## Merchant Name: Astranis 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   Astranis’ billing process is recurring billing, sometimes milestone-driven rather than high-volume subscription or usage billing.  1 contract = 1 satellite - each engagement is a large, bespoke deliverable.  They don’t have standard seasonality or a high transaction volume; success is measured in a small number of annual contracts (e.g., “if we do 12 contracts a year, we’ll be flying”).  Their revenue recognition model (as discussed with Marshall) often books invoicing to deferred revenue first, then reclasses monthly as revenue is recognized.  Given the long build cycle for satellites (12–24 months), billing is often tied to milestones such as build phases, delivery, or service commencement, rather than a recurring monthly cadence.  1) What is the merchant temperament?  Astranis’ temperament was **engaged, curious, and collaborative**. They were consistently open in sharing context, quick to give feedback, and willing to dive into technical details with our team. They came across as thoughtful and methodical—asking good questions, seeking to fully understand our workflows and capabilities—while maintaining a friendly, personable tone throughout. Even when dealing with complex or nuanced topics, their approach was constructive and solutions-oriented.  3) What are the Tabs features that the key POC cares about?   * **Automated invoice generation** - They want invoices to flow cleanly through a single deferred revenue (or revenue clearing) account, with flexibility to post directly to revenue if needed. * **Revenue recognition automation** - Clear, auditable monthly rev rec journal entries that align with their accounting rules, especially given their milestone and long-term contract structure. * **Tight NetSuite integration** - Posting journal entries and invoices directly into NetSuite in a way that’s simple to manage and doesn’t require heavy manual intervention. |
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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)*

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