## Merchant

Scoping start date: 3/20/24

Implementation Completed Date (Go live date): Apr 3, 2024

MSA Signature Date: Mar 29, 2024

GTM POC: Rebecca

ERP: QBO

Tax Integration: QBO Hard Coded Taxes

### 

### Key people at Merchant

### Sun Choi (fractional CFO)

* Arra and Gail: outsourced accounting clerks (Philippines)
  + Arra is more active here, she manages most of the day to day billing
* Kate: New accounting manager (Poland)
  + Unsure of her exact role yet…

### Company summary

Talkable offers referral marketing software solutions, enabling businesses to create and manage referral programs that drive customer acquisition and retention effectively.  
  
AM Notes

N/A

### Billing model

* Frequently have ToS/MSA + order form (2 separate docs)
* Mix of annual / quarterly / monthly
* About 50 bills per month

### Contract Processing Steps

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[~~Talkable Invoicing Details~~](https://docs.google.com/spreadsheets/d/1-8nCrqFCt8oiMv5Ma_xTWxvItjlcPiXXmqkekUlg1j8/edit#gid=1961144792) ~~←- Old Source of Truth~~

* Service Start Date:
  + Implementation - effective date (signature)
  + Pilot Period - launch date (go live)
  + Continuation Period (Pilot end date)
* Months of Service: “fees” section details service periods.
* Item Name: From the contract
* Item Description: leave blank
* Integration Item: This is determined in the “Business segments” column on the [spreadsheet](https://docs.google.com/spreadsheets/d/1rvkUKOV9QYR6nm-otaFkprmJDPfm8SLPoQh51UZV3jA/edit?gid=248875037#gid=248875037) (column A). All items for a specific customer should correspond to the segment identified in that column. Three options are: SMB, MID, ENT
  + Same integration item can be used for both Implementation and Contract Period
* Billing Type: “Billing” Section in contract refers to invoice scheduling
* Total Price: refer to contract
* Class: leave blank
* Category: leave blank
* Quantity: Refer to contract
* Start Date: Follow instructions in the contract.
* Periods: “Billing” section in contract
* Frequency:
  + “Billing” section in contract. For contracts that are billed monthly during implementation and then full for the continuation period, if the contract extends past that term, continue with most recent billing frequency
  + In the spreadsheet, column I “Prepayment end date” refers to the next billing date for annual, semi-annual and quarterly billing.
* Net Terms:
  + refer to contract. For no net payment terms, default to net 30
  + For amendments with no original MSA/contract and no net payment or frequency is specified, continue with most recent billing frequency and net terms. If not net terms are specified in either location, default to net 30

If professional services are included in the contract, do not add them as BTs - these are rarely used and the merchant wants to manage these manually.

Please do not process BTs for “management” or “engineering”. No need to include on invoices\

### Events Processing (if necessary)

N/A

### Customer Information

* Please look at the peach row at the top of the regular order form documents for customer names

### Feature Requests

* Rev rec
* ARR reporting
* Custom dunning - customized messaging, and post-30 day automated escalations
* Interested in late fees - either charging them or threatening to charge them based on aging

### Rewatch Calls

* <https://tabs.rewatch.com/video/ovp0a9yix25l4w7c-sun-rebecca-tabs-demo-march-22-2024>
* <https://tabs.rewatch.com/video/erxxc0sxcuutq67v-talkable-tabs-onboarding-april-3-2024>