Merchant: Beacon Software

Demo date: May 6, 2025  
Scoping start date: May 6, 2025

MSA Signature Date: July 31, 2025  
Onboarding Kick Off Date: TBD

[If Exists] Opt Out Date: None  
Go Live Date: September 1, 2025

GTM POC: Kat  
Implementation POC: Royce

ERP: QBO

Tax Integration: No Tax

**Key people at Merchant**

1. Erik Mosney – Director

* Primary decision maker and Tabs champion.
* Driving evaluation, legal alignment, and rollout strategy.

2. Maaz Patel (Maaz) – Director of Accounting

* Partnering with Erik on implementation.
* Focused on operational setup and reconciliation workflows.

4. AR Analyst – New hire starting August 11

* Will operate Tabs day-to-day across portfolio companies.
* Junior, transitioning from Netsuite environment.

5. Divya – Co-founder

* Kept informed throughout but not involved in daily decisions.

6. Nilam – Co-founder

* Senior exec being brought along in the process.
* Supportive but not directly involved in the Tabs decision.
* Formal signatory on contracts.

**Notes Sections**

*(AE/ Implementation to fill)*

**Info on how merchant bills**

Beacon's portfolio companies currently use varied and often fragmented invoicing processes:

* Many companies use QuickBooks, and some store contracts in disparate systems like Google Drive, not CRMs.
* Some businesses have usage-based billing, often done retrospectively (e.g., giving 100 credits, then charging for overages at year-end).
* Invoicing is often manual and consumes substantial time from GMs or CEOs
* The goal is to move to a centralized, standardized AR process handled by a dedicated AR analyst using Tabs

**Is there any important merchant relationship information?**

* First three PortCos: PowerUp Sports, Edge Software, VieFUND
* Beacon evaluated Tabs for **use across its entire portfolio**, not just a single entity.
* The relationship is viewed as a **strategic partnership**, potentially evolving into a case study and collaborative story.
* We offered milestone-based billing and tailored pricing to support a long-term partnership.
* Beacon is backed by VCs like General Catalyst and is looking for tooling that supports scale and operational efficiency

**What is the merchant temperament?**

* Collaborative and constructive – Erik is highly transparent, thoughtful, and solution-oriented.
* He expresses high trust in Tabs, values clear communication, and cares deeply about cross-functional buy-in.
* Temperament is pragmatic: seeking long-term efficiency but cautious about contractual and customer-facing risks.
* Wants assurance that things will work as intended and not be disruptive to existing customer experience

**Is there a key POC: (i.e.: who is the buyer/decision maker?)**

* Erik Mosney, Director at Beacon Software, is the primary decision-maker and point of contact (Champion)
* Maaz Patel (Director of Accounting), newly hired, heavily involved in the evaluation from a technical perspective, will oversee implementation and onboarding
* Divya (co-founder) is the formal signatory but not the active buyer
* AR Analyst: Starting August 11th, will be Head of Admin for Tabs

**What are the Tabs features that the key POC cares about?**

* Multi-entity invoicing with standardized workflows.
* Usage-based billing and flexibility to support multiple pricing models (flat, tiered, usage, etc.).
* Agentic automation: Erik is excited about Tabs' AI-driven workflows for billing, AR, and cash application.
* CRM + contract ingestion via integrations with tools like DocuSign, HubSpot, and Salesforce.
* Auditability and reconcilability – confidence in Tabs becoming the subledger for AR.
* Customer touchpoint preservation: wants Tabs to handle invoicing delicately without alienating customers.
* Support model: 24/7 direct Slack/Teams access is a huge differentiator for them

**Company summary**  
*(AE to fill)*

**Summary of what company does:**

* Beacon Software is a platform company acquiring vertical SaaS and services businesses, aiming to centralize and modernize their finance operations.
* Their typical acquisitions are SMBs with little to no finance infrastructure. (sitting between $300,000 - 2 mill ARR)
* Beacon’s vision is to provide “YC-level infrastructure” to great but under-tooled companies

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

**What is the merchant's goal?**

* Centralize invoicing and AR across portfolio companies.
* Empower a lean finance team (1 AR analyst) to support many businesses.
* Avoid hiring large finance teams by leveraging Tabs’ automation and agentic capabilities.
* Create a replicable, scalable tech stack to use across their roll-ups.
* Use Tabs to help clean up and modernize fragmented back-office processes, making Beacon more efficient and attractive as a platform operator

**What pain are we solving?**

* Fragmented, manual AR processes across companies.
* Lack of billing standardization, creating bottlenecks and inefficiencies.
* Deferred revenue and reconciliation issues.
* GMs spending too much time on back-office tasks like invoicing.
* Poor collections performance (mentioned in the context of legal and services industries)
* Why are they buying Tabs?
* Is there an opt out clause? If so, what is the merchant looking for so they do not exercise it?

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

**Are there unique things about the customer creation process for this merchant?**

* Many contracts live in non-standardized locations (e.g., Google Drive).
* Some companies lack CRMs or store billing logic in proprietary databases.
* Beacon needs Tabs to support both CSV and API-based ingestion of usage data.
* Several customers have idiosyncratic pricing models, legacy practices, and usage policies that require custom workflows

**One off things to know about the merchant**

* They are building their centralized AR function from scratch with Tabs as the foundational tool.
* They've hired a new AR analyst starting August 11th, intended to run Tabs day-to-day.
* Interested in being a referenceable case study and customer advisory board member.
* Want to use Tabs as a competitive differentiator in their M&A strategy

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

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)  
*(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?

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
  + Why it's important
  + Urgency

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

**Rewatch by dates**

* [Disco](https://us-56595.app.gong.io/call?id=8336729422236600263)
* [Demo](https://us-56595.app.gong.io/call?id=6938771923739833981)
* [Pricing](https://us-56595.app.gong.io/call?id=7920066923850258011)
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* [Competitor Briefing](https://us-56595.app.gong.io/call?id=3392221227811300640)
* [Accounting Firm Demo](https://us-56595.app.gong.io/call?id=3042759419584457779)
* [Demo for Accounting Director](https://us-56595.app.gong.io/call?id=8080663925147682184)
* [Cont. Demo for Accounting Director](https://us-56595.app.gong.io/call?id=1340784125257887032)
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* [Ali and Erik](https://us-56595.app.gong.io/call?id=4551312192469195602)
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