## Merchant Name: Astra 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 They have an internal system to create and calc invoices (very complex) - interchange components - platform - license - chargeback   Tabs will be ingesting their invoices as “contracts” to then essentially copy the invoices and send out of Tabs   1) What is the merchant temperament?  Nice and collaborative Sam- a bit dryer  Zach- great  3) What are the Tabs features that the key POC cares about?  Main reason they’re buying us is cash app and dunning. Rev rec is second priority |
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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)*

* **General**
  + All contracts will generally be invoices with flat BTs
  + Pay attention to how line items total up to make sure that the total in Garage lines up with the total on the invoice
* **Item Name**: listed on the line item
* **Quantity:** use the # under the “count” column if available; otherwise, use 1
* **Total Price:** 
  + Use the total listed for that line item
  + if negative (e.g., User Fees credits), process as a negative BT
  + Process $0 BTs
* **Service Start Date and Billing Start Date:**
  + Use the first of the month for whatever the date of the invoice is
  + So if the invoice date is July 27, 2025, use July 1, 2025 as the start date
* **Months of Service:** Always 1 month for these monthly invoices
* **Frequency:** Month
* **Net Terms:** use net 0
* **Additional items:**
  + If totals aren’t matching up, create an additional BT for the difference called “Additional Fee”

### 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)*

* .<https://us-56595.app.gong.io/call?id=8209417798175172621&account-id=4213540540444994996>
* .<https://us-56595.app.gong.io/call?id=1144396161279514880&account-id=4213540540444994996>
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