Merchant: Corvus Robotics

Demo date: 08/21/25  
Scoping start date: 08/13/25

MSA Signature Date: 08/29/25  
Onboarding Kick Off Date: 09/05/25

[If Exists] Opt Out Date: Yes, first 90 days of the partnership.  
Go Live Date: Oct 1 ideally

GTM POC: Kat  
Implementation POC: Stephen

ERP: QBO

Tax Integration: No Tax

Key people at Merchant

* Eric Andreas – Head of Finance (joined Aug 2025, oversees all finance, invoicing, AR, collections).
* Jackie – CEO & Founder

Notes Sections

*(AE/ Implementation to fill)*

Info on how merchant bills

* Currently using QuickBooks Online (QBO) for invoicing.
* Contract types:
  + Typically 1–3 year agreements with monthly service fees.
  + Sometimes an upfront implementation fee.
  + Billing frequency varies (annual upfront, monthly, quarterly, or 12 months upfront).
* Processes today:
  + Contracts are scattered (Hubspot, spreadsheets, Slack, Google Drive).
  + Invoices are created manually in QBO → often late, which delays collections.
  + Some enterprise customers require invoices via procurement portals (Coupa, Ariba).
    - Did not commit to doing this for Corvus Robotics. He knows it will be a manual upload on their side.
* Payment methods: mix of ACH and large enterprise checks.
* Tax: calculated manually, not using Avalara/Anrok.
* No payment processor

Is there any important merchant relationship information?

* Contracts are often signed and stored ad hoc → CEO executes them, then uploaded to Google Drive/Slack, sometimes Hubspot.
* They want one centralized source of truth for contracts and billing.
* Relationship history: Eric used Tabs previously at Outrider and had a positive experience. He trusts Tabs already and is excited for the partnership.

What is the merchant temperament?

* Eric is practical, detail-oriented, and pro-automation.
* He’s been clear about wanting to move quickly.
* He’s receptive to Tabs and is familiar with the product already.
* Cares about predictability and efficiency.

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

* Champion: Eric Andreas (Finance Lead)
* Economic Buyer: Jackie, needs to sign off and may be final contract signer, but Eric is leading the process.

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

* Automated invoicing & dunning (stop sending late invoices).
* Revenue recognition & deferred revenue automation
* Renewals management with reporting and visibility into when they are coming up
* Collections visibility & cash forecasting
* Contract ingestion from Hubspot, Google Drive, Slack.
* ARR waterfall reporting and ability to export for custom reporting.
* Integration with QBO

Company summary  
*(AE to fill)*

Summary of what company does:

* Corvus Robotics builds autonomous warehouse inventory scanning robots. Their robots autonomously capture real-time inventory data, detect shrinkage, and provide analytics to help large warehouses operate more efficiently.

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

What is the merchant's goal?

* Scale finance operations without adding headcount.
* Support growth from ~50 active contracts → “hundreds” of customers by 2026.
* Ensure cash collections are timely and predictable.
* Build processes now so billing, renewals, and reporting are scalable.

What pain are we solving?

* Invoices go out late, leading to late payments and high DSO.
* Scattered contracts across Slack, Hubspot, and Google Drive → no centralized source of truth.
* Revenue recognition and deferred revenue are manual in QBO.
* Renewals and collections are ad hoc, not tracked systematically.
* Manual tax calculations (risk of errors, inefficiency).

Why are they buying Tabs?

* Eric already trusts Tabs from past experience.
* Tabs automates order-to-cash → saves time, reduces manual work, eliminates late billing.
* Tabs provides scalability ahead of growth (they expect to grow significantly in 2025–2026).
* Tabs provides renewal and revenue visibility that QBO lacks.

Is there an opt out clause? If so, what is the merchant looking for so they do not exercise it?

* Yes, 90 day opt out. It was put in place to give peace of mind to the CEO but the Controller (your POC and previous power user) has full conviction of Tabs and is 100% confident he will not use it.

Billing model  
*(AE/ Implementation to fill)*

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

* Some Corvus contracts start billing only after deployment/go live (can be 6 - 8 weeks after signing). Eric will adjust the go-live date once and Tabs will automatically reflow the billing & revrec schedule.

How contract is broken up?

* Implementation fees: recognized at go-live.
* Service fees: annual upfront (ideal) or monthly/quarterly (some contracts).
* Custom work: rare, but sometimes included in SOWs as one-off charges.
* Renewals: annual, ad hoc today but Tabs will track.

One off things to know about the merchant

* Enterprise customers (few) may require special invoice formatting (supplier numbers, procurement portal invoicing).
* Half of their routine invoices go out late today.
* They never charge late fees, but include them in contracts as leverage.
* Growth target: move from ~50 active contracts → hundreds by 2026.
* Payments include large checks, even from enterprises.

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

* Applies to all Order Forms using Corvus’s standard Master RaaS Agreement
* Includes both flat-fee and usage-based billing
* **General**
  + Billing type: follow flat vs usage as indicated in the contract
  + Billing schedules and revenue schedules to match 1:1
  + 30 day lead time from signature to go-live which is when billing should start
  + Customer should always already be created - name my vary slightly check address/details to confirm
* **BTs to process:**
  + One-time implementation fee
  + One time fee’s to be an upfront payment
  + Recurring RaaS service fee (usually annual)
  + Usage based development & support fees (if present)
* **Months of service:** use full contract term (e.g. 12 or 36 months)
* **Service start date:** latest signature date
* **Billing start date:**
  + Service Fees = signature date + 30 days
* **Item name:** name of service or fee
  + Implementation fee
    - One-time flat BT
    - Qty: 1
    - Frequency: none
  + RaaS service fee
    - Recurring
    - Frequency: default to annual unless stated otherwise
  + Usage-based development fees
    - Create event
    - Price: use listed price per hour
    - Frequency: monthly (in arrears)
* **Late fees:**
  + Item name: Late Fees
  + Qty: 1 (usage-based)
  + Price: 1.5%
  + Billing start date: contract start date
  + Service start date: same as billing date
  + Months of service: 12 (or contract term)
  + Frequency: monthly
  + Net Terms: default 30
* **Ignore:**
  + Complimentary or waived services (e.g. free consulting)
  + API access and hosting options
* **Processed examples:**
  + [dd3f00c7-79bd-4d83-9deb-54dab2d436c0](https://garage.tabsplatform.com/prod/contracts/dd3f00c7-79bd-4d83-9deb-54dab2d436c0/terms/key)
  + [18a7c662-cfde-42d8-ba45-61de5b4b7174](https://garage.tabsplatform.com/prod/contracts/18a7c662-cfde-42d8-ba45-61de5b4b7174/terms/key)

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=9056162517558282253&account-id=5754518756269793067)
* [Demo](https://us-56595.app.gong.io/call?id=3929021688962466985&account-id=5754518756269793067)
* [Pricing](https://us-56595.app.gong.io/call?id=5976405115232447287&account-id=5754518756269793067)