## Merchant

Demo Date: May 29, 2025

Scoping Start Date: May 22, 2025

MSA Signature Date: (Not provided)

Onboarding Kick Off Date: August 6, 2025

Opt-Out Date: (None specified, but they do have opt-out clauses in contracts)

Go Live Date: (TBD — aiming to go live by March 2026 when Chargebee contract expires)

GTM POC: Jarrett  
Implementation POC: Jason Lopez

ERP: QuickBooks

Tax Integration: Anrok preferred (evaluating sales tax compliance support)

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### Key people at Rewst:

### **Jason Lopez**, Controller **Accounting Associate** (unnamed, started March 2025, based in Australia)

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| AE/ Implementation Notes Sections [Ops International Team to Ignore]   * Info on how merchant bills   + Chargebee currently manages subscriptions   + Monthly billing with 90-day commitments and 30-day cancellation   + Current pricing is a mix of tiered and usage-based (e.g. per user, per endpoint, per API call block)   + Moving to a workflow/task-based usage model with overage tiers and optional “support” add-on (10% or 20% of total bill)      * Is there any important merchant relationship information?  1) What is the merchant temperament? Engaged, thoughtful, analytical, process-oriented 2) Is there a key POC: (i.e.: who is the buyer/decision maker?) Jason Lopez, Controller 3) What are the Tabs features that the key POC cares about?   + Contract ingestion and invoice generation automation   + Usage-based billing and tiering support   + Revenue recognition (ASC 606) and waterfall reporting   + QuickBooks integration   + Cash application and AR automation   + Slack-based invoice collaboration and dunning   + Payment flexibility (especially integration with NMI gateway) |
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### Company summary

Rewst offers an automation platform primarily focused on MSPs (Managed Service Providers), managing workflows and task execution.

Goals (North star)

* Transition to usage-based billing for scalability
* Automate invoicing, collections, and revenue recognition
* Eliminate manual ramp tracking and billing adjustments
* Support new pricing model with flexibility in contract terms and payments

### Billing model

**Unique customer creation process:**

* Uses HubSpot and PandaDoc; expects contract-driven creation
* Customer ID is consistent across HubSpot, Chargebee, and Rewst platform

**Information on how merchant bills:**

* Monthly billing
* Tiered and usage-based pricing
* Overage tiers
* Add-ons like support % fee
* Custom ramp pricing, which changes monthly

**Contract Structure:**

* Contract contains subscription and support line items
* Usage tracked via platform (Pendo now; Roost platform soon) and piped into billing

**One-off Notes:**

* Large reseller (25% of revenue) gets consolidated monthly invoice
* Reseller relationship management involves grouping many sub-customers
* Currently done manually via spreadsheets

### Contract Processing Steps

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)

* 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 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

* Any important information on specifics customers of this merchant
  + ~1,000 customers; growing by 60+/month
  + Resellers get monthly roll-up invoices
  + Each customer has unique usage ID tied across systems
  + Sub-customers may need to be grouped under parent/reseller accounts

### Feature Requests

### Rewatch Calls

* Rewatch by dates