## Merchant

Demo date: Oct 8, 2024  
Scoping start date: Nov 14, 2024

MSA Signature Date: Dec 31, 2024  
Onboarding Kick Off Date: N/A

[If Exists] Opt Out Date: None  
Go Live Date: N/A

GTM POC: Jarrett  
Implementation POC: Dani

ERP: QBO

Tax Integration: No Tax

### 

### Key people at Merchant

### CEO: Ankur Patel <ankur@multimodal.dev >

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + Mostly billing for high-dollar trials with light usage. Very few customers at any given time 10-15 * Is there any important merchant relationship information?  1) What is the merchant temperament?   + Ankur is a busy CEO of level headed and easy to chat with.   2) Is there a key POC: (i.e.: who is the buyer/decision maker?   * Ankur   3) What are the Tabs features that the key POC cares about?   * Invoicing and usage |
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|  |

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### Company summary *(AE to fill)*

Summary of what company does:

[Multimodal](https://www.multimodal.dev/) builds and manages secure, integrated, and tailored Gen AI automation for complex workflows in financial services. Our enterprise-grade AI agents are trained on company data for greater precision and work together as your digital workforce.

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

What is the merchant's goal? What pain are we solving? Why are they buying Tabs?

Ankur has a small amount if usage and wants to a system to bill. He was using casheflow which is being sunset. Pretty simple business.

Is there an opt out clause? If so, what is the merchant looking for so they do not exercise it?

None

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

* Are there unique things about the customer creation process for this merchant?
* How contract is broken up
  + Nothing notable
* One off things to know about the merchant
  + None

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

1. Steps to process

Processing Multi Modals are simple, create a line item for every recurring cost listed. Create a line item for one time costs but have them not be a repeating cost.

**Service Start Date:**

* Rule: if the effective is between the 1-15- have it default to the start of that corresponding month (example 01/14/2025 would start the first of January)
* If the effective date is between the 16-end of month, have it start the following monh
* (example 01/23/2025 would start 02/01/2025)

**Total months of Service:** Included under “service term”

**Category:**

* Multimodal Agent - Document AI: Platform
* Multimodal Agent - Activation Team: Service
* Multimodal Platform - Implementation Fee: Service

**Item Name:** Name of item under recurring costs

**Item Description:** Bullet Under line item ( see screenshot below as example)

**Integration Item:** Search the item name and it will map to the correct integration item

**Billing Type:** Flat

**Total Price:** Listed next to the item name  **Start Date:**

Rule: if the effective is between the 1-15- have it default to the start of that corresponding month (example 01/14/2025 would start the first of January)

If the effective date is between the 16-end of month, have it start the following monh

(example 01/23/2025 would start 02/01/2025)

**Periods:** 12 if yearly, this will depend on the amount of months that is listed on the line item

**Frequency:** Monthly if otherwise stated

**Net Terms:** Always 15

1. Anything to ignore in contracts?
   1. **Payment scheduled listed**
2. 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. Always date invoice to first of date
3. Default Service Term
   1. If None Listed, Ops Default is 1 Year
4. Default Net Payment Terms
   1. Default 15
5. Default Billing Frequency
   1. If None Listed, Ops Default is Monthly
6. 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) *(Implementation/Success to fill)*

* Any important information on events billing

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

* What are the instructions for assigning integration items?
  + Look above for instructions
* 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)  
*(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 [Azmat Aziz] 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)*

* none

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

* Nov 26: <https://www.loom.com/share/c884f844be9444ada9fdd97db0ae4e4c>
* Dec 5: https://www.loom.com/share/91a821797b904312bfcd1297fa349b87