## Merchant Name: GovExec 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   Flat fee contracts only at present.  Usage-based billing is not currently in play, though they may consider it in the future.  1) What is the merchant temperament?  GovExec’s stakeholders are cautious, consensus-driven, and detail-oriented. They value persistence, thoroughness, and partnership, and once their concerns are resolved, they’re ready to move decisively.  3) What are the Tabs features that the key POC cares about?  Multi-Entity Billing & Reporting - GovExec has 10-15 subsidiaries and complex intercompany needs. GovExec360 is the pilot instance (most complex, <50% of the business) and then scale to other more simple entities.  They care deeply about Tabs’ ability to:   1. Consolidate reporting across entities (ARR, GAAP rev rec, collections, cash forecasting).    * Consolidated Cash forecast report via Omni is **the most important thing** for CFO Matt Ziegler 2. Handle invoicing & Collections workflows across entities    * Payment Flexibility & Cash Application are key 3. Historical data migration since the start of 2024 (Netsuite invoice records only) 4. Domain-specific email deliverability (Tabs team is building, this is a go-live requirement)   [Tabs Onboarding Sheet.xlsx](https://docs.google.com/spreadsheets/d/1s4T2iSGorwTaAmUQeYDNFsCCEXQEvizW/edit?gid=1307353559#gid=1307353559)-> overview of subsidiaries 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)*   * Custom email deliverability from a singular provided email domain will be available for any communications out of Tabs. Target general release Q3 2025. * Tabs will partner with Government Executive to provide consolidated data reporting for billing, Collections, Cash Forecast, ARR and GAAP Rev Rec through email delivery, any additional reports will be subject to scoping. |
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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)*

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) *(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)*

* Custom email deliverability from a singular provided email domain will be available for any communications out of Tabs. Target general release Q3 2025.
* Tabs will partner with Government Executive to provide consolidated data reporting for billing, Collections, Cash Forecast, ARR and GAAP Rev Rec through email delivery, any additional reports will be subject to scoping.

### 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)*

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