## Merchant: DSN

Demo date:   
Scoping start date: Nov 6, 2023

MSA Signature Date: Feb 7, 2024  
Onboarding Kick Off Date: Feb 7, 2024

[If Exists] Opt Out Date:  
Go Live Date: Feb 7, 2024

GTM POC: Jarrett  
Implementation POC:

ERP: Rillet

Tax Integration: Avalara

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### Key people at Merchant

### Accountant: Involved but not joining demos (name not provided)

### Finance Sponsor: Peter Mahoney (Vertica Capital, Strategic Finance)

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| AE/ Implementation Notes Sections [Ops International Team to Ignore]   * Info on how merchant bills   + DSN operates a **monthly usage-based billing model** for products like electronic claims.   + Usage data comes from external software platforms with differing customer IDs from QuickBooks.   + Manual reconciliation and AR workflows are common today.   + Contract SKUs are not standardized—upstream contracting processes are inconsistent.   + DSN supports evergreen monthly subscriptions (auto-renewing). * Is there any important merchant relationship information?  1) What is the merchant temperament? - Collaborative and detailed; open to deep product testing before decision-making. * 2) Is there a key POC: (i.e.: who is the buyer/decision maker?) * **Peter Mahoney** – Sr. Director, Strategic Finance at Vertica Capital Partners, overseeing DSN's finance systems evaluation.  3) What are the Tabs features that the key POC cares about? Automated **usage-based billing** with custom usage ingestion and mapping (CSV and potentially Snowflake or API). * Auto-pay and **cash application automation**, especially mapping ACH and checks. * **AR waterfall**, **rev rec**, and invoice-level revenue scheduling. * AI-enhanced collections and reporting dashboards. * Integration with HubSpot (customer creation) and QBO (ERP). |
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### Company summary

Summary of what company does

Goals (North star)

Eliminate time-consuming, manual processes around usage billing, payment reconciliation, and revenue recognition.

Create a **future-proof O2C system** that can adapt to changing pricing models and usage-based SKUs.

Enable accounting team efficiency through centralized reporting, visibility, and cash forecasting.

Serve as a potential **repeatable platform** across other Vertica-backed portcos.

### Billing model

* Customer creation triggered by HubSpot “Closed Won” → Tabs auto-creates or appends customer records.
* Uses **monthly usage uploads** from external systems (CSV or Snowflake/S3).
* Custom field support for tracking DSOs or unique structures.
* Invoices require approval before sending when usage is involved.
* Tabs handles revenue recognition per service dates (manual, or future: auto from CRM fields).

### Contract Processing Steps

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)

* Any important information on events billing

Integration Items Processing (if necessary)

* 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)

* 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

* Any important information on specific customers of this merchant
  + Special memo’s certain invoices require
  + Invoice changes due to merchant/customer relationship

### Feature Requests

* **FR1:** Default-enable certain usage SKUs across customers (like electronic claims)  
   **Why:** Reduce manual ops burden when a customer starts using the product
* **FR2:** Centralized product catalog / price book for easier pricing updates  
   **Why:** Avoid updating usage tiers customer-by-customer

### Rewatch Calls

* https://us-56595.app.gong.io/account?id=4454737231912483547&type=ACCOUNT&workspace-id=2531298410931371606&date=2025-05-19&activity-id=4827067837084321707&filter=%7B%22accountFilter%22:%7B%22type%22:%22And%22,%22filters%22:%5B%7B%22type%22:%22ActivityType%22,%22values%22:%5B%22CALL%22%5D%7D%5D%7D%7D