## Merchant

Demo date: Mar 25, 2025  
Scoping start date: n/a

MSA Signature Date: May 30, 2025  
Onboarding Kick Off Date: Mar 28, 2025

[If Exists] Opt Out Date: none  
Go Live Date: Nov 14, 2024

GTM POC: Austin  
Implementation POC: Royce

ERP: QBO

Tax Integration: Avalara

### 

### Key people at Merchant

### [Cyndi Abee](https://www.linkedin.com/in/cyndi-abee-3a985428/), Controller (Champion and main end-user)

* [Brad Jarvis](https://www.linkedin.com/in/bradjarvis/), President (Executive Buyer)

### 

| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + Tenant operates with only flat fee billing terms. No usage.   + All contracts / invoices are in USD and in English right now   + In the instance that there is an amendment, change order, upgrade, or downgrade, billing proration may be required.   + Most payments are made via ACH. There are some exceptions, with about ~5% of payments made via credit card.   + Billing Terms can vary, but it’s often monthly.   + Vast majority of their clients on Autopay.   + Right now, they leverage a tool called Propay as their payment rails for their invoices now, and it apparently has better rates than stripe. They have agreed to move over to Stripe for the time being. We explained that we don’t have Propay on our immediate integration roadmap, but that we would consider exploring an integration down the line (did not give any timeline commitment). * Is there any important merchant relationship information?   + Cyndi is a very nice controller with a lot of experience. She does come from an older generation and a more traditional background. She may not be as comfortable with newer technologies.   + Brad is a classic Exec who only became involved in this process at the very end. He is a high level guy. He won’t be involved in the day to day.   1) What is the merchant temperament?   * Very nice, easy going. Was a very good champion in the sales process and advocated for us internally well.   2) Is there a key POC: (i.e.: who is the buyer/decision maker?)   * + Cyndi is main POC. Executive Buyer is the President (Brad). Brad joined at the end. Did not get involved for any demos, just customer reference calls   3) What are the Tabs features that the key POC cares about?   * Invoice creation * Autopay * Parent / child reporting * SSP (See SOW - which is also attached to the MSA) * Dunning / reminder emails * Cash application * Rev rec |
| --- |
|  |

### 

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

Summary of what company does:

* Tenant is a software company that provides management and automation solutions tailored specifically for the self-storage industry. Their platform offers tools for online rentals, payment processing, tenant communication, and facility operations to help storage operators streamline workflows and increase efficiency. By integrating modern technology into daily operations, Tenant enables self-storage businesses to deliver a more seamless and digital customer experience.

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

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

* The ultimate goal is to save time on invoice creation, rev rec, and collections. They manually create all of their invoices right now, and track all customers in a massive spreadsheet.
* They’re also in the process of changing the contracts. They’d like a prescriptive approach / recommendations from Tabs on how to best structure their contracts so it can easily be read by our systems
* Need help with bundles / SSP. The products have a set price, but that price could vary depending on the bundle. For the larger bundles for example, a product could be cheaper.
* Collections - it’s all manual right now. Need it to be automated.
* Autopay – can’t seem to get autopay to work automatically for each customer. Need this feature.
* Right now their customers have to add their account information each time they make a payment. If they’re on autocharge (which all their customers are), their payment info would stick.

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

* No

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

* Are there unique things about the customer creation process for this merchant?
  + No
* Information on how merchant bills
  + See above
* How contract is broken up:
  + Their contracts are subject to change as they actually are trying to re-vamp the content of contracts now. They’re looking to have Tabs be partners in this and provide recommendations on content / formatting so that we can properly read them for invoice creation
  + Bundles! On the contract, there is a bundle price, but the individual products / features included in that bundle is not on the contract. It is currently maintained on a spreadsheet.
* One off things to know about the merchant
  + West coast based
  + Cyndi is the main point of contact and has some very young AR / billing specialists that she works with (mostly for collections).
  + They were initially on QBE (Desktop) and are in the process of currently moving over to QBO.
  + Hubspot = CRM

### 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)*

* FR 1
  + What is it
    - SSP / Bundles.
  + Why it's important
    - Their contracts all have Bundles. See SOW for our proposed approach
  + Urgency
    - As soon as possible. They have a spreadsheet that allocates all prices / percentages to each product within a bundle. So they have the logic written out / stored.
* FR 2
  + What is it
    - Integration with Propay
  + Why it's important
    - Part of their offering as a company is payment processing, and they have a sweetheart deal with a company called propay. They want us to explore implementing with Propay at some point. We’ve explained it’s not on the roadmap for the near future, but would keep the door open
  + Urgency
    - Not urgent.

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

* Rewatch by dates
  + List of all calls: <https://us-56595.app.gong.io/account?id=2380746185635800289&type=ACCOUNT&workspace-id=2531298410931371606&date=2025-05-05&activity-id=6332993907780151988&filter=%7B%22accountFilter%22%3A%7B%22type%22%3A%22And%22%2C%22filters%22%3A%5B%7B%22type%22%3A%22ActivityType%22%2C%22values%22%3A%5B%22CALL%22%5D%7D%5D%7D%7D>
  + Intro Call (5/5)
  + Demo (5/6)
  + Scoping (5/9)
  + Proposal (5/15)
  + Reconnect (5/23)