## Merchant

Demo date: Nov 25, 2024  
Scoping start date: Nov 25, 2024

MSA Signature Date: Nov 25, 2024  
Onboarding Kick Off Date: Nov 26, 2024

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

GTM POC: Nick  
Implementation POC: Jeff

ERP: QBO

Tax Integration: QBO Hard Coded Taxes

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### Key people at Merchant

### Accountant: David Morgan, Fractional CFO - https://www.linkedin.com/in/david-morgan-01ba5122/

* Investor: Kyle Doppelt - https://www.linkedin.com/in/kyle-doppelt-46b8421a/

### CFO:

### Customer service rep who is really involved:

* Account Receivable POC: Vibhav Joopelli - https://www.linkedin.com/in/vibhavjoopelli/
* Billing POC

### Etc.

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Software Subscription + Usage Fees for # of agent actions   + https://www.rox.com/pricing * Is there any important merchant relationship information?  1) What is the merchant temperament? * This is the second time this team has bought from us. Huge believers in Tabs 2) Is there a key POC: (i.e.: who is the buyer/decision maker?) * Kyle 3) What are the Tabs features that the key POC cares about? * Contract Management is #1. Care about eliminating the complexities across their contracts. Rev Rec and automated invoicing are also important |
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### Company summary *(AE to fill)*

Rox is building a new revenue operating system for the applied AI era for sales teams. Rox unifies relevant data into a single source of truth and uses public and private data to power agentic workflows that help secure and grow revenue. Prioritizing, researching, engaging and managing prospects and customers can now all happen in a single place

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

What is the merchant's goal? What pain are we solving? Why are they buying Tabs?  
Contract Management and putting a system in place before they scale dramatically in the next 12 months. They bought the software because their contracts are variable - they value that Tabs can extract the unstructured data in their contracts (key terms, billable items) to automate their revenue workflows - source of truth for customer relationship management.

Is there an opt out clause? If so, what is the merchant looking for so they do not exercise it?  
No

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

* Are there unique things about the customer creation process for this merchant?
  + N/A
* Information on how merchant bills
  + Subscription + Usage
* How contract is broken up
  + N/A
* One off things to know about the merchant
  + They have 8 trial customers today and are hiring their first sales reps. They want a system in place before onboarding their first customer

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

1. Steps to process
   1. All customers will need to be created within Tabs
      1. Customer Name, Address, and Contact are at top of contract
      2. Use “Finance Contact” if multiple emails in contract
   2. Date typically found in “Date” box in top left corner of contract
      1. If not found there, use date of customer signature as effective date
   3. Description in left column is Item Name
      1. Example: “Base SaaS Fees”
   4. If fee is waved - do not show BTs in invoice
   5. Follow example for Pallet
      1. [Contract](https://688899763172-prod-contracts.s3.us-east-1.amazonaws.com/8d5f415c-f021-43f6-b998-4e5e983f3085/Complete_with_Docusign_PalletRox_Agreement.pdf?X-Amz-Algorithm=AWS4-HMAC-SHA256&X-Amz-Content-Sha256=UNSIGNED-PAYLOAD&X-Amz-Credential=ASIA2AZNAFPSBPKHJSVN%2F20250131%2Fus-east-1%2Fs3%2Faws4_request&X-Amz-Date=20250131T141846Z&X-Amz-Expires=300&X-Amz-Security-Token=IQoJb3JpZ2luX2VjELP%2F%2F%2F%2F%2F%2F%2F%2F%2F%2FwEaCXVzLWVhc3QtMSJGMEQCIDlCzaZRCMKiOuTQOtBM%2BlvmupipvwvgN8%2BELiVYERGdAiA1c2I8bsEc234wvzq%2Ftr30NHKy567v%2BQWvvg%2FwVLpL6ir4Awi8%2F%2F%2F%2F%2F%2F%2F%2F%2F%2F8BEAIaDDY4ODg5OTc2MzE3MiIMy7UUQfc5kohqnA8%2FKswDf854UmsTdDBRiZg7QEJBk4l6LD3AGTXu2ND%2FP3XyfKYY8WbFGgZrFPEb2fGDbIwmj0T%2BMhgvTcBMtTuI7OEb4mpOP9OMJ47MyWB8TLm6j4qqWvnmuI1jQOA1O92K1LIWor3tTpnUMWD6NBa35g9M9uPKi7XA8APfxNIU970JVMDlna49QsRrv%2BEVbPZd1Wr1yn%2BaPUTGaCM7oy%2BGVH6rQ2IA4SqAXtVMhCTZnK84Hx5T1lOxHfnUEMilwETtFRrhXhuWgqUZjIdTUkmQm8w1cmYnBGqsxh%2FhFZ51p2uCxZzC4iOcJ3ZOVoyfkFoVd5eHaLUbbQb34EAqQy3ZKUch3z7vFylvqhaCz9Wx7SfIappdOHwoC4te6MQInnpMu1FpnNG6Ns%2B4hDXMt7JMTvjMnsYZq1TMmrbVR%2BFVLrgy4bHcYA%2B4h3FPifVUFJc4nhzHE3LroGsouRglK0Pmub0rCIDj%2FJg4Ula1Oqupx12giuL846b0umESJZ%2FAnCyrTno8qZ5AW66Q9qB16dCAI04Rq0GHSSTMYvb5dc5FXuPhZIp4a%2Fq9R1LkPEpljya0wxNyCfnDApv46AEG%2FBguWz0G9k9TNty9aXcz94i%2BYTCt0fK8BjqmAb5VB%2BwBNi6NOdOx7OPs2pVi5l1pqfdz0kIeqbG%2F7QOHuNUW3mJjQkvI4dLWrm2vV9ySyI1znlOLXb3iJz9zBSUMfg8DdQfi5TIbBWhcymCv%2FlDYqewF%2FrH0eKdGWuAalFxNJ4jdgNEEdVB4MmfvFkgokyF6QxnzcqqudDu3Q6nZEXzIL37T1xfulVNuenWqY%2BCwKr7HGXectHcSh%2BTUAZsJqD0xxQM%3D&X-Amz-Signature=ca5289c7e2fd1b830b2db947a30872c6442ae8aee52790a418683f3be1bbe6bf&X-Amz-SignedHeaders=host&x-id=GetObject)
      2. [Garage](https://garage.tabsplatform.com/prod/contracts/8d5f415c-f021-43f6-b998-4e5e983f3085/terms/revenue)
   6. Most customers are quarterly with first month due up front
      1. In this case the format is:
         1. First charge = 1 month
         2. Next 3 charges are quarterly
         3. Final charge is for 2 months
      2. See [Palet Invoicing](https://app.tabsplatform.com/merchant/customers/c2a393b0-87c7-4938-8156-dc89d4b58b8e/billing/invoices?page=1&sort=issueDate&sortDir=desc)
2. Anything to ignore in contracts?
   1. Waived charges
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)
   1. Contracts with upfront $ due and quarterly invoicing:
   2. Charge first month, then 3 quarters at monthly rate \* 3, then 2 months at monthly rate \* 2
4. Default Service Term
   1. If None Listed, Ops Default is 1 Year
5. Default Net Payment Terms
   1. 30 unless stated otherwise in contract
6. Default Billing Frequency
   1. Found in "Initial Service Term”
7. How do we handle taxes as a line item?
   1. NA

### Events Processing (if necessary) *(Implementation/Success to fill)*

* Any important information on events billing
  + Calibrated in Garage
  + Billed on agents/month (usually $49)
  + Always billed in arrears

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

* What are the instructions for assigning integration items?

[Rox | Integration Items](https://docs.google.com/spreadsheets/d/1gMFX-7qvTa-z6D9e0sw29bWxrbjA-D5hQJLOIWvym1E/edit?gid=0#gid=0)

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 [Charlie] 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
  + What is it
  + Why it's important
  + Urgency

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

* 11/25/24 - First Intro Call
  + https://tabs.rewatch.com/video/d9f59v7430n3e23t-tabs-rox-november-25-2024