



Activating Subscription Billing Opportunities

A practical partner playbook for knowing when D365 BC core capabilities are enough – and when Binary SBS becomes critical.



Featured speaker.

Taimoor Tariq
Product Marketing Manager

Overview and flow.

1

Why subscription billing becomes a hidden sales-cycle risk.

2

Core Business Central vs Binary SBS – where each fits.

3

The partner cheat sheet:
7 high value triggers.

4

How to engage Binary Stream early and de-risk the deal.



The subscription market size.

The global subscription economy market size is projected to be

\$1.5 trillion
in 2025¹

Subscription based e-commerce is expected to be worth

\$539 billion
in 2025²

The subscription billing market is worth

\$9.16 billion
in 2025 and growing³



Challenges in Subscription Billing.

Billing rarely fails at once. It breaks quietly, in small operational gaps that compound over time.



**A contract renewed
in a spreadsheet.**



**A price change
applied outside
Business Central.**



**A deferral schedule
adjusted manually.**



**A payment or
invoice dispute
handled after the
fact.**



Challenges.



Revenue leakage and billing errors.

Beyond the time-consuming nature of this process, it places you at risk of mistakes, revenue leakage, and strained customer relationships.



Compliance Risk.

Navigating complex regulations like ASC 606 and IFRS 15 requires meticulous tracking and reporting. Without automation, compliance becomes a complicated, time-consuming process.



Tracking performance obligations.

One of the most challenging aspects of subscription accounting is properly identifying and separating distinct performance obligations.



Hidden risks of manual billing.

Top causes of Revenue Leakage:



Manual reconciliation.



Incorrect proration.



Misaligned billing cycles.



Deferred revenue errors.



Missed renewals and Involuntary churn (expired cards, failed payments).



Inconsistent pricing or contract changes.



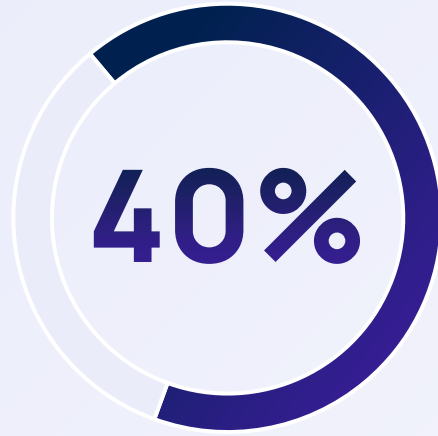
Siloed systems and duplicated entry.



Manual collections and customer communication.



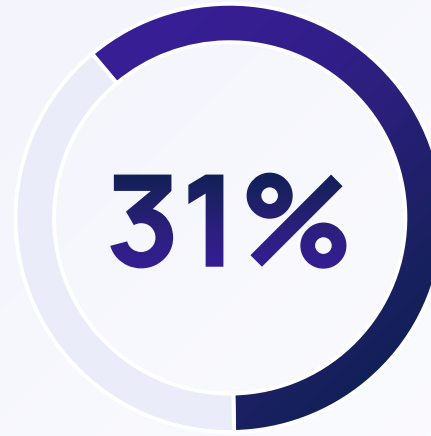
The cost of manual finance.



of CFOs **do not** completely trust the accuracy of their organization's financial data.



say manual work leaves them **vulnerable to errors** undermining decisions.



are using **spreadsheets** for **revenue recognition** even with ASC 606 and IFRS 15 complexity.



of finance teams expect automated workflows for their Finance and Sales ERP systems.



Subscription billing pain shows up quietly.

Customers rarely say, “We need a subscription billing suite”.

They say:

- “We can handle renewals in Excel for now”
- “Usage charges are only a few lines this month”
- “Finance can adjust the revenue schedule manually”
- “We just need one small customization”

What partners need to spot

- Workarounds that are becoming operating procedures.
- Billing complexity moving downstream into finance.
- Deferrals, renewals, and price updates creating revenue risk.
- A customization request that is really a product-fit signal.



The sales-cycle risk is in waiting too long.

Common concern

"If we bring another solution into the deal, will it slow us down?"

Better answer

We are the recurring billing specialist you bring in early to reduce ambiguity.

Early SBS discovery helps partners:

- ✓ Avoid late-stage solution review surprises.
- ✓ Scope implementation with fewer customizations.
- ✓ Use referenceable patterns from similar customers.





Subscription Billing.

In D365 Business Central.



Billing inside D365 Business Central.

Dynamics 365 Business Central is built for structured subscriptions and billing.



**Continuous process
from quotation to
recurring billing.**



**Automatic straight-
line deferral of costs
and revenue.**



**Flexible billing
schedules and
comprehensive
reporting.**



**Automatic price
calculation for
associated
services.**



Features of SB in Business Central.

Dynamics 365 Business Central is built for structured subscriptions and billing.



Create individual and automated billing periods.



Preview all existing monthly recurring billing and upcoming invoices.



Simplify billing with templates and automatically calculate notice periods.



Use accrual-based posting of income and expenses to profit & loss accounts.



Power BI reports available for subscription billing.

Revenue

- Revenue year-over-year
- Revenue analysis
- Revenue development
- Revenue by item
- Revenue by customer
- Revenue by salesperson
- Churn analysis

Contracts, Deferrals & More

- Subscription overview
- Total contract value YoY
- Total contract value analysis
- Customer deferrals
- Vendor deferrals
- Sales and cost forecast
- Billing schedule





Subscription Billing.

Complete order-to-cash solution.



Strategic role of Binary Stream.

Microsoft's Subscription Partner.

25+

years

3000+

Customers.

30+

Countries



Microsoft Preferred ISV

- Endorsed by Microsoft Finance leadership.
- Deep alignment with Microsoft roadmap.
- End-to-end order to cash solution.
- GP to BC migration expertise.
- Platform designed for ANY recurring model.



Binary Stream is the recurring revenue engine that makes D365 Business Central the system of record your subscription business needs.”

- April Olson



Binary Stream AI vision.



Seamless Microsoft Alignment.

As Microsoft embeds AI into Dynamics 365, we ensure our solutions integrate these advancements, closing parity gaps and maintaining a unified experience.



AI-Driven Roadmap Innovation.

We enrich our D365 Finance and BC roadmaps with intelligent automation, predictive analysis, and personalized experiences to elevate our solutions and deliver greater efficiency for end users.



AI for Operational Excellence.

We develop AI agents to support product development, quality assurance, and professional services, driving automation, reducing errors, and improving internal processes.



Dynamics Stack

Solutions for Microsoft Dynamics by **Binary Stream**

Win with core Microsoft ERP capabilities – and confidently extend into complex scenarios with Binary Stream solutions.



Multi-Entity Management

- Multi-entity workflows.
- Intercompany control.
- Consolidation readiness.



Subscription Billing + Portal

- Usage, pricing, deferrals.
- Renewals & self-service.
- Order-to-cash depth.



Property & Lease

- Lease accounting.
- Property & equipment workflows.
- CAM and schedule control.



Move upstream

- D365 Finance + ASM.
- Enterprise-grade billing breakpoints.
- Bigger services runway.

AI agents are layered across the stack: Renewal assistance, intercompany analysis, quote-to-cash agents, anomaly spotting, and faster decision support.

Embedded within:



**Dynamics 365
Finance**



**Dynamics 365
Business Central**



**Microsoft
Dynamics GP**

Why embedded matters.



One source of truth.

- a. Contracts, sales orders, invoices, deferrals, collections, and payments, all live in D365 Business Central.
- b. Eliminates duplicate entry across spreadsheets, portal, and billing tools.



ERP-level compliance.

- a. ASC 606 / IFRS 15 support for bundled contracts and performance obligations.
- b. Line-level revenue and expense deferrals.
- c. Waterfall reports & audit trails.



End-to-end Order to Cash automation.

- a. Sales order / CRM → Contract → Invoice → AR & Collections → Payment → Reporting.
- b. eMailer + Portal streamlines customer communications and payment follow-up.



Scalability without adding headcount.

- a. Evergreen renewals and mid-term contract changes.
- b. Usage, milestones, tiered, and minimum commitment billing.
- c. Batch invoicing, invoice consolidation, and automated price escalations.



Predictable forecasting and analytics.

- a. MRR, renewals, churn, and profit margin visibility.
- b. Solver reporting for revenue KPIs and planning.



When is Binary SBS a fit in your workflow?



Time consuming
manual billing &
contract processes



Manual revenue
recognition or
deferral processes



Using expensive
third-party billing and
rev rec solutions



Need self-serve
payment and
subscription portal
capabilities



Core BC is the foundation. SBS is the specialist layer.

1
**Subscription
Billing Suite**

2
AR & Collections

3
**eMailer
Management**

4
Portal

5
**Advanced
Reporting + Solver**



Core Business Central

Stay within when the process is simple.

Included in BC

- Base contracts created from sales orders.
- Simple renewals and straight-line deferrals.
- Fixed recurring invoices.
- Low contract change volume.



Where Binary SBS attaches

Complexity BC can't handle alone

SBS extends this

- CRM or shipment driven contract creation.
- Mid-term amendments, escalations and calendar billing.
- Tiered, usage, milestone, and consolidated invoicing.
- Advanced deferrals, performance obligation, and reporting.
- Payment Portal, collections, email automation, and AI renewal



SBS comparison with Core BC.

Order-to-cash lifecycle	 Dynamics 365 Business Central	 Subscription Billing
Contract Start:	From sales orders and sales contracts	 Also from CRM or upon shipment
Contract Changes:	Renewals, termination, month-start / month-end alignment	 Any-day billing, mid-period changes, calendar billing
Pricing & Usage:	Item pricing, billing discounts, usage uploads	 Tier pricing, commitments, billing limits, escalations
Billing:	Mass invoice creation	 Invoice consolidation, bundled items, milestone billing
Revenue Recognition	Straight-line deferrals	 Event-based rules, unbilled revenue, ASC 606 / IFRS 15 support



Business Central gives you the foundation.

Subscription Billing Suite delivers end-to-end subscription order-to-cash.





Portal

+

globalpayments

Binary stream integrated PSPs.



Global Pay Partner

Primary PSP for Binary Stream portal and subscription billing

Dynamics 365 · Business Central

Credit card

- All major credit card providers
- Visa, Mastercard, Amex, Discover

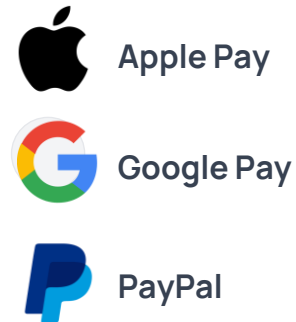
Sub gateway enabled

Direct debit

- ACH

Bank transfer

Wallets



Digital wallets



Portal for BC.

BC Portal	Includes
Essential	<ul style="list-style-type: none">• Unlimited payments• Binary PSP partners
Essential Plus	<ul style="list-style-type: none">• Essential• Customer's PSP
Premium	<ul style="list-style-type: none">• Essential Plus• 1 from MEM/SBS/PLM/ARC
Premium Plus	<ul style="list-style-type: none">• Premium• 2 from MEM/SBS/PLM/ARC
Premium for Partners	<ul style="list-style-type: none">• Premium Plus• SBS self-serve• CSP





Contract Renewal AI Agent.

For Subscription Billing.

Contract Renewal Assistant.



Built to automate renewals end-to-end.

The **Renewal Agent** automates the entire contract renewal process, improving efficiency and reducing manual workload across teams.



Eliminates repetitive manual tasks.

Currently, contract renewals require **significant manual effort** – creating emails, tracking responses, and processing renewals or cancellations. The Agent handles all of this.

How it works

- Contract approaches renewal window → Agent triggers
- Reminder email sent automatically to customer
- Response tracked → renewal or cancellation processed
- Zero manual intervention required



Full end-to-end contract lifecycle handled automatically



Contract Renewal Assistant Agent.



Automated identification:

Detects contracts approaching their expiration date within a defined period.



Smart communication

Generates and sends personalized renewal notifications to customers automatically.



Response handling

Monitors customer replies, interprets intent (renew or cancel), and records the decision.



Action automation

- For approved renewals, the agent automatically renews the contract in the system.
- For cancellations, it updates the record and notifies the appropriate team.

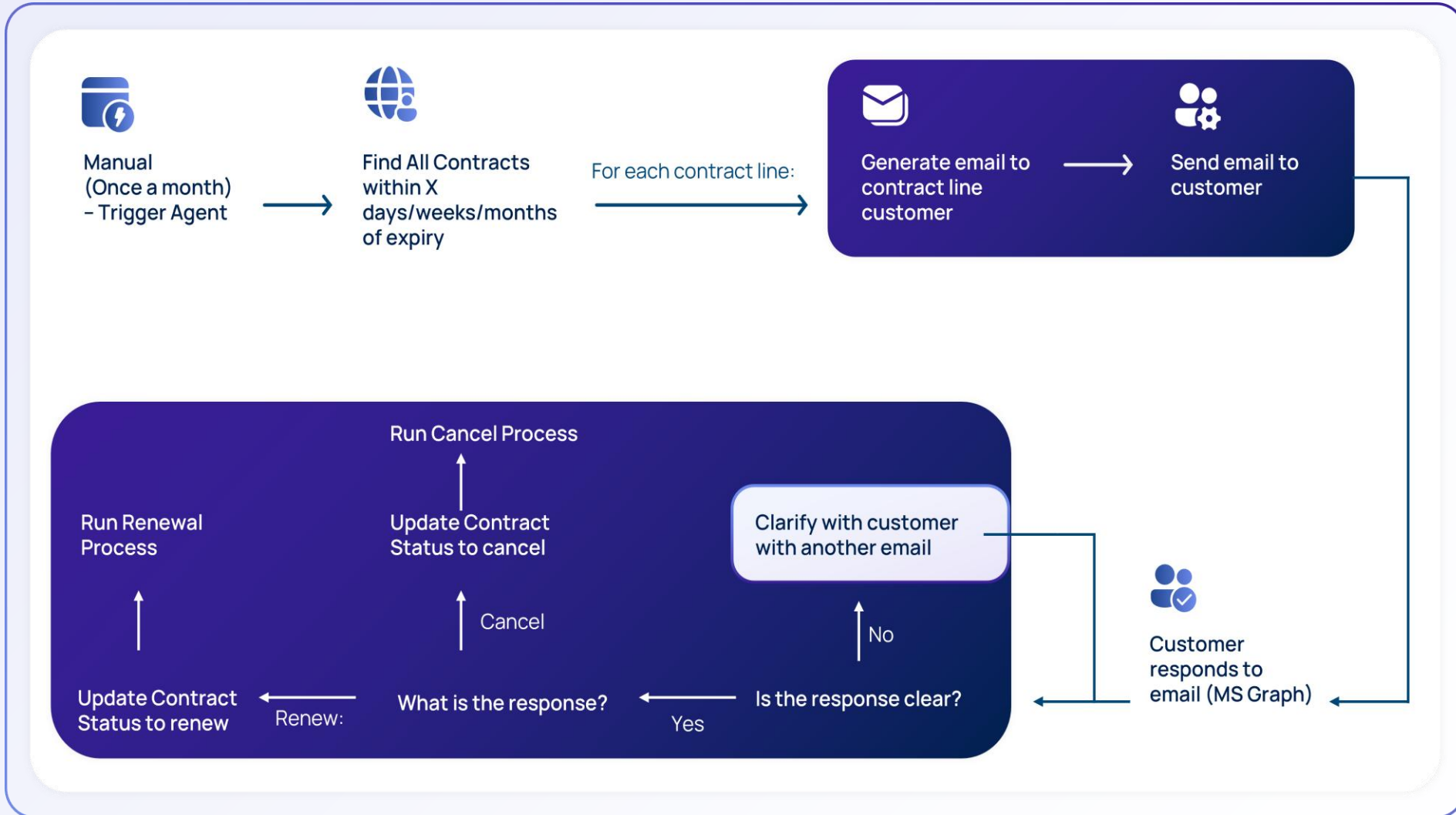


Operational efficiency

Significantly reduces manual work, ensuring faster turnaround times and fewer human errors.



Renewal Assistant workflow.



Business impact:



Saves **many staff hours** per renewal cycle.



Streamlines customer communication through automated and timely notifications.



Improves renewal conversion rates with consistent follow-ups and reduced delays.



Enables the team to **focus on higher-value activities** instead of repetitive administrative work.



Reduces human errors by automating manual renewal processes.

SBS Upcoming AI Capabilities.

AI that catches revenue leakage before it costs your client.



"What changed?" Surfacing

AI automatically flags contract amendments, mid-period modifications, and price escalations that create revenue risk – before month-end close.

Hours saved on contract audit



Revenue leakage detection

Machine learning flags unbilled items, missed price escalations, and deferred revenue not recognized on schedule – across your entire contract portfolio.

Revenue recovered per quarter



Renewal acceleration

AI-surfaced renewal alerts with suggested action dates and contract health scores – reducing manual follow-up and shortening renewal cycles.

Faster renewal cycle



Subscription Billing Suite.

2026/27 Roadmap



Dynamics 365
Business Central



Subscription
Billing



Retroactive Price Index

Automatically calculate and bill the difference, ensuring compliance with regional indexation requirements and eliminating manual adjustments.



Profit & Cost Reconciliation

Track profitability in real time with a dedicated reconciliation view that shows margin instantly, without exporting or manual analysis.



Microsoft D365 CRM Integration

View and update subscription details directly in D356 CRM, with seamless synchronization to Business Central for accurate billing and faster deal execution.



Churn Prediction & Renewal Agent

Surface churn signals directly in Business Central and trigger renewal actions with built-in promotional offers, enabling your team to act early and retain revenue.





Subscription Billing Discovery & Fit Assessment.

Helps identify gaps, quantify fit, and provide a clear path forward.

Solution Fit Assessment purpose.

A **focused, high-impact engagement** designed to help organizations and Microsoft partners evaluate subscription billing readiness for Business Central.

Areas evaluated

- Order-to-cash process alignment with BC + SBS.
- Contract creation, renewal, termination, & billing scenarios.
- Deferral, revenue recognition, and ASC 606 / IFRS 16 requirements.
- Portal, AR & Collections, eMailer, and payment workflow needs.
- Reporting, forecasting, and ROI from SBS enablement.

3-4 h

Duration

5

Focus areas

What you get

Immediate clarity, quantified fit scoring, and actionable recommendations delivered at the end of the session.

Clear path forward

Understand exactly where your client stands and how to modernize order-to-cash lifecycle in D365 BC.



Why Partners should use this.

Early subject matter expertise.

Free, low-friction access to a Binary Stream subject matter expert helps the partner lead a better early conversation with the customer.

Grow deal size and services.

The discussion can uncover more D365 BC licenses, SBS scope, add-ons, and implementation workstreams.

Reduce pursuit risk.

The partner gets a clearer view of complexity before demo, quote, SOW, or solution promises get ahead of reality.

Bring in Binary Stream early. Give your customer access to a subscription billing Subject Matter Expert and use the conversation to decide whether the opportunity should stay light, move to demo, or expand into a paid full Solution Fit Assessment.



Discovery Assessment Process.

Designed to feel like a structured discovery motion with a short readout.

- **Partner owns** relationship context, access, and commercial orchestration.
- **Binary Stream owns** Subject Matter Expertise validation, directional fit guidance, and the handoff recommendation.



1

Preparation.

Before the session

Partner or customer shares context, key stakeholders, current tools, and the top 3-5 pain points..

2

Working Sessions.

3-4 hours

Binary Stream leads focused discovery across billing, pricing, deferrals, revenue recognition, integrations, and reporting.

3

Internal Consolidation.

Binary Stream

Captures directional fit observations, likely risks, and what still needs deeper validation.

4

Readout.

Deliverable

Partner + customer receive a high-level summary and a recommendation.

Demo

Fit assessment

Quote Path

The practical cheat sheet: when SBS becomes critical.

1	Recurring billing / invoicing	High volume, renewals, contract changes, or batch contract management.
2	Consumption-based billing	Minimums, maximums, free quantities, commitments, or billing limits
3	Frequent price adjustments	Recurring payment changes, CPI, escalations, promos, or contract-wide updates
4	Tier-based pricing	Usage thresholds, quantity breaks, and pricing rules that change invoice outcomes.
5	Revenue reallocation	Multiple performance obligations or bundled products requiring allocation.
6	Revenue deferral	Straight-line plus event-based, adjusted schedules, unbilled revenue, or audit exposure.
7	Contract management at scale	Holds, proration, renewals, portal updates, and approval workflows.





MSP – Financial Services Industry

The turning point.



Subscription
Billing



Dynamics 365
Business Central

Ability to Bundle Software, Services, & Block time



Support for Complex Pricing (I.E. Min & Max pricing + tiered pricing)



Milestone Biling & Batch Invoicing



Compliance - ASC 606-compliant revenue allocation



Flexibility to Adjust Deferral Schedules - Customer wanted to adjust based on software activation



Billing Partners on Customer Specific Pricing



The results.



For the client

- Expanded capacity to serve larger, more complex MSP customers previously out of scope
- Enabled scalable, accurate billing to support international growth while controlling operational costs



For the Partner

- Successfully delivered complex billing requirements within Business Central
- Retained a high-value client by stabilizing and future-proofing the implementation





**Software, Telecom
& Technology
Services.**



Customer.
Experlogix, LLC.

Industry.
Software (CPQ & Document Automation).

Business application solution.
D365 Business Central with Subscription Billing Suite (SBS).

Deal value.
Global multi-entity SaaS company operating five entities across the U.S., Canada, Europe, and multiple currencies.

Microsoft Partner:
JourneyTEAM



“ *Being able to use Binary Stream to issue invoices makes the process much cleaner. We’ve automated it rather than trying to keep track and manually issue renewals.* ” – Arjun Nukal, CFO

Customer challenges.

- Manual revenue recognition and deferral schedules.
- Disjointed reporting and manual data entry.
- The team had no system to manage the multiple companies and currencies resulting from the mergers.

Solutions.

- Automated deferral schedules and revenue recognition.
- Unified billing across five global entities.
- Flexible billing schedules for annual, quarterly, and custom renewal.

Results.

- Centralized billing schedules with automated deferrals and revenue recognition in Business Central
- Improved data accuracy by eliminating reliance on spreadsheets.
- Enhanced collaboration between sales and finance through synchronized CRM data.



[Read full story here](#)



**Healthcare &
Supply Chain.**

Healthcare industry win.



Overview.

Industry: Healthcare

Why it mattered: Existing customer on GP, MEM, and SBS with complex billing cycles and many entities.

Not a typical BC win: Migration from GP to BC with advanced requirements that Binary Stream was able to close the gaps.

Customer challenge.

Limitations of native BC: Couldn't handle 50+ entities and 3,000+ recurring subscriptions.

Risks: Manual work, scalability issues, revenue leakage, and delayed go-live.

Why Binary Stream.

Trusted solution: Already using our GP tools – migration to BC was seamless.

Peace of mind: No customization needed, proven reliability, and simplified setup.

Partner engagement & result

How Binary Stream supported the deal.

- Conducted detailed reviews of BC requirements.
- Identified a perfect fit with no customization needed.
- Delivered multiple demos to showcase the BC environment.
- Client was confident and satisfied with the solution.

Why the partner won

- Took ownership of the full migration cycle.
- Clearly explained GP vs. BC differences.
- Highlighted BC's value and how ISVs close gaps.
- Resulted in a smooth, successful project.



**Real Estate
Industry.**



MoxiWorks saves 80 days annually by automating recurring billing processes.

“Wonderful, wonderful, wonderful. A joy to work with Binary Stream. Everyone was super helpful and positive, which had a big impact on the success of the implementation.”

– Dean Tibbetts, Controller, MoxiWorks

Situation:

With over 340,000 active users, monthly payments processing became impossible for MoxiWorks, requiring cumbersome workflows, and resulting in errors.

Solution:

A trusted implementation partner as user feedback helped MoxiWorks identify Binary Stream's Subscription Billing Suite (SBS) as an innovative software solution to address their challenges.

Benefits:

Reduced processing time, increased access to insights, and streamlined revenue and expense recognition.

80%

less time spent
on manual
tasks.

260+

brokerages
served.

15days

saved per year
preparing taxes.

80 days

saved per year.

[Read the story here](#)



**Manufacturing &
Fleet
Management.**

Northern BI reduces billing workload by **50%** with migration to Dynamics 365 Business Central.

“We wanted to continue to use Subscription Billing Suite in our migration from Dynamics GP to Dynamics 365 Business Central. For us, it was a great and natural transition because we had already learned the functionality within the old environment and could move seamlessly into the new environment.”

– **Brian Mackintosh**, VP of Operations at Northern Business Intelligence.

Situation:

Northern BI's accounting software was insufficient for managing ongoing subscriptions and renewals, requiring manual reconciliations and leading to time-consuming errors.

Solution:

Northern BI adopted Binary Stream's Subscription Billing Suite (SBS) and transitioned to Microsoft Dynamics 365 Business Central.

Benefits:

Greater accuracy, improved scalability, and time and effort saved through automation.

50%

less time spent on recurring billing cycles.



scalability as expansion accelerates.

100%

embedded within GP and D365 BC.



migration from on-premise to cloud-based.

98%

customer retention.



advanced security features.

[Read the story here](#)



**Public Safety,
Utilities &
Education.**



Sunshine 811 saves 15,000 annually by streamlining recurring billing with Subscription Billing Suite.

"It makes things efficient for us because it's one upload that we have to do. We can set it and forget it for almost a year. The system manages itself. It's flawlessly integrated."

– Julie Adamson, Accounting Manager and Controller at Sunshine 811.

Situation:

Sunshine 811 struggled to manage billing processes for over 1000 members, resulting in limited visibility, unreliable data, and time-consuming processes.

Solution:

A consultant partnered with Sunshine 811 to identify Binary Stream's Subscription Billing Suite (SBS) as an innovative solution that fit their needs.

Benefits:

Greater flexibility, improved transparency, and time and effort saved by automating processes.

2+

weeks saved each month.

6+

months saved per year.

100%

integration with Business Central.

\$12,000-\$15,000

annual savings.

1,000+

members accurately billed.

[Read the story here](#)



How Partners work with us.

Write.

Why partner with us.



80%

Win Rate on joint opportunities with Partners.



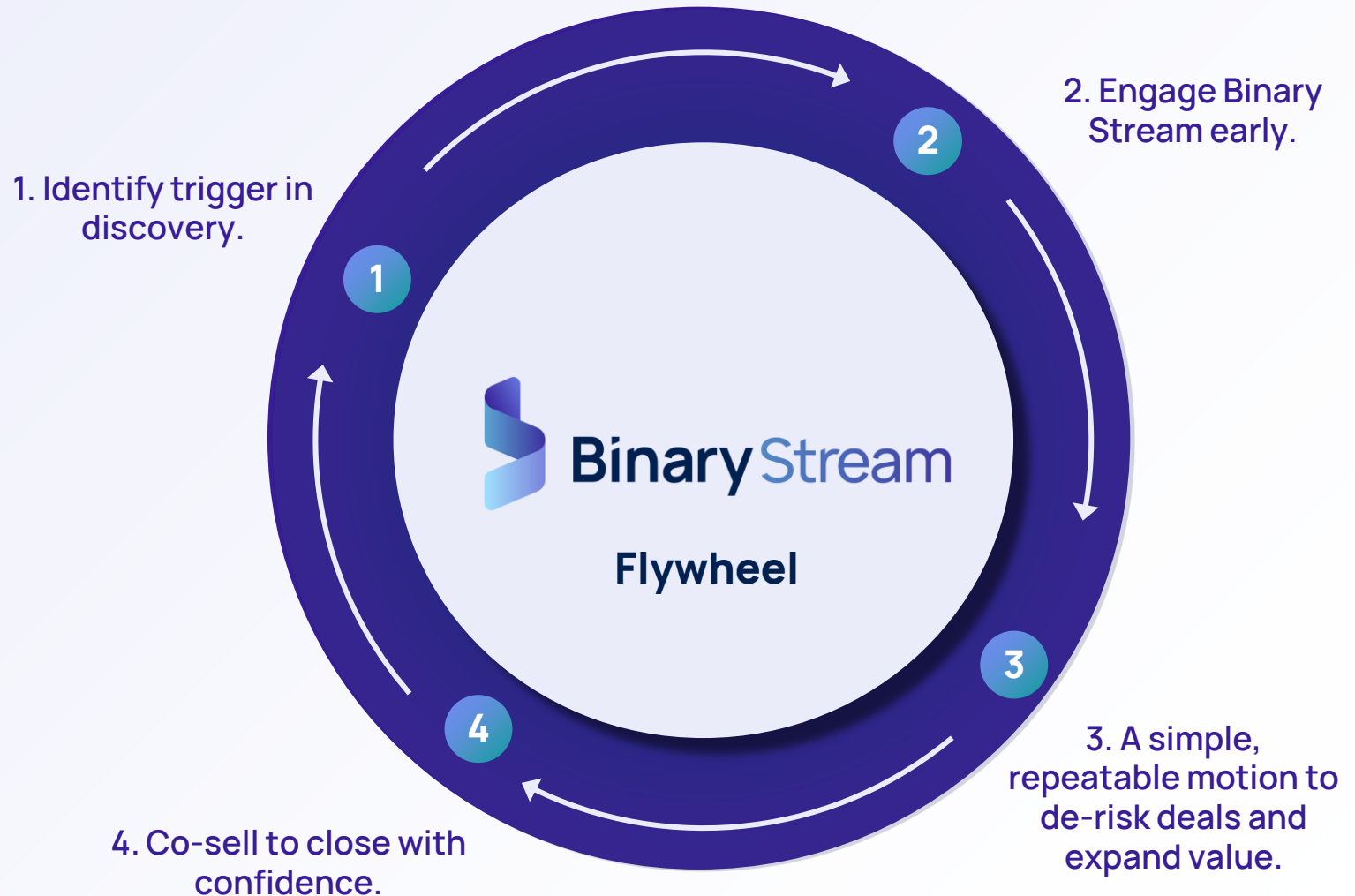
97%

Customer satisfaction from Binary Stream + Partner customers.



Partner + Binary Stream Co-sell Flywheel.

A unified approach to identifying opportunities, co-selling effectively, and expanding value.



How we help you win.



Win bigger.

- Expand deal size with complex billing and multi-entity requirements.
- Higher-value projects that customers can fund when scoped early.
- More services + long-term expansion potential.



Win faster.

- De-risk requirements early so the deal doesn't stall in solution review.
- Support discovery and solution shaping with proven patterns.
- Reduce late-stage surprises that trigger delays.



Win more confidently.

- Differentiate your pitch with capabilities competitors can't easily match.
- Bring proof points from similar wins to build buyer confidence.
- Partner owns the customer – we amplify the sale.



When to call Binary Stream.

Prospects say:

1.

We have recurring revenue requirements.

2.

We have complex pricing models.

3.

We have consumption-based billing.

4.

We have milestone-based billing.

5.

We need to defer revenue or expense.

6.

We have ASC 606 requirements.

7.

We need to reallocate revenue.

8.

We want to change the way we sell our products or services.





Thank you.

Questions & Answers.