## Merchant Name: Zamp 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   Zamp bills customers based on tiers related to the number of states they operate in, with different pricing for different state count ranges. This is tiered unit pricing across their customer base, with discounts negotiate by the sales rep.  Based on this- we will NOT support proration, rather add the overage on the next months invoice. We will configure this with:  Annual payment contracts- 2 billing terms (1 flat, 1 tiered volume flat)  Monthly payment contracts- 1 billing term (1 tiered volume flat)  1) What is the merchant temperament?  Carie is the Head of CS and main Champion for Tabs. Cares immensely about renewals and having a single source of truth for revenue. Very nice, lives in Bozemon, MT - consistently taking calls on her porch.  Amelia will be the day to day billing specialist. She’ll be in the weeds charging customers and tracking collections. Has vocalized Tabs will make her life way easier and also a strong champion.  Jae is their RevOps lead and cares about HS. Currently severely underutilized and will leverage Tabs data sync to optimize their CRM. Will be main POC for HS connection.  Matt is their head of partnerships, and will want a solidified partnership announcement in the fall. Caitlin will handle this end of the conversation.  Clete is their COO and executive buyer. Will not be involved day to day, but will be tracking implementation closely.  3) What are the Tabs features that the key POC cares about?  Start utilizing HubSpot more - HubSpot is basically a data dump for them and they want to leverage Tabs for contract ingestion and syncing invoices back to start utilizing this system more.  Stripe fees - ability to push CC fees onto customers for their smaller deals, or push them to ACH.  Partnership for Tax - part of the reason they're paying 50k is for us to build a Zamp integration via bridge tech. This will move towards a larger partnership conversation in the future.  **Context (this was not written into MIS but is the expectation):** “*With Zamp as a customer, we are willing to commit to the following for the partnership:*   1. *Automate Zamp’s order-to-cash process as discussed with Carie* 2. *Stand up a bridge integration in the short-term to enable Tabs to ingest Zamp’s tax calculations for invoices with Target go-live in December, 2025* 3. *Kick-off broader partnership discussions in September with plan to make a public partnership announcement in Q4 and for our commercial teams to begin joint prospecting efforts* 4. *Once we’ve identified at least 3 new mutual customers, our eng teams will begin writing software for the full product integration*   Clean up invoicing on time. They're constantly delayed on invoicing due to contract complexity and translating date between HS, Stripe, and QBO. Its impacting cash collection and renenewing customers on top.  A single source of truth for revenue. Currently split among QBO, Stripe, Spreadsheets, and HS - none of which are reliable. They want one system to stripe everything.  Renewals tracking - main champions are customer success who are wayyy behind on renewals. Renewals report is a huge value add for their team. |
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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

**Free months:**

* When free months are included on the front end, merchant would like payment due once free months have expired.
  + Ex. 2 free months upfront, then 12 month contract billed monthly. Payment would be due on day 61 (assuming 30 days in a month)
  + Splitting out recurring services vs one-time services
    - Recurring would be our typical subscription fee
    - One-time services would be charging for overdue filings that the customer needs help with. This will be a new SKU, yet to be setup. **One-time services must be paid up front.**
      * Should this be a separate invoice? Can we include it on the agreement and then have Tabs generate 2 invoices: one for recurring fees and a second for one-time fees?

1. Anything to ignore in contracts?
2. 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)
3. Default Service Term
   1. If None Listed, Ops Default is 1 Year
4. Default Net Payment Terms
   1. If None, Ops Default is 0
5. Default Billing Frequency
   1. If None Listed, Ops Default is Monthly
6. 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)*

* Zamp Tax Integration
  + Zamp is a Tax provider for B2B and B2C businesses. They will only go live on Tabs with a bridge integration here to send invoices with Zamp tax calculated.
  + Will block go live without this built
  + High - contract start date is 12/31/25 and expectation is to have this built for go live
  + **Critical call:** <https://us-56595.app.gong.io/call?id=8552194763416521825>
* Expectations set:
  + *Do they realize that this is not a channel for them to get other Tabs clients because we are building a one-off integration for them?* 
    - Expectations set that this is a unique integration to Zamp and will have no benefit to other merchants who onboard.
  + *Are tax estimates needed or just on sent invoices?*
    - No tax estimates needed, just sent on invoices
  + *Do they expect to have tax refunds when credit memos are created?*
    - They can't think of an instance where this has happened
  + *Do they have any tax exempt clients?* 
    - Yes Zamp does, but rarely. Zamp has an exemption property in our API.
    - Exemptions are important to Zamp, but expectations set that we don’t support
  + We don't manage tax codes in Tabs. We will instead hard-code a single tax code for all transactions line items we send them. Confirmed for [their business](https://developer.zamp.com/api/zamp-tax-codes) it would be R\_DIG\_SAAS\_B2B.
* Follow up items for product:
  + OPTION 1: Universal Tax Integrator: Ariel mentioned that she’s done some work on creating a universal tax integrator
  + OPTION 2: Product Delivery: Jean can create a one-off integration following similar requirements to what we do for direct integrations with Anrok / Avalara
* Other uncertain items:
  + Use case 1: Upgrades - when a customer exceeds their tier threshold amount (tracked in Zamp Admin) > send this information over to Tabs to support Upgrade process/billing.
    - How does Tabs treat pro-ration vs going to next month? Are both options in Tabs?
    - ***ANSWER: Nick confirmed these points with them (***[***https://tabs-7so1666.slack.com/archives/C09BQJN11AA/p1756219703892549***](https://tabs-7so1666.slack.com/archives/C09BQJN11AA/p1756219703892549)***), based on this- we will NOT support proration, rather add the overage on the next months invoice. We will configure this with:***
      * ***Annual payment contracts- 2 billing terms (1 flat, 1 tiered volume flat)***
      * ***Monthly payment contracts- 1 billing term (1 tiered volume flat)***
  + Use case 2: Delinquent Payments - subscription invoice unpaid or failed payments - I assume we can setup the recovery process in Tabs, but if those efforts fail > send this information over to Zamp Admin to properly mark the account as such so that our team does not service unpaid accounts (ie. ensure Zamp is not working for free)
    - ***ANSWER: This data is available for Zamp to pull from Tabs with the below fields (available from exporting the billing report with filters, or leveraging our API to connect to their system)***
      * ***PaymentStatus***
      * ***Invoice status***
      * ***Due date***

### 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 8/22
  + https://us-56595.app.gong.io/call?id=1974343359238093296
* Custom Demo and Workflows 8/25
  + https://us-56595.app.gong.io/call?id=8453558021261596874
* Next Steps and Zamp Partnership 8/26
  + https://us-56595.app.gong.io/call?id=4045714213021396919
* Technical Scoping and Validation 8/28
  + <https://us-56595.app.gong.io/call?id=8552194763416521825>