## Xeal Energy

MSA Signature Date: Feb 1, 2024  
Onboarding Kick Off Date: May 1, 2024

Go Live Date: Jul 15, 2024

GTM POC: Rebecca  
Implementation POC: Arjun

ERP: NS

Tax Integration: Avalara

### 

### Key people at Merchant

### Accountant: [Carl Rojas](mailto:carl@xealenergy.com)

### RevOps: [Joan Dunne](mailto:joan@xealenergy.com)

### Company summary

Xeal sells electric car chargers to apartment buildings. They charge for the hardware and also charge an annual license for the software. Drivers

Goals (North star)

What is the merchant's goal? What pain are we solving? Why are they buying Tabs?  
  
Is there an opt out clause? If so, what is the merchant looking for so that they don’t feel the need to exercise it?  
  
AE Notes

Any important relationship information  
  
1) What is Merchant Temperament?  
2) Is there key POC the buyer/decision maker?  
3) What are the Tabs features the key POC care about?

### Billing model

* Info on how merchant bills
* How contract is broken up
* One off things to know about merchant

### Billing model

* Are the unique things about the customer creation process for this merchant?

### Contract Processing Steps

1. Steps to process
2. Anything to ignore in contracts?
3. Specifics processing things 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. If None Listed, Ops Default is every tax line item becomes a BT

### Events Processing (if necessary)

* Any important information on events billing

Integration Items Processing (if necessary)

* What are the instructions for assigning integration items?
* Example: All Statsig integrations items should be labeled as “Sales”
* Example: All “Pinata” integration items should be labeled as “Software Subscription Bundle” unless otherwise noted by Merchant

Post Processing Communications (if necessary)

* Does 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 [Azmat Aziz] needs to be notified
    - Where: Messari internal merchant channel
    - When: contracts are processed [Merchant Phase: Active]

### Customer Information

* Any important information on specifics customers of this merchant
  + Special memo’s certain invoices require
  + Invoice changes due to merchant/customer relationship

### Feature Requests

* FR 1
  + What is it
  + Why it's important
  + Urgency

### Rewatch Calls

* Rewatch by dates