## HUBBLE MIS

## *\*\* This was a legacy deal from pre-AE times. MIS purpose for contract processing by Ops - see Contract Processing Steps section\*\**

## Merchant

Demo date:  
Scoping start date:

MSA Signature Date:  
Onboarding Kick Off Date: Dec 4, 2024

[If Exists] Opt Out Date:  
Go Live Date: Jan 1, 2025

GTM POC:  
Implementation POC: Jeff

ERP: QBO

Tax Integration: No Tax

Customer volume:

Billing model:

### Key people at Merchant

* Valerie (Siegfried)
* Abe (Hubble)

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills * Is there any important merchant relationship information?  1) What is the merchant's temperament?   2) Is there a key POC: (i.e.: who is the buyer/decision maker?)  3) What are the Tabs features that the key POC cares about? |
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Company summary  
*(AE to fill)*

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

What is the merchant's goal? What pain are we solving? Why are they buying Tabs?

Is there an opt out clause? If so, what is the merchant looking for so they do not exercise it?

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

* 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 *(Implementation/Success to fill)*

1. Steps to process
   1. **Guidance on Customer name:** Customer should already exist in Tabs, these have been synced from QBO and can be found in first paragraph of contract
   2. Use **effective date** in first paragraph for start date and service start date
   3. Term length found in section 1 of contract
   4. Fee found in section 3 **Implementation Fee**
      1. Billing name = “Pilot Subscription”
      2. Integration Item = “Pilot Subscription”
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. Refer to contract
5. Default Net Payment Terms
   1. Refer to contract
6. Default Billing Frequency
   1. Refer to contract
7. How do we handle taxes as a line item?
   1. No taxes

### 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)*

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