**Merchant:** Augment

**Demo date:** August 20, 2025  
 **Scoping start date:** August 2025  
 **MSA Signature Date:** TBD  
 **Onboarding Kick Off Date:** TBD  
 **[If Exists] Opt Out Date:** TBD  
 **Go Live Date:** TBD

**GTM POC:** TBD (sales side not explicitly mentioned)  
 **Implementation POC:** Daniel Chen — Director of Finance  
 **ERP:** QuickBooks **Tax Integration:** TBD

### **Key people at Merchant**

* **Finance:** Daniel Chen — Director of Finance

### **AE / Implementation Notes**

* Company is transitioning from stealth to commercialization
* Daniel Chen is driving finance/billing infrastructure decisions
* Customers already lined up; billing must begin quickly
* Processes not yet formalized; expects Tabs to help set up billing & revenue recognition from scratch

### **Info on how merchant bills**

* Augment is just starting to monetize; expects to begin charging customers immediately
* Billing model not yet formalized; Tabs evaluation intended to establish first billing system
* Needs rapid setup of billing + revenue recognition (starting “day one” of commercialization)

### **Important merchant relationship information**

1. **Merchant temperament:** Early-stage, fast-moving. Daniel Chen is pragmatic, detail-oriented, and focused on speed to revenue. Company is resource-constrained, needs a scalable foundation.
2. **Key POC / decision maker:** Daniel Chen (Director of Finance)
3. **Tabs features that matter most:**
   * Ability to stand up billing and rev rec immediately
   * Flexibility for evolving pricing and contracts (still early stage)
   * GAAP compliance from day one (to avoid rework)
   * Contract ingestion and automation to reduce manual setup burden

### **Company summary**

Augment is an early-stage startup transitioning from stealth to commercialization. They have customers ready to pay immediately and need to establish a billing and revenue recognition system. Current finance processes are minimal; Tabs is being evaluated to serve as the foundational system for billing, contracts, and compliance .

### **Goals (North star)**

* Enable billing and collections “day one” of commercialization
* Avoid manual QuickBooks + spreadsheet reliance by starting on scalable infrastructure
* Build GAAP-compliant rev rec and reporting foundation for investors/future growth

**Why buying Tabs / pain points:** Need to set up billing/revenue process rapidly; avoid manual work; ensure scalability and auditability from inception.

### **Billing model**

* Current: Not yet operational; billing to start immediately upon commercialization
* Likely structure: subscription licenses with usage (details TBD)
* Customer creation: still manual; Tabs would provide first structured workflow
* Contract processing: not standardized yet; Tabs would create baseline system

### **Customer information**

* Initial customers in pipeline; details not disclosed in call
* Expect immediate billing needs once commercial contracts signed

### **Feature requests**