## Merchant

Demo date: Oct 2, 2024  
Scoping start date: Oct 2, 2024

MSA Signature Date: Nov 26, 2024  
Onboarding Kick Off Date: Dec 2, 2024 (unscheduled)   
Go Live Date: TBD

GTM POC: Jarrett  
Implementation POC: Royce

ERP: NS

Tax Integration: No Tax

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### Key people at Merchant

### VP of Finance: [Jenna Keenan](mailto:jenna.keenan@tifin.com) jenna.keenan@tifin.com

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + Typically billed annually, monthly, or quarterly B2B SaaS * Is there any important merchant relationship information?  1) What is the merchant temperament?   Jenna is awesome—very friendly and works hard to get things done. She’d love to kick things off as soon as possible to align closely with the beginning of her fiscal year (1/1). She’s aware that our typical timeline is 8–12 weeks. |
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### Company summary *(AE to fill)*

Summary of what company does: TIFIN is a holding company that creates and operates new companies that apply data science, AI, and technology to address frictions in wealth and asset management.

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

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

There is no automation on the B2B side of TIFIN- they have 7 different companies in their holdco and want a consolidated billing solution.

No opt out

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

* Are there unique things about the customer creation process for this merchant?

None. Classic signed agreement to billing

* How contract is broken up

n/a

* One-off things to know about the merchant

n/a

### 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
* Make default product item 20400 Deferred Revenue

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)*

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

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

* <https://tabs.rewatch.com/video/7olnqa44ejkhd6mk-jenna-and-rebecca-schwartz-tabs-september-18-2024>
* <https://tabs.rewatch.com/video/27og8dq1xoyqn1xx-tifin-tabs-demo-september-30-2024>
* <https://tabs.rewatch.com/video/o6k9234zn8l5p6mh-jenna-keenan-and-jarrett-martin-october-2-2024>
* <https://tabs.rewatch.com/video/0ca7psxn41srcnwb-tifin-tabs-proposal-october-3-2024>
* <https://tabs.rewatch.com/video/03pdw6udvz7jod2c-jenna-rebecca-check-in-october-21-2024>