

Multi-Entity Subscription Management Vendor Evaluation Checklist

Use the GOLD framework to pressure-test any billing platform's multi-entity architecture — where it holds up, where it relies on workarounds, and where risk surfaces as you scale. Check each box if your current or evaluated platform supports it.

The GOLD Framework for Multi-Entity Evaluation

GOVERN

Financial & Compliance Readiness

WHAT TO LOOK FOR

- ☐ Tax registrations & rate overrides per entity (VAT / GST / Sales Tax IDs set centrally, with entity-level overrides where local registration differs)
- ☐ Invoicing rules & sequences (invoice numbering, legal disclosures, e-invoicing requirements)
- ☐ Legal identity on customer-facing documents (registered address, remittance details, payment instructions)
- ☐ Traceable billing records — who changed what, and when, at the transaction level
- ☐ Entity-aware revenue recognition configured per entity, with group-level roll-ups
- ☐ Entity-aware ERP integrations (NetSuite, Intacct, Xero, etc.) without blended transactions

► **Red flag:** Separate sites for compliance → duplicated controls, manual reconciliation, and audit risk at scale

OPERATE

Master Data & Workflows Without Duplication

WHAT TO LOOK FOR

- ☐ Site-level configuration as default — billing rules, product catalog, and workflows apply to every entity unless explicitly overridden
- ☐ A defined, documented set of entity-level overrides (tax registration, time zone, payment routing, branding, invoice/credit note numbering, notifications) — not a blanket "configure everything" model
- ☐ Entity overrides only where local requirements demand it, within the platform's published override list

► **Red flag:** Rebuilding catalogs & workflows per entity → configuration drift, higher cost, and maintenance overhead

LOCALIZE

Customer-Facing Experience Per Entity

WHAT TO LOOK FOR

- ☐ Entity-specific branding — logos & colors across checkout, invoices, and customer portals
- ☐ Region-specific pricing & product bundles — entity-level price points without duplicating the catalog
- ☐ Localized notifications — entity-specific invoice emails and payment reminders, layered on language localization
- ☐ Regional payment methods & gateways — local direct debit schemes and preferred payment methods per entity

► **Red flag:** Site-wide branding and templates only → customer-facing inconsistency, technical debt, and fragmented customer relationships

DIAGNOSE

Reporting & Insights Across Entities

WHAT TO LOOK FOR

- ☐ Group-level diagnostic metrics — MRR, churn, collections, cohorts, and geographic performance
- ☐ Entity-level drill-down for operators — RevOps and finance can analyze by entity, region, or product family without re-modeling data
- ☐ Unified global/entity view — switch perspectives using filters, not separate instances or disconnected dashboards
- ☐ Entity-aware exports & integrations — entity-tagged data into ERP/CRM/RevRec with transaction timestamps in the entity's own timezone

► **Red flag:** Manual exports and per-instance reporting → slow month-end close and low confidence in cross-entity data

Ready to see multi-entity billing done right?

Book a 30-minute tailored demo and pressure-test Chargebee against your own GOLD criteria.

[Get the Demo →](#)

Questions to Ask Any Vendor

— and what strong multi-entity architecture looks like

EVALUATION QUESTION	⚠ WARNING SIGNS	✅ STRONG MULTI-ENTITY ARCHITECTURE
Multiple legal entities in a single account?	Separate accounts or instances required per entity.	Multiple legal entities operate within one account, with entity-level separation and controls.
How do entities share billing rules, catalog, and workflows?	They don't. Configure each instance separately.	Site-level config applies to every entity by default; a defined set of settings can be overridden per entity.
Inheritance + override, or pure duplication?	Copy/paste configs and maintain them separately.	Site-level defaults apply automatically; entity-level overrides available for a defined list (tax, timezone, payment routing, branding, invoice numbering).
Practical upper limit on entities per account?	No clear answer; depends on support; practically limited.	Clear published/contracted limits; designed to scale to many entities under one account.
Tax registrations, invoice sequences, and legal addresses per entity?	Global only; entity differences require separate sites or manual workarounds.	Yes — tax registration numbers, rate overrides, invoice numbering/formatting, legal address, and remittance details.
Entity-specific timezones for transactions and reporting?	"Single global timezone" or "handle it downstream in BI."	Transactions record in the entity's own timezone; global reports use the site-level timezone.
Audit trail at the entity level?	Audit logs exist but are hard to trace across instances.	Customer, subscription, and billing changes are traceable — who changed what, and when — at the transaction level.
Access controls across entities (RBAC/ABAC)?	"Separate user setups per instance" or "all-or-nothing access."	Granular access at site and entity scope; restrict users to specific entities while HQ retains global visibility.
Restrict users to specific entities while HQ has global access?	Not in one account; separate sites required.	Yes. Entity-scoped access plus global roles for HQ/finance leadership.
How does RevOps/Finance manage across entities?	"Switch sites/instances" or "consolidate in spreadsheets."	Unified global view with entity drill-down. A customer and subscription record belongs to one entity at a time; moving across entities uses a transfer.
Localize branding, checkout, invoices, and notifications per entity?	Branding/templates are site-wide; separate sites for different brands or regions.	Yes. Entity-level customization for all customer-facing touchpoints while still using one account.
Entity-specific payment gateways and methods?	"Single gateway setup" or "per-instance gateway configurations."	Entity-level payment routing (Smart Routing) and offline payment methods, layered on site-level gateway config.
Consolidated reporting across entities?	"Export from each site and combine" or "build it in BI."	Consolidated reporting with filters: global roll ups and entity-level breakdowns in the same system.
Single global view with entity drill-down?	Each instance has its own reporting; custom data engineering needed to drill deeper.	Yes. Global and entity-level views using filters. Multi-entity reports via MCP coming soon.
Multi-entity flows into ERP/CRM/tax/RevRec tools?	Each instance integrates separately; consolidation is a downstream responsibility.	Supported for documented integrations: NetSuite, Intacct, Xero, QuickBooks, Salesforce, Avalara, TaxJar, and more.

Ready to pressure-test Chargebee against these questions?

Book a 30-minute tailored demo — bring your own evaluation criteria.

Get the Demo →