## Merchant Name *(AE to fill): Niche* Implementation POC: Jane *(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 Niche’s current contracts only have flat fee billing terms (Tabs supports other billing models, such as usage-based pricing, if there is a need in the future).   In the instance that there is an amendment, change order, upgrade, or downgrade, billing proration will be required 1) What is the merchant temperament?  Obe is our champion and main POC. She is very sweet, but somewhat stubborn with systems and how she wants Tabs to work.  Rory is CFO from the F-Suite. Removed from Tabs except for commercials and initial demo. Best friends with Rakib from Alkira. Nice guy, but will not be too involved in the day to day. Obe has 5 team members under her who will be influencers and power users 3) What are the Tabs features that the key POC cares about?  Automated invoicing from contracts. Contracts are unique and they sign amendments mid-contract all the time. Have major problems with keeping invoicing and revenue in line. Ideal state is contract ingestion, LLM extraction of terms to update customer in Tabs, Generate all future invoices to schedule to send, then automate collections and do Cash App. All of this will sync to Rillet Automated collections and audit log to track changes to invoices and customers. They have a large team and no visibility into changes. A ton of back and forth to follow up on invoices |
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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. Steps to process
   1. Service Start Date: Locate the "Effective Date" or "Start Date" mentioned in the agreement or order form section.
   2. Months of Service: Look for a defined term, such as 12, 24, or 36 months; if not directly stated, infer from start/end dates or renewal clauses.
   3. Item Name: Identify the primary product or service listed - often found in tables or labeled sections with service/module names. One BT for each line item in the contract.
   4. Item Description: Leave blank
   5. Integration Item: Leave blank.
   6. Billing Type: Determine whether billing is flat fee, tiered, or usage-based (e.g., storage, delivery, user seats).
   7. Total Price: Locate the fee breakdown (annual, monthly, onboarding, etc.) and list any per-unit or bundled pricing where applicable.
   8. Quantity: Capture any unit-based metrics (e.g., number of seats, licenses, GB/TB of storage, titles/entities) to quantify the scope.
   9. Start Date: Use the official commencement date mentioned; if onboarding is separate, note when onboarding begins.
   10. Periods: Check if the contract includes a one-time service, fixed term, or auto-renewal terms (e.g., rolling 12- or 36-month terms).
   11. Frequency: Identify billing/invoice frequency (e.g., monthly, annually, milestone-based.
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)*

* SFDC Integration
  + Syncing Quotes in from SFDC
  + Currently store multiple quotes in a separate tab on the opportunity level
  + High - working with the team to post in notes object as well, but this is ideal state
* EBiz Integration for Payments
  + Integration with EBiz for payment processing
  + This is their payment provider. Aligned Rillet with handle this integration
  + Medium - have workaround now with Rillet
* Email Inbox
  + Want invoices sent from [ar@niche.com](mailto:ar@niche.com)
  + Want customer facing communication to be from Niche, not Tabs
  + Medium - they pressed here during the sales process. Ideal state is all invoices coming from this inbox

### 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 4/7
  + https://us-56595.app.gong.io/call?id=2611643491070336267
* Disco Part 2 4/7
  + https://us-56595.app.gong.io/call?id=8138020956964667542
* Custom Demo 4/11
  + <https://us-56595.app.gong.io/call?id=7688801370985822779>
* Commercials and ROI 4/14
  + <https://us-56595.app.gong.io/call?id=805106064906763610>
* Technical Workflow with Rillet + EBiz
  + <https://us-56595.app.gong.io/call?id=7982546739019457843>