## Merchant

Demo date: Jan 24, 2025  
Scoping start date:

MSA Signature Date: Feb 12, 2025  
Onboarding Kick Off Date:

[If Exists] Opt Out Date: None  
Go Live Date:

GTM POC: Paula  
Implementation POC: Dani

ERP: QBO

Tax Integration: No Tax

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### Key people at Merchant

### Accountant: Linda <https://www.linkedin.com/in/linda-turner-5b23ab51/>

### CFO: Josh <https://www.linkedin.com/in/josh-brown-1985806/>

### Customer service rep who is really involved:

* Account Receivable POC: Jessie <https://www.linkedin.com/in/jessica-turner-0aa03b61/>
* Billing POC: Jessie

### Etc.

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + Flat SaaS price * Is there any important merchant relationship information?   Josh is close with Nick from Coalesce (who at the time was going through a tough renewal with us)   1) What is the merchant temperament?  **Josh**- I suppose positive, but it’s hard to read him. He’s very dry and fairly unpleasant. BUT he’s straight forward and very fair  **Jessie**- the one feeling the most post, leaned into the sales process the most. Everyone at Haus is pretty straight forward **Linda**- just hired. The least dry on the team. Nice  2) Is there a key POC: (i.e.: who is the buyer/decision maker?)  Josh 3) What are the Tabs features that the key POC cares about?   1. **Rev rec**- previously going to Pilot.com to make any edits in rev rec 2. **Automated customer and invoice creation**- currently a multiweek gap between signing a customer and first invoice bc Jessie has to manually type into Bill.com and set up invoicing for every new customer 3. **Auto escalation or ramp up**- Jessie has a calendar reminder to execute |
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### Company summary *(AE to fill)*

Summary of what company does:  
  
Haus Analytics is a marketing science and experimentation platform that empowers businesses to make data-driven decisions by measuring the precise impact of their advertising efforts across various channels, both online and offline. By leveraging advanced econometric and causal inference models, Haus enables companies to design and launch experiments swiftly, providing insights into the incremental value generated by their marketing strategies

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

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

1. Automate rev rec and clear visibility into cash forecasting- Jessie has to communicate to pilot invoice date vs when rev is recognized
2. Get first invoice out faster- Jessie manually creating customer + setting up invoices in bill.com → 1st invoice delayed by multiple weeks
3. Reduce manual lift on creating customer and invoice schedule- manually keying into bill.com
4. Eliminate need to manually keep track of auto escalations and ramp ups

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, Jessie + onboarding manager are manually creating each
* Information on how merchant bills  
  Flat SaaS, 12 month usually
* How contract is broken up
* One off things to know about the merchant

### Contract Processing Steps *(Implementation/Success to fill)*

Haus wants contracts processed according to **the Order Effective Date.** If not available, please use the Term Start Date.

Read the rules below to see how to process:

* All contracts (example 2/1/2025) [LOOM Video Walkthrough](https://www.loom.com/share/e2eda7b1253a45d8a025c062fd6f9609?sid=3865ae39-341e-4ba0-ba72-3b37e8c64023) + [Garage Example](https://garage.tabsplatform.com/prod/contracts/a9e9f283-d297-4dcc-a84f-6a7021e80435/terms/revenue)
  + Service Start Date: Same as order effective date
  + Months of Service: Term Period, default to 12 if none started
  + Category for Rev Rec: Revenue
  + Item Name: [Product Name] Monthly
  + Integration Item: Type the product name and select the closest match, if it has an X, ignore
  + Billing type: Flat
  + Total Price: Annual price divided by total term period (typically 12 months)
  + Quantity: 1
  + Start Date: Same as Service Start Date
  + Periods : 12 if yearly change if quarterly
  + Net Terms: Check contract for Payment Terms Section

1. Anything to ignore in contracts?
2. 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)
3. Default Service Term
   1. If None Listed, Ops Default is 1 Year
4. Default Net Payment Terms
   1. If None, Ops Default is 0
5. Default Billing Frequency
   1. If None Listed, Ops Default is Monthly
6. 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
  + Why it's important
  + Urgency

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

* Intro <https://us-56595.app.gong.io/call?id=7256455548189817263>
* Demo <https://us-56595.app.gong.io/call?id=6485198124604882967>
* Implementation, CS, Pricing <https://us-56595.app.gong.io/e/c-share/?tkn=1794enjvb9n111949icd3e9kwz>
* Workshop with Controller <https://us-56595.app.gong.io/call?id=7410539427932474592>

Decks:

Demo: <https://docs.google.com/presentation/d/1JU_ywcB1b7mcsgTgZkDne4yf1x8HAvVe_5TYOFHaJKw/edit?usp=sharing>

Workshop <https://docs.google.com/presentation/d/1uOVQjycPZ-vkkUB-Ov3ZHQPpu85WKhhW5EncJ1HHvhs/edit?usp=sharing>

Pricing CS Implementation <https://docs.google.com/presentation/d/1uOVQjycPZ-vkkUB-Ov3ZHQPpu85WKhhW5EncJ1HHvhs/edit?usp=sharing>

**Implementation Notes:**

* 115 current customers, but 2x in 2025
* Ask for examples of amendments for second year contracts
* Ask for current rev rec schedule to be sure to map correctly