## Merchant Name: Quotapath 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   QuotaPath uses **two primary billing models**:   1. **PLG (Product-Led Growth) billing**     * Powered by **Stripe Subscriptions**.    * Used for smaller, self-serve customers via a **self-checkout flow** embedded in QuotaPath’s UI.    * Currently supports upfront credit card collection and recurring billing via Maxio, which they are migrating off of.    * They plan to retool this flow directly on Stripe, with Tabs ingesting data for rev rec and reporting. 2. **Sales-led (SLG) billing with seat-based and true-up mechanics**     * Customers sign contracts for a set number of users. They bill seat based, with seat floor and true ups.    * QuotaPath bills **monthly for true ups**, with **weekly seat counts** captured via internal scripts.    * These true-ups are currently processed via Maxio; Tabs would replicate this via either a product ops workflow or, eventually, a native productized workflow.    * Customer expectations are for **monthly billing cadence** with **weekly usage capture**.   1) What is the merchant temperament?  **Thoughtful, skeptical, but cooperative.**   * **Jonathan (Finance Lead)** is detail-oriented and cautious - he seeks confidence in *how* workflows will actually function, not just conceptual alignment. * They've been **burned by Maxio**, which makes them eager to switch but wary of overpromising. * They're not pushing unrealistic requirements, but they want **visible, verifiable solutions** - especially for the **self-checkout flow** and **seat-based billing automation**. * Open to ops-based stopgaps as long as there’s a clear **path to productization**. * Comfortable with shared workstreams if Tabs is transparent and accountable — they appreciate **clear expectations**, regular updates, and implementation flexibility.   3) What are the Tabs features that the key POC cares about?  **1. Stripe-Integrated PLG Support**   * Ingests **Stripe Subscriptions** directly for PLG customers. * Powers reporting, revenue recognition, and forecasting without retooling Stripe workflows. * Allows QuotaPath to embed billing info into their UI via API, replacing Maxio limitations.   **2. Self-Checkout + Auto-Charge Workflow**   * Enables **upfront credit card capture** at contract signing to reduce churn risk. * Tabs’ new **form-based self-checkout** experience (rolling out Q3) meets their sales team’s expectations for automation and payment assurance. * Temporary workarounds available if go-live precedes rollout.   **3. Seat-Based Billing with True-Ups**   * Tabs supports **monthly billing with weekly usage tracking**, aligned with QuotaPath’s current cadence. * Can process true-ups via API or automated exports. * Long-term: productized expansion billing workflows (currently in development) for a more scalable solution.   Pain  **1. Maxio limitations & inefficiencies**   * Their current billing system (Maxio) lacks flexibility and has led to manual workarounds. * Difficult to manage evolving product lines and pricing models, especially for seat-based upsells. * Poor API support limits their ability to embed customer billing views into QuotaPath’s UI.   **2. Self-checkout & PLG constraints**   * Their self-checkout flow depends on Maxio, which they’re phasing out. * They want a Stripe-powered flow with upfront card capture, but need a replacement that fits sales expectations. * Key concern: ensuring customers don’t churn by signing without providing payment info.   **3. Expansion billing & usage-based true-ups**   * Current process involves internal scripts pushing seat changes to Maxio weekly, then billing monthly. * They want to preserve this logic, but simplify the ops and reduce customer-facing billing noise. * Lack of real-time visibility and confidence in billing accuracy. |
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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)*

* FR 1
  + What is it
  + Why it's important
  + Urgency

### 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)*

Calls from the start of the year

* <https://us-56595.app.gong.io/call?id=4640625705198629687>
* <http://us-56595.app.gong.io/call?id=3739526401371608770>

Calls from June re-engagement

* <https://us-56595.app.gong.io/call?id=6991175222760942396>
* <https://us-56595.app.gong.io/call?id=6445359535305918240>
* <https://us-56595.app.gong.io/call?id=8851614502885033063>