[Req] Billing: Paid POC Update

Problem

BD sales model is misaligned with billing. Customers are regularly entering into “Paid POC” phase before going into “Paid” status, and the current billing platform does not reflect this.

What is “Paid POC”? This is a temporary status with an expiry date in between trial and paying that typically lasts 2-3 months and can be billed monthly or at a flat rate. Canceling a Paid POC is *not* considered as churn, because the customer was never officially paying in a long-term contract.

Current customers on Paid POC status: Hepsiburada, Matahari Mall.

Target Users

* BD
* Finance

Use Cases

As a BD team member, I should be able to input the billing plan, solutions, and limits for a Paid POC customer in the billing platform.

As a CSM, I should be able to convert a trial to a Paid POC customer to a Paid customer through the ViSenze dashboard.

As a BD/CSM internal admin, I should also be able to change the usage limits and expiry date of a Paid POC.

As a Finance team member, I should be able to pull the billing details for a customer who is in Paid POC phase.

Features of “Paid POC” Status

* Like a trial, should be able to send the end date (automatically suspended after 2 months or extend)
* If customer cancels Paid POC, will not be considered as churn
* Only selected solutions get activated / subscribed
* Pricing can be monthly or flat fee
  + Monthly billing follows paid customers
  + Flat fee option: can choose # of months
    - Some have overages, some have unlimited API calls

Workflow

Features by Component

Dashboard System Management

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| --- | --- | --- |
| **Task** | **Priority** |  |
| Insert Paid POC Status:  Trial > Paid POC > Paid > Suspended > Disabled > Churned  Paid POC page should look like Trial page with Current Billing Cycle (CBC) and Amount due for CBC  Current Plan would be “Paid POC”  Actions would include: Detail, Suspend, Convert to Paying, View Limit, Change Current Plan, View Billing Detail | 0 |  |
| From Trial customers, insert button “convert to paid POC” | 0 |  |
| If customer cancels Paid POC, considered as suspended rather than churned | 0 |  |

Dashboard Billing

|  |  |  |
| --- | --- | --- |
| **Task** | **Priority** |  |
| Input and edit “Plan Expiry Date” of Paid POC (beneath the effective date) | 0 |  |
| Insert “flat-rate” pricing type - only allowed one price amount to be inputted followed by the the billing date (need UI design) | 0 |  |
| Insert “unlimited” pricing type that has unlimited API calls by solution that makes the selected solution have unlimited usage | 0 |  |
| Sync flat-rate Dashboard billing with Chargeover | 0 |  |

Todo

Wireframes: Audrey  
Tech design: YuLu