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

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### SOW: <https://docs.google.com/document/d/18PdAa6BJymkO0rPai6gLCPdOnca_fokMXs7kcAAsCSw/edit?tab=t.0>

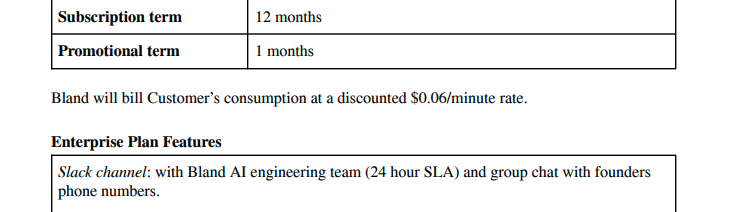
| Notes Sections   *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills   Pricing models can include flat fee, unit price, tiered flat, and tiered unit. Tabs can support commit consumption with true-up or bill for overages.  1) What is the merchant temperament?  Turner (Head of Ops & Finance, Champion) is young and smart. Worked at Jeffries for 4 years and moved to Bland a year ago. Mostly focused on efficiency in operations and will be the main POC at Bland. Side Note - he went to elementary school with my gf and lives 2 blocks from the office. Dan (Fractional CFO, Influencer) is going to be the main user. Already using Tabs with #arcee-ai. Has a partnership with our partnerships team. Tabs Champion. Somina (Fractional Controller, Influencer) cares about revenue and MEC. All manual today and she works at EXBO. Another champion from our partnerships side  3) What are the Tabs features that the key POC cares about?  Tabs automates collections, cash application, and integrates with payments infrastructure → Accelerates cash flow and frees up operational bandwidth for the team.  Tabs consolidates data from tools like Stripe, HubSpot, QuickBooks, and internal databases → Centralizes billing operations and eliminates silos for a cleaner, more reliable process.  Tabs uses AI to ingest contracts, apply pricing logic, and generate usage-based invoices → Reduces manual effort and ensures accurate, scalable billing across both enterprise and self-serve customers.  Tabs syncs journal entries, deferred revenue, and AR reporting directly to QuickBooks → Streamlines month-end close and reduces reliance on external accountants. |
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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)*

* **General**
  + Will need to turn on usage AI for “Free Call Minutes” or "Committed Usage”
* **Item Name:** mostly will be the “Units” column; use best judgement if not clear
* **Pilot Periods:**
  + Pilots: when a contract has a pilot period, that pilot is in addition to the full subscription length
    - For example, a 1 month pilot is a separate BT that's active for 1 month. Then the full year subscription would start after the pilot period
    - For the one month pilot product, please use revenue category Pilot
* **Total Price**
  + Use the total price listed in consideration with the billing frequency
    - I.e. annual total price billed quarterly will be the total price divided by 4
* **Service Start Date**
  + Use the "Service Start Date" stated in the order form.
  + If there are multiple start dates for BTs (i.e. month 1 price, month 2-3 price), start the service date with the billing start date
* **Month of Service:** 
  + use the amount of months that the product goes for
    - If the price is for months 2-3, this will be 2
* **Billing Start Date**
  + Use the service start date (should already acknowledge different BT start dates)
* **Frequency**
  + Determine from contract language or billing terms.
    - If monthly pricing is listed and invoiced monthly, set to Monthly.
    - If a lump sum covers multiple months (e.g., annual), set to Annual.
    - If the BT covers a one-time onboarding or milestone, set to None.
    - If billed quarterly, use 3 Months
  + Make sure to look at the sections below the order form total to see if billing cadence is listed there
    - “Billing Terms:”
    - “Additional Terms:”
* **Net Terms**
  + Use payment terms if available
  + If specific days are not listed, default to 30.
* **Revenue Categories**
  + “Pilot”
    - First pilot month
  + “Professional Services”
    - Implementation
    - Enterprise services
    - Forward deployed engineer
    - Implementation and maintenance support
    - Ongoing support of pathway development
  + “Support”
    - Support (if it’s it’s own line item)
  + “Platform”
    - (default for all subscription products!)
    - Platform fee
  + “Dedicated Infrastructure”
    - (old terminology, should be rare)
    - Dedicated infrastructure
    - Dedicated infrastructure and Support
  + “Usage Based Commit”
    - Committed usage
    - Connected minutes
    - Chat messages
    - SMS messages
* **Additional instructions**
  + Committed usage should be its own flat BT if included in the order form total ([Example](https://garage.tabsplatform.com/prod/contracts/f8412987-8113-4005-8728-00bbe60f5c8e/preview)).
  + Usage BTs will often be in fine print – be sure to look out for them



* + Same is true for Free Minutes or other free usage events given to the customer -> these will need to be incorporated into the usage AI model ([Example](https://garage.tabsplatform.com/prod/contracts/664ff1a0-3892-42ad-9721-687cb4bec260/usage))
    - “During the first year, Bland will provide Customer 1.5 million free minutes of call time. Any minute overage during year 1 will be billed at $0.06/minute.”
  + Multi-pathway pricing (e.g., additional pathway bundles) should be separate BTs if priced separately.
* **Usage AI**
  + Will need to be turned on for most contracts
  + Look for a *Usage Commitment / Prepaid Usage* or for any *Free Usage Events* (for example, free call minutes)
    - When we see this, we need to make sure that we don’t charge customers for usage they already paid for or that they got for free upfront
  + Most all of these will be “Has Threshold” models
    - This is true if the usage amount if prepaid or if they received a free amount upfront
    - If there is a minimum required for usage, it would be “Has Minimum”
  + Usage Name:
    - If a committed usage or prepaid usage, can call it “Prepaid Usage”
    - If free usage, call it “Free [insert event type] (i.e. Free Call Minutes)
  + Included products
    - Select all of the usage products that apply
      * If they only received free call minutes but there are other usage events, only select call minutes
      * If there is an overage usage BT and a regular, prepaid usage BT, select the prepaid usage BT.
    - If it’s prepaid usage for ALL usage, select all of the products
  + Threshold period:
    - This depends on what range the prepaid or free minutes goes for
      * If monthly, use “individual billing period” ([Example](https://garage.tabsplatform.com/prod/contracts/27582f06-619d-4bd7-aca8-a70c90e0278f/usage))
      * If annual, use “full service period” ([Example](https://garage.tabsplatform.com/prod/contracts/f8412987-8113-4005-8728-00bbe60f5c8e/usage))
  + Threshold amount
    - The total prepaid or free amount for that period (the monthly amount if it’s for the individual billing period
  + Select “charges overages”

### 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)*

* Disco (6/9) -https://us-56595.app.gong.io/call?id=8760335038348701086
* Demo (6/11) - https://us-56595.app.gong.io/call?id=7558620536075423099
* Custom Demo, Technical Scoping (6/17) - https://us-56595.app.gong.io/call?id=9037405092022941974
* Next Steps (6/20) - https://us-56595.app.gong.io/call?id=4924670863912071994
* ROI and Pricing (6/24) - https://us-56595.app.gong.io/call?id=6487012684246113336
* Q2 Commercial Alignment (6/30) - <https://us-56595.app.gong.io/call?id=3020078879149461689>