees for example (1 price for months 1-3 and a different price for month 4-12), use that number of months
  + Default to 12 if not specified
* **Frequency**:
  + Monthly for the % usage BTs
  + For flat BTs, use the frequency listed
* **Integration Items:** all should be “Sales”
* **Net Terms**:
  + Often in the Payment section
    - Example: “5.2 Late payments beyond fifteen (15) days from the due date may result in service suspension until payment is received”
  + Default to Net 15
* **Examples:**
  + [2 different monthly fees](https://garage.tabsplatform.com/prod/contracts/17cb1f75-2e1a-440c-8f4d-b063d9603023/preview)

### 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)*

* HS integration
  + Wants to start using their CRM more
  + Source of truth as they expand the sales team
  + Medium - expects this during implementation

### 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)*

* Disco (7/17)
  + https://us-56595.app.gong.io/call?id=1398962228341628759
* Demo (7/23)
  + https://us-56595.app.gong.io/call?id=174156394667801998
* Path to Partnership (7/28)
  + https://us-56595.app.gong.io/call?id=7263391379212502526