## Merchant

Demo date: Nov 26, 2024  
Scoping start date: Nov 26, 2024

MSA Signature Date: Nov 27, 2024  
Onboarding Kick Off Date: Dec 5, 2024

[If Exists] Opt Out Date: NA  
Go Live Date: Dec 9, 2024

GTM POC: Sean  
Implementation POC: Jeff

ERP: QBO

Tax Integration: No Tax

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### Key people at Merchant

### CEO: Kobby Amoah (pronounced like Kobe)

### Operations: Liang Xiong

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + Very bespoke contracts   + Working with Taco Bell, Cracker Barrel etc. so different tiers for different employees working at that company   + Billing monthly * Is there any important merchant relationship information?  1) What is the merchant temperament? - Kobby is very nice, calm, business focused but smiles and talks about his weekend too   2) Is there a key POC: (i.e.: who is the buyer/decision maker?) - Kobby  3) What are the Tabs features that the key POC cares about? - all of them - especially automatic invoice creation and ability to schedule invoices, collections process including dunning |
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### Company summary *(AE to fill)*

Summary of what company does:  
Health platform for hourly/1099 workers. Taco bell employees who need health insurance. TB is the customer and the workers all get different plans depending on hours worked

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

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

Liang spends a ton of time managing contracts today, all tracked in spreadsheets today.

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

No opt out

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

* Are there unique things about the customer creation process for this merchant? - no
* Information on how merchant bills - bills monthly with very minimal usage (seats that are not often updated month to month)
* How contract is broken up - NA
* One off things to know about the merchant - NA

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

1. Steps to process
   1. Service Start Date: Refer to the "Plan Start Date".
   2. Months of Service: Default to 12 if none listed.
   3. Item Name: ~~River Health~~ Essentials Plan or ~~River Health~~ Complete Plan along with Individual, Individual + Partner, Individual + Children, or Individual + Family.
      1. For example, “Essentials Plan - Individual + Family”
   4. Item Description: Include unit price.
   5. Integration Item: Employer Invoicing
   6. Integration Item: 2000 Revenue
   7. Billing Type: Unit price
   8. Total Price: Refer to pricing details.
      1. Ignore Contribution and Discounts.
   9. Event to Track: [Here](https://docs.google.com/spreadsheets/d/1KIIIrS-PZVu-2Sie65SJjywqg43lVc3d1FjrYsW-NVI/edit?gid=2113096825#gid=2113096825).
   10. Start Date: always use bill last of period w/ invoice date on first of month
       1. Use the "First Invoice is expected on" date from the document.
       2. start date for all Prime Hospitality accounts to be set to 1/1/2025
   11. Periods: Depends on the frequency and the months of service.
   12. Frequency: Refer to Invoicing Cadence.
   13. Net Terms: Refer to Invoicing Terms.
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) *(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?
* 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

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

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

Both calls in slack