## Merchant

Scoping start date: Feb 7, 2024

Implementation Completed Date (Go live date): Feb 7, 2024

MSA Signature Date: Feb 7, 2024

GTM POC: Jarrett

ERP: QBO

Tax Integration: Other

### 

### Key people at Merchant

### Accountant- Megan (megan@clinicontact.com)

### CEO: Kit Dobyns (kit@clinicontact.com)

### Company Summary

### Recruit patients for clinical testing.

### AM Notes

Friends with Ali. Moved to QBO to start using Tab. Active Merchant.

### Billing model

* Original contracts were very simple: one-page and one-time billing. Often one item.
* Recently, Clinicontact has uploaded recurring invoices, typically on a monthly cadence - to date all products / billing terms have been flat fee.
* If you come across usage billing terms, stop processing and reach out to CX for clarification.

**Contract Processing Steps**

1. [Ashni Walia](mailto:ashni@tabsplatform.com)/ Ops to provide more detail from next contract ingested. (then they can remove this item from the MIS)
2. **Customer creation**:
   1. Check the file name for any existing customers.
   2. If a new customer needs to be created or you are unsure about the correct customer mapping, flag to [Ashni Walia](mailto:ashni@tabsplatform.com) → Ashni to flag CX.
      1. The naming convention for new customers is “Institution Name - Researcher Name”
         1. Institution Names are Universities/Colleges or Large Research Organizations - Examples: Rutgers, UCLA, University of Florida, Vanderbilt University, Harvard
         2. Researcher Names are the individual name on the contract - Examples: Dr. Chen / Teresa Johnson Etc.
         3. Example Of a Proper Customer Name “Rutgers - Dr.Chen”
         4. If no institution name is included - Use Researcher’s full name including title - “Dr. Full Name”
         5. Example of a proper customer name with no institution: “Dr. Loren Fishman”

### Events Processing (if necessary)

* Don’t process usage → Flag to Ashni

### Customer Information

* n/a

### Feature Requests

* n/a

### Rewatch Calls

* Feb 2- https://tabs.rewatch.com/video/mhcm08aw16vp7udj-tabs-cliniccontact-demo-february-2-2024