## Merchant

Demo date: Mar 25, 2025  
Scoping start date: n/a

MSA Signature Date: Mar 30, 2025  
Onboarding Kick Off Date: Mar 28, 2025

[If Exists] Opt Out Date: 90 days after start date (July 1)  
Go Live Date: Nov 14, 2024

GTM POC: Austin  
Implementation POC: Royce

ERP: QBO

Tax Integration: Avalara

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### Key people at Merchant

### [Yogesh Vats](https://www.linkedin.com/in/yogesh-vats-0a824450/), CFO

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| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + [Attentive.ai](http://attentive.ai) bills in a multitude of ways, all centered around usage.   + **Example of the most common way of billing:** They sell 100,000 amount of usage credits (either sheets or acres) for $40k amount of dollars. They bill quarterly for the quota amount, so 10k each quarter. If the customer remains under the quarterly usage quota, they won’t show anything except the minimum. If they go over, they will show the overage amount. If they remain under their quota all the way until the last quarter, they will true it up at the end.     1. They do not want to show usage or usage drawdowns on invoices unless customer goes into overages     2. Sometimes when a customer hits their quota, they will decide to just early renew for another year     3. If the annual quota is exhausted prior to the fourth quarter, all invoices are raised at once   + They also have tier based pricing, such as up to 20000 - $2.35 per acres; 20000-40000 - $2.30 per acres; above 40000 - $2.25 per acre   + They also have some optional features which are billed to customers if they decide to use any during the agreement. The cost of optional features is mentioned beforehand. (We created individual BTs for this during the demo, see “New York Knicks” in the sandbox environment. We created Automeasure and Beam AI as the optional features).   + In case annual quota is exhausted before the 4th installment due date, all the invoices become due to be raised immediately   + They also have some PLG customers. They use Stripe for this. They will continue to use stripe for the invoicing, but may want to bring in the data for rev rec at some point * Is there any important merchant relationship information?  1) What is the merchant temperament?   Very intelligent and hard working individual. Clearly well versed at negotiating. Communicative over email and slack.  2) Is there a key POC: (i.e.: who is the buyer/decision maker?)  Yogesh handled everything in this sales cycle. He served as the Decision Maker and Champion. We did a sandbox trial, and for that he added someone named Nishant Sharma to the Slack channel, but we never interacted with him before.  3) What are the Tabs features that the key POC cares about?  Really cares about invoice creation. He was insistent on our ability to not show usage drawdowns on invoices.   He also wanted to have usage based Rev Rec. Recognize actuals in the first 3 quarters, then in the 4th quarter if they go over, recognize the overage, if they go under, it trues up to the minimum. He realizes this is not perfectly available today but something we’re working towards building in the near future. **We presented a Product Ops flow for him on the rev rec, where we’d deliver a spreadsheet every month, but he declined it.**  I would also put an early emphasis on communicating with the client around how we will get the usage data delivered. |
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### Company summary *(AE to fill)*

Summary of what company does:  
Attentive.ai is a software company that helps businesses in landscaping, construction, and property maintenance by automating the process of measuring properties and creating estimates. Instead of spending hours manually measuring sites, companies can use Attentive.ai's tools to get accurate measurements quickly, saving time and reducing errors.

They have two main software products:

1. **Automeasure**

* Imagine this: You're a landscaping company asked to provide a quote for maintaining a large commercial property. Traditionally, you'd send someone out to measure lawns, sidewalks, and parking lots—a time-consuming task.

With Automeasure, you can:

* Use aerial imagery to get accurate measurements of properties without visiting the site.
* Quickly generate estimates for landscaping, paving, snow removal, and facility maintenance jobs.
* Save time and bid faster, allowing you to take on more projects and grow your business.

**2. Beam AI**

* Now, think about this: You're a construction company needing to estimate materials for a new building project. You have blueprints but calculating the quantities manually is tedious.

With Beam AI, you can:

* Upload your blueprints, and the software will automatically calculate the quantities of materials needed for various trades like electrical, plumbing, concrete, and more.
* Reduce manual errors and ensure more accurate estimates.
* Speed up the bidding process, giving you a competitive edge in securing projects.

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

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

* **Goal** = To save time in their invoice creation process
* **Pain we’re solving** = They are manually creating invoices right now out of QBO. It’s a manual and cumbersome process. They’re buying Tabs to automate this as the business scales. The business has ambitious goals and wants to grow revenue by 2x this year.

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

* Yes, there is a limited termination clause. The merchant is looking to make sure that we can fulfill their needs around invoicing specifically. The clause is specifically tied to Tabs being able to support their invoicing needs.

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

* Are there unique things about the customer creation process for this merchant?
  + Yes. We’re going to move forward with a contract centric view for them. This means for every customer record, there will be 2 contracts. One contract will be used to show invoices, and the other will be used to track the usage. [See this slack comment to our solution.](https://tabs-7so1666.slack.com/archives/C08PL3ZMFAB/p1747365026378759)
    - [Loom video of Royce walking through how we set it up in the demo](https://www.loom.com/share/c2014242bdfb4daf8a8edb4b46010d94)
  + The start date is July 1, but we agreed to start onboarding earlier. This was part of negotiations, of which Ali was involved.
* Information on how merchant bills
  + See above
* How contract is broken up
  + Standard Order Form + MSA contract. Most things related to billing are listed in the terms sections of the contract (e.g. 3.2 Description of Services).
* One off things to know about the merchant
  + Merchant is based in India. Most of the team is also based in India, although their business runs completely out of the US
  + Time Zones were challenging during the sales cycle, with most of our calls taking place between 9-10:30 am ET.

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

1. Steps to process

NO LONGER PROCESSING AN EXTERNAL VERSION - INTERNAL VERSION ONLY :)

**Service Start Date**

* Date of last signature

**Service Months**

* Default to 12 months unless stated otherwise

**Item Name**

* Use the item name listed in the products & services section
* In the example below, item name is circled in pink. DO NOT list the description circled in blue

**Quantity**

* Ensure that Qty is consistently set to 1 for installment-based invoices



Billing Type - Flat

* If there is a unit price that is > 0 listed in the product table, billing type is flat
* Otherwise, unit or tiered unit based pricing
* Reference Fees & Schedule section for the billing schedule
  + This merchant wants one BT for every invoice period because they want to denote which invoice it is in the sequence (e.g. 1, 2, 3, 4 etc)
  + SO if there are 4 invoice periods mentioned you would have 4 BT with the same fields besides the item description and billing start dates
  + In the example below - 4 BT:
    - Start Date: 5/15/25, 8/15/25, 11/15/25, or 2/15/26
    - Quantity: 69,368.72
    - Item Description: 1, 2, 3, or 4
    - Integration Item: map all products to “SaaS Revenue”
    - Rev Rec: ignore
    - Frequency: 3 months
    - Periods: 1
    - Total price: $152,611.18 / 4 = $38,152.8
    - Billing Timing: First of Period



Billing Type - Usage



* In the example above, the two red products are usage based billing
  + Create events to track if it doesn’t already exist:
    - “Workable sheet” for Automated Blueprint Property Measurements
      * Unit price $30
    - “Per site” for Manual Aerial Property Measurements
      * Unit price $4
    - There should be a **unique** event for every usage product on any particular contract. This is because usage upload maps to the customer level, not the product/BT level, so the only way to differentiate which product the usage upload is for is for every usage BT to have a different “event to track”. Even if there are the same tracking unit names in a contract, if they are for different products, make a different event
  + Other billing categories should match the flat fee product **besides:**
    - Billing Timing for Usage BT should be **BILLED IN ARREARS** (not first of period!!!)
    - you **do not** need to create a separate BT for each invoice period for usage products
* **Please also** reference “Description of Services” section for additional usage based items that may not be listed in the table like “users” or “platform access fees”. Sometimes, there are also other billing terms like a one-time installation fee
  + **DO NOT** process Addendum products
* **[USAGE AI] ADDITIONALLY!!!** You’ll notice that even products with a listed price in the “unit price” column like “Automated Aerial Property Measurements” has a usage based component noted in the Fees & Schedule section if they go over the quota (here, 69,368.72 acres + 5,631.28 rollover acres so 75,000 acres total)
  + Create another BT labeled “Additional [Product Name]”
    - Product name here = automated aerial property measurements
    - Create events to track if it doesn’t already exist = acre
    - Unit Price = $2.20
  + Create usage AI:



* Usage Name: same as Item Name
* Included Products: ONLY select the respective product
  + E.g. The “Additional Automated Aerial Property Measurements” product
* Threshold amount: calculated as the quota (inclusive of rollover amounts) \* price per unit
  + In this example 75,000 \*2.20

Contracts to Reference if any questions:

* 00a8e22b-8690-404f-854a-b89e79dd62b5

Under old MIS (i.e. one BT for all invoice periods) but might be helpful to see other BT/Usage AI set-up:

* C3341552-4a8b-4042-92d6-79fb9c3e1d1b
* 6f8d4528-d17d-4db9-9603-e8ff1b1cb86e
* 095de83e-0462-4970-ad80-cdd29609bf3c
* F0b7d7ae-df03-498c-ab8a-33e70d38086d
* B75c829d-e432-4ffd-b769-df907f7d3cb8
* 37cb4e71-1726-460f-81dd-67d2202e7caf
* D51078b4-fd54-405a-9875-4ccd24bdb3de

1. Anything to ignore in contracts?  
   Ignore addendum sheets and do not create a separate BT for rollover products (the rollover quota here should be included in the other BT that tracks the same event)
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 30
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) *(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)*

* FR 1
  + What is it: He also wanted to have usage based Rev Rec. Recognize actuals in the first 3 quarters, then in the 4th quarter if they go over, recognize the overage, if they go under, it trues up to the minimum. He realizes this is not perfectly available today but something we’re working towards building in the near future.
  + Why it's important: They requested this early in the sales process and it’s important to them because they don’t have an automated / dynamic way of seeing this today.
  + Urgency: Ideally 6 months

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

* Rewatch by dates
  + All Gong Calls: <https://us-56595.app.gong.io/account?id=2825873797614175136&type=ACCOUNT&workspace-id=2531298410931371606&date=2025-05-29&activity-id=9095946602696673218&filter=%7B%22accountFilter%22%3A%7B%22type%22%3A%22And%22%2C%22filters%22%3A%5B%7B%22type%22%3A%22ActivityType%22%2C%22values%22%3A%5B%22CALL%22%5D%7D%5D%7D%7D>
  + First 2 calls were not recorded (gong issues)