## Merchant

Scoping start date: 3/20/24

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

MSA Signature Date: Jan 1, 2024

GTM POC: Ali

ERP: QBO

Tax Integration: QBO Hard Coded Taxes

### 

### Key people at Merchant

### Ali Hussain (CEO)

### Company summary

Tabs is a B2B SaaS coming that focused on Accounts Receivable Automation and is building the first CRM purpose built for Finance teams  
  
AM Notes

N/A

### Billing model

* Frequently have ToS/MSA
* Mix of annual / quarterly / monthly / Ramp-up schedules
* About 10-20 bills per month

### Contract Processing Steps

Customer

* If Customer does not exist in Customer dropdown, please create one in Garage and use that Customer. This will create the customer record on QBO.

Launch/Implementation Dates

* Launch Date = Live Date, which is undetermined at the date of the contract signing. Default to signature date if no kick off call or launch date defined in contract.
* Default to 1 month implementation date if no implementation date or time period listed  
    
  End Date
* For contracts that have an **end date in the past,** we will set the end date to 6 months from now & merchant will let us know if the customer cancelled, sent an amendment, or sent a renewal agreement
* For all contracts that **do not have an end date,** we will set the end date to 6 months from today, & merchant will let us know if the customer cancelled, sent an amendment, or sent a renewal agreement
* For all contracts that **have an end date in the future but potentially ends within the next few months,** we will go by the end date of the contract unless we hear otherwise.
* Renewals -*~~the billing term~~* ***~~for an additional year is automatically included~~*** *~~when it comes to renewals for Tabs Platform customers. Please write Billing Term Description as renewal~~*
* *Send a slack bot notification*

### Revenue Processing Steps

### Events Processing (if necessary)

N/A

### Customer Information

### Feature Requests

### Rewatch Calls