## Merchant

Scoping start date: May 22, 2025

MSA Signature Date: May 29, 2025  
Onboarding Kick Off Date: Apr 17, 2025

[If Exists] Opt Out Date: none  
Go Live Date: N/a

GTM POC: Jarrett  
Implementation POC: Royce

ERP: QBO

Tax Integration: No Tax

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### Key people at Merchant

### Head of Finance / DRI: Nadav Yuhjtman Senior Accountant: Leslie Romer

### Accounting Firm: Countsy (outsourced, transitioning out)

### Main Point of Contact for Tabs: Nadav

### Customer Success Target: Streamlined AR, improved audit readiness, single source of truth for finance

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + Primarily annual SaaS with occasional one-off professional services.   + Bills the prime contractor (e.g., HII), not the end government customer (e.g., CENTCOM).   + Contracts are on third-party paper (usually government/primes).   + Internal preference to report by end-customer entity. * Is there any important merchant relationship information?  1) What is the merchant temperament?   Onebrief's temperament is collaborative and eager to move quickly. They see Tabs as a strategic partner to help modernize and automate their financial operations, especially as they transition away from outsourced accounting and prepare for growth.  2) What are the Tabs features that the key POC cares about?  **Automated revenue recognition** – to eliminate manual rev rec work and avoid using NetSuite’s revenue module.  **Contract ingestion via AI** – to handle complex government and third-party contracts without manual data entry.  **Integrated invoicing and collections** – to centralize AR, automate billing, and manage government-specific billing workflows. |
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### Company summary *(AE to fill)*

Summary of what company does:  
  
Onebrief is a government-focused SaaS company selling to U.S. government entities (e.g., CENTCOM) through subcontracting relationships with government primes. They are rapidly scaling their internal finance operations, moving from outsourced accounting (Countsy) to building an in-house team led by Nadav Yuhjtman (Head of Finance).

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

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

They’re looking to replace manual billing and rev rec processes with a centralized, automated platform to prepare for scale. Tabs is seen as a strategic platform to replace NetSuite’s revenue module, centralize contract/invoice data, and support government billing complexities.

### Billing model *(AE/ Implementation to fill)*

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

Contracts are on third-party paper (usually government/primes).

* **Information on how merchant bills**

Bills the prime contractor (e.g., HII), not the end government customer (e.g., CENTCOM).

* How contract is broken up

Each is different and on government paper.

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

1. Steps to process
2. Anything to ignore in contracts?
3. 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)
4. Default Service Term
   1. If None Listed, Ops Default is 1 Year
5. Default Net Payment Terms
   1. If None, Ops Default is 0
6. Default Billing Frequency
   1. If None Listed, Ops Default is Monthly
7. 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)*

* Mosaic integration- nice to have

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