## Merchant Name: Lakera Implementation POC: Royce *(IM to fill)* CX POC: *[IMP to Add]*

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| Notes Sections   *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills Very Bespoke, high ACV ($100k) contracts ~10 customers  1 invoice/month   **Today:** Usage commit Services - “red team” upfront, or after completion (milestone) Implementation  **Future state:** usage  All contracts are in english and billed out of the US   1) What is the merchant temperament?  Aloys is really easy to work with and super straightforward  3) What are the Tabs features that the key POC cares about?  1) auto generated invoices - especially as they scale 2) flexibility to support usage based billing in the future |
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### Billing model *(Entire Section: Implementation to fill section)*

* Are there unique things about the customer creation process for this merchant?
* Information on how merchant bills
* How contract is broken up
* One off things to know about the merchant

### Contract Processing Steps *(Entire Section: Implementation/Success to fill Post-Go Live)*

1. Steps to process

**Locate billing items**

* Identify billing items based on the structure and content of the Order Form

**Item Name**

* Use the item name as listed in the Order Form

**Service Start Date**

* Use the effective date or order start date from the contract

**Months of Service**

* Calculate inclusive full months between the Order Start Date and Order End Date
* Default 12 months if nothing is stated (most contracts are annual)

**Billing Start Date**

* Use service start date unless otherwise specified by a different invoicing trigger (e.g., upon signature), use that instead

**Frequency**

* Determine from invoicing terms in the Order Form (e.g., Annual upfront)
* If unstated:
  + Fixed subscriptions → Annual upfront
  + One-time/milestone fees → None

**Net Terms**

* Extract from the Payment Terms in the Order Form
* If not specified, default to Net 30

**Quantity**

* For fixed fees: use 1 unless otherwise specified
* If volume caps are listed (e.g., API request limit), record the threshold for reference only.

**Amount**

* Use the total contract amount
* If invoiced periodically, divide evenly across periods

**Discounts**

* Please add discounts **in-line** and not as a separate product

**Revenue Category**

* n/a

**Integration Items**

| **Product Name** | **Product Integration Item (NS)** |
| --- | --- |
| **Additional hours** | **Professional Services** |
| **Additional Requests** | **Professional Services** |
| **Lakera Guard** | **Lakera Guard** |
| **Lakera Guard AI Application Firewall for Deployment in R2D2** | **Lakera Guard : SaaS** |
| **Lakera Guard Enterprise** | **Lakera Guard : SaaS** |
| **Lakera Guard (Enterprise SaaS)** | **Lakera Guard : SaaS** |
| **Lakera Guard Enterprise SaaS** | **Lakera Guard : SaaS** |
| **Lakera Guard Enterprise SaaS** | **Lakera Guard : SaaS** |
| **Lakera Guard Enterprise Self-Hosted** | **Lakera Guard : Self-hosted** |
| **Lakera Guard, Self-Hosted** | **Lakera Guard : Self-hosted** |
| **Lakera Implementation Package** | **Professional Services : On-prem implementation** |
| **Testing Fee** | **Professional Services : Red Teaming** |

1. Anything to ignore in contracts?
2. 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)
3. Default Service Term
   1. If None Listed, Ops Default is 1 Year
4. Default Net Payment Terms
   1. If None, Ops Default is 0
5. Default Billing Frequency
   1. If None Listed, Ops Default is Monthly
6. 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) *(Entire Section: Implementation/Success to fill Post-Go Live)*

* Any important information on events billing

Integration Items Processing (if necessary)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

* 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)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

* 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 *(Entire Section: Implementation/Success to fill Post-Go Live)*

* 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 to fill for all requests prior to Imp handoff, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

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

### Merchant Calls *(AE to fill for all videos prior to Imp involvement, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

* .Intro <https://us-56595.app.gong.io/call?id=2039808918746856338&account-id=4510569308154570916>
* .Demo <https://us-56595.app.gong.io/call?id=7126677519105947967&account-id=4510569308154570916>
* .ROI call <https://us-56595.app.gong.io/call?id=5532650537271318207&account-id=4510569308154570916>
* Sync with sales ops <https://us-56595.app.gong.io/call?id=3279173550303081490&account-id=4510569308154570916>