## USE THIS UPDATED VERSION INSTEAD [HERE](https://docs.google.com/document/d/11CqZFPGYa52i3d7hsf6aC9Pf3c6DwdPDWbiTx_rdXLE/edit#heading=h.kpy0upq2lmk1) Merchant

Scoping start date: 3/20/24

Implementation Completed Date (Go live date): Apr 3, 2024

MSA Signature Date: Mar 29, 2024

GTM POC: Rebecca

ERP: QBO

Tax Integration: QBO Hard Coded Taxes

### 

### Key people at Merchant

### XYZ ABCD (fractional CFO)

### Company summary

XYZ Co offers referral marketing software solutions, enabling businesses to create and manage referral programs that drive customer acquisition and retention effectively.  
  
AM Notes

N/A

### Billing model

* Frequently have ToS/MSA + order form (2 separate docs)
* Mix of annual / quarterly / monthly
* About 50 bills per month

### Contract Processing Steps

Example: Launch/Implementation Dates

* Launch Date = Live Date, which is undetermined at the date of the contract signing. Default to signature date if no kick off call or launch date defined in contract.
* Default to 1 month implementation date if no implementation date or time period listed  
    
  End Date
* For contracts that have an **end date in the past,** we will set the end date to 6 months from now & merchant will let us know if the customer cancelled, sent an amendment, or sent a renewal agreement
* For all contracts that **do not have an end date,** we will set the end date to 6 months from today, & merchant will let us know if the customer cancelled, sent an amendment, or sent a renewal agreement
* For all contracts that **have an end date in the future but potentially ends within the next few months,** we will go by the end date of the contact unless we hear otherwise.

### Events Processing (if necessary)

N/A

### Customer Information

### Feature Requests

### Rewatch Calls