## fMerchant: Outrider

Demo date:   
Scoping start date: Nov 6, 2023

MSA Signature Date: Feb 7, 2024  
Onboarding Kick Off Date:

[If Exists] Opt Out Date:  
Go Live Date: Jul 31, 2024

GTM POC: Rebecca  
Implementation POC: Royce

ERP: NS

Tax Integration: No Tax

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### Key people at Merchant

### CFO: Eric Andreas

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| AE/ Implementation Notes Sections [Ops International Team to Ignore]   * [Tabs | Outrider Netsuite Implementation](https://docs.google.com/document/d/10Ym7pgJDIP4CnFk_LDYRK0acsZXwCAoFurdGGeFct7Q/edit) * <https://tabs.rewatch.com/video/apc7cwjq9h8fby27-outrider-tabs-go-live-aug-1st-invoices-july-31-2024> - Rewatch from go-live |
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### Company summary

Outrider, the pioneer in autonomous yard operations for logistics hubs, helps large enterprises improve safety and increase efficiency. The only company exclusively focused on automating all aspects of yard operations, Outrider eliminates manual tasks that are hazardous and repetitive.

Goals (North star)

Billing and Invoicing

| **No.** | **Questionnaire** | **Outrider Configuration** |
| --- | --- | --- |
| 1. | **Netsuite flow**   * Create Sales Order * Sync Sales Order * Invoice Only | **Update: Adjust to Sales Order flow as Tabs support Sales Order flow for a single account** |
| 2. | **Sales order Data Fields** | Department is the Revenue (ID: 105) |
| 3. | **Invoice creation** | * Invoice # * Customer * Subsidiary * Location * Department: Revenue * Items & Pricing |
| 4. | **Items** | * FedEx Operational Services * Site Setup * Autonomy Kit * Sync integration item |
| 5. | **Customer Creation** | Not applicable |
| 6. | **Taxes** | No taxes |
| 7. | **Payments**  When payments come in, what account should it be mapped to? | Is there a specific bank account we should set the payments to be sent to  revenue: 10000 - [PacWest (Sq. One) Bank - Checking Acct](https://5553156.app.netsuite.com/app/reporting/reportrunner.nl?acctid=1&reload=T&reporttype=REGISTER) |
| 8. | **Timeline** | August 1st, 2024 |
| 9. | **Setup & API access** | Both Sandbox & Production access acquired   * Billing - I pulled the logo & populated billing info, confirm if this is correct * Payment info needed (Payment method & instructions) * Dunning config needed * Integration items need to be mapped * New contract needed |

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### Billing model

* There’s currently 2 different business models for Tabs right now.
  + 1) Actual Company contracts (Outrider automation)
  + 2) The sub-tenant agreements for Outrider

### Contract Processing Steps

1. Steps to process
   1. Process the contract terms either for actual company contracts or for the sub-tenant agreements
      1. Subtenants contract example: 6ff84c22-7151-426e-bb98-b049be3ee4b4
      2. Outrider business contract example: 5f60604e-1ee0-42a5-8b6f-e36cac483211
2. Anything to ignore in contracts? No
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 0
6. Default Billing Frequency
   1. If None Listed, Ops Default is Monthly
7. How do we handle taxes as a line item?
   1. There’s no taxes that are expected for Outrider at the completion of implementation.

### Events Processing (if necessary)

* Any important information on events billing

Integration Items Processing (if necessary)

* For Subtenants
  + Base Rent for Base Rent portion of the rent
  + Security Deposit for Security Deposit portion of the rent

Post Processing Communications (if necessary)

* Does the Ops Team need to notify anyone on the team re: completion of processing batches in Implementation or Active phase?
  + No
* Who needs to be notified and when?
  + Notify outrider in their channel & set up a bot for them.

### Customer Information

* For CS: Please read through the documentation that are pertaining to the Netsuite side

### Feature Requests

* FR 1
  + None that we are aware of today

### Rewatch Calls

### Post Implementation check in -

1. **Check in on Cash Application & Reporting in 2 weeks. Set up calendar reminder for check in on Aug 13th**