## Merchant

Demo date: Jun 16, 2025  
Scoping start date: n/a

MSA Signature Date: Jun 19, 2025  
Onboarding Kick-Off Date: TBD

[If Exists] Opt Out Date: none  
Go Live Date: BD

GTM POC: Jarrett  
Implementation POC: N/a

ERP: QBO

Tax Integration: No Tax

### 

### Key people at Merchant

### Accountant:

### CFO:

### Customer service rep who is really involved:

* Account Receivable POC: Ameer Shaikh (EVP)
* Billing POC: Ameer Shaikh (EVP)

### Etc.

### 

| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + Project data is initially compiled in Excel, then redone in Airtable for validation, and manually input into QuickBooks   + Invoices may attach include timesheets, schedules of values   + Invoicing spans 90–150 invoices per month   + Payments often come in the form of checks 120+ days after billing; cash application is manual   + Tabs is expected to ingest contracts/emails and generate invoices automatically, improving turnaround from 5–15 days to ~5 hours * Is there any important merchant relationship information?  1) What is the merchant temperament?   Eager, time-sensitive, decisive. Ameer is pushing to deploy quickly ahead of a company-wide announcemen 2) Is there a key POC: (i.e.: who is the buyer/decision maker?)  Ameer Shaikh (EVP)  3) What are the Tabs features that the key POC cares about?   * + Rapid invoice creation from emails/contracts   + Ability to handle unstructured invoice data   + Support for PDF/Excel invoice attachments |
| --- |

### 

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

Summary of what company does:  
  
Construction technology company specializing in electrical contracting. Projects span 6–30 months. Contracts are variable and often non-standard, requiring flexible AR processing and invoice creation

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

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

Replace slow, manual AR and contract review work

Reduce reliance on overburdened high-cost team members (e.g., junior legal staff)

Automate invoicing for complex, non-standard contracts

Transition to Rillet and centralize financial ops

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

n/a

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

* Are there unique things about the customer creation process for this merchant?
* Information on how merchant bills
* How contract is broken up
  + Billing cadence varies per project
  + Recurring, project-based billing with potential gaps or long delays between jobs
  + Placeholder invoices sometimes needed for contract-based estimated services
* One off things to know about the merchant
  + Wants PO numbers, EINs, and custom fields visible or editable
  + No CRM system in place

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

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) *(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)*

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

* https://us-56595.app.gong.io/account?id=6527329486262917299&type=ACCOUNT&workspace-id=2531298410931371606&date=2025-06-17&activity-id=8276671064279843806&filter=%7B%22accountFilter%22:%7B%22type%22:%22And%22,%22filters%22:%5B%7B%22type%22:%22ActivityType%22,%22values%22:%5B%22CALL%22%5D%7D%5D%7D%7D