## Merchant

Scoping start date: Jun 7, 2023

Implementation Completed Date (Go live date): Jan 1, 2024

MSA Signature Date: Jan 29, 2024

GTM POC: Skoro

ERP: Other (Currently QBO, moving to Rillet)

Tax Integration: QBO Hard Coded Taxes

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### Key people at Merchant

### [Primary] Head of Finance: Heath Ritchie <heath@gopinata.com>

### COO: Rob Olson <rob@gopinata.com>

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### Company summary

PINATA provides operational software designed for task management, primarily in the food and beverage industry. It enables businesses to efficiently manage and optimize their on-the-ground activities by organizing tasks and workflows, facilitating communication across distributed teams. The platform also integrates with other essential business systems, enhancing operational efficiency and providing insights to improve return on investment (ROI). Essentially, PINATA helps food and beverage companies streamline their operations, from the strategic level down to everyday tasks.

AM Notes

Heath Ritchie is one of Tabs earliest users and has been incredibly generous with his time, been understanding of issues/bugs, and eager to support Tabs as we build our product. Heath is a former Software Engineer, now Head of Finance, bringing a unique perspective. Ultimately a friendly individual, who wants to see Tabs succeed.

### Billing model

Pinata has a multi-faceted billing model. Contracts comprise some number of the following:

* Usage-based, for number of ‘reports’ provided (aka events based)
* User-based, for number of users on the platform
* Recurring SaaS
* Implementation fee

### Contract Processing Steps

1. Please follow all comments in contracts.
2. 4/11 Update: The Effective Date will now be printed below the Pinata address at the button of the contract to specify if the effective date is different from the DocuSign date on the final page.
3. 4/19 update: Please process discounts as 2 BTs.
   1. One with the original price, second with the discounted amount.
      1. (e.g. $1,000 item with a 30% discount, please process as $1,000 for BT 1 and -$300 for BT 2)
4. For QBO integration items please default to “Software Subscription Bundle” for all BTs unless told otherwise.
5. For add ons to existing contracts or amendments. Please set the billing cadence the same as the MSA.
   1. Prorate the first invoice of the amendment on the signature date of amendment until the period of the next invoice of MSA. Then ensure all amendments/addons are charged on the same day and payment terms as original MSA. All charges recurring charges should be same cadence on one invoice per occurrence
6. DO NOT include professional services and custom development from the fine print of the contract
7. Please name Price Name blank. NEVER INPUT A PRICE NAME
8. For any contract that is default monthly with no term, default to 1 yr term
9. Please default to Net 0 payment terms unless otherwise noted on contract

### Events Processing (if necessary)p

* Typically send the data via Slack to #pinata-ext or by email in written format
* They are working on structuring the data into a spreadsheet for consistency and scale
* **Partnerships are not billed as events based billing**
  + Bill as flat billing

### Customer Information

* Please set all **new customers** and customers who didn’t have a contract before to “auto-charge”
* For customers, please only select the parent customer

### Feature Requests

* n/a

### Rewatch Calls

* n/a