

Tabs: Building Your Revenue Engine on Intelligence, Not Spreadsheets

A Thank You to Our Partners in Innovation

We're grateful to Tabs for participating in the Next Generation Solution Showcase on Billing and Revenue Management. This blog is written for CFOs of fast-growth companies who are building the foundation of their finance tech stack. Leaders who need crystal-clear visibility into cash flow, want data-driven investment strategies, and require accurate forecasting to guide their next phase of growth.

"AI-Native Revenue Platform for Modern Finance Teams"

That's how Tabs describes themselves, and it's not marketing fluff. Founded just two years ago by former operators who lived the pain of manual billing processes, Tabs has already raised \$90 million (including a Series B from Lightspeed) and secured customers like Cursor and StatSig. Their mission? To eliminate the manual effort strangling the order-to-cash process through autonomous AI agents that actually take action on your behalf.

Who Tabs Serves Best

Tabs is purpose-built for hypergrowth startups navigating that challenging \$10M to \$100M ARR zone where everything breaks. You know the story. Your sales team is crushing it, but your finance team of one to three people is drowning in spreadsheets. You're still on QuickBooks Online or just moved to NetSuite, and the complexity of your billing is threatening to force an expensive ERP upgrade you're not ready for.

Specifically, Tabs excels when you have high contract volume or complexity. Bespoke deals with custom terms that don't fit neatly into CRM fields. Usage-based billing components with consumption models, mid cycle upgrades, prorated licenses. Lean finance teams where you're scaling revenue three to ten times but can't scale headcount proportionally. A modern tech stack like Salesforce or HubSpot CRM with contemporary ERPs such as QBO, NetSuite, Sage, or Rillet.

If you're a CFO thinking "we're outgrowing our tools but not ready for the \$200K NetSuite implementation," Tabs was built for you.

What Makes Tabs Unique: The Contract is King

Here's where Tabs fundamentally diverges from legacy players in the billing automation space.

Traditional order to cash platforms pull data from CRM fields. Those little boxes in Salesforce that sales reps are supposed to fill out correctly. We all know how well that works. Tabs takes a radically different approach by treating the signed PDF contract as the single source of truth.

Their AI agent autonomously reads your MSAs and order forms, extracting every critical billing term. Start and end dates, products and services, cancellation clauses, renewal terms, sales tax requirements, usage parameters. It's not just OCR. It's intelligent extraction that understands context and billing logic.

This "PDF first" philosophy solves a problem every finance leader recognizes. Sales teams are brilliant at closing deals, but terrible at data hygiene. By going straight to the contract, Tabs eliminates the game of telephone between what was actually sold and what got entered into Salesforce.

Anthony Song of Tabs, puts it clearly: "We all know that sales people aren't the greatest stewards of data cleanliness or data quality. We're taking the actual signed PDF itself as the source of truth to generate the invoice."

The Capability That Changes Everything: End-to-End Autonomous Billing

Tabs isn't just extracting data. They're orchestrating your entire order to cash cycle through AI agents.

Here's the workflow. The moment a deal is marked "closed won" in your CRM, Tabs pulls the contract, extracts terms, drafts the invoice, integrates usage data from your data warehouse or spreadsheets, applies sales tax via Avalara or Anrok, sends the invoice, connects to your bank through Plaid, reconciles payments automatically, recognizes revenue according to ASC 606, and pushes journal entries back to your ERP.

And it learns. Their AI analyzes customer payment behaviors to predict when invoices will actually be paid, not just when they're due. This powers smarter cash forecasting and helps prioritize collections efforts.

For finance teams drowning in manual work, this is transformative. Instead of spending 80% of your time on data entry and reconciliation, you're doing strategic work. Analyzing trends, advising the business, planning for growth.

Customer Story: Statsig's 5X Productivity Multiplier

The Situation

Statsig, a high-growth analytics platform, faced the classic hypergrowth challenge. They were scaling past \$50 million in ARR with a finance team of just one to two people. They were still on QuickBooks Online, which typically taps out around \$10 to \$15M ARR, and the manual billing processes were becoming unsustainable.

Every month was a scramble. Extracting contract terms, calculating prorations, tracking usage, generating invoices, chasing payments, reconciling cash, recognizing revenue. The team was spending less time on strategic finance and more time playing data janitor.

The Stakes

For Statsig's CFO, this wasn't just about efficiency. It was existential. Without automation, they faced three bad options. Miss billing deadlines and damage customer relationships. Hire three to five more accountants in an already tight labor market. Or invest \$100K plus in a NetSuite implementation they weren't ready for.

Meanwhile, aged receivables were creeping up. Financial close was taking longer each month. The finance team couldn't provide the real-time metrics the executive team needed to make investment decisions.

The Action

StatSig implemented Tabs' AI native platform, letting autonomous agents take over the grunt work. Contracts flowed automatically from Salesforce into Tabs. The AI extracted terms, generated billing schedules, created invoices, and handled the entire collections workflow. Payment reconciliation became automatic. Revenue recognition happened in real time.

Critically, StatSig didn't have to change how they sold or restructure their contracts to fit a system. Tabs adapted to their complexity, not the other way around.

The Results and Why They Matter

The metrics tell part of the story. Three to five times scaling of billing output with the same one to two person team. A 10% reduction in aged receivables. Extended QBO shelf life by avoiding a six figure ERP migration. Dramatically less time spent on accounts receivable.

But the emotional and strategic impact runs deeper.

StatSig's finance leader could finally breathe. Instead of being reactive and scrambling to get invoices out the door, they became proactive. They had time to analyze unit economics, model growth scenarios, and advise on pricing strategy.

The CFO could walk into board meetings with real-time ARR waterfalls showing new customer acquisition, expansion, contraction, and churn by product line. Investors saw a finance function that was strategic, not just operational.

And perhaps most importantly, the company avoided hiring three to five additional accountants during the Great Resignation when finance talent was nearly impossible to find. That's \$300K to \$500K in annual savings, but more valuably, it's avoiding the management overhead and distraction of rapidly scaling a team.

The Bottom Line: Intelligence at the Foundation

For CFOs building their finance tech stack, Tabs represents a fundamental choice. Are you going to build on top of manual processes and spreadsheets, or start with intelligence at the foundation?

The old playbook of hiring more people to do more data entry doesn't work in today's environment. The CPA profession is facing a retirement crisis with fewer young accountants entering the field. Tabs' thesis is that AI agents will close this gap, not by replacing accountants, but by making them 10x more productive.

If you're a CFO at a fast growth company dealing with billing complexity, lean teams, and the pressure to scale efficiently, Tabs deserves your attention.

Watch their full Next Generation Solution Showcase presentation to see the platform in action and understand how AI native billing could transform your order to cash process. Visit tabs.com to learn more and connect with their team.

Your finance team shouldn't be drowning in spreadsheets. They should be driving strategy.