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

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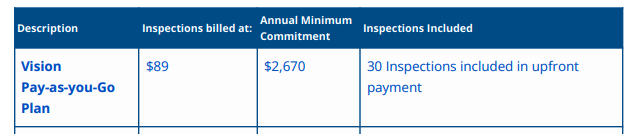
### 

| Notes Sections   *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills   Contracts are typically annual, with some having defined inspection thresholds (e.g., 800 inspections per year). Customers are billed upfront for a base amount, and overages are billed when usage exceeds contracted amounts.  Overages can be billed: Mid-year, when usage exceeds the threshold partway through the term. At the end of the term, depending on customer type and contract structure.  There is variability across customers: Some are on monthly usage-based billing. Others are annual with per-inspection overages.  1) What is the merchant temperament?  Sean (Senior Accountant, Champion) is the only in house finance hire. He handles all contract management and billing. He’s a guys guy - loves to golf and talk sports, a little bit of a space cadet. Easy to manage. Victoria (Rev Ops, Influencer) is very nice, however a stickler for details. Cares a ton about Hubspot integration and how we will be ingesting contracts from CRM. Jason (Engineer, Influencer) is their technical lead. Very social and open to working through ideas on the best way to partner. Tom (Fractional Accountant, Influencer) is na older finance vet who had always used Maxio. Loves our contract based approach and is speaking with our partnerships team.  3) What are the Tabs features that the key POC cares about?  HS Integration and QBO integration. Tabs being the source of truth and moving them out of Excel spreadsheets. Contract-first, AI-powered automation: Extracts all billing/revrec rules directly from contracts.  Flexible billing logic: Supports ramp-ups, monthly/annual overages, varied renewal structures.  Journal entry automation: Syncs with QBO and supports eventual auto-push of entries. Integrated RevRec engine: Straight-line, prorated, category tagging, exportable journal entries.  Collections automation: Scheduled invoices, reminder emails, Slack alerts, and dunning.  Custom cash forecast engine: Learns customer payment behavior to improve predictions. |
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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**
  + Most contracts are standard order forms
  + About half of contracts will have a prepaid upfront BT which means that *Usage AI needs to be turned* on
* **Item Name:**
  + Use the item description
  + Differentiate if a single line-item has multiple BTs
  + Example:
    - 
    - This needs to be a Flat BT for $2,670 for the prepaid amount and a usage BT for $89 for the overage usage BT
      * Flat BT can be called Annual Minimum Commitment
      * Usage BT can be called Vision Pay-as-you-Go Inspections
    - Use best judgement given what each BT is
* **Quantity:** use the listed quantity (e.g., 120 inspections) if stated; default to 1 if not specified
* **Total Price:**
  + Use the full price shown in the table for the committed / prepaid amount unless it specifies the prepaid BT is billed on a different cadence
  + Make sure to match the total price with the invoicing frequency
  + Use in-line discounting -> include waived BTs with 100% in-line discount
  + For *overage* usage BTs, make sure to use the correct overage unit price
    - This could just be the regular unit price but sometimes the rate goes up
    - “Once the contracted amount of Annual Inspections is exceeded during the applicable annual period, client will be billed monthly at a rate of $54 per inspection.”
    - \*\*\*If there is an overage rate, you will need to create a usage BT for BOTH the regular amount and the overage amount (instructions below)
* **Contracts with an Overage Rate:**
  + [Example](https://garage.tabsplatform.com/prod/contracts/6e9decac-93ed-46ae-bed5-263e7a2a2dd1/preview)
  + If you see a contract where the prepaid annual amount is at a cheaper rate than the overage rate, you will need to create 2 separate usage BTs
  + The first can be the unit price that the prepaid amount is billed at
    - Use the event “inspections” and can title it normally
  + The second can be the unit price for the overage rate
    - Use the event “inspections (overage)”
    - Name the item the same as the regular but add “(Overage)” at the end
* **Service Start Date:** “Effective Start Date”
  + Use Effective Start Date from the order form (e.g., 07/18/2025 for Services S&L; 06/22/2025 for Main Street Launch).
* **Billing Start Date:** Same as Service Start Date
* **Months of Service:** “Contract Length”
  + Calculate based on contract length (typically 12 months unless stated otherwise).
* **Frequency:** 
  + Will be listed in the “Payments:” section
  + Often Monthly or Annual Upfront
* **Net Terms:**
  + “Payment Terms”
  + “Upfront” means it should be net 0 days
* **Usage AI for Prepaid or Committed Amounts**
  + This scenario is relevant when a customer has bought a package of inspections or other usage events in bulk upfront
  + Will need to set up Usage AI so that customer doesn’t get charged until they have gone over the prepaid amount
  + [Example](https://garage.tabsplatform.com/prod/contracts/6e9decac-93ed-46ae-bed5-263e7a2a2dd1/preview)
  + Select “Has Usage Requirements”
  + “Has Threshold”
  + Usage name: Overage
  + Included products:
    - If there is only 1 rate, use that
    - If there is an overage rate as well, select the regular rate NOT the overage rate
      * The overage rate should have “(Overage)” at the end
  + Threshold period: Full service term
  + Threshold amount: the prepaid annual amount / minimum commitment

### 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)*

* QBO payment link to accept CC
  + Using QBO’s payment link to accept CC payments
  + They have to onboard with basic Stripe Account
  + Low
* Syncing Revenue Reporting to HS
  + Syncing our ARR, TCV, Revenue, usage back to HS fields natively
  + Victoria wants to continue to use HS as the source of truth for revenue reporting. Cautious about moving all her reporting to Tabs
  + Low to Medium. Would be a HUGE win for her and cement a long term partnership. However, Sean is going to be the power user

### 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)*

* Demo 5/9 - https://us-56595.app.gong.io/call?id=2558689265761864240
* ROI + Proposal and Dayee introing MEC 5/19 - https://us-56595.app.gong.io/call?id=4399922205818376589
* Implementation and HS 6/18 - https://us-56595.app.gong.io/call?id=6891957760903557960
* Custom Demo 6/27 - https://us-56595.app.gong.io/call?id=6842820473198013716