## Merchant Name: Mithril Implementation POC: Royce *(IM to fill)* CX POC: *[IMP to Add]*

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| Notes Sections   *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills   PLG + SLG   Billing model: - negotiated rate for access to compute - discounts and credits  SLG (about 10% of biz rn, scaling to 20%) - standard flat price listed in contract  PLG (only about 100-150 customers) - essentially replacing stripe. They have their homegrown script feeding into stripe right now. They will redirect this to Tabs.  1) What is the merchant temperament?  **Vivan**- Head of strat finance. Easy to work with– totally gets the value of Tabs. He was just hired so Tabs is his first big bet.  **Adeesh**- Ops/Strat- has been there longer than Vivan. The one that was previously involved in billing– has an understanding of the systems + workflows  **Olivier** “oh liv ee aye”- eng that built their homegrown system. Previously worked at stripe. Knows their systems well  **Aparajit**- head of engineering- likely will be less involved but he previously set up the systems  3) What are the Tabs features that the key POC cares about?   * Dunning + visibility * PLG billing * SLG - Accurate cash forecasting  Plg + SLG in one place |
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### Billing model *(Entire Section: Implementation to fill section)*

* Are there unique things about the customer creation process for this merchant?
* Information on how merchant bills
* How contract is broken up
* One off things to know about the merchant

### Contract Processing Steps *(Entire Section: Implementation/Success to fill Post-Go Live)*

1. Steps to process
2. Anything to ignore in contracts?
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)
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) *(Entire Section: Implementation/Success to fill Post-Go Live)*

* Any important information on events billing

Integration Items Processing (if necessary)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

* 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)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

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

### Customer Information *(Entire Section: Implementation/Success to fill Post-Go Live)*

* 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 to fill for all requests prior to Imp handoff, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

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

### Merchant Calls *(AE to fill for all videos prior to Imp involvement, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

* <https://us-56595.app.gong.io/account?id=2858934270917789252&type=ACCOUNT&workspace-id=2531298410931371606&date=2025-09-26&activity-id=4890965229046077068&filter=%7B%22accountFilter%22%3A%7B%22type%22%3A%22And%22%2C%22filters%22%3A%5B%7B%22type%22%3A%22ActivityType%22%2C%22values%22%3A%5B%22CALL%22%5D%7D%5D%7D%7D>