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

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| Notes Sections [Ops International Team to Ignore]  *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills   + Flat SaaS fee, Some Usage, Some international Billing (GBR, INR). They have 24 active customers and are acquiring a business with 8 customers in Jan.   + Discounts from list price are important to them for rev rec reporting  1) What is the merchant temperament?   + Part of the deal was agreeing to a case study and beta testing. They are super excited about Tabs and want to be a thought partner as we build tools   3) What are the Tabs features that the key POC cares about?  Usage billing, Contract Management, Renewals, Rev Rec |
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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. Merchant Instances: saltmine usa inc, saltmine ptd ltd, the changing workplace limited
   2. Service Start Date: Locate the "Effective Date" specified in the contract.
   3. Months of Service: Identify the contract duration by checking the "Expiration Date" and any monthly terms.
   4. Item Name: Look for the name of the service or software being provided (e.g., "MS Space Tool").
   5. Item Description: Leave blank.
   6. Integration Item: Leave blank.
   7. Billing Type: Flat.
   8. Total Price: Locate the total contract value, including pricing for different fiscal years, discounts, and any additional service fees.
   9. Quantity: Find the number of licenses, user seats, or other units included in the contract.
   10. Start Date: Confirm the effective date based on the agreement.
   11. Periods: Verify if the contract includes renewal terms, modification clauses, or early termination conditions.
   12. Frequency: Identify the invoicing schedule (e.g., annual upfront payment, monthly invoices).
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: Rev Rec by Product Reporting
  + Why it's important: They have multiple entities and want to see revenue across all their customers
  + Urgency: Nice to have not need to have
* FR 2
  + What is it: Converting international currency to USA in reporting
  + Why it’s important: They have customers in the UK and India. Do all of their reporting in USD and do the conversions manually
  + Urgency: Would be a huge add for them and save manual work. Nice to have and an opportunity to make them very happy

### 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)*

* September 24th, 2024: Disco
  + https://www.loom.com/share/14c77a6b6e8f42159e5e7f9326d4b45e?sid=d7d0d240-154a-4fb2-9d1a-46248cea7fb6
* September 27th, 2024: Custom Demo
  + <https://www.loom.com/share/4fc5670cb2594b9b90a5d4517b357c2c?sid=9693ae1a-8502-4031-9fff-43efbfe6e3cd>
* October 7th, 2024: Rev Rec with Arjun
  + <https://www.loom.com/share/009cea93b8d541339db1490211b8f682?sid=6c1dd50e-3c36-4231-a053-3d1e39c285f4>
* October 10th, 2024: NetSuite Scoping with Royce
  + <https://www.loom.com/share/7c3dd2356de9440a96827323eda5917d?sid=16befa0a-a86d-4a5d-a50d-8ebf25a6a7f1>
* December 27th, 2024: EOY Update
  + <https://www.loom.com/share/95a7ca507321490899a5a341e4d3fd58?sid=4a3a07b4-fa8a-43da-b6fc-9c8e6477ad39>
* December 30th, 2024: Product Deep Dive with Steve
  + https://www.loom.com/share/8b098460d16a424f8c014ad5ab4507c6?sid=590c0980-40ab-4698-a50c-c2bf1984822e