## Merchant

Demo date: Sep 20, 2024  
Scoping start date: Sep 30, 2024

MSA Signature Date: Sep 30, 2024  
Onboarding Kick Off Date: Oct 1, 2024

[If Exists] Opt Out Date: N/A  
Go Live Date: Nov 1, 2024

GTM POC: Ben  
Implementation POC: Ariel

ERP: QBO

Tax Integration: No Tax

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### Key people at Merchant

### Chief of Staff: Lauren Jones

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + Each customer the merchant bills has bespoke pricing and terms   + Tiered Subscriptions with varying usage components * Is there any important merchant relationship information?  1) Lj is very smart and engaged and excited to get started with Tabs! 2) Michelle is the CEO, has not been involved in the evaluation process but we have a good relationship through Rebecca 3) Providing infrastructure for contract processing and management is super important - every agreement is bespoke and they need support with managing that side of the business. |
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### Company summary *(AE to fill)*

FindMine inspires shoppers throughout their journey with on-brand, dynamic, and inventory-aware outfitting & styling. The world’s leading brands like Lululemon, Gap, and Anine Bing trust FindMine’s AI to amplify what their teams can do alone, increasing revenue and improving margins while creating loyalty that lasts.

Goals (North star)  
*(AE/ Implementation to fill)*

They have no infrastructure today outside of QBO and have very large complex contracts, each one is unique and they need a place to help them to start administering them.   
  
No opt out

### Billing model *(AE/ Implementation to fill)*

* Are there unique things about the customer creation process for this merchant?- no
* Information on how merchant bills - mostly tiered subscription, but with some usage components depending on the customer.
* How contract is broken up - subscription and sometimes usage pieces. They also have a few clauses that could be use cases for remittance (rebates if they refer business, etc)

### Contract Processing Steps *(Implementation/Success to fill)*

1. There are many types of contracts structures, and their terms can overlap between the various structure. Listed below are all of the various subscriptions/terms/items that can be listed in a contract, and how to process:
   1. Annual Subscription Tiers - There 2 different Tiers that can be outlined in a contract
      1. Tier option #1 (most common): Only 1 Tier applies to the contract
         1. If multiple tiers are listed, only process the bottom tier. The next tier up is in the contract as a reference point, but would have an amendment if the customer moves up to the next tier
         2. **This is the most common option, so this will be the default way of processing tiers**
      2. Tier option #2 (only [one contract](https://garage.tabsplatform.com/prod/contracts/634f74c4-d4ff-4429-98d7-78055180e425/terms/revenue) like this): They move through the tiers throughout the contract
         1. This is a more rare option, and unfortunately there is not a good way of identifying that this is processed differently in the contract today. **Do not default to this method unless the contract explicitly states that the tiers will automatically apply**
         2. In this case, each subsequent tier is prorated for the year.
         3. If there is language in the contract that expresses that this is the model:
            1. Process the first tier for to bill at the beginning of the contract
            2. Process the next tier to bill 6 months into the first year of the contract, prorated in order to annualize the rate
            3. Process the next tier to bill 9 months within the contract, prorated in order to annualize the rate
            4. If multi year, process the 2nd annual invoice as the final tier as the full annual rate
      3. BT Info:
         1. Name: Tier X Subscription Fee (or however it is named in the contract)
         2. Integration item: Annual Subscription Fees
         3. Dates: Default to effective date for first annual bill, and contract will state contract term
            1. If no term, default to 1 year
            2. If no effective date, default to sign date
         4. **Category: Platform**
   2. Implementation Fee
      1. Default to 1 month rev schedule
      2. Integration Item: Implementation
      3. **Category: Implementation**
   3. Professional services
      1. Sometimes this is added to the contract at a flat rate. If so, process as such
      2. Name: Professional Services
      3. Integration Item: Professional Services
      4. **Category: Professional Services**
   4. Add-ons
      1. Sometimes there might be extra services that the customer could opt into, such as hourly professional services or other additional products
      2. I**GNORE THESE, do not process**
   5. Early payment discounts
      1. Some contracts contains a clause for early payment discount
      2. If this is seen, process as a separate BT as a negative amount, on the effective date (same date as the first invoice for the contract)
      3. BT Details:
         1. Name: Early payment discount
         2. Integration Item: Discount
         3. **Category: Discount**
   6. Amendments
      1. There might be an amendments that moves the customer into a different tier or makes another adjustment.
      2. If an amendment is received that adjust the amount of a current contract:
         1. End the rev schedule of the original product on the original contract
         2. Create a new rev schedule and BT for the updated product on the amendment contract
      3. If the invoice cadence or net payment terms are not on an order form, there also might be an MSA that is submitted. Refer to the MSA for this information as needed.
         1. If not listed and no MSA, default to:
            1. Net terms: 30
            2. Invoice cadence: Annual
2. Anything to ignore in contracts?
   1. Add-ons, details above
   2. Auto-renewals - there will always be a new document so never process auto-renewal
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 30
6. Default Billing Frequency
   1. If None Listed, Ops Default is Annual
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) *(Implementation/Success to fill)*

* Any important information on events billing

Integration Items Processing (if necessary)  
*(Implementation/Success to fill)*

* 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)  
*(Implementation/Success to fill)*

* 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 *(Implementation/Success to fill)*

* 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/Implementation/Success to fill)*

* FR 1
  + Usage based Rev Rec
  + Have a usage component to their contract
  + Not heavily discussed, but will be a need as they start to shift their processes fully onto Tabs

### Rewatch Calls *(AE/Implementation/Success to fill)*

* <https://tabs.rewatch.com/video/k4i8olyhkwf6x9tc-lauren-and-rebecca-schwartz-tabs-september-20-2024>
* <https://tabs.rewatch.com/video/dt0gmr4u6dvsl6rh-tabs-findmine-custom-demo-september-30-2024>