## 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

### 

### 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

### 

| 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) |
| --- |

### 

### 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

* **General**
  + For Torch order forms, each line in the Product table is its own Billing Term (BT)
  + Typical examples include Coaching 6 Month Unit – Executive, Coaching – Annual – Professional, or Platform – Mentoring Edition
  + For order forms not on Torch paper, look for a similar Products table with BTs similar to the above mentioned
  + For amendments, if there are new BTs, add them under the amendment contract
  + Don’t process PO documents but look for the corresponding contract because the PO# will need to be added to that contract’s invoices. Instructions below
* **Customer Creation:** If creating a customer that does not already exist, include both the billing and shipping date
* **Item Name**: Copy the label exactly as it appears in the Product column
* **Item Description:** Copy the language exactly as it appears in the Product Description column
* **Quantity**: Use the Quantity column; default to 1 if the field is blank
* **Total Price**:
  + If no discounts are present, take the value in the **Total** column for that line
  + If a discount line is present, take the BT value net of the discount
    - If there is one discount item that applies to multiple BTs, apply the discount proportionally to calculate net price
* **Service Start Date:** Use the Contract Start Date listed at the top of the order form
* **Billing Start Date:** Same as the Service Start Date
* **Months of Service:** Use the length between contract start and end date in the Contract Terms
* **Frequency**
  + Match the length of the contract start and end dates
    - If an annual contract → 1 year
    - If a 6 month contract → 6 months
* **Net Terms**:
  + Use the customer’s MSA to determine payment terms if available
  + If no MSA is available, check the Additional Terms section for payment terms
  + If the customer is listed in the mapping below, apply the specified net terms:
    - Airbnb: Net 60 days
    - Sony: Net 60 days
  + If none of the above apply, default to Net 30 days
* **Integration Item**:
  + Follow the mapping exactly
    - [Torch Item Mapping](https://docs.google.com/spreadsheets/d/1NRBHCSnK8R2oxHBeCfZOeKYqMWPHz5dljsWaQ56zNYk/edit?gid=0#gid=0)  spreadsheet
  + *PASTE the INTEGRATION ITEM ID into Garage, NOT the item name*
  + Use best judgement if exact item name not listed
* **Additional Invoice Fields:**
  + Add the PO# (Purchase Order ID) if available in the order form
  + If the document is a PO, search for the corresponding order form and add the PO# on the additional invoice field

### Events Processing (if necessary)

* No events billing

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