## Merchant Name: Fynn Implementation POC: Jean *(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   Upfront saas fee per location - some parent/child relationships and seat based usage pro-rated based on active users  1) What is the merchant temperament?  Nice, straight-forward. Used to using chargebee and hates their customer service  3) What are the Tabs features that the key POC cares about?  parent/child relationships, reporting and revrec, automated billing, dunning and payment collection |
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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: Refer to the "Effective Date" listed in the agreement. If not present, use the contract signature date.
   2. Months of Service: Refer to “Contract Term”.
   3. Item Name: Listed under Product.
   4. Item Description: Leave blank.
   5. Integration Item:
      1. Map Fynn seats to Fynn QBO Item
      2. Map Implementation Fees to Fynn Implementation
   6. Revenue Category
      1. Map Fynn seats to Usage Revenue Category
      2. Map Implementation Fees to Service Revenue Category
   7. Billing Type: Flat and Unit.
   8. Total Price: Refer to the “Net Total” column.
      1. Create a separate unit BT for the Fynn List Price
   9. Quantity: Refer to the “Quantity” column.
   10. Start Date: The "Effective Date" mentioned in the contract.
       1. Add 2 months to this date for the fynn flat fee and unit fee
       2. Implementation/one-time fees would start on the effective date
   11. Periods: Refer to the months of service.
   12. Frequency: Usually monthly billing cycle; Check the paragraph under the pricing table.
   13. Net Terms: Refer to “Payment Terms”
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 15
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
* <https://www.loom.com/share/f92c90336cd042b1b4c61b8afbf9cf96?sid=9781a3a1-918e-4266-af26-9b36cdb7c63c>
* <https://us-56595.app.gong.io/call?id=258425555512363807&g_ajs_param_source_comp=slack-share-call>