How Simetrik Turns Metered Usage Into A Scalable, Finance-Owned Revenue Engine

a case study report by vayu

Company Snapshot

Industry
Financial Data Reconciliation

HQ
Bogotá, Colombia

Stage
Series B+

Tech Stack
Salesforce + NetSuite + Snowflake

Core Challenge
Multi-entity consumption billing across contracts, thresholds, and NetSuite invoice rules

15 → 3
Month-end close days reduced

Key Outcomes

01 Month-end close reduced from 15 days to 3 days

02 Consumption metering automatically converted into contract-aware billing outcomes

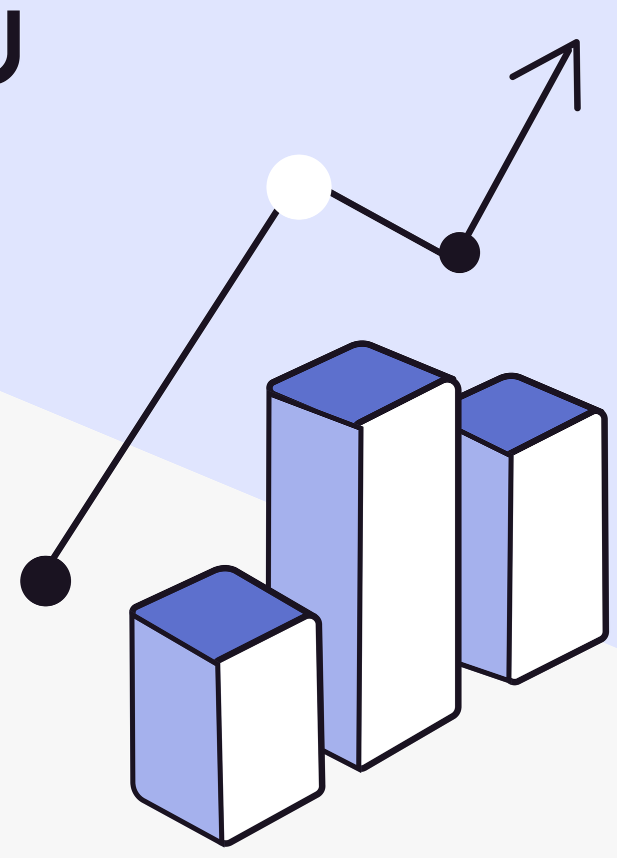
03 Pricing models, usage thresholds, renewals, CPI adjustments, and overage rules applied automatically

04 Billable vs. alert-only overages classified by contract logic

05 Invoicing completed in minutes instead of days

06 Earlier invoice readiness improves DSO efficiency and gives Finance, Sales, and CS better consumption and revenue visibility

> "Before Vayu, Everything Was Manual. After Vayu, We Don't Need Spreadsheets Anymore, And We Don't Make Mistakes Anymore."
>
> **— Felipe Pardo, CFO, Simetrik**



Simetrik: About & Pricing Model

Simetrik helps enterprise finance teams automate complex reconciliation and financial operations workflows. Serving enterprise organizations like Santander, Nubank, Mercado Libre, and Rappi, Simetrik is known for supporting a wide range of customer requirements through highly configurable commercial models.

That same flexibility extends to Simetrik's pricing model. Contracts are custom and can include any combination of the following:

- **01** Usage packages with defined consumption limits
- **02** Automatic renewals, with or without CPI-linked price adjustments
- **03** Overage rules - some triggering additional invoice charges, others generating commercial alerts only
- **04** Non-annual billing periodicities
- **05** Customer-specific contract terms

The Challenge

As Simetrik onboarded more enterprise clients, billing became more challenging. Each contract introduced a different combination of terms, renewal rules, and consumption thresholds, and overage rules, all of which could change mid-cycle or between billing periods.

Every usage event had to be evaluated in the context of the relevant commercial agreement before Finance could determine the correct billing outcome. The same customer behavior could produce different outcomes depending on the contract.

The business rules were clearly defined, but had to be applied manually.

Consequently, Finance spent each billing cycle translating Snowflake usage events, contract terms, package thresholds, and entity-specific invoice requirements into billable outcomes.

2025: Manual Billing Workflow

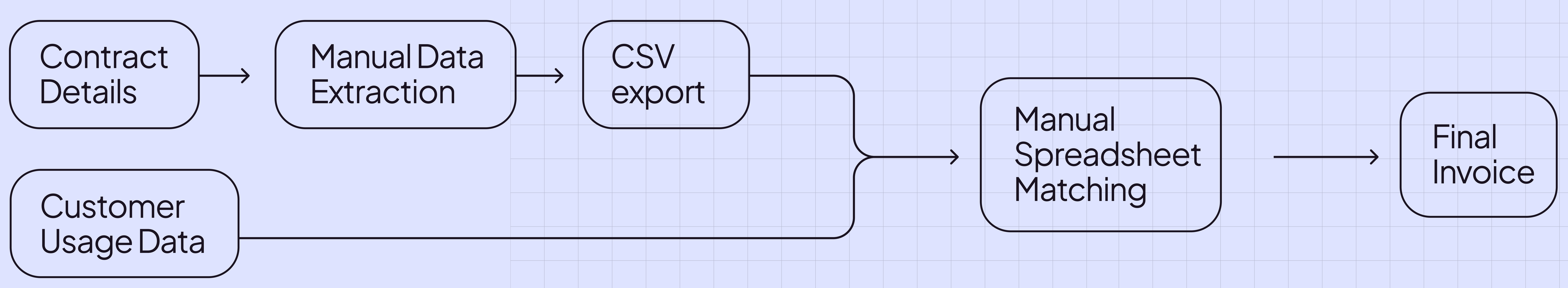
By late 2025, Simetrik's finance operations team was managing billing for a growing enterprise customer base.

The inputs required to generate invoices were distributed across several systems:

- **01** Contract terms (Salesforce)
- **02** Metered usage data (Snowflake)
- **03** Accounting records (NetSuite)
- **04** Renewal rules, including CPI-linked adjustments
- **05** Overage thresholds (billable or alert-only)
- **06** Subsidiary-specific billing requirements across the US, Brazil, and Colombia

Generating an invoice required Finance to manually reconcile those inputs before determining the correct billing outcome for each customer.

Simetrik's Invoice Generation Workflow in 2025



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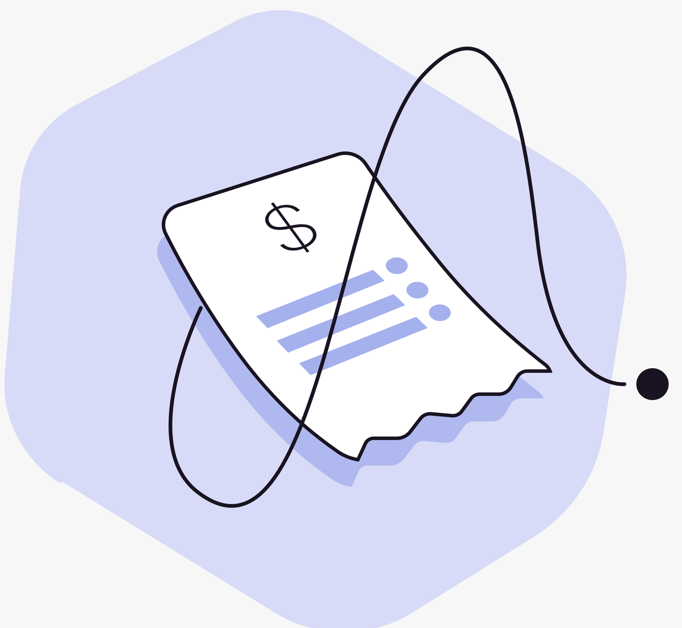
Simetrik

Under the Hood: Reviewing Simetrik's Billing Workflow

The workflow review identified four areas that made billing difficult to scale.



01 Contract terms and usage data were siloed in different repositories

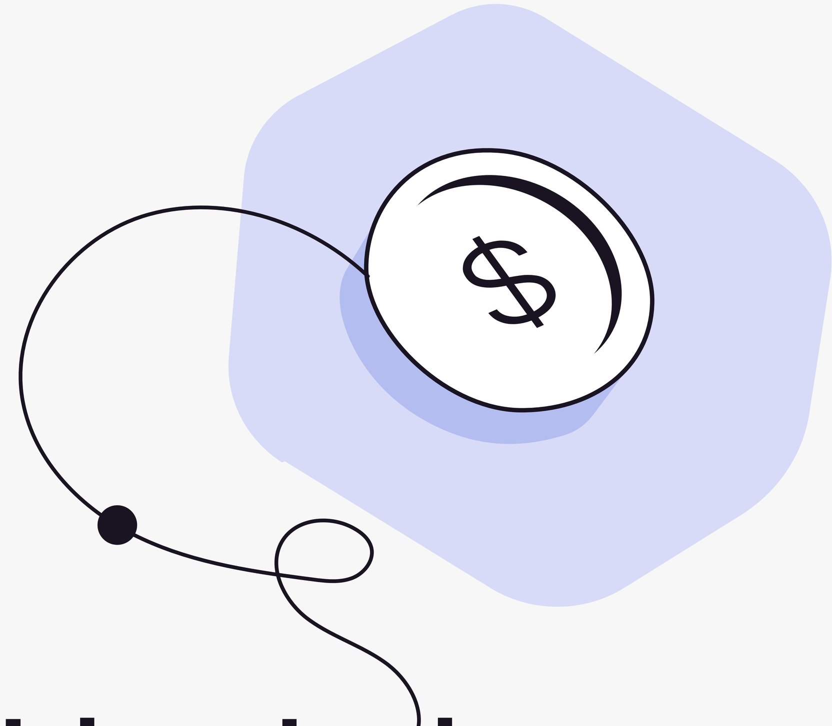
Before billing decisions could be made, Finance had to manually match contract information from Salesforce with usage data from Snowflake. The process was error-prone and stretched the close timeline at every billing cycle.

Contract Data

- Salesforce
- PDFs
- Spreadsheet1

Usage Data

- Snowflake
- Metabase
- Spreadsheet2



02 Identical consumption behaviors yielded varied commercial results across contracts

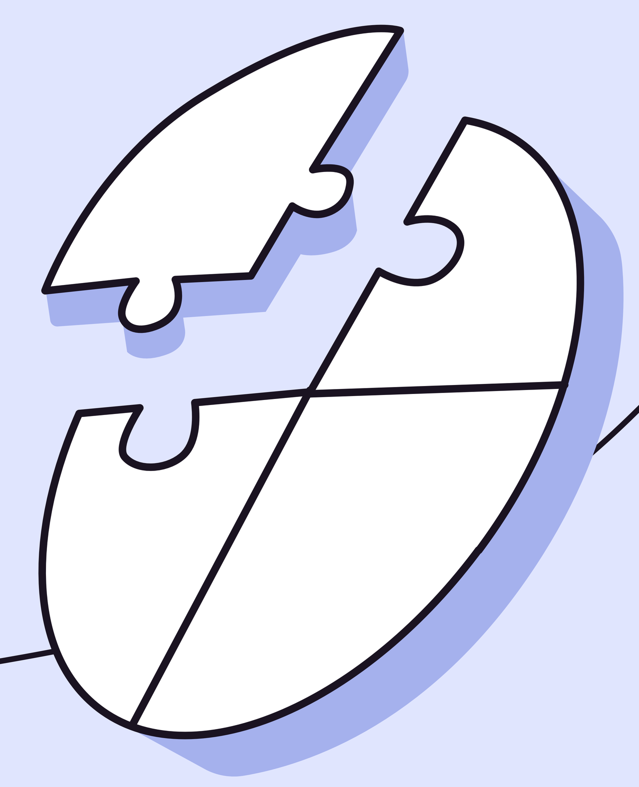
Some contract thresholds generated additional charges, while others required commercial follow-up only. Every month, Finance had to determine whether each customer's overage was billable or alert-only. Getting it wrong meant either revenue left on the table or a customer incorrectly charged.

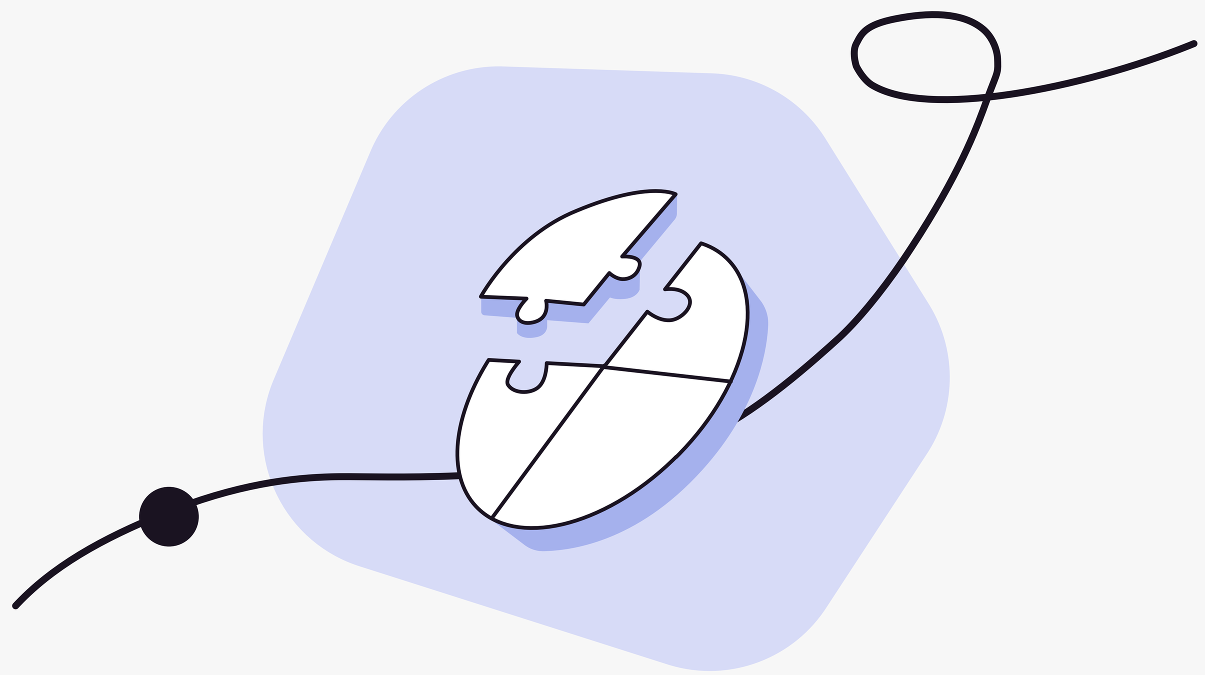
Billable overconsumption

- Add to invoice
- Track in spread sheet A

Non-billable overaged

- Send alert to CSM
- Track in spreadsheet b





03 Entity-specific invoice rules added another layer of complexity

Billing also had to account for legal entities across the US, Brazil, and Colombia. Each subsidiary had its own NetSuite custom form, required fields, currency handling, exchange-rate logic, location, class, PO number, and billing rules. Finance had to ensure every billing outcome was routed to the correct legal entity and invoice structure.

04 Renewal & CPI adjustments had no enforcement mechanism

When a renewal was due, Finance had to manually apply the CPI increase to the base price, then update the billing spreadsheet. The math was simple but with no system to automate them, renewals and price adjustments could be missed, delayed, or applied inconsistently across customers.

Element	Location
Renewal dates	Spreadsheet C
CPi percentage	Spreadsheet D (updated quarterly)
Contract base price	Salesforce

05 Commercial teams had no real-time visibility into revenue data

Whenever Sales or Customer Success needed information about a customer's usage or billing status, they had to go through Finance. This made it hard to proactively manage renewals or identify business opportunities in real time.

> "Customer Success Didn't Have Visibility With Certain Customers. Now We Have Real-Time Data In One Place, So We Can Operate With Customers Better".
>
> **— Sofia Pardo, Finance Operations Lead, Simetrik**

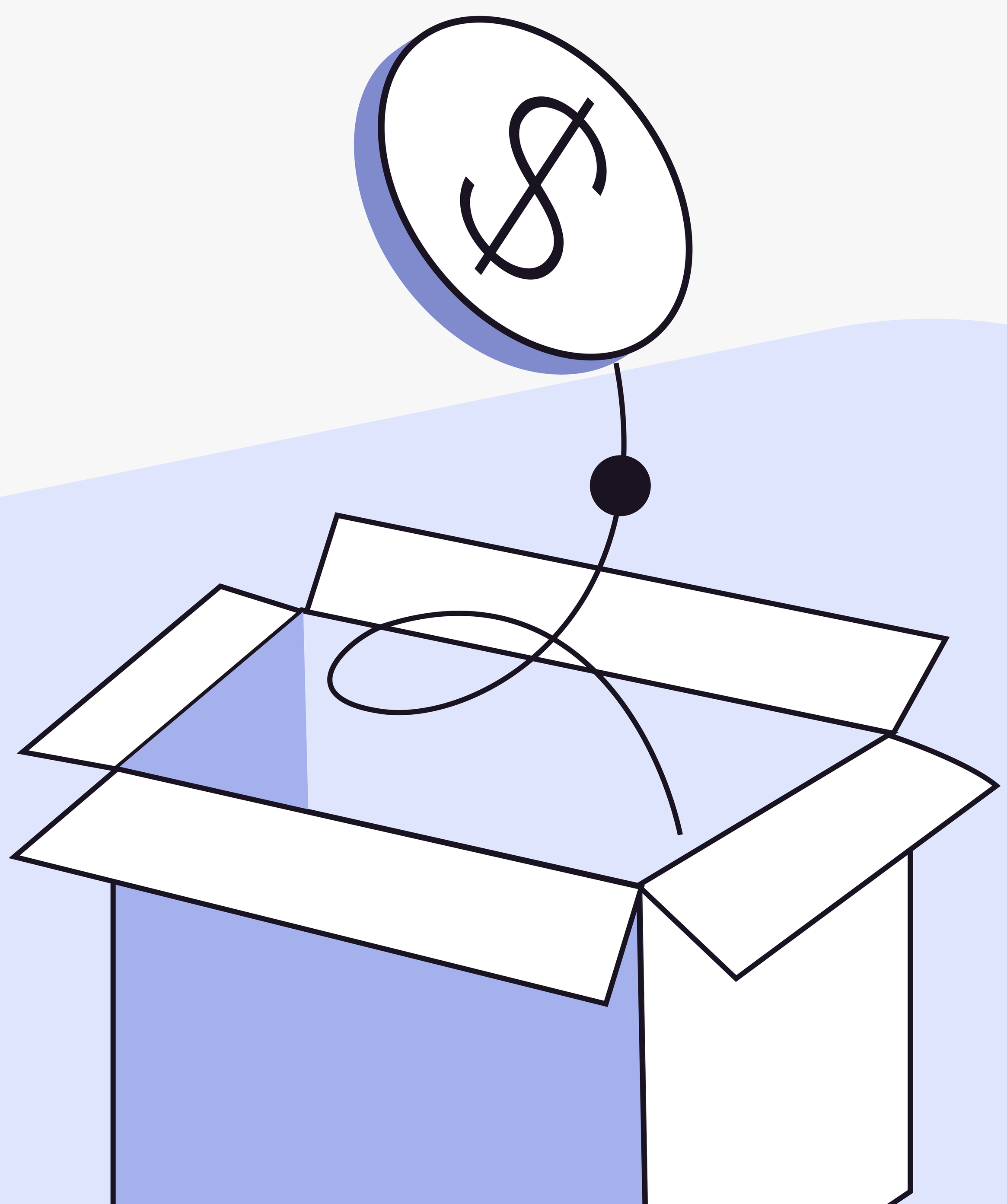
The Decision

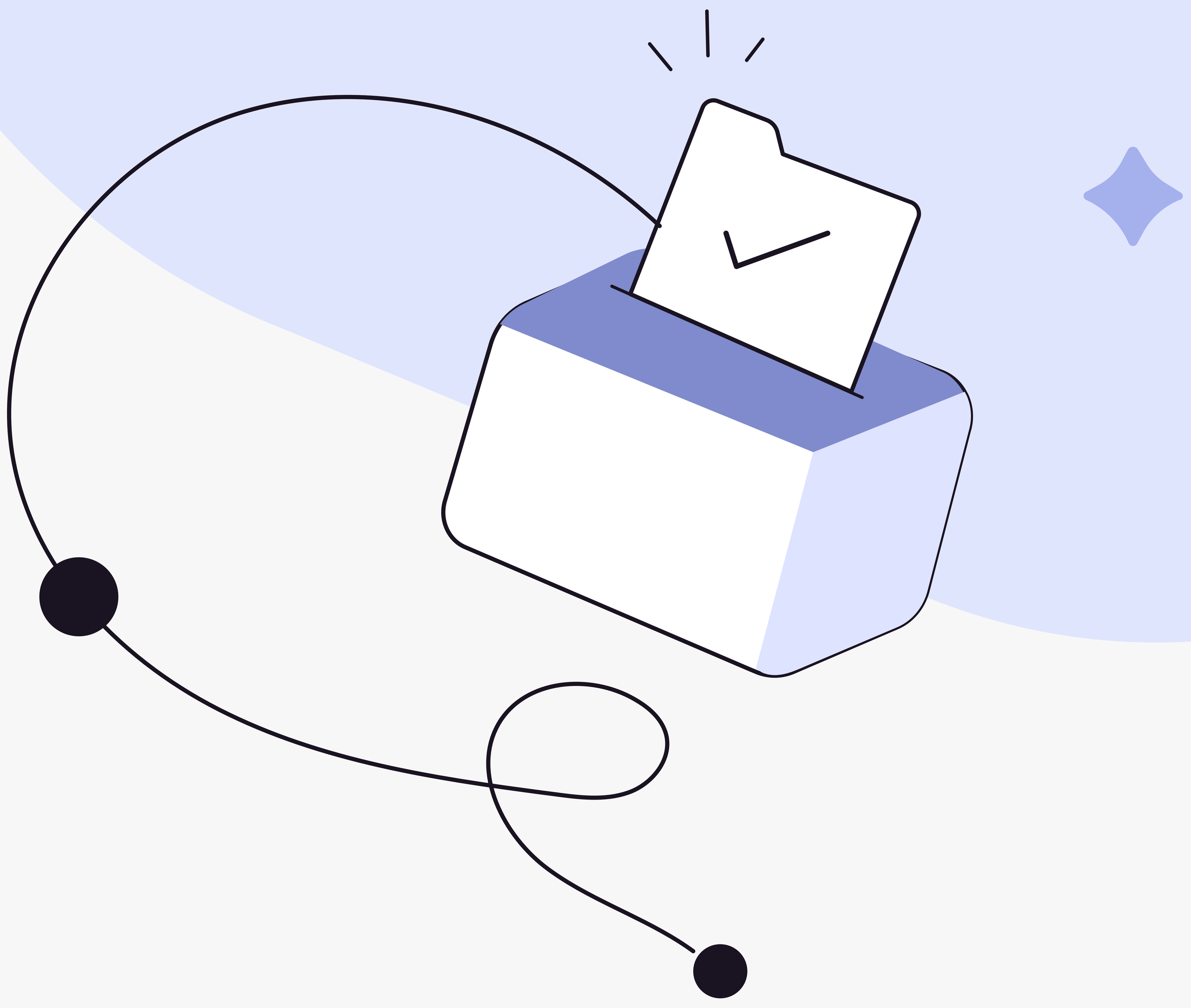
By late 2025, Simetrik was looking for a more scalable way to manage billing. The existing process was still functional but also reaching its limits.

Four options were on the table:

Option	Projected outcome at 100 customers	Estimated cost
Hire more billing staff	+2 FTEs. Manual error risk remains. Sales still requests visibility via Slack.	~$150,000 annual
Build internal tooling	6–9 months engineering time. Ongoing maintenance. Not a core competency.	1–2 engineers, fully loaded
Continue existing process	Reconciliation hours grow linearly with customers. Month-end delays become routine.	Increasing operational risk
Implement a revenue execution platform	Finance defines the billing logic once. The platform continues to apply it automatically.	Yearly SaaS subscription investment

Each option came with a different trade-off, leaving most of the operational burden with Finance or shifting it to engineering. Vayu was the only alternative that could execute complex billing rules across usage, contracts, entities, and invoicing without requiring any team to absorb the growth.





The Solution

New Workflow with Vayu

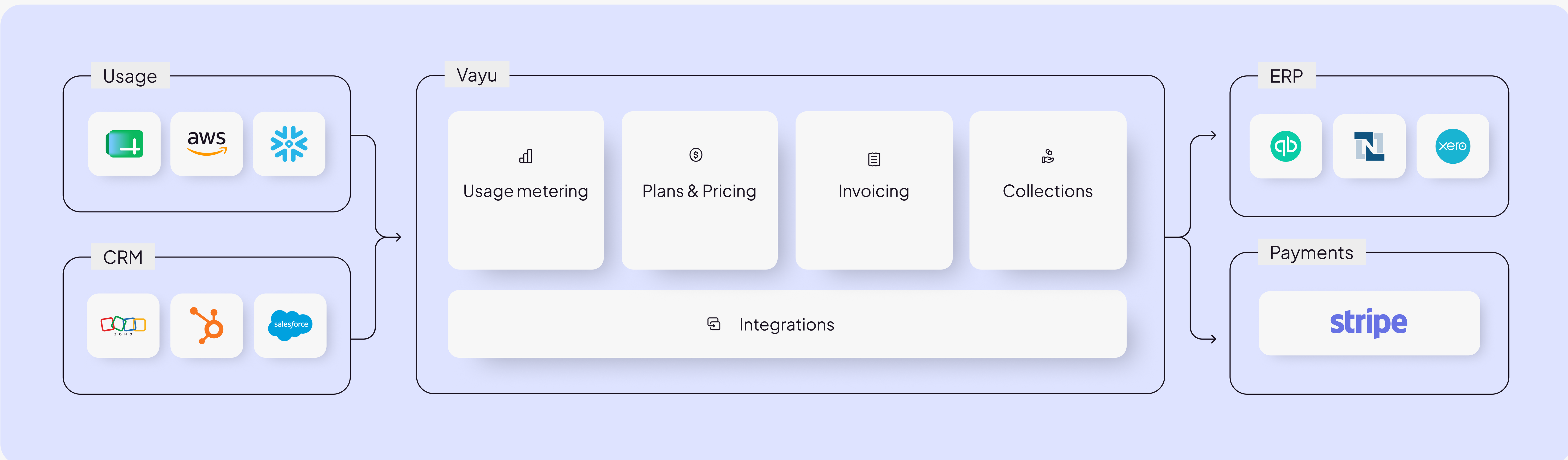
The workflow review showed Simetrik had both the tech stack and billing logic in place. What was missing was a centralized revenue engine that would connect contracts, Snowflake usage events, subsidiary-specific NetSuite requirements, and billing workflows — then apply the right logic automatically without manual intervention.

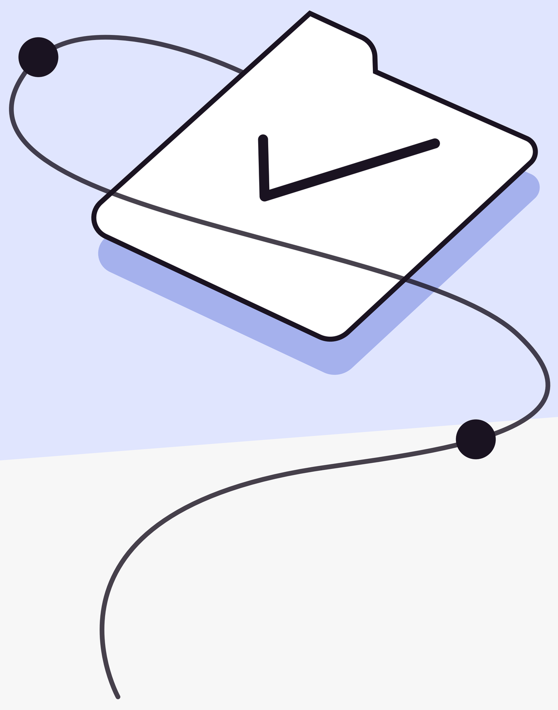
salesforce → Contract terms: package volume, start/end date, renewal rule, CPI flag, overage treatment

snowflake → Vayu continuously meters rows and gigabytes per customer, maps consumption to the relevant package, and evaluates it against contract-specific thresholds."

ORACLE NETSUITE → Accounting records, invoice status, subsidiary-specific forms, required fields, currency, exchange rate, location, class, and PO number

Simetrik chose Vayu to operate as that live execution layer.





Vayu continuously evaluates contract and usage activity against the relevant billing rules. When a contract is modified or a customer exceeds a usage threshold, the change is automatically evaluated against the relevant billing rules and reflected throughout the system.

How Rules Are Configured Within the Platform

Vayu gives Finance direct control over billing logic. Built for business users, the platform allows Finance teams to configure, update, or remove rules independently, without involving Engineering.

The platform supports a broad range of billing rules and operational workflows. For example:

- **Apply contract-specific overage rates when thresholds are exceeded**
- **Classify overages as billable or alert-only based on the contract**
- **Route invoice data to the correct NetSuite subsidiary form**
- **Notify Sales when usage exceeds a predefined threshold**
- **Generate invoice line items before month end**

Finance defines the logic once. Vayu applies it consistently, across every customer, every cycle.

> "I Really Like The Tool, The Platform. I Told Sofia Some Days Ago That You Guys Thought Of Everything — You Have A Lot Of Features To Set The Contracts And All Of This. It's Pretty Complete, A Really Good Tool."
>
> **— Alejandro Prieto, Technical Lead, Finance Operations, Simetrik**

New Workflow: Automated Billing & Real-Time Visibility

Once the rules are set, Vayu runs them continuously against live contract and usage data. The system produces two distinct outputs: invoices for Finance and dashboards for Sales and CSM.

Invoices (to NetSuite)

Vayu generates invoice PDFs and line item data directly within NetSuite. The finance team no longer builds invoices line by line - they review the invoices Vayu creates, focusing on review and governance.

Dashboards (for Sales and CS)

Sales and customer success teams see consumption and revenue visibility directly inside Vayu. For each customer, the dashboard shows:

- Usage percentage (how much of the package has been consumed)
- Overage flag (billable or alert only)
- Next invoice date and estimated amount
- Renewal status and upcoming price change

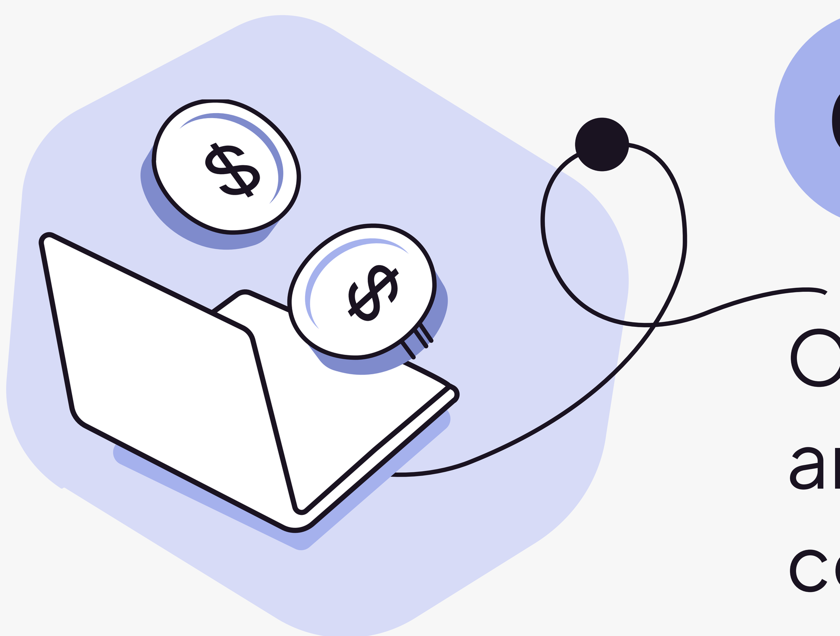
The dashboard updates continuously as new usage data arrives.

> ”Our Biggest Goal Is That The Sales Team Enters Vayu To Review Consumption — We Don’t Need Them To Use Metabase Or Snowflake. Our Biggest Goal Is That Our Sales Team Comes To Vayu And Checks The Consumption, The Numbers, The Invoices, Everything.”
>
> **— Alejandro Prieto, Technical Lead, Finance Operations, Simetrik**

Results

Strategic Outcomes

Vayu's impact shows up first in Finance's day-to-day: billing operations are efficient and predictable, and the team has complete control over billing logic and execution. But the broader impact is felt across the organization.

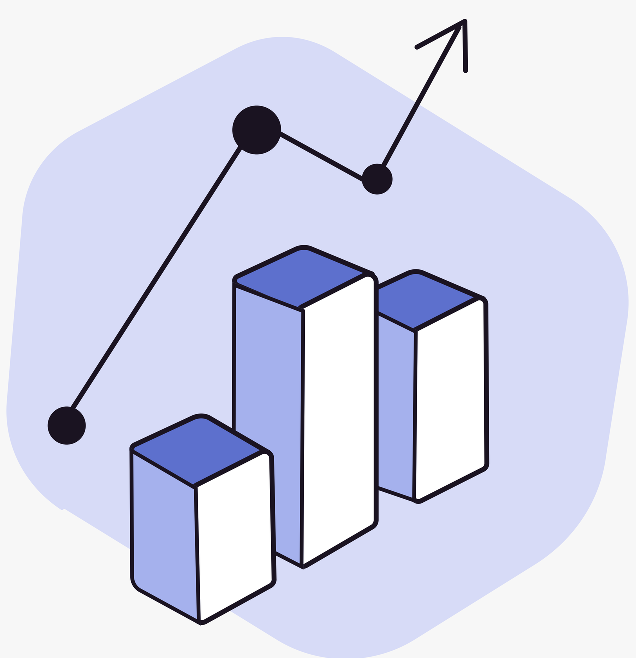


01 Revenue leakage is no longer an operational risk.

Overage events are evaluated automatically against contract terms and classified as billable or alert-only. The same rules are applied consistently across every customer and billing cycle.

02 Revenue issues are visible before they become problems.

Usage, renewals, contract changes, invoice activity, and customer consumption trends are visible as they happen. Teams can identify risks or opportunities and intervene earlier in the customer lifecycle.



03 Simetrik is positioned to innovate and scale.

The new infrastructure can support additional customers, contracts, entities and pricing models without additional headcount or work processes.

04 Finance evolved into a strategic revenue operations function.

Finance can focus on commercial outcomes, owning the end-to-end revenue workflow and governing how revenue is executed across the business.

Operational Outcomes

Outcome	Before Vayu	**With Vayu**
Usage metering	Usage pulled from Snowflake and manually matched to customer packages and contract thresholds	**Vayu meters rows and gigabytes by customer & evaluates consumption against relevant contract thresholds**
Overusage tracking	Manual calculation and classification per customer, each cycle	**Automated. Contract rules define whether overage is billable or alert-only**
Invoicing	Manual, line by line, spreadsheet-driven	**Automated. Vayu generates invoice data and pushes it to the correct NetSuite subsidiary setup**
Renewal & price increases	Tracked in a separate spreadsheet, applied manually	**Encoded in contract rules, applied automatically on renewal**
Sales access to usage data	Request routed through Finance, Metabase, or Snowflake	**Self-serve consumption, invoice, and contract visibility inside Vayu**
Reconciliation speed	Manual spreadsheet-based reconciliation of usage, overages, and billing outcomes	**Automated reconciliation workflow. Use "90% faster" only after customer approval**
Billing error risk	Human classification of billable vs. alert-only overages	**Rule-based classification, consistent across all customers and billing cycles**

The Bottom Line

Today, Simetrik's Finance, Sales, and Customer Success teams share a real-time view of revenue. Vayu automatically evaluates customer usage against commercial rules, ensuring every usage event reaches the correct revenue outcome.

With that visibility comes control. Simetrik can continue evolving its commercial models, confident that every customer agreement can be executed consistently at scale.

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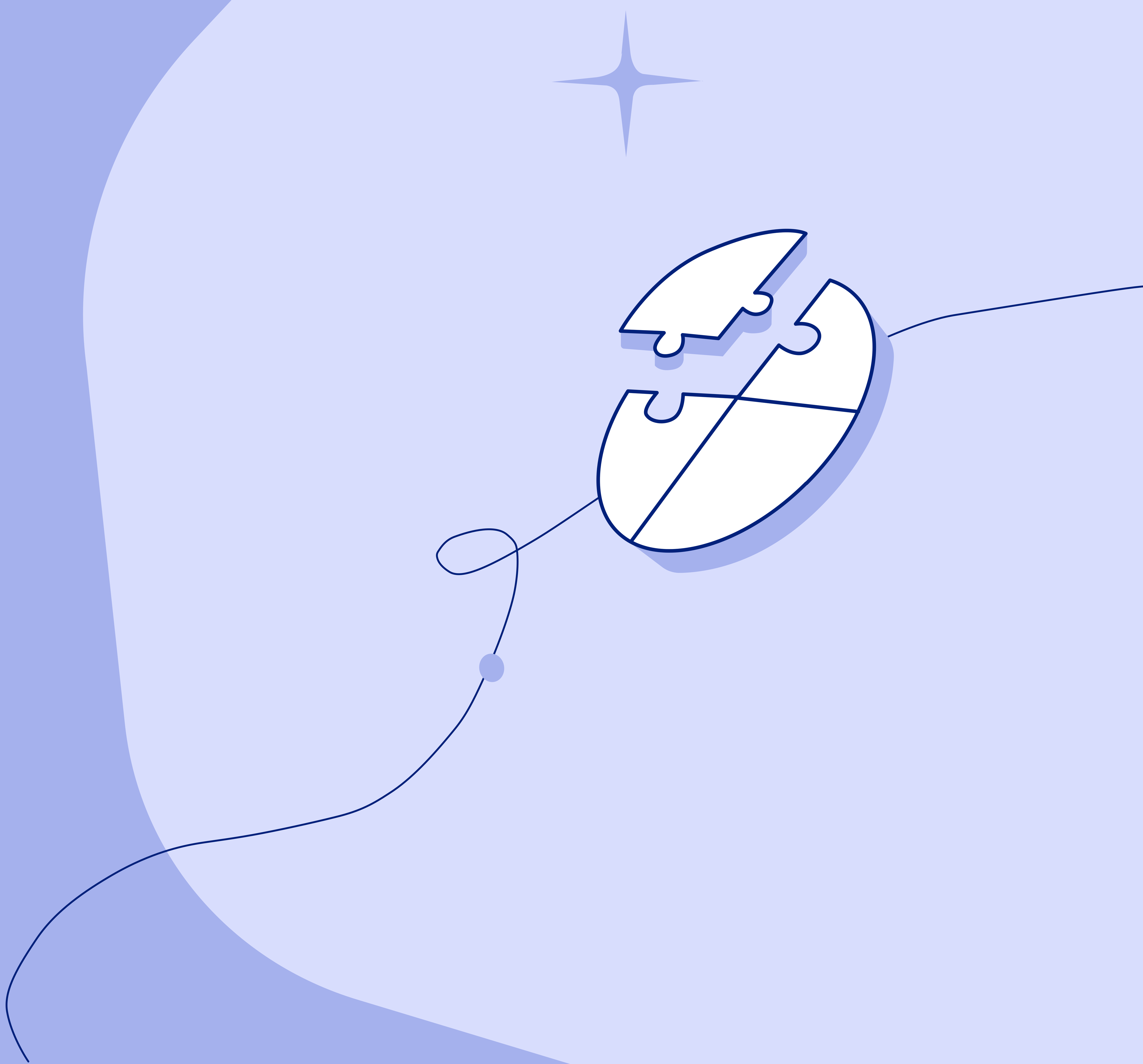

Vayu provides finance-native revenue infrastructure for modern SaaS and AI companies. Vayu helps fast-growing teams launch new pricing models, scale usage, and move from pricing decisions to execution without engineering drag. **For more information, visit withvayu.com**