



MULTI-ENTITY MANAGEMENT · DISCOVERY QUESTIONNAIRE

# MEM Discovery Questionnaire.

For Microsoft Dynamics 365 Business Central · 2026 edition, updated for MEM Basic, Essentials and Premium.

Thank you for taking the time to complete this questionnaire. Your answers help your Binary Stream partner and our solution consultants recommend the right Multi-Entity Management tier and scope the implementation accurately. There are no wrong answers. Where a question does not apply, write "N/A". Where you are unsure, say so; we will cover it on the discovery call.

## Part 1: About our organization.

|                                                |  |
|------------------------------------------------|--|
| <b>Company name.</b>                           |  |
| <b>Contact name and role.</b>                  |  |
| <b>Email and phone.</b>                        |  |
| <b>Business Central partner (if selected).</b> |  |
| <b>Headquarters location.</b>                  |  |
| <b>Date completed.</b>                         |  |

## Part 2: Current environment.

1. How many Business Central licenses do you have today, or expect to have? These are your Microsoft Business Central license types; MEM licenses are matched to the same total.

|                          |  |
|--------------------------|--|
| <b>Essentials users.</b> |  |
| <b>Premium users.</b>    |  |
| <b>Team Members.</b>     |  |
| <b>Device licenses.</b>  |  |

2. If you are not yet on Business Central, please describe your current environment.

|                                              |  |
|----------------------------------------------|--|
| <b>Current ERP and version.</b>              |  |
| <b>User count.</b>                           |  |
| <b>Integrations or third-party software.</b> |  |

3. Which Multi-Entity Management tier are you currently considering?

☐ MEM Basic   ☐ MEM Essentials   ☐ MEM Premium   ☐ Not sure yet

Any context on your choice:

### Part 3: Business overview.

4. What is the main purpose of using Multi-Entity Management? For example: centralizing business processes in a single instance, or managing multiple business entities. Please explain.

5. How many entities do you have today, and how many do you expect in the next two years? Which of these changes do you also expect over that period?

☐ New entities or acquisitions   ☐ A second finance team or entity owners   ☐ Higher transaction volumes  
☐ New Business Central modules   ☐ Manufacturing or service across entities

Used for licensing and implementation scoping. Entity count does not determine which MEM tier fits you.

6. Do all entities share the same currency, Business Central localization, fiscal year and close? If not, please specify below, including any entity or entity owner that runs its own period-end or year-end close.

|                                 |  |
|---------------------------------|--|
| Local or home currencies.       |  |
| Business Central localizations. |  |
| Fiscal years and close.         |  |

7. Does your organization have a hierarchy? If so, please explain.

8. Are there partial ownership stakes between entities, or a formal parent and subsidiary structure? If so, please specify.

#### **Part 4: Finance team and close.**

9. Does one finance team work across all entities, or are there separate finance teams or entity owners responsible for their own entities? Please describe.

#### **Part 5: Business Central knowledge and modules.**

10. What is your current knowledge of Business Central?

☐ None   ☐ Seen a demo   ☐ Previous experience   ☐ Working on it now

11. If you are already on Business Central, is entity or company already one of your two global dimensions? If not, do you have a global dimension available to set as the entity dimension?

12. Is there any other reason, such as a regulatory requirement, that you may need to keep separate Business Central companies? Please explain.

13. Are you planning to use any of the following Business Central modules? For any in scope, tell us which entities will use them and whether anything moves between entities.

- ☐ Fixed Assets   ☐ Projects   ☐ Assembly   ☐ Advanced Warehousing   ☐ Manufacturing  
☐ Service Management

Which entities will use them? Will assets, records, production or service delivery move between entities?

14. What other third-party add-ons or integrations are you considering?

## Part 6: Intercompany transactions.

15. Do your finances require only basic General Ledger, Payables and Receivables?

16. What volume of intercompany transactions do you have per day, month or year?

17. Do you need to post or pay across many entities in a single run (for example, one payment run or journal posting for several entities at once)? If so, please specify.

18. Do entities keep their own bank accounts for issuing payments, or is payment processing managed through a centralized treasury?

19. Do you require intercompany distributions between all entities, and do you regularly allocate repeated expenses or revenues across entities? If you allocate, is manual entry enough, or do you need reusable allocation templates?

20. Do your entities require arm's-length transactions, such as issuing purchase and sales invoices, when doing business with one another?

### **Part 7: Security and access.**

21. Do you need to limit which entities users can post transactions to?

22. Does any user need to be unaware of entities they do not work in, so that those entities are hidden from them entirely? If so, please specify.

23. Does master data (customers, vendors, items) need protecting by entity, so that one entity cannot see or use another entity's records? If so, please specify.

24. Do auditors or other external parties access your data directly, and do you need to restrict what they can see?

## Part 8: Master records.

25. Do you want a cleaner way of managing customers and vendors across multiple entities?

26. Do you need to manage items or inventory globally and per entity?

27. Do you need to align your chart of accounts by entity?

## Part 9: Reporting.

28. Do you require consolidated reporting as well as reporting by entity?

29. Do you need to process eliminations as part of your consolidation?

30. Do you have a reporting solution in place today? If so, which one?

## Part 10: AI, currency and journal imports.

31. Are you using AI today, or do you plan to? What tools (for example Copilot, Claude, ChatGPT)? Please explain.

32. When handling multi-currency transactions, how important are automated, regularly updated exchange rates?

33. Do you regularly import journals from spreadsheets or other systems? If so, please specify.

### **Part 11: Related needs.**

Binary Stream offers other Business Central solutions. These questions help us understand your wider requirements.

34. Collections: do you experience challenges with collections, such as late payment, disputes, communication or a lack of customer self-service?

35. Leasing: how many leases do you manage as a lessee or lessor?

36. Billing, subscriptions and deferrals: do you have billing, subscription or deferral needs that standard Business Central does not meet?

37. Is there anything else we should know about your multi-entity requirements?

## Reading the answers: tier indicators.

The tier follows requirements, never budget or entity count. Read the answers in this order: any Premium indicator first, then any Essentials indicator. If neither appears, MEM Basic fits. Confirm on the discovery call; the questionnaire supports discovery, it does not replace it.

| Answer that points to a tier.                                                                                           | Tier.        | Questions.                                                     |
|-------------------------------------------------------------------------------------------------------------------------|--------------|----------------------------------------------------------------|
| Manufacturing or Service Management running across entities.                                                            | Premium      | Q13                                                            |
| Users must be unaware of entities they do not work in; auditors restricted.                                             | Essentials   | Q22, Q24                                                       |
| Master data protected by entity.                                                                                        | Essentials   | Q23                                                            |
| Separate finance teams or entity owners; entities close on their own; different fiscal year-ends (confirm on the call). | Essentials   | Q6, Q9                                                         |
| Partial ownership or a formal parent and subsidiary structure.                                                          | Essentials   | Q8                                                             |
| Reusable allocation templates needed.                                                                                   | Essentials   | Q19                                                            |
| Posting or paying across many entities in one run at volume.                                                            | Essentials   | Q16, Q17                                                       |
| Fixed Assets, Projects, Assembly or Advanced Warehousing in use (any use, not only entity assignment).                  | Essentials   | Q13                                                            |
| AI features, Easy Journal Import, Easy Currency Exchange as requirements.                                               | Essentials   | Q31, Q32, Q33                                                  |
| Connect entities, automate intercompany, consolidated and entity reporting, eliminations, one central finance team.     | Basic        | Q9, Q16, Q19, Q20, Q21, Q28, Q29                               |
| Growth expected in the next 12 to 24 months.                                                                            | Upgrade path | Q5. Record the triggers in the CRM; raise them as they appear. |

**Not a tier indicator: entity count (Q5), currencies and localizations (Q6). They set the licensing band and implementation scope only. The fiscal-year and close row in Q6 is an Essentials indicator.**

**Business Central licenses (Q1)** are Microsoft license types. MEM Basic is a MEM tier, not a Business Central license, so it belongs in Q3, not Q1.

## Upgrade and downgrade, for the qualification call.

| Situation.                                      | What to tell the customer.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>New customer on Basic.</b>                   | Implementation bundle is the same as Essentials: same hours, US\$6,400 MSRP.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Basic customer growing into Essentials.</b>  | A license change through Finance. Optional Basic-to-Essentials upgrade services bundle: US\$1,320 MSRP (US\$1,155 VAR), 6 PS hours, typically 2 to 4 weeks from kickoff.                                                                                                                                                                                                                                                                                                                                                                                               |
| Existing Essentials customer asking about Basic | Not self-service. Complete Q6 and Parts 4 and 7 with the customer first; any Essentials indicator means they stay on Essentials. If none, the partner assesses requirements and risk with the customer before licensing is updated. No services required. The customer loses user entity security, master data security, batch processing, allocation templates, org chart support, entity close, AI features, Easy Journal Import, Easy Currency Exchange, Advanced Warehousing and Fixed Assets, Projects and Assembly support. A downgrade is not a retention tool. |
| Timing question                                 | "MEM Basic is licensed and priced from October 1, 2026, and includes the features listed for Basic. Choose the tier your requirements call for from day one." Partner context: tier boundaries are enforced in releases over the coming months, and features outside Basic are then disabled for Basic customers.                                                                                                                                                                                                                                                      |