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

### SOW: <https://docs.google.com/document/d/1OsgLlSYI8KduuhshJRfkO90n6a2C0tyuOMB4cWtYchM/edit?tab=t.0>

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| Notes Sections   *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills   Flat Fee  Unit-Based Pricing  Tiered Unit Pricing  Flat Unit Pricing  Minimum commitments, pre-payments, and thresholds with overages  Parent/Child Relationships and different for every customer for who gets billed  1) What is the merchant temperament?  Kelsey is the controller and an all-star. Very strong champion who joined the team in March. She will be the main Tabs user. Super nice and brought her baby to our negotiation call. Tom is the fractional CFO and de facto CFO. Been with the company for years and was the executive champion for Tabs. Will also be a power user (experience with Maxio and Chargebee)  Seba is the engineer tasked with implementing Tabs API. Very nice and smart, technical lead who responds well to workflow diagrams  John is VP of Product and built everything internally around Stripe. Might pop up here and there and is a touch cookie. Was originally a blocker to this deal and has been burned by Chargebee in the past.  3) What are the Tabs features that the key POC cares about?  Leverage Tabs' capabilities for complex billing models, usage-based metering, and programmatic API integration to automate their revenue and invoicing workflows.  Improve their payment collection and dunning processes through Tabs' features like Stripe integration and autocharge.  Automate collections, cash app, and month end close through Tabs. Currently takes at least a week to close the books and close out invoices.  Autocalculation of invoices from contract data. Extraction of customer information from contracts. |
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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)*

**Billing Start Date**

* Use contract Effective Date unless a different billing commencement date is listed
* For recurring monthly usage or seat fees, use the 1st of each month in the contract term
* For one-time charges (e.g., implementation), use the contract effective date

**Service Start Date**

* Match Billing Start Date for each BT

**Months of Service**

* Annual platform/seat bundles: 12 months
* Implementation: 1 month
* Usage or recurring monthly items: 1 month per BT
* Use full contract term length unless a shorter duration is specified

**Frequency**

* Annual for:
  + Platform base fees when charged upfront
  + Annual seat bundles when billed annually
  + One-time fees (e.g., Implementation)
* Monthly for:
  + Usage BTs (e.g., SMS, MMS, Voice)
  + Monthly recurring services (e.g., agent overages, short codes)

**Quantity**

* Use stated quantity in contract pricing tables or itemized lists
  + Default to 1 unless a quantity is explicitly listed
  + For usage-based rates (e.g., per segment or per minute), default quantity to 1 per line

**Total Price**

* Use price per unit as listed in the contract
  + Apply monthly or annual math as needed (e.g., $80/seat/month × 12 months × number of seats)
  + For usage rates (e.g., SMS/MMS/Voice), use per-unit rate + applicable carrier fee schedule if included

**Net Terms**

* Use stated payment terms if listed
* If no terms listed, default to 30 days

**Item Name**

* Use the label provided in the contract pricing table or fee description

**Item Description**

* Optional; use to clarify timeframe (e.g., "Year 1", "Month 1") or fee type (e.g., "SMS Volume")

**Integration Item**

**Other Notes**

* Do not process optional services unless clearly included in the contract
* If contract includes a quarterly minimum usage clause, do not create a BT for the minimum itself - this will be usage AI
* For usage BTs, derive frequency and rate logic from the billing structure in the contract
* If discounts depend on thresholds or exclusivity, apply only if alternate pricing is explicitly stated

### 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)*

* Enablements support for their app
  + Based on products in the contract, pulling from our API to kickoff their onboarding flow in app
  + Currently use Stripe for entitlements and it’s an opportunity to completely remove stripe from their process
  + Medium. Not covered in initial implementation but will be important down the line

### 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 4/10
  + <https://us-56595.app.gong.io/call?id=1268846078937426631>
* Sandbox Demo Prep 5/20
  + <https://us-56595.app.gong.io/call?id=7763331937968754560>
* Sandbox Demop 5/20
  + <https://us-56595.app.gong.io/call?id=4530330285006536775>
* Hubspot integration 5/23
  + <https://us-56595.app.gong.io/call?id=4198161729173875797>
* SOW Review 5/29
  + <https://us-56595.app.gong.io/call?id=4409834490225749925>
* Workflow Alignment with Product 5/30
  + <https://us-56595.app.gong.io/call?id=2589026622365619167>
* Technical Next Steps 6/5
  + <https://us-56595.app.gong.io/call?id=602107602197031180>
* Updated Proposal 6/10
  + <https://us-56595.app.gong.io/call?id=1130743308258403208>
* Next Steps 6/17
  + <https://us-56595.app.gong.io/call?id=3241941041999170843>
* Partnership Finalization 6/25
  + <https://us-56595.app.gong.io/call?id=8501042383180561379>