## Merchant

Demo date: June 8th 2024  
Scoping start date: Jul 24, 2024

MSA Signature Date: Aug 15, 2024  
Onboarding Kick Off Date: Aug 22, 2024

[If Exists] Opt Out Date: n/a  
Go Live Date: Oct 2, 2024

GTM POC: Jarrett  
Implementation POC: Royce

ERP: NS

Tax Integration: No Tax

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### Key people at Merchant

### Accountant:

### CFO: [Jeff Nichols](mailto:jeff@torch.io)

* Controller [anthony@torch.io](mailto:anthony@torch.io) → Good thought partner on implementation & Decision Making
* Sr. Accountant: [katie@torch.io](mailto:katie@torch.io) → approves the contract, review the contract
* Jr. Accountant: [jonathan@torch.io](mailto:jonathan@torch.io) → manages collections & send out the invoice

### [adam@torch.io](mailto:adam@torch.io) → CRM integration

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| AE/ Implementation Notes Sections [Ops International Team to Ignore]  Kickoff and Implementation Deck   * [Torch + Tabs](https://docs.google.com/presentation/d/17Sxn11IbVP2S2iEuuwdz4kAC28WZ0N7lABKaRZDhkCA/edit#slide=id.g2f0e16edcac_0_0) * [Onboarding Deck for Torch](https://docs.google.com/presentation/d/14pdLhm9X78kB43th2MzgDTcHW4gx_fyfy2oMIy-3ZJc/edit#slide=id.g2fe432fa05e_0_57) |
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### Company summary

Torch is a leading people development platform that harnesses the power of trusted relationships to fuel employee growth and success.

Goals (North star)

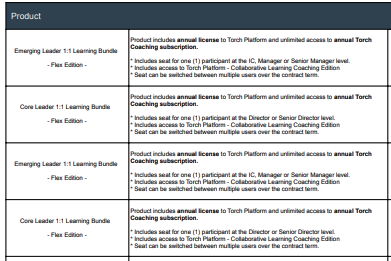
Buying tabs because they want to downsize their Netsuite bill. They used to have ARM modules and Celigo integration to do piping of information between CRM <> NS, there’s a lot of errors and inaccuracies from the process.

### Billing model

* Are there unique things about the customer creation process for this merchant?
* Information on how merchant bills
* How contract is broken up
* One off things to know about the merchant

### Contract Processing Steps

1. PLEASE ENSURE 1 CONTRACT = 1 INVOICE
   1. If contracts have the same date, then you may have to go into merchant app to amend the dates as needed
2. Dates (Please do in order) - See [Loom](https://www.loom.com/share/cf04cdfdbf4b408fb91f5b6ccc02be98) for instructions
   1. The invoice date should be the date the contract was uploaded. In order to do this, the BT date should *always* be the date the contract was uploaded.
   2. The revenue schedule date should be the contract start and end dates found in the contract
   3. After processing is complete, go to merchant app, open the invoice that was generated for that particular contract, and then change the period dates on the invoice line items to be the contract start and end dates
   4. No need to use signature date for anything
3. Items
   1. Please include the short description and all the details text in the second column



1. Quantity - Please include the quantity as displayed in the contract
2. Address
   1. If it’s a new merchant, please add both invoicing and shipping address
3. Discounting display
   1. Do not process discounts as a BT, please use only the net BT amounts
   2. Please pro-rate the discount based on the ratio of amounts associated with each BT
4. Add the PO# (**Purchase Order ID)** as stated in the contract in the invoices tab
5. Service Term
   1. Please process the Service Term as noted
6. Default Net Payment Terms
   1. If None, Ops Default is 30
7. Billing Frequency
   1. Please process it as stated in the contract
8. How do we handle taxes as a line item?
   1. No taxes in the interim. Do not need to worry about this.
9. Anything to ignore in contracts? N/A

### Events Processing (if necessary)

* No events billing

Integration Items Processing (if necessary)

* [Torch Item Mapping](https://docs.google.com/spreadsheets/d/1NRBHCSnK8R2oxHBeCfZOeKYqMWPHz5dljsWaQ56zNYk/edit?gid=0#gid=0)  spreadsheet

Post Processing Communications (if necessary)

### Customer Information

* Katie and Anthony both comes from audit background and they said that they can

### Feature Requests

* **FR 1 - SalesForce Integration**
  + What is it: CRM data to be set in NetSuite
  + Why it's important
  + Urgency: October
  + DRI: [Royce Kok](mailto:rkok@tabsplatform.com)[Deepak Bapat](mailto:deepak@tabs.inc) on ownership
* **FR 2 - Access controls / Permissions**
  + Banking and payments
* **FR 3 - Approval Workflow**
  + [Link](https://tabs-7so1666.slack.com/archives/C07924NC3T8/p1727205605915689)
  + Conversation started with Jon on Tabs Team in design thinking

### Rewatch Calls

* See #torch slack channel