## Merchant Name: Juniper Square 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   Juniper will not be billing through Tabs. They will strictly be using us for contract management for their 5000 contracts.   Here is the working Doc we have with their team for AI extraction of data/fields: <https://docs.google.com/spreadsheets/d/1bTrhdcAs10dCRYbMeZJBd2eiO64UjPsARvEcMRJdZXM/edit?gid=0#gid=0>  They want about 20 fields living in SFDC and another 60 in a CSV/Excel. We will be running a phased implementation with them  1) What is the merchant temperament?  Juniper Square exhibits a **highly analytical, control-oriented, and forward-thinking temperament**, particularly focused on: **A. Precision & Control**  * The team (especially Controller Prasana Ram) is deeply experienced in navigating **complex billing**, **usage-based pricing**, and **multi-layered fund structures**. * There's a clear preference for systems that offer **detailed configuration**, **low error tolerance**, and **high auditability** (e.g. merging contracts, revenue allocations, and invoice presentation logic). * They are wary of service-heavy, black-box platforms (e.g. Billing Platform, SuiteBilling) and demand transparency and precision.  **B. Strategic Engineering Mindset**  * Prasana and Eric are methodical, thinking not only about what works now but how systems will **scale**, **be maintained**, and **automate intelligently** long-term. * They actively compare solutions not only based on current features but by evaluating **modularity, future-state architecture, and agent-readiness**.  **C. AI-Curious but Cautious**  * Strong enthusiasm for agentic workflows (e.g., intelligent querying, renewal insights, predictive pricing), but with realistic skepticism about the **current limitations of AI in financial computation**. * Their attitude: get the **foundational systems right first**, then layer in intelligent automation.   Claudia Yang is going to be our pain POC - she’s awesome and a joy to work with. Head of RevOps  Prasana is their VP of Finance - more of an executive role but will be involved day to day  Alexis, Elisa, and Gina are the rest of the deal desk team. They’re also great to work with Tabs will save them many hours not having to do contract review.  Eric is the CFO. Will not be involved but Tabs champion. More executive oversight  3) What are the Tabs features that the key POC cares about?  The team’s interest centers on how Tabs can either replace or simplify their current complex stack (ZoneBilling + Salesforce CPQ + Boomi + NetSuite ARM), with an eye on *agent-driven automation and single-source truthing*. Key feature themes include: **A. Contract Ingestion & Structuring**  * **Tabs’ LLM-powered contract parsing** stood out as highly valuable for extracting billing terms, fund structures, CPI clauses, and usage triggers directly from legal documents—reducing dependency on CPQ and manual entry.  **B. Usage-Based Billing & Complex Hierarchies**  * The team cares deeply about Tabs’ ability to handle **tiered and variable usage** across **parent/fund structure/entity levels**, with **flexible invoice consolidation** rules and customization.  **C. Horizontal Automation / “Commercial Graph”**  * They were intrigued by Tabs’ vision to act as a **commercial engine across Salesforce + ERP**, consolidating:    + Order ingestion   + Usage tracking   + Billing logic   + Revenue event triggering * Potential to **eliminate Boomi**, reduce reliance on CPQ, and standardize subscription logic across products.  **D. Agentic Capabilities (Medium-Term Interest)**  * Strong interest in future Tabs functionality like:    + **Proposal automation based on historical pricing logic** (for fund admin services).   + **Renewal forecasting bots** based on fund-level metadata.   + **Contract clause querying** (e.g., CPI triggers, true-up logic).   + **Meeting-to-action AI** (e.g., summarizing Gong calls into tasks). |
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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
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) *(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)*

* Custom Fields extraction for AI model
  + Extraction of custom fields from contracts
  + SFDC is their source of truth for everything and want all data living here
  + High and immediate

### 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 Call (6/24)
  + <https://us-56595.app.gong.io/call?id=4450951635901223322>
* Contract Review and Model Alignment (7/9)
  + <https://us-56595.app.gong.io/call?id=5909088570225652590>
* Contract Review and Model Alignment (7/16)
  + <https://us-56595.app.gong.io/call?id=6188220290340281998>
* Implementation and Salesforce (7/21)
  + <https://us-56595.app.gong.io/call?id=6389405274381062301>
* Security and Legal Check In (7/24)
  + <https://us-56595.app.gong.io/call?id=4091570813844559893>
* Security and Legal Check In Part 2 (7/29)
  + <https://us-56595.app.gong.io/call?id=6898088081373476249>