Merchant: Inspiren

Demo date: Apr 30, 2025  
Scoping start date: April 30, 2025

MSA Signature Date: TBD  
Onboarding Kick Off Date: Signature Date

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

GTM POC: Kat  
Implementation POC: Royce

ERP: QBO

Tax Integration: No Tax

Key people at Merchant

* Alan Federman: Controller
* Christina Allbright: Senior Accountant

| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*  Info on how merchant bills   * Usage-based billing for devices, priced per unit. * Trial periods often include tiered minimums (e.g., 50%, 75%, 80%). * Invoices are sent monthly in advance, despite contracts stating quarterly terms. * True-ups for actual usage are billed at the end of each quarter. * Payments are received by physical checks and manually reconciled.   Is there any important merchant relationship information?   * Inspiren is a fast-growing healthtech company expanding its hardware and financial systems. * They are onboarding Salesforce and plan to integrate it with Tabs. * Previously had issues with revenue recognition due to manual memo-based entries in QuickBooks. * The team is relatively new and building processes from scratch, making this a strategic inflection point.   What is the merchant temperament?   * Christina: detailed oriented, kind, meticulous * Alan: thoughtful, great perspective on Tabs partnership   Is there a key POC:   * Christina Allbright – Senior Accountant, leads billing and rev rec; main Tabs user, coach * Alan Federman – Likely CFO or Head of Ops; strategic buyer, focused on system integration and process scalability, Champion * Alex H - CEO, EB, great relationship with Ali   What are the Tabs features that the key POC cares about?   * Automated usage-based billing with clear, editable line items. * Rev Rec automation with structured schedules, synced to QuickBooks. * Cash application via AI + Plaid for reconciling physical checks. * Invoice memo customization for clarity across Tabs and QuickBooks. * Forecasting dashboards that use real behavior, not just due dates. * Slack integration and activity tracking to improve internal collaboration. |
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Company summary  
*(AE to fill)*

Summary of what company does:

Inspiren is a healthtech company that develops AI-enabled hardware and software solutions for healthcare facilities. Their flagship product, the Inspire Augi, is a smart sensor device installed in patient rooms to passively collect and analyze data on patient safety, nurse engagement, and overall room activity. The system integrates machine vision, multiple sensors, and AI to help prevent adverse events (e.g., patient falls) and improve clinical workflows.

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

What is the merchant's goal?

* Automate invoicing and revenue recognition.
* Scale with complex usage-based billing.
* Reduce manual data entry and spreadsheet tracking.
* Improve financial visibility and forecasting.

What pain are we solving?

* Disjointed, manual billing and rev rec.
* High risk of rev rec errors.
* Inefficient check-based payments and reconciliation.
* Poor visibility into AR and forecast.
* Lack of automation in dunning and renewals.

Why are they buying Tabs?

* Tabs offers structured, auditable, automated processes for billing and rev rec.
* Direct integration with QuickBooks and upcoming Salesforce implementation.
* Strong focus on client visibility, flexibility, and data accuracy.

Is there an opt out clause? If so, what is the merchant looking for so they do not exercise it?

* No opt out clause.

Billing model  
*(AE/ Implementation to fill)*

Are there unique things about the customer creation process for this merchant?

* Christina is very particular on how she wants to see invoices. Her overall goal is to make them clear so that communities are not asking her a ton of questions. This is what we have committed to:
  + Billing Cadence: They want a monthly invoicing cadence, with true-up billing done quarterly in arrears
  + True-ups on invoices: Committed to workflow that creates two invoices to help them simultaneously invoice externally and track the true-ups with the second invoice. That way, we can hide the second invoice impacting the true-up line items and it won’t be sent out to their customer to avoid confusion (what we do for [Attentive.ai](http://attentive.ai), approved by Vanessa & Royce)- requires contract centric settings.
  + Memo Line Details: Each invoice includes individual memo lines with percentage breakdowns for charges during the trial period. These memos will sync with QuickBooks. These are customizable when uploading via CSV with the differentiator field.
  + Sorting: Invoices sorted by service date (approved to be handled by product ops)
  + Overage Memo Quantities: Tabs will attach a .csv file alongside the invoices that contains overages quantities instead of being on the invoice (approved to be handled by product ops)
* Other things they prefer on the invoice: discounted items are shown with the original price

How contract is broken up

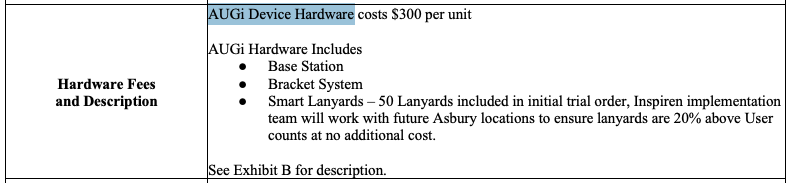
* Trial periods with true-up usage minimums.
* Waived implementation and hardware fees.
* Usage thresholds that determine billing ("greater of 80% of contracted or actual occupancy")

One off things to know about the merchant

* The team is new and still defining SOPs; they are building systems as they scale. New products and bundles will be released in June.
* They may implement Ramp for purchase orders and want to customize how that data is interpreted by Tabs (future state, no rush here)
* Memo fields in invoices are critical for internal audit, revenue recognition, and customer communication.

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

* **General**
  + Billing contact and addresses are to be populated and match the contract
  + Auto renewal to be included
    - Default: 12 months
* **Locate BTs**
  + Primary billing terms are defined in the Subscription Order Form and can be amended in subsequent addenda.
* **Item name**
  + Use the product/service name
    - Ex. “AUGi Device Hardware”, “AUGi Software Fee”, or “AUGi eCall System”
    - For special communities label clearly: ex. “Laurelhurst - Subsidized Community”
  + Example:

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* **Frequency**
  + All device-based and software fees are billed monthly
    - Even if contract states quarterly, cadence is to be monthly
  + Implementation Fee: frequency = none, months of service = 1
* **Quantity** 
  + Use contracted device or residence counts as listed
  + Default to 1 if not listed
  + Set to tiered usage when tracking price per unit per month
    - Ex. Software Fees based on Occupancy Rate with overages (166 residences):

| Tier Name | Price per Occupied Room | Applied Qty |
| --- | --- | --- |
| 60% - 100% Occupancy Rate | $75.00 (full price) | >= 99.6 (166\*0.6) |
| < 59% Occupancy Rate | $52.50 (30% discount) | >= 66.4 (166\*0.4) |
| < 40% Occupancy Rate | $37.50 (50% discount) | >= 0 |

* **Price**
  + Use $0 when fees are waived/subsidized
    - Revenue still needs to be recognized
  + Check for waived Implementation Fee:
    - “Can be waived if Agreement is fully executed by specific date - check signature = 100% discount”
  + Use price specified under “Fee”:
    - Per unit per month = Tier unit price
  + Use net price, don’t include discount on the billing term



* **Net terms:**
  + Stated under “Billing Terms”
  + Default to net 30 if not listed
* **Months of Service** 
  + Listed next to “Subscription Period”
* **Service Start Date:**
  + Use device activation date (not installation date)
  + Date of signature
  + For free periods (ex. 12 months free for eCall) service start still = activation date
    - Billing starts after the free period
* **Billing Start Date**
  + First day of the month following activation date
  + Stated under “Billing Terms”
  + Hardware invoice is billed upon contract signature
  + Implementation invoice is billed upon contract signature
  + For product with free periods - billing starts after
* **Special Handling** 
  + **Free Periods:**
    - Sometimes in the middle of a term - create BTs accordingly
  + **Addendum**:
    - Service dates are to match dates of original contract
    - Update quantities to reflect new totals if pricing is the same
      * If pricing differs create new billing term
  + **Customer - Solera:** 
    - Bill in advance
* **Examples**
  + d44b00f5-574b-46f9-83b2-5234f469924e
  + 28c3f944-f6a3-47ca-975e-2db0feee3d23

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?

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?

Customer Information  
*(Implementation/Success to fill)*

* Any important information on specifics customers of this merchant

Feature Requests  
*(AE/Implementation/Success to fill)*

* FR 1
  + What is it
  + Why it's important
  + Urgency

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

* Rewatch by dates
  + [Demo May 2nd](https://us-56595.app.gong.io/call?id=1033617810441709503&account-id=6174212164017927625)
  + [Demo May 12th](https://us-56595.app.gong.io/call?id=8966385001417806855&account-id=6174212164017927625)
  + [Demo May 14th](https://us-56595.app.gong.io/call?id=8638828325747038225&account-id=6174212164017927625)