## Merchant: Tailorbird

Demo date: Nov 19, 2024  
Scoping start date: Dec 26, 2024

MSA Signature Date: Dec 23, 2024  
Onboarding Kick Off Date: Jan 3, 2025

[If Exists] Opt Out Date: N/A  
Go Live Date:

GTM POC: Josephine  
Implementation POC: Kenny

ERP: QBO

Tax Integration: No Tax

### 

### Key people at Merchant

### Accountant: Kruze Accounting Firm

### CFO: Jacques Souk - **main POC/day to day**

* CEO: Tim Cantwell
* Account Receivable POC: Jacques
* Billing POC: Jacques

### 

| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + Sample contracts are in Tailorbird account * Is there any important merchant relationship information?  1) What is the merchant temperament? * Friendly, straightforward, empathetic and excited about what Tabs is building   2) Is there a key POC: (i.e.: who is the buyer/decision maker?)  Jacques is the POC and CFO  3) What are the Tabs features that the key POC cares about?  QBO integration, invoice automation, payment portal to collect payments faster, parent/child structures, cash forecasting, rev rec and revenue reporting  **100 current customers  Not currently on stripe-they use ACH** |
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### Company summary *(AE to fill)*

Summary of what company does:  
  
Tailorbird uses AI to transform real estate property into actionable floorplan data, to accelerate speed-to-knowledge, reduce risk, and maximize returns. They work with commercial and residential real estate companies both at the property level and management level.

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

What is the merchant's goal? What pain are we solving? Why are they buying Tabs?

Reduce time spent on invoicing, including manual AP portal submissions. Collections has been a big challenge historically, so they would like to see a reduction in DSO. They are a finance team of 1, who uses Kruze as an outsourced accounting firm. Their current invoicing and reporting process is all manual through Quickbooks and spreadsheets. Jacques spends most of his time making sure invoices are accurate and sent on a timely basis, as well as chasing down payments and then manually pulling all of that data into spreadsheets for rev rec and ARR reporting. He is buying Tabs to help automate the invoicing and dunning process so that he can focus on more strategic finance projects, has a single source of truth for company revenue, as well as have the most accurate reporting for his board.

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

No

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

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

Some customers have a parent/child relationship due to billing the property management company and the related properties beneath them

* Information on how merchant bills

Fixed and usage components, typically billed on an annual basis with usage tiers based and pro rated terms.

Need custom AP portal integrations to the below AP portals. Ops team agreed to support the Tailorbird team operationally for 5 hours/month to facilitate payments until integrations are productized:

* Vendor Cafe
* RealPage
* NetVendor
* Paymode X
* OpsTechnology
* I-BEAM
* Risk Ledger
* IRT Portal (Client-Specific)
* How contract is broken up

Contracts can vary between customers, would be open to partnering with Tabs to help improve their contract structure and streamline it.

* One off things to know about the merchant

All product asks listed in this doc: [Tailorbird product requirements](https://docs.google.com/document/d/1Z4klN1qunjgivHvM2d8UeN_8d4-8riFiAUBfFkaZZdU/edit?tab=t.0)

Not on Stripe

### 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?
* 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)  
*(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