



# Microsoft Dynamics 365 Licensing Guide



October 2019

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## Using This Guide

Use this guide to improve your understanding of how to license Microsoft Dynamics 365 (Dynamics 365). Microsoft Dynamics 365 evolves Microsoft's current Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) cloud solutions into one cloud service with new purpose-built applications to help manage specific business functions. Dynamics 365 applications are designed so they can be easily and independently deployed. A customer can start with what they need, yet the applications work together so, as the business demands, the customer can adopt additional capabilities with ease.

For licensing information related to Dynamics 365 Business Central, Microsoft's comprehensive ERP and CRM solution designed for smaller businesses, refer to the Dynamics 365 Business Central Licensing [Guide](#). Licensing information for using mixed reality business tools and Dynamics 365 applications can be found in the Dynamics 365 Mixed Realty Licensing [Guide](#).

This document **does not** apply to Microsoft Dynamics 365 on-premises, Microsoft Dynamics 365 for Operations on-premises, Microsoft Dynamics NAV, Microsoft Dynamics GP, Microsoft Dynamics SL, Microsoft Dynamics AX 2012 or prior versions, or Microsoft Dynamics CRM 2016 or prior versions. This guide also **does not** apply to the Microsoft Dynamic CRM Online or Microsoft Dynamics AX online services. This guide is not intended to influence the choice of Microsoft Dynamics products and services. The examples presented in this guide are illustrative. Microsoft reserves the right to review or update this document at any time without notice.

Legacy online customers should refer to the applicable licensing guide for details on their entitlements and use rights, including benefits derived from Dynamics 365 licenses.

- Dynamics CRM Online Licensing [Guide](#)
- Dynamics AX Licensing [Guide](#)

This document applies for users with Dynamics 365 licenses.

To facilitate understanding of licensing requirements this guide is structured as follows:

- |                                     |                               |
|-------------------------------------|-------------------------------|
| 1) Brief description of the product | 5) Use rights/dual use rights |
| 2) Channel Licensing (how to buy)   | 6) Add-ons                    |
| 3) Licensing (how to license)       | 7) Notes: Changes             |
| 4) Minimum requirements             | 8) Scenarios                  |

For help determining the right technology solution for any given organization, including the license requirements for a specific product or scenario, consult with your Microsoft account team or your Dynamics Certified Partner.

This guide does not supersede or replace any of the legal documentation covering use rights.

# What's new in this licensing guide

This licensing guide was updated to reflect licensing updates and new online service offerings as of October 2019. Note, effective October 1, the Dynamics 365 application names were updated removing 'for' from the name. For example, 'Dynamics 365 for Sales' is now 'Dynamics 365 Sales'.

Effective	Dynamics 365	Description	New offer or change summary
October 1	Plans	Customer Engagement Plan, Unified Operations Plan, Dynamics 365 Plan changes	Remove all plan SKUs from all channels
	Customer Engagement	Marketing Attach	New minimum user requirement
		Additional Marketing App (Non-production) add-on	Reduced price for non-production use
		Market Insights Professional	New AI service (non-monetized)
	Finance and Operations, Retail, and Talent	Supply Chain Management	New standalone workload
		Finance	New standalone workload
		Asset Management	New asset management add-on
	Customer Engagement/ Finance and Operations, Retail, and Talent	Attach SKUs	New offers
		From SA SKUs (on-premise to cloud offers)	New offers for Base SKUs and Attach SKUs. Refer to the new Transition Guidance <a href="#">[Field]</a> <a href="#">[Partners]</a>
	Dynamics 365	Fraud Protection	New AI service
	Power Platform	PowerApps and Microsoft Flow	General use rights update
		API	New service <a href="#">limits</a>

## Introduction to Dynamics 365

Microsoft Dynamics 365 (Dynamics 365) is the next generation of intelligent business applications in the cloud. Dynamics 365 unifies Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) capabilities by delivering new purpose-built applications to help manage specific business functions. Designed to be personalized, enable greater productivity, deliver deeper insights and adapt to business needs, Dynamics 365 applications help businesses accelerate digital transformation to meet the changing needs of customers and capture the new business opportunities of tomorrow.

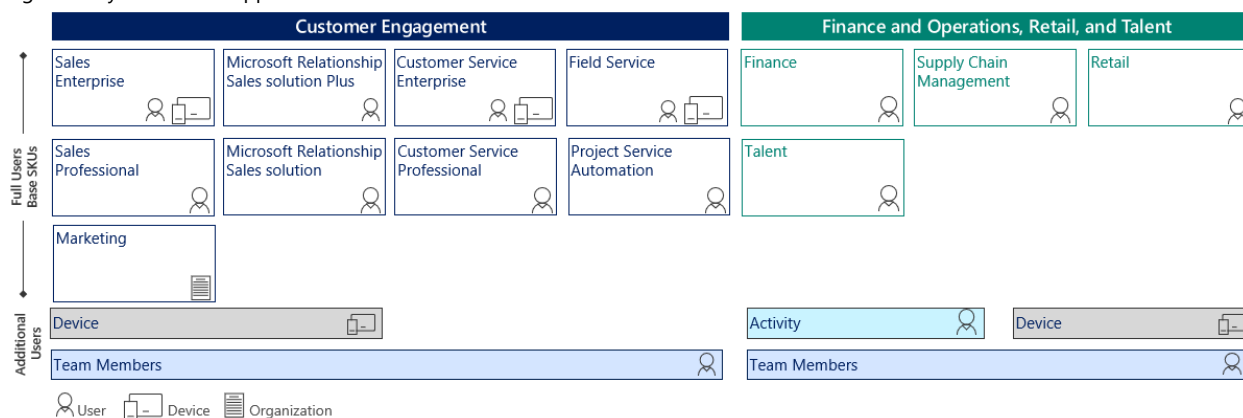
### Dynamics 365 Applications:

- Dynamics 365 Sales
- Dynamics 365 Marketing
- Dynamics 365 Customer Service
- Dynamics 365 Field Service
- Dynamics 365 Project Service Automation
- Dynamics 365 Finance
- Dynamics 365 Supply Chain Management
- Dynamics 365 Retail
- Dynamics 365 Talent

### Hereinafter written as:

Sales  
Marketing  
Customer Service  
Field Service  
Project Service Automation  
Finance  
Supply Chain Management  
Retail  
Talent

Figure 1: Dynamics 365 Application Overview



# How to buy Dynamics 365

## Licensing Programs

Licensing Programs are channels where you can buy Dynamics 365. You can license Dynamics 365 through Microsoft Volume Licensing, Cloud Solution Provider program (CSP), and/or Web Direct programs. In Volume Licensing, Dynamics 365 is available through:

- Enterprise Agreement (EA)
- Enterprise Agreement Subscription (EAS)
- Server and Cloud Enrollment (SCE)
- Enrollment for Education Solutions (under the Campus and School Agreement) (EES)

Additional channels:

- Microsoft Dynamics Online Government (except Finance, Supply Chain Management, Retail, Talent, and Dynamics 365 Operations - Activity)
- Microsoft Products and Services Agreement (MPSA). More information on MPSA is available [here](#).
- Microsoft Online Subscription Program (Web Direct/MOSP) (except Finance, Supply Chain Management, Retail, Talent, and Dynamics 365 Operations - Activity)

For more information on Dynamics 365 licensing channels and segment availability, refer to [Appendix G](#).

Mixing of licenses across different licensing programs on a single tenant is not recommended and could lead to incompatible subscriptions. MPSA licenses may be mixed with EA licenses if short term subscriptions are required.

Participating in a Volume Licensing program typically involves signing an agreement and/or enrollment, meeting a minimum purchase requirement, and ordering licenses through a Microsoft Reseller. Visit the [Microsoft Volume Licensing website](#) to learn more about how to buy through Volume Licensing, find a reseller partner, and more helpful information.

## International Availability

Country, language, and localization availability for Dynamics 365 is available [here](#).

# How to License Dynamics 365

To license core Business Applications (Sales, Customer Service, Field Service, Project Service Automation, Finance, Supply Chain Management, Retail, and Talent), customers may purchase as either a base or as an attach license(s).

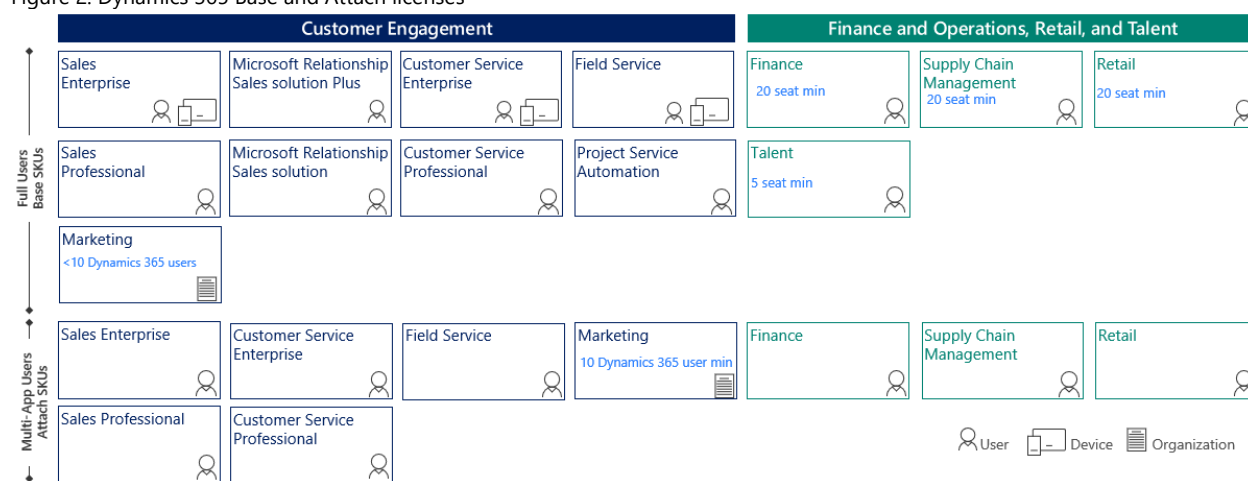
When purchasing multiple core Business Applications, the first or Base license must be the highest priced license for the user. Every full user must have a Base license.

Users requiring multiple core Business Applications may purchase as many Attach SKUs as needed at a reduced price. Each Attach license can only be assigned to a user with a qualifying prerequisite Base license. The admin will not be able to assign the Attach license to a user who doesn't have the required Base license. Customers trying to assign an Attach license to a user that does not have the prerequisite Base license, will get an error during assignment. In EA if an Attach license is purchased when a Base license is required, customers may step-up the Attach license to the appropriate Base license. In CSP and MPSA, customers need to return the Attach license and purchase the appropriate Base license.

Note, this sales motion is user license (USL) based. Only the Business Applications that are USLs may be purchased as an Attach license.

1. Purchase the first or Base license at standard pricing
2. Purchase additional eligible Attach licenses at a reduced price

Figure 2: Dynamics 365 Base and Attach licenses



Note, Project Service Automation and Talent licenses are available as Base licenses only. Project Service Automation customers seeking multiple Customer Engagement application(s) may purchase Project Service Automation as the Base license and additional Customer Engagement applications (Sales, Customer Service, Field Service) at the Attach price. If a user requires both a Project Service Automation license and a Finance, Supply Chain Management, or Retail, license, the customer must purchase both as a Base license at the standard price. Talent is not available as an Attach license and there are no options to purchase Attach licenses for Talent users.

Additional applications, capacity, or non-core Business Applications don't qualify for the multi-application Base/Attach motion but may be purchased as individual licenses. Reference [Appendix H](#) for eligible Base and Attach license combinations.

## Licensing Requirements for Internal Users

Dynamics 365 has two types of SLs (the only exception is Marketing application, which is licensed per tenant – more details in product chapter):

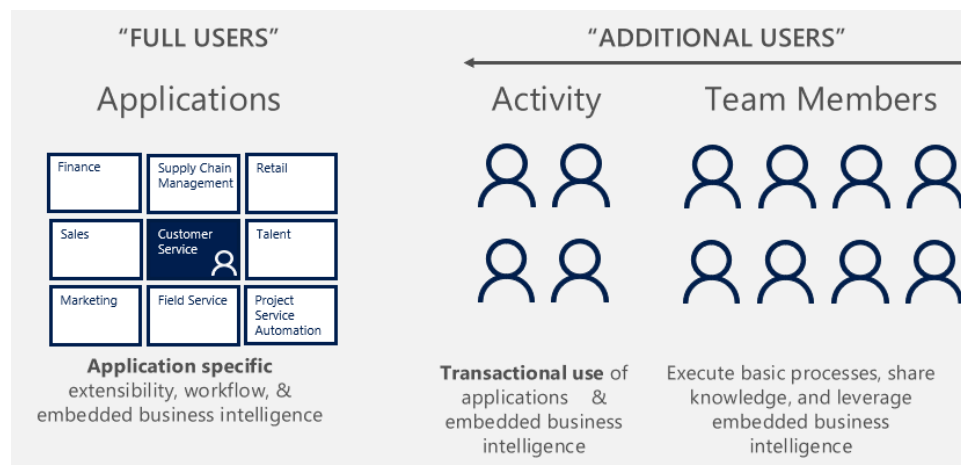
**User SL:** The primary licensing is by User SLs, which are assigned on a “named user” basis, meaning each user requires a separate User SL named user subscription. User SLs cannot be shared, but an individual with a User SL may access the service through multiple devices. The Dynamics 365 user subscriptions classify users into the following types:

- **Full users:** are the users whose work requires use of the feature rich business applications functionality. Examples of full users are sales people, customer service representatives, finance employees, controllers and supply chain managers. These users have also been referred to in the past as Professional users or Power Users. These full users are licensed with a Dynamics 365 application subscription.

Full users can be further defined as Enterprise and Professional:

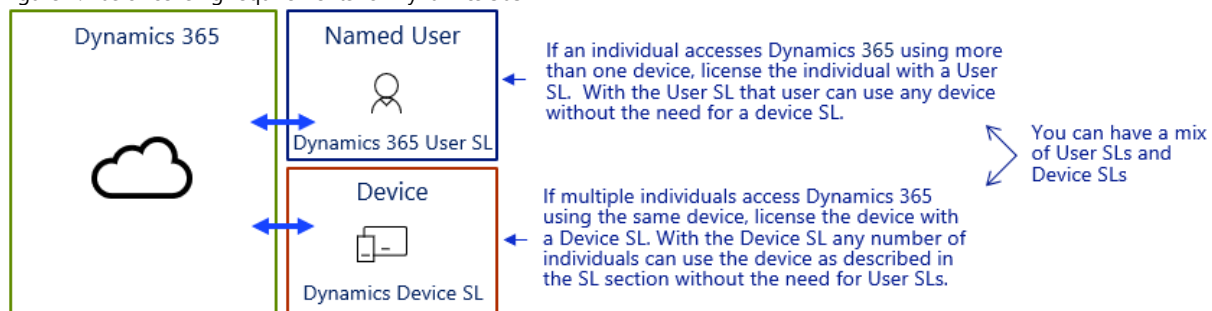
- Enterprise users: Sales Enterprise, Customer Service Enterprise, Field Service, Project Service Automation, Finance, Supply Chain Management, Retail, and Talent
  - Professional users: Sales Professional and Customer Service Professional
- **Additional users:** often represent a large percentage of users in an organization and may consume data or reports from line of business systems, complete light tasks like time or expense entry and HR record updates or be heavier users of the system, but not require full user capabilities. These additional users are licensed with Dynamics 365 Team Members (hereinafter written as Team Members) or Dynamics 365 Operations – Activity (hereinafter written as Operations – Activity) SL.

Figure 3: User Types



**Device SL:** With Device SL any number of users can access a licensed device with individual logins without the need for separate User SLs. If individual users share one login, their individual usage cannot be tracked. Customer Engagement device licenses are full devices – they include the same rights as the equivalent user license, while the Dynamics 365 Operations – Device (hereinafter written as Operations – Device) license is a limited license with a subset of Finance, Supply Chain Management, and Retail capabilities. See the Device Subscription License [section](#) for more information.

Figure 4: Basic licensing requirements for Dynamics 365



Since Dynamics 365 may be licensed with User or Device SL, only the user or the device requires a SL, but not both. If the user of a device is licensed with a User SL, then the device does not need a Device SL. Likewise, if the device is licensed with a Device SL, then the user does not need a User SL. Customers can mix both User and Device SLs.

For qualifying indirect transaction types, Dynamics 365 Operations - Order Lines (hereinafter written as Operations - Order Lines) may also be used to license indirect access scenarios such that a user or device license is not required. Please see the Operations - Order Lines [section](#) for more details.

The User and Device SL grants users non-perpetual rights (with no buy-out rights) to the use of the Dynamics 365 service. As long as you are current on your subscription payments and adhere to the [Product Terms and the Online Service Terms](#), you will have access to the most up-to-date version of Dynamics 365.

Subscription duration requirements are determined by the Licensing Program under which a SL is licensed. Short term subscriptions are available exclusively through the [MPSA Licensing Program](#).

In a multi-tenant scenario, a licensed Dynamics 365 user associated with a tenant can only access one or more Dynamics 365 instances mapped to the same tenant. To access another tenant a user would need a separate license and a unique set of sign-in credentials for that tenant. For example, if User A has an account to access Tenant A their license allows them to access any and all instances created within Tenant A - if they are allowed by their administrator. If User A needs to access instances within Tenant B, they will need an additional Dynamics 365 license.

The subscription licenses include access rights to the default Dynamics 365 instances included in the subscription account, and every additional Dynamics 365 instance (production or non-production) is associated with the same Azure AD tenant. For more information on Azure AD tenants, please see [here](#).

## Minimum License Purchase Requirements

To activate a subscription, customers enrolling in Dynamics 365 must purchase a minimum quantity of full user licenses where required:

### Customer Engagement

#### Academic SKUs

Applications on the *Academic price list* must purchase a minimum of 20 full user licenses:

- Sales
- Customer Service
- Field Service
- Project Service Automation

#### Microsoft Relationship Sales solution Plus and Microsoft Relationship Sales:

- 10-user minimum

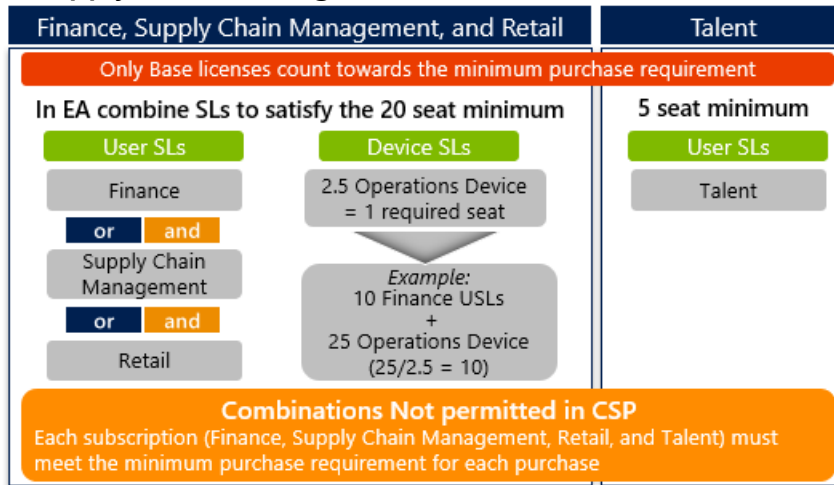
**Dynamics 365 Marketing Attach:** Dynamics 365 customers with at least 10 users or Base licenses of Sales, Customer Service, Field Service, Project Service Automation, Supply Chain Management, Finance, or Retail are eligible to purchase Marketing Attach.

**Dynamics 365 Marketing Additional Contacts:** To activate the additional contact packs, customer must meet the minimum purchase requirements

- Dynamics 365 Marketing Additional Contacts Tier 3: 2 packs
- Dynamics 365 Marketing Additional Contacts Tier 4: 5 packs
- Dynamics 365 Marketing Additional Contacts Tier 5: 10 packs
- All other additional contact packs have no minimum purchase

Note, customers who have the 'free' Marketing application with 2K contacts are required to purchase Dynamics 365 Marketing Additional Contacts (8K) prior to purchasing any other additional contacts.

## Finance, Supply Chain Management, Retail, and Talent



Note, each Finance, Supply Chain Management, Retail, and Talent subscription must meet the minimum license requirement.

**Talent comprehensive hiring:** to get the entitlements included with the Talent comprehensive hiring add-on, customers must satisfy:

- The 5-seat minimum purchase requirement for the Talent application
- Sufficient number of comprehensive hiring (100 employee pack) add-ons to meet or exceed the number of employees on payroll (e.g. 1500 employees = 15 Tier 2 packs)

## Dynamics Professional Support

Dynamics 365 customers requiring Professional Direct Support must purchase support for each user.

- 20 user minimum
- 250 user maximum

## Licensing Requirements for External Users

External users are not employees, contractors, or agents of the customer or its affiliates (i.e. a separate company, an independent contractor). External users are end customers and third-party users of the organization or its affiliates and do not require SLs to access Dynamics 365. External user access is included with the organization's internal user SLs. Customer Engagement Applications graphical user interfaces may not be accessed by external users.

Dynamics 365 customers have the option to license a Portal to provide access to business processes or internal data for external users.

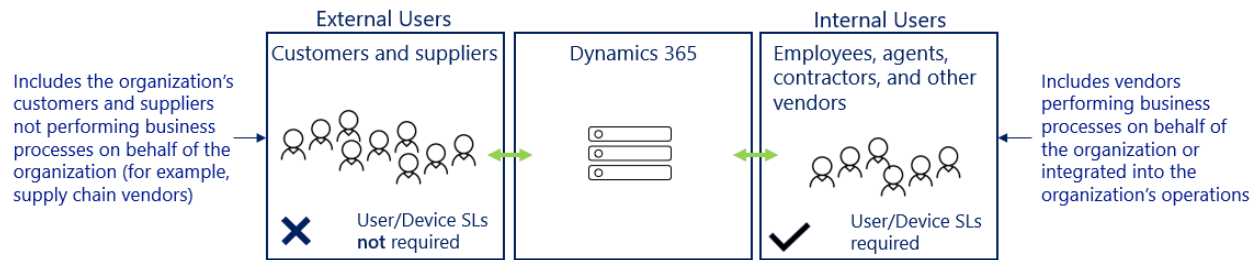
In addition, external users include off-site vendors not on an employee-like relationship with the organization or its affiliates (e.g. IT help desk support vendors serving multiple customer organizations).

However, external user access does not extend to the customer or the customer's affiliate's contractors, vendors, or agents providing business processes on the customer's behalf or using Dynamics 365 to manage any portions of their business (e.g. accounting, payroll, HR, telemarketing, data recording, social media marketing, etc.). In this sense, the customer may not use Dynamics 365 to provide business process outsourcing services to its clients.

For qualifying indirect transaction types, Operations - Order Lines may also be used by internal or external users in indirect access scenarios such that a user or device license is not required. Please see the Operations - Order Lines [section](#) for more details.

Operations - Order Lines is an opt-in model, and once you opt-in, any transaction that comes in via OData or DIXF and creates or updates a qualifying order line type will be counted and charged for, independent of whether it came from an internal or external user. If that would adversely affect them, they can choose not to opt-in to the Operations - Order Lines model.

Project Web App, and the Project Online Desktop Client are services and/or features included as part of select Dynamics 365 licenses, that do not distinguish between internal and external users. You must license external users, as well as, internal users who will access these services or features with a Dynamics 365 license.

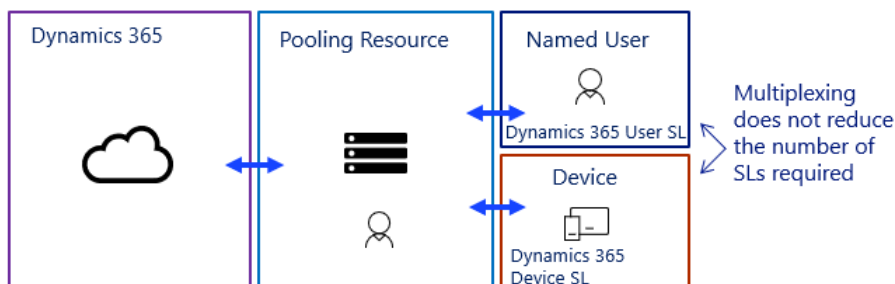


## Multiplexing

Multiplexing refers to the use of hardware or software that a customer uses to pool connections, reroute information, or reduce the number of devices or users that directly access or use the Dynamics 365 service. Multiplexing does NOT reduce the number of SLs of any type required to access the Dynamics 365 service. Any user or device that accesses the Dynamics 365 service—whether directly or indirectly—must be properly licensed.

Dynamics 365 SLs are required for users or devices that directly input, query, or view data from the Dynamics 365 service. Similarly, Dynamics 365 SLs are required for users or devices that input data into, query, or view data from the Dynamics 365 service through a pooling device. Pooled connections use a non-interactive user account in Dynamics 365 that can access the system but only via the web service layer. Internal users and devices accessing Dynamics 365 data indirectly through a portal or via an API to a separate service such as Microsoft Outlook must also be properly licensed, regardless of if they are set up as a Dynamics 365 user in the service, for example:

- Internal users and devices accessing Dynamics 365 [restricted](#) data indirectly through a PowerApps must still be properly licensed for Dynamics 365
- Any user or device that accesses the service, files, data, or content provided by the service that is made available through an automated process requires a Dynamics 365 SL
- The number of tiers of hardware or software between the Dynamics 365 service and the user or devices that ultimately use its data, services, or functionality does not affect the number of SLs required.



For qualifying indirect transaction types, the Operations - Order Lines SKU may also be used to license indirect access scenarios such that a user or device license is not required. Please see the Operations - Order Lines [section](#) for more details.

For additional information about multiplexing refer to the Microsoft Volume Licensing Brief [Multiplexing—Client Access License \(CAL\) Requirements](#). Note, this document is intended to provide general multiplexing guidance that can be used for online as well as on-premises situations.

**Note:** Licensed users may manually rekey information (when coming from non-licensed users) into the Dynamics 365 service. This scenario is not considered multiplexing.

## Dual Use Rights

One of the advantages of Dynamics 365 is dual use rights. This allows customers the option to deploy the server software either in Microsoft's cloud or in a private on-premises or partner-hosted cloud. In some cases, customers may want to deploy both types of instances simultaneously. This might be done to help with migrating a Dynamics 365 on-premises deployment to Dynamics 365, running private Dev/Test deployments in Microsoft Azure. With Dual Use Rights, Dynamics 365 users licensed with the required User SL do not need to acquire CALs to access Server instances.

Users or devices licensed with Dynamics 365 SLs have use rights equivalent to a CAL for the purpose of accessing equivalent on-premises functionality. With Dynamics 365 the server license is included with the SLs. For Finance, and Supply Chain Management applications, this is the Dynamics 365 for Operations Server and for the Customer Engagement applications this is the Dynamics 365 (On-premises) Server. Customers may use downgrade rights to deploy an earlier version of a server, however, downgrade rights are limited to Dynamics AX 2012 R3 Server for Dynamics 365 for Operations on-premises Server, and Dynamics CRM 2016 for Dynamics 365 (On-Premises) Server. Licenses for all supporting servers (e.g., Windows Server and CAL(s)) must be obtained separately.

Users or devices licensed with the following SLs may access the on-premises Dynamics 365 Server software provided via dual use rights:

- Sales **Enterprise**
- Customer Service **Enterprise**
- Team Members (granted via Enterprise SL)

Users or devices licensed with the following SLs may only access the on-premises Dynamics 365 for Operations Server software provided via dual use rights:

- Finance
- Supply Chain Management
- Operations - Activity
- Operations - Device
- Team Members (granted via Finance and/or Supply Chain Management SL)

On-premises dual use rights *only* apply for the specific Dynamics for Operations applications for which the user has a cloud SL. For example, a user licensed for Finance may only use the Dynamics 365 on-premises security roles associated with the Finance USL.

Access to the Dynamics 365 for Operations Server software provided via dual use rights is exclusive to those users assigned a qualifying Dynamics 365 SL and External Users and not provided for users licensed with on-premises CALs.

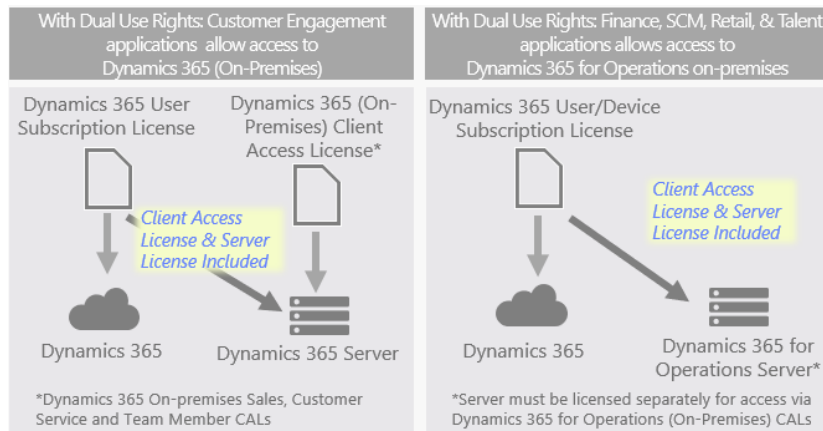


Figure 5: Dual Use Right Mapping

Dynamics 365	Dynamics 365 SKUs	Dynamics 365 on-premises SKUs
Applications	Dynamics 365 Sales	Dynamics 365 for Sales (On-Premises)
	Dynamics Customer Service	Dynamics 365 for Customer Service (On-Premises)
	Dynamics 365 Field Service	Dynamics 365 for Field Service functionality (On-Premises)
	Dynamics 365 Finance	Dynamics 365 for Operations (on-premises) *
	Dynamics 365 Supply Chain Management	Dynamics 365 for Operations (on-premises) *
	Dynamics 365 Retail	Dynamics 365 for Operations (on-premises) *
Additional User/Device	Dynamics 365 Team Members	Dynamics 365 for Team Members (on-premises)
	Dynamics 365 Operations - Activity	Dynamics 365 for Operations Activity (on-premises)
	Dynamics 365 Operations - Device	Dynamics 365 for Operations Device (on-premises)

Field Service on-premises functionality is available for Dynamics 365 Field Service license

\*On-premises dual use rights only apply for the specific Dynamics 365 for Operations applications for which the user has a cloud SL. For example, a user licensed for Finance may only use the Dynamics 365 on-premises security roles associated with the Finance USL.

Dual Use Rights included with Dynamics 365 SLs are non-perpetual and will expire when the cloud subscription expires.

Dynamics CALs have no reciprocal rights to access functionality provided exclusively to Dynamics 365 User SLs, nor do Dual Use Rights imply equivalent capabilities between Dynamics CALs and Dynamics 365 SLs.

Customers who have purchased Dynamics 365 and are entitled to On-Premises software can obtain their software as follows. Volume Licensing: [Volume Licensing Service Center \(VLSC\)](#), Cloud Solution Provider Program: [PartnerSource](#), Microsoft Online Subscription Program: [CustomerSource](#). Registration may be required. For more information regarding on-premises licensing, see [Microsoft Dynamics 365 On-premises](#) and [Microsoft Dynamics 365 for Operations, on-premises](#) licensing guides.

## Dynamics 365 Subscriptions

The core Business Applications can be licensed as base or attach licenses, exceptions apply for Project Service Automation, Talent, and Marketing. Reference [Appendix H](#) for appropriate license combinations.

### Dynamics 365 Applications

Application subscriptions are named user subscriptions where a user is licensed only for one individual application. This is largely how business applications have traditionally been licensed. Dynamics 365 applications can be licensed by Enterprise User SL, Professional User SL, or by Device SL (see Device Subscription License [section](#) for more information). Marketing is licensed at the tenant level.

- Sales Enterprise
- Sales Professional
- Marketing
- Customer Service Enterprise
- Customer Service Professional
- Field Service
- Project Service Automation
- Finance
- Supply Chain Management
- Retail
- Talent

## Dynamics 365 Additional Users

Additional users are not subject to the Base/Attach motion and may access all applicable Dynamics 365 applications within the constraints described below.

### Team Members

The Team Members User SL enables users to read Dynamics 365 data generated from Finance, Supply Chain Management, Retail, Talent, and Customer Engagement Applications. Full access to these applications is governed through Dynamics 365 application user, as described above. Note, at least one full user must be assigned to the tenant to administer and configure the individual Team Members applications.

The Team Members subscription is a named user subscription designed for users who are not tied to a particular function, but who require basic Dynamics 365 functionality. This license entitles the user to light weight access *through designated scenarios* built into Team Members experience. The Team Members subscription does not provide access to custom applications and is not intended for scenarios beyond those listed in [Appendix B](#).

The Team Members User SL grants a user access to participate in a limited specific set of functionalities, as defined below, from the applications.

#### Team Members use rights for Customer Engagement Applications

The Team Members User SL grants a user the following Sales, Customer Service, Field Service, or Project Service Automation rights for their own use and not for, or on behalf of, other individuals:

- (i) Create, view, update, and delete contacts, activities, tasks, and notes access to contacts, activities, tasks and notes
- (ii) Record time and expense for Project Service Automation, and apply for projects
- (iii) Update personal employee information
- (iv) User reporting and dashboards
- (v) Participate as an end-consumer of Dynamics 365 services such as responding to surveys
- (vi) A Team Members application module may not be customized with more than 15 custom entities available to the Team Members license\*

\*Customization is only allowable if it does not result in a change to core purpose of the specified scenario

Reference [Appendix B](#) for a detailed list of the Customer Engagement Team Members use rights.

#### Team Members use rights for Finance, Supply Chain Management, Retail, and Talent Applications

The Team Members SL grants a user the following Finance, Supply Chain, Retail, and Talent rights for their own use and not for, or on behalf of, other individuals:

- (i) To record any type of time
- (ii) To record any type of expenses
- (iii) Manage personal employee information
- (iv) Manage direct employee and candidate activities for hiring, onboarding, and human resources
- (v) Create requisitions
- (vi) Create or edit the items related to the following capabilities: quality control and departmental budgets

- (vii) Approval of time, expense, invoices
- (viii) Team Members application module may not be customized with more than 15 custom entities available to the Team Members license. This only applies to entities that sit on Common Data Service Platform (Talent – Attract) \*

\*Customization is only allowable if it does not result in a change to core purpose of the specified scenario

Reference [Appendix C](#) for a detailed list of the Finance, Supply Chain Management, Retail, and Talent Security Roles by User SL Level.

## Operations - Activity

The Operations - Activity subscription is a named user subscription intended for users who require more capabilities than the Team Members license, but do not require the use rights of a full user. Operations - Activity use rights include all Team Members user rights as well as the right to:

- (i) Approve all Activity related transactions
- (ii) Create or edit the items related to warehousing, receiving, shipping, orders, vendor maintenance, and all budgets
- (iii) Operate a Point-of-Sale (POS) device, store manager device, shop floor device, or warehouse device.

Please review [Appendix C](#) for a list of the Finance, Supply Chain Management, Retail, and Talent Security Roles by User SL Level.

## Device

### Customer Engagement Device SL

With the Customer Engagement Device SLs multiple users can access Dynamics 365 applications through a shared device login. The use rights are equal to that of the Dynamics 365 User SL, except that access is limited to only the licensed device. For a detailed view of the use rights associated with Customer Engagement Device please refer to [Appendix B](#).

Customer Engagement applications Device SLs options:

- (i) Sales Enterprise
- (ii) Customer Service Enterprise
- (iii) Field Service

### Finance, Supply Chain Management, and Retail - Device SL

With the Operations - Device license, multiple users can use a device that is licensed with an Operations - Device SL to operate a point of sale device, shop floor device, warehouse device or store manager device. A single device can provide any of the following functionality in any combination.

Device SL	Functionality
Point of Sale	One device located in the Commerce location, used by any individual, for completing customer facing sales of goods or services transactions
Store Manager	One device located in the Commerce location, used by any individual, dedicated to performing the following tasks solely for that Commerce location. Commerce location or Store means a physical location (static or itinerant) operated by you when closing goods or services transactions with customers: <ul style="list-style-type: none"> <li>• Managing and replenishing inventory</li> <li>• Balancing cash registers and processing daily receipts</li> <li>• Configuring and maintaining menu options displayed by the ISV Devices</li> <li>• Purchasing supplies and services required to run the Commerce Location operations</li> <li>• Managing Commerce Location staff</li> <li>• Processing reports required to analyze and manage Commerce Location results</li> <li>• Managing master data related to Commerce Location operations</li> </ul>
Shop Floor	One device used for manufacturing shop-floor functions. Shop Floor Functions: <ul style="list-style-type: none"> <li>• Clock-in and clock-out</li> <li>• Starting and finishing production jobs (including project activities carried out on the shop floor)</li> <li>• Reporting progress</li> <li>• Materials consumption and completion</li> <li>• Viewing documents and instructions related to production jobs</li> <li>• Viewing worker holiday balances</li> </ul>
Warehouse Device	One device used for Warehousing functions: <ul style="list-style-type: none"> <li>• Receiving</li> <li>• Putting-away</li> <li>• Doing internal stock transfers</li> <li>• Picking, packing</li> <li>• Capturing product attributes</li> <li>• Shipping goods plus performing inventory count checks in the context of a warehouse management system</li> <li>• Posting output and materials consumption against production orders when captured as transfers of raw materials and finished goods between a warehouse and a production line (all other types of transactions are excluded)</li> </ul>

Note, Operations - Device SL use rights are also available to Operations - Activity users. When multiple users who only require these use rights work exclusively on shared devices, it will generally be more cost effective to license those devices with the device SL. When a single user utilizes one or more dedicated personal devices, it will be more cost effective to license that user with an Activity USL. Device SLs do not include all the capabilities of the Operations - Activity user and full user.

# Product Licensing

## Dynamics 365 Sales



Territory Sales  
Managers

Manage sales  
pipeline  
Close deals



Dynamics 365 Sales  
or  
Microsoft  
Relationship Sales

### General information:

Licensing	User subscription and/or device (Enterprise SLs only) subscription
Purchase requirements	No purchase requirements. For additional information, see <a href="#">How to Buy</a>
Default Capacity	<a href="#">Default Capacities</a> Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-in	Sales Enterprise application add-ins: <ul style="list-style-type: none"><li>• Microsoft Relationship Sales solution Plus</li><li>• Microsoft Relationship Sales solution</li><li>• Sales Insights</li></ul>
Capacity Add-on	For details, see <a href="#">Add-ons</a>
Entitlements/Use Rights	For details of entitlements and use rights, see <a href="#">Use Rights</a>
Capabilities	For a list of full capabilities, see <a href="#">(link)</a>

### Microsoft Relationship Sales solution

Microsoft Relationship Sales solution (MRs), licensed per user, helps sales professionals build the relationships they need to win, from a single, trusted vendor. This solution will help connect more businesses with the power of relationship selling.

- **Microsoft Relationship Sales solution Plus:** Sales Enterprise and LinkedIn Sales Navigator Enterprise
- **Microsoft Relationship Sales solution:** Sales Enterprise and LinkedIn Sales Navigator Team

MRs qualifies as a base license as it includes a Sales Enterprise license, customers may purchase eligible attach licenses. Reference [Appendix H](#) for appropriate license combinations.

### Other considerations:

- True downs are not allowed
- Tiered pricing (based in number of users for subscription) applies per customer tenant, and does not accumulate across tenants
- Tiered pricing does not apply to Team Members, Operations - Activity, any Dynamics 365 application (e.g. Customer Service) subscriptions
- Tiered pricing is not available in the Microsoft Online Subscription Program (MOSP), nor for Academic or Charity pricing in any program

For more information and list of features included with LinkedIn Sales Navigator Enterprise and Sales Navigator Team, see <https://business.linkedin.com/sales-solutions/sales-navigator/comparison-table>.

### Dynamics 365 Sales Enterprise

With Sales Enterprise customers go beyond sales force automation and meet the needs of more complex sales processes. Sales Enterprise provides customization, extensibility and embedded intelligence, in addition to all the functionality available in Sales Professional.

### Dynamics 365 Sales Professional

Sales Professional provides core sales force automation or SFA that is used by an organization without a complex sales organization.

The Sales Enterprise and Sales Professional applications are not meant to be combined within an organization and may not be deployed on the same instance; however, they may be deployed on the same tenant (e.g. when a subsidiary sales organization has less complex sales force needs than parent organization). Customers may mix and match Enterprise licenses with Sales Professional on the same tenant. A user with Sales Professional license is licensed only for that application and therefore may not directly or indirectly access another instance with Sales Enterprise application. Conversely, as Sales Enterprise includes Sales Professional capabilities, a Sales Enterprise user may access the Sales Professional instance. However, the functionality in the Sales Professional application will still be limited to the Sales Professional features.

Figure 6: Instance separation

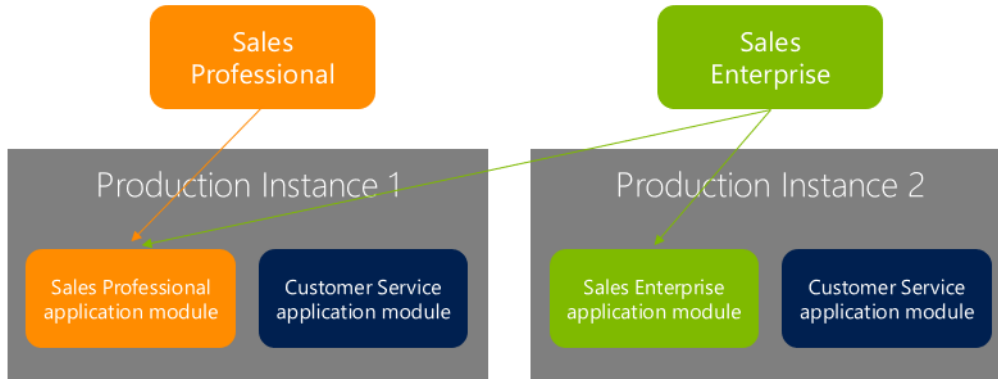


Figure 7: Mix and Match Deployment

Customer Scenario – 1 Tenant	Comment
Sales Enterprise + Sales Professional	Sales Enterprise users may access all instances on a tenant. Sales Enterprise users may access Sales Professional instance but Sales Professional may not access Sales Enterprise instance
Microsoft Relationship Sales solution + Sales Professional	Relationship Sales users may access both Sales Enterprise and Sales Professional instances
Sales Professional + Team Members	Team member use rights do not change

## Dynamics 365 Sales Insights

Dynamics 365 Sales Insights (formerly known as Dynamics 365 AI for Sales), licensed per user, improves engagement and decision-making with prebuilt and embedded insights to businesses that are quick to deploy and easy to act upon. Sales Enterprise includes the Sales Insights features: Assistant, Email engagement, Auto capture, and Business card scanning (limited). Customers are required to have a Sales Enterprise or Microsoft Relationship Sales solution (MRSs) license to enable all the Dynamics 365 Sales Insights features listed below.

- (i) Predictive lead scoring
- (ii) Predictive opportunity scoring
- (iii) Talking points
- (iv) Relationship analytics
- (v) Who knows whom
- (vi) Notes analysis
- (vii) Conversation intelligence
- (viii) Business card scanning (limited)

For more information on Dynamics 365 Sales Insights, see <https://dynamics.microsoft.com/ai/sales-insights/>

# Dynamics 365 Marketing



## General information:

Licensing	Per tenant
Purchase requirements	No purchase requirements For additional information, see <a href="#">How to Buy</a>
Default Capacity	<a href="#">Default Capacities</a> Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant (Marketing standalone only)
Application Add-on	NA
Capacity Add-on	For details, see <a href="#">Add-ons</a>
Entitlements/Use Rights	For details of entitlements and use rights, see <a href="#">Use Rights</a>
Capabilities	For a list of full capabilities, see <a href="#">(link)</a>

The Marketing application is licensed per tenant and is based on contacts used in Marketing. The administrator will need to assign user licenses through the admin portal to Marketing users that need access to the Marketing application. Since

Marketing is a tenant-based license, customers may install, use, and configure one Marketing application with only one Dynamics 365 instance.

The Marketing application is a tenant-based license, therefore the per user Attach sales motion does not apply to this application. Reference [Appendix H](#) for appropriate license combinations.

## Dynamics 365 Marketing (standalone)

Customers who are new to Dynamics or have fewer than 10 full users of Sales, Customer Service, Field Service, Project Service Automation, Finance, Supply Chain Management, or Retail may purchase the Marketing (standalone) application with an entitlement of 10K contacts. Customers receive Customer Engagement entitlements once, providing these entitlements are not already on the customer's account, and only when purchasing Marketing standalone application:

- (i) Common Data Service Database Capacity
- (ii) Common Data Service File Capacity
- (iii) Common Data Service Log Capacity
- (iv) Microsoft Forms Pro

## Dynamics 365 Marketing Attach

Customers with at least 10 full users of Sales, Customer Service, Field Service, Project Service Automation, Finance, Supply Chain Management, or Retail may purchase Marketing Attach application with an entitlement of 10K contacts.

The base pack of Marketing includes 1 Marketing Application instance and an entitlement of 10K contacts. Only one of the "base packs" with 10K contacts may be purchased. Customer Engagement entitlements are at the tenant level; therefore, they are not included with this application.

### Scenario:

*Dynamics 365 Sales on-premises customers would like to use Marketing.*

- *Customer may purchase Marketing with the understanding that it is an online solution only.*

For additional environments (production or non-production), reference [Appendix F: Dynamics 365 Capacity Add-ons](#).

**Marketing Contacts:** Marketing Contacts are based on the contacts used for a marketing activity. Marketing activity includes any contact or engagement via Marketing emails, landing pages, forms, LinkedIn integration, events, surveys and any other custom channel. Marketing currently enables customers to market to their contacts, leads and opportunities that are associated/linked to a contact record in their database. All marketable contacts used in a tenant are counted irrespective of instance (production and non-production). Customers will only be charged for Contacts that are engaged in marketing activities using the Marketing application OR capabilities delivered as part of the application. Visit this [help documentation](#) to learn more.

## Dynamics 365 Customer Service



### General information:

Licensing	User subscription and/or device (Enterprise SLs only) subscription
Purchase requirements	No purchase requirements. For additional information, see <a href="#">How to Buy</a>
Default Capacity	<a href="#">Default Capacities</a> Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-in	Customer Service application add-ins: <ul style="list-style-type: none"><li>• Customer Service Chat</li></ul>
Capacity Add-on	For details, see <a href="#">Add-ons</a>
Entitlements/Use Rights	For details of entitlements and use rights, see <a href="#">Use Rights</a>
Capabilities	For a list of full capabilities, see <a href="#">link</a>

Customers may choose what level of functionality is appropriate for their business with two solution options for licensing Customer Service. Note, these two services are not meant to be combined within an organization.

### Dynamics 365 Customer Service Enterprise

Customer Service Enterprise for more complex, configurable, and intelligent capabilities, Customer Service empowers businesses to provide a branded, personalized self-service experience that leverages an organized, searchable knowledge base to deliver consistent, up-to-date answers.

### Dynamics 365 Customer Service Professional

Customer Service Professional for less complex scenarios with streamlined capabilities to provide core support functionality.

The Customer Service Enterprise and Customer Service Professional application modules may not be deployed on the same instance; however, they may be deployed on the same tenant (e.g. when a subsidiary customer service organization has less complex needs than parent organization). Customers may mix and match Enterprise licenses with Customer Service Professional on the same tenant. A user with Customer Service Professional license is licensed only for that application and therefore may not directly or indirectly access another instance with Customer Service Enterprise application. Conversely, as Customer Service Enterprise includes Customer Service Professional capabilities, a Customer Service Enterprise user may access the Customer Service Professional instance. However, the functionality in the Customer Service Professional application will still be limited to the Customer Service Professional features.

Figure 8: Instance separation

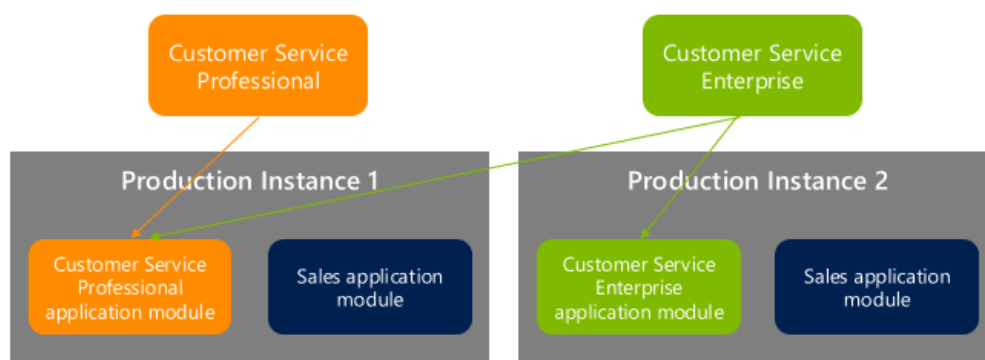


Figure 9: Mix and Match Deployment

Customer Scenario – 1 Tenant	Comment
Customer Service Enterprise + Customer Service Professional	Customer Service Enterprise users may access to all instances on a tenant. Customer Service Enterprise users may access Customer Service Professional instance but Customer Service Professional may not access Customer Service Enterprise instance
Customer Service Professional + Team Members	Team member use rights do not change

## Dynamics 365 Customer Service Insights

Microsoft Dynamics 365 Customer Service Insights, licensed per user, provides an actionable view into critical performance metrics, operational data, and emerging trends for customer service organizations. Customer Service Enterprise users are entitled with Customer Service Insights capabilities.

Customer Service Enterprise users are entitled with Customer Service Insights capabilities. Customers who wish to purchase Dynamics 365 Customer Service Insights, refer to the [Dynamics 365](#) section.

For more information on Dynamics 365 Customer Service Insights, see <https://docs.microsoft.com/dynamics365/ai/customer-service-insights/overview>

## Dynamics 365 Customer Service Chat

Microsoft Dynamics 365 Customer Service Chat is an add-in capability for the Dynamics 365 Customer Service Enterprise application that helps agents engage in real-time with customers and resolve issues faster. Chat is licensed per user.

Use of historical Supervisor reporting through Omnichannel Intraday Insights, Omnichannel Chat Insights and Omnichannel Sentiment Insights Dashboards requires Power BI Pro license or higher.

# Dynamics 365 Field Service



## General information:

Licensing	User subscription and/or device subscription
Purchase requirements	No purchase requirements. For additional information, see <a href="#">How to Buy</a>
Default Capacity	<a href="#">Default Capacities</a> Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-in	Field Service application add-in: <ul style="list-style-type: none"><li>• Resource Schedule Optimization</li></ul>
Capacity Add-on	For details, see <a href="#">Add-ons</a>
Entitlements/Use Rights	For details of entitlements and use rights, see <a href="#">Use Rights</a>
Capabilities	For a list of full capabilities, see <a href="#">(link)</a>

Field Service is the recommended choice for your field-based service teams, leveraging tight integration between Customer Service case management capabilities and field service work orders to deliver business process driven, best in class field service management.

This User SL also includes the latest version of Field Service Mobile, a Microsoft application that is specifically designed for Field Service, distinct from the Dynamics 365 Mobile Client application. The Field Service Mobile application will no longer have a limit on the number of custom entities that can be used so long as the application is being used in the context of Field Service. The Field Service Mobile (2016) and Field Service Mobile (2017) applications continue to have a maximum limit of 10 custom entities.

## Dynamics 365 Field Service - Resource Schedule Optimization Add-on

Resource Scheduling Optimization is an add-on capability for the Field Service application that enables customers to automatically create a schedule for the appropriate resource in SharePoint, while simultaneously optimizing appointment setting for travel time, mileage, and many other constraints.

Resource Schedule Optimization is licensed per resource included in the optimization process and will typically be accessed by a scheduler or dispatcher user who will designate any number of resources to be included. Resources may be individuals, such as field technicians or other human resources.

The add-on license allows for unlimited use of schedule optimization, which may be on a regular cadence such as daily or weekly, or ad-hoc.

A Field Service license is required for managing the Resource Schedule Optimization.

## Dynamics 365 Project Service Automation



### General information:

Licensing	User subscription
Purchase requirements	No purchase requirements. For additional information, see <a href="#">How to Buy</a>
Default Capacity	<a href="#">Default Capacities</a> Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-in	NA
Capacity Add-on	For details, see <a href="#">Add-ons</a>
Entitlements/Use Rights	For details of entitlements and use rights, see <a href="#">Use Rights</a>
Capabilities	For a list of full capabilities, see <a href="#">(link)</a>

Project Service Automation is designed for professionals who manage projects and the associated customer engagement process end-to-end.

Project Service Automation qualifies as a base license but may not be purchased as an attach license. Customers seeking multiple Customer Engagement application(s) may purchase Project Service Automation as the Base license and additional Customer Engagement applications (Sales, Customer Service, Field Service) at the Attach price. Reference [Appendix H](#) for appropriate license combinations.

## Dynamics 365 Finance



### General information:

Licensing	User subscription
Purchase requirements	For minimum requirements, see <a href="#">How to Buy</a>
Default Capacity	<a href="#">Default Capacities</a> Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-in	NA
Capacity Add-on	For details, see <a href="#">Add-ons</a>
Entitlements/Use Rights	For details of entitlements and use rights, see <a href="#">Use Rights</a>
Custom Roles	How to create and license custom <a href="#">roles</a>
Capabilities	For a list of full capabilities, see <a href="#">(link)</a>

Finance is Microsoft's financial management business application that enables medium and enterprise organizations to monitor the performance of global financial operations in real-time, predict future outcomes, and make data-driven decisions to drive growth. Finance provides deep data and process integrations across Dynamics 365, Office 365, and partner applications to offer a centralized source of information that saves time, facilitates collaboration across your organization, and enables faster, more informed decisions. It empowers users to do business anywhere, anytime with an intuitive user-interface personalized for their role and preferences.

Reference [Appendix C](#): Finance, Supply Chain Management, Retail, and Talent Security Roles by User SL Level for detailed information.

# Dynamics 365 Supply Chain Management



## General information:

Licensing	User subscription
Purchase requirements	For minimum requirements, see <a href="#">How to Buy</a>
Default Capacity	<a href="#">Default Capacities</a> Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-in	Asset Management for Dynamics 365 Supply Chain Management (100 assets)
Capacity Add-on	For details, see <a href="#">Add-ons</a>
Entitlements/Use Rights	For details of entitlements and use rights, see <a href="#">Use Rights</a>
Custom Roles	How to create and license custom <a href="#">roles</a>
Capabilities	For a list of full capabilities, see <a href="#">link</a>

Supply Chain Management is Microsoft's business application for managing manufacturing and supply chain operations.

Supply Chain Management provides manufacturers, distributors, and retailers with the real-time visibility and intelligence they need to move from reactive to proactive operations. Supply Chain Management unifies data and uses predictive insights from AI and IoT—across order fulfillment, planning, procurement, production, inventory, warehousing, and transportation processes—to maximize operational efficiency, product quality, and profitability.

Reference [Appendix C: Finance, Supply Chain Management, Retail, and Talent Security Roles by User SL Level](#) for detailed information.

## Asset Management Add-in for Dynamics 365 Supply Chain Management

Asset Management helps manage and maintain physical assets throughout the lifecycle. Asset Management is licensed per tenant, customers must purchase a sufficient number of Asset Management add-ons to meet or exceed the number of assets under management of the Asset Management application (e.g., 1500 assets = 15 additional asset licenses).

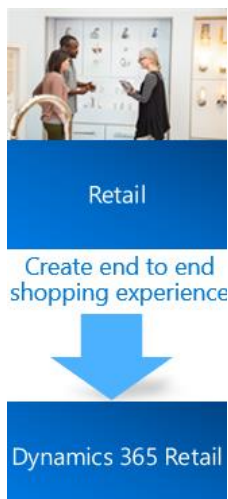
Asset Management works 'out of the box' for Finance and Supply Chain Management for up to 100 assets. Note, after 50 Asset Management add-in licenses have been purchased (5K assets), customers may manage unlimited assets with no additional purchase.

Assets must be licensed:

- Assets under management of the Asset Management feature
- Parent level assets are the only assets that need to be licensed

Role	Team Members	Activity/Device	Full User
Ticket creation	•	•	•
Maintenance worker		•	•
Maintenance clerk			•
Maintenance manager			•

# Dynamics 365 Retail



## General information:

Licensing	User subscription
Purchase requirements	For minimum requirements, see <a href="#">How to Buy</a>
Default Capacity	<a href="#">Default Capacities</a> Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-in	NA
Capacity Add-on	For details, see <a href="#">Add-ons</a>
Entitlements/Use Rights	For details of entitlements and use rights, see <a href="#">Use Rights</a>
Custom Roles	How to create and license custom <a href="#">roles</a>
Capabilities	For a list of full capabilities, see <a href="#">(link)</a>

Retail application is designed to help retailers manage their operations, deliver a connected employee experience, and offer exceptional shopping experiences. By leveraging intelligent forecasting and product recommendations, retailers may:

- (i) Improve in-store and e-commerce profitability
- (ii) Drive intelligent business insights to optimize strategy and cost
- (iii) Accelerate buying behavior through ubiquitous customer experiences

The Retail application is optimized for full users, including headquarter and central operation employees of retail organizations. Depending on the scenario, employees in retail stores will generally be licensed with either the [Dynamics 365 Operations - Device SL](#) or [Dynamics 365 Operations - Activity SL](#). Examples of these scenarios may include store employees, store managers and point of sale devices.

Reference [Appendix C: Finance, Supply Chain Management, Retail, and Talent Security Roles by User SL Level](#) for detailed information.

Retail deployments may also utilize the Retail Store Scale Unit, which is a retail server, cloud Point of Sale (POS) website and channel database deployed locally in a store. It maintains connectivity with and extends a Retail deployment, providing improved performance, business continuity and hybrid capabilities in store.

The Retail Store Scale Unit installation and use rights are included with a qualifying minimum purchase of Retail Application SLs and may be downloaded and installed at no additional cost. All servers, users and devices accessing the Retail Store Scale Unit must be appropriately licensed. The Retail Store Scale Unit is not available as a standalone license. Required hardware, Windows Client or Windows Server and SQL licenses must be acquired and licensed separately.

If dual use rights are being exercised and downgrade rights are utilized to downgrade to AX 2012, the Retail Store Server is not an included use right and appropriate licensing must be obtained. Please see AX 2012 Retail Licensing Guide and refer to the AX downgrade mappings table in the Dynamics 365 for Operations on-premises Licensing [Guide](#) to determine appropriate licensing.

# Dynamics 365 Talent



## General information:

Licensing	User subscription
Purchase requirements	For minimum requirements, see <a href="#">How to Buy</a>
Default Capacity	<a href="#">Default Capacities</a> Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-in	Talent application add-in: comprehensive hiring
Capacity Add-on	For details, see <a href="#">Add-ons</a>
Entitlements/Use Rights	For details of entitlements and use rights, see <a href="#">Use Rights</a>
Custom Roles	How to create and license custom <a href="#">roles</a>
Capabilities	For a list of full capabilities, see <a href="#">link</a>

Talent application helps organizations strategically attain, empower and optimize human resources to achieve high-impact, sustainable results for the organization.

There are two sets talent experiences:

- (i) HR Experience: strategic HR experience to drive operational excellence through intuitive experiences, visibility and collaboration and impactful programs.
- (ii) Talent Experiences: hire the best talent faster, build high performing agile teams and maximize the potential of your team (includes "Attract" and "Onboard" capabilities).

Both experiences are licensed together in the Talent application. Examples of full users who would be licensed with Talent application SLs would include human resource professionals and recruiters.

Users who sit outside of HR and recruiting, such as employees who need self-serve HR access or hiring managers who will be hiring for their own teams need to be licensed with the Team Members or Operations - Activity USLs.

Reference [Appendix C](#): Finance, Supply Chain Management, Retail, and Talent Security Roles by User SL Level for detailed information.

## Dynamics 365 Talent comprehensive hiring Additional Application

Talent comprehensive hiring add-on enables new capabilities for recruiter-grade features for appropriately licensed recruiters, talent specialists, and people managers.

### Talent comprehensive hiring packs:

SKU Name	Target Employee Count	Minimum Purchase
Comprehensive hiring Tier 1	<1K	2 packs
Comprehensive hiring Tier 2	1K - 5K	10 packs
Comprehensive hiring Tier 3	5K+	50 packs

Figure 10: Recruiters, talent specialists, and people managers: hiring experience with expanded capabilities

Capabilities		Attract Capabilities included Talent	comprehensive hiring required
Business Process	Configurable & extensible hiring process	●	●
	Hiring process template management		●
	Job requisition workflow & advanced business rules		●
	Email template		●
Candidate Sourcing	Create & manage jobs	●	●
	External job pages & URL		●
	Talent career site		●
	External job sites integration		●
	LinkedIn recruiter system connect		●
	Multi-position hiring		●
	Relevant jobs intelligence		●
Candidate Management	Candidate portal	●	●
	Create & Manage candidates	●	●
	1 personal talent pool	●	●
	Global talent pool		●
	Unlimited named, shareable talent pools		●
	Relevant candidate intelligence		●
Hiring Management	Screening & Interview scheduling	●	●
	Provide interview feedback	●	●
	Offer Management		●
Reporting	Individual action dashboards	●	●
	Summary and KPI dashboard		●
Administration	Job-governed, activity-based security	●	●
	Admin-governed security		●
	Compliance features & reporting		●

### Talent Modular Application

Talent "Onboard" modular application allows users to take advantage of Dynamics 365 application capabilities in a lighter weight, more targeted solution. It represents a subset of the capabilities in Talent but is fully functional standalone experience that can also integrate with and extend Microsoft and third-party business applications.

Talent: Onboard modular application is sold individually. Pricing is per user per month with a one-year minimum commitment and there is no minimum purchase requirement.

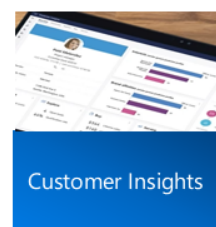
The "Onboard" capabilities are included for users who are licensed for Talent.

- The capabilities are targeted at hiring managers
- New hires don't need a user license to use Talent application
- New hires don't need an Onboard license to use its capabilities

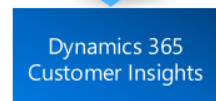
This application is only available for direct purchase and are licensed under the Microsoft Online Subscription Program (MOSP – Web-direct).

# Dynamics 365

## Dynamics 365 Customer Insights



Create unified customer profiles and predictive insights

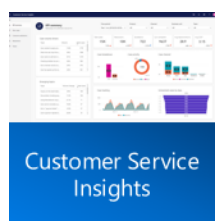


### General information:

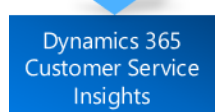
Licensing	Per tenant
Purchase requirements	No purchase requirements. For additional information, see <a href="#">How to Buy</a>
Default Capacity	<a href="#">Default Capacities</a> Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-in	NA
Capacity Add-on	For details, see <a href="#">Add-ons</a>

Dynamics 365 Customer Insights is licensed per tenant and enables every organization to unify and understand their customer data to harness it for intelligent insights and actions. Customer Insights eliminates data silos, enabling customers to bring data from any source, unify their customer data, and view it from their Dynamics 365 applications.

## Dynamics 365 Customer Service Insights



Gives view into metrics, data, and trends



### General information:

Licensing	User subscription
Purchase requirements	Reference Figure 15 below
Default Capacity	<a href="#">Default Capacities</a> Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-in	NA
Capacity Add-on	For details, see <a href="#">Add-ons</a>

Customer Service Enterprise users are entitled with Customer Service Insights capabilities. The following customers may purchase Customer Service Insights:

- Customer Service Professional (application add-in)
- Dynamics 365 on-premises (standalone application)
- Non-Dynamics solutions (standalone application)

Figure 11: Customer Service Insights Availability

Dynamics 365	Customer Service Insights (standalone)	Customer Service Insights Additional Application
Availability	For purchase	For purchase
Purchase requirements	No Dynamics 365 purchase is required for standalone application	Customer Service Professional customer may purchase as an additional application add-in
Default Capacity (pooled at tenant level)	Customer Service Insights Cases: 100K cases/user/month (e.g., 1 user has 100K cases. If tenant has 100 users, the tenant has 10M cases)	
Capacity Add-on (per tenant/month)	Additional Customer Service Insights Cases: 500K/tenant/month	

For more information on Dynamics 365 Customer Service Insights, see <https://docs.microsoft.com/dynamics365/ai/customer-service-insights/overview>

# Dynamics 365 Fraud Protection



Identify fraud patterns and reduce losses



Dynamics 365 Fraud Protection

## General information:

Licensing	Per tenant
Purchase requirements	No purchase requirements. For additional information, see <a href="#">How to Buy</a>
Default Capacity	<a href="#">Default Capacities</a> Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-on	NA
Capacity Add-on	Additional assessments may be purchased. For details, see <a href="#">Add-ons</a>

Dynamics 365 Fraud Protection is a cloud-based anti-fraud solution for medium to large-sized organizations worldwide, designed to help lower fraud-related costs, increase profits, and improve customer experience. Fraud Protection is licensed per tenant with an entitlement of 100K assessments per month (purchase and account creation assessments). If the entitlement is exceeded, additional assessments may be purchased.

## Additional Services and Software

Microsoft offers additional services and software that work in tandem with Dynamics 365. These services are included with the full user as indicated below. There is no need to license these additional services and software.

**Microsoft Power Platform** - Dynamics 365 applications are built on the Microsoft Power platform, a high-productivity platform that includes the ability for customers to integrate products:

- **Microsoft PowerApps:** Extend and customize applications
  - PowerApps Portals add-on
  - AI Builder capacity add-on
  - PowerApps and Flow capacity add-on
- **Microsoft Flow:** Automate business processes and workflow
- **Microsoft Power BI:** Deliver business intelligence

Please visit <https://powerapps.microsoft.com> and <https://flow.microsoft.com> for more details on PowerApps and Flow.

**Note-1:** Power BI capabilities are licensed separately at this time.

**Note-2:** PowerApps and Flow use rights are determined based on the Dynamics 365 application that the user is licensed for. Please see Figure below for more details.

Figure 12: PowerApps/Flow Use Rights with Dynamics 365 licenses

	Dynamics 365 Apps <sup>1</sup>	Dynamics 365 Enterprise Apps <sup>2</sup>
<b>Customization / Extension of licensed Dynamics 365 application</b>		
Customize licensed Dynamics 365 application	Yes (Limited to 15 custom entities)	Yes (No limits on custom entities)
Run custom applications	-	Yes - unlimited (Within the same environment as licensed Dynamics 365 application)
Access custom portals	-	Yes - unlimited (Within the same environment as licensed Dynamics 365 application)
<b>Connector use rights</b>		
Standard connectors	•	•
Premium connectors	•	•
On-premise data gateway	•	•
Custom connectors	•	•
<b>Common Data Service use rights</b>		
Number of custom entities per licensed Dynamics 365 application	15	Unlimited
Restricted entities (within licensed Dynamics 365 application)	•	•
<b>Microsoft Flow use rights</b>		
Run Flows that extend licensed Dynamics 365 application	•	•
Run Standalone Flows that do not map to licensed Dynamics 365 application	-	-
Business process flows	•	•

<sup>1</sup>Dynamics 365 Sales Professional, Dynamics 365 Customer Service Professional, Dynamics 365 Talent: Onboard, Dynamics 365 Team Members, Dynamics 365 Activity, Dynamics 365 Business Central Team Members

<sup>2</sup>Dynamics 365 Sales Enterprise, Dynamics 365 Customer Service Enterprise, Dynamics 365 Field Service, Dynamics 365 Project Service Automation, Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Retail, Dynamics 365 Talent, Dynamics 365 Business Central

Note: PowerApps and Flow usage will count against daily API request limits associated with the Dynamics 365 license. More details at <http://aka.ms/platformlimits> - "PowerApps and Flow capacity add-on" can be purchased to increase daily service limits.

**Unified Service Desk for Microsoft Dynamics 365 (USD)** consolidates numerous communication channels (such as phone, chat, email, and social media) and relevant services into a single interface to enable greater efficiency and productivity.

USD is not available as a standalone license. USD software is installed and run locally on the user's device. The use rights expire upon expiration of the qualifying User SL subscription term or Software Assurance subscription. Note, USD is included for Customer Service Enterprise.

**Interactive Service Hub** provides a modern and intuitive end user experience for Customer Service and knowledge management roles through an online user experience (UX) design. It unifies customer interactions and pulls together all related information, enabling customers to be productive and view what's most relevant. The interactive service hub includes a multi-stream dashboard where users can view and act on their workload across multiple data streams as well as a single-stream dashboard where users are provided an aggregate view of the workloads.

**Microsoft Forms Pro** (replaces Voice of the Customer (VoC)) easily creates surveys and polls to collect customer feedback, measure employee satisfaction, and organize team events. Forms Pro is licensed per tenant and is based on the number of responses received for distributed surveys. Admins will see this service under "Microsoft Forms Pro capacity add-on". Dynamics 365 Enterprise users (Sales Enterprise, Customer Service Enterprise, Field Service, Project Service Automation, Marketing, and Talent) are entitled to Microsoft Forms Pro capabilities. Included with the entitled Microsoft Forms Pro capability is 2K Survey Responses per tenant per month.

Additional Responses (2K Survey Responses/tenant/month) may be purchased as an upgrade to Office 365 Forms or as a standalone application for Sales Professional, Customer Service Professional customers.

Customers who currently have the application and need additional capacity, may purchase as many of the Microsoft Forms Pro Additional Responses 2K Survey Responses packs as needed.

Forms Pro survey respondents don't need to be licensed providing the survey designer/editor has a license on the tenant.

- Designer/editor: need a license
- Respondents: don't need a license

For use rights details, reference [Forms Pro use rights table](#).

For more details on options for turning his service on or off, please reference the [how to buy](#) page for Admins.

**Dynamics 365 Mobile Offline capabilities** enable offline entities, provides autoreply for offline actions, a strong security model and offline views and offline search for Customer Engagement customers.

**The Dynamics 365 - Gamification** service allows Customer Engagement customers to incent their workers by turning work into play via individual and team contests, as well as engaging the broader organization by enabling them to build fantasy team competitions.

Role	Use Rights	Team Members, Sales Pro, & Customer Service Pro	Enterprise Users
Spectator	View results on leaderboards (web, mobile, and TV screens), and chats with participants	•	•
Fan	Draft personal Fantasy Teams, earn points, badges, and trophies on team results	•	•
Player	Play/compete in game (earn points, badges, and trophies) and participate in Chat		•
Game Manager	Setup games: define game model, metrics, positions, and prizes		•
Commissioner	Oversee games: admin, role management		•

**Microsoft Power BI in Dynamics 365** - Dynamics 365 users are not provided with any standalone or general-purpose Power BI license or use rights. Customers who require Power BI Pro will need to license and pay for it separately.

Finance, Supply Chain Management, Retail, and Talent applications themselves may embed Power BI content within the service User Interfaces. This is simply a product feature and no Power BI licensing is required to access this content (e.g. view embedded tables and charts). Please consult the [Dynamics 365 roadmap](#) for more information on this feature.

Customer Engagement application subscriptions include an option to embed Power BI content as a product feature but require users to subscribe to Power BI (free user or Power BI Pro depending on content) separately to configure access to this content. More details are available in [this article](#).

**Dynamics 365 Market Insights** - enables business professionals to gain a competitive edge by staying on top of news, trends and insights, derived from Microsoft and other trusted US data sources, about their customers, competitors and products.

# Dynamics 365 Default Subscription Capacities

Customer Engagement applications default subscription capacities leverage the same tenant and infrastructure and will accrue across the one tenant. Finance, Supply Chain Management, Retail and Talent applications leverage an entirely different tenant and have their own set of default capacities. The Customer Engagement and Finance, Supply Chain Management, Retail, and Talent applications' capacities are not shared.

The first subscription of Customer Engagement or Finance, Supply Chain Management, Retail and Talent applications includes the default capacity which is shared per tenant. Additional subscriptions do not include additional default capacity.

For example, if a new customer purchases Sales, they will receive 10GB of default Common Data Services Database Capacity.

If an existing Sales customer purchases Field Services, they will not receive additional Common Data Services Database Capacity above the initial 10GB.

## Customer Engagement Applications

Professional Application subscriptions such as Sales Professional and Customer Service Professional do not receive additional/accrued per user capacity entitlement, but their tenants do receive the default tenant allocations of all capacity types. The Marketing application is licensed per tenant; therefore, Marketing licenses don't include default capacities.

Additional capacity can be purchased separately. Refer to the additional capacity Dynamics 365 Add-on in [Appendix F](#).

Figure 13: Common Data Service Default Capacity

Capacity	Purpose
Database	Stores and manages entity definitions and data
File	Store attachments to notes or emails in Customer Engagement applications and PowerApps. These include documents, image files, videos, PDF files and other crucial files needed in an organization.
Log	Records entity and attribute data changes over time for use in analysis and reporting purposes. Log capacity is designed to help organizations meet their auditing, compliance, and governance policies. Customers may delete audit change history for a record or a data range to reduce the log storage size. Users who have "View Audit History" and "View Audit Summary" security privileges may retrieve and display audit history.

Additional database and file capacity are accrued and granted at no charge at a rate of 250MB and 2GB, respectively, per Enterprise user (Sales Enterprise, Customer Service Enterprise, Field Service, and Project Service Automation).

Default and Accrued Capacity Allocation	Default/tenant	Accrued/Enterprise USL
Common Data Service Database Capacity	10GB	250MB
Common Data Service File Capacity	20GB	2GB
Common Data Service Log Capacity	2GB	NA

Scenario: 10 Enterprise USLs

- Default capacity: per tenant
- Accrued capacity: per user

Default and Accrued Capacity Allocation	Default/tenant	Accrued/10 Enterprise USL
Common Data Service Database Capacity	10GB	10*250MB = 2500MB
Common Data Service File Capacity	20GB	10*2GB = 20GB
Common Data Service Log Capacity	2GB	NA

## Default Customer Service Chatbot Sessions Capacity

Each Dynamics 365 Customer Service Chat subscription will receive an entitlement of 50 sessions. These will be pooled at the tenant level and will expire at the end of each month.

Default Capacity Allocation	Default/tenant
Customer Service Chatbot Sessions	50 Sessions/user/month (pooled at the tenant level)

## Default Customer Service Insights Case Capacity

The required case capacity is determined by the total number of case records imported into Customer Service Insights workspaces. The number of cases imported into a workspace is the number of cases created in a 60-day window to which the workspace owner has read access. Note that if multiple workspaces are connected to the same Dynamics environment, the same records may be imported multiple times and each import will count towards the total tenant capacity.

Default Capacity Allocation	Default/tenant
Customer Service Insights Cases	100K Cases/user/month (pooled at the tenant level)

# Finance, Supply Chain Management, Retail, and Talent Applications

Finance, Supply Chain Management, and Retail user subscriptions receive default tenant allocations of all capacity types. Note, Talent receives different tenant allocations.

Additional capacity can be purchased separately. Refer to the additional capacity Dynamics 365 Add-on in [Appendix F](#).

## Default Database Capacity for Finance, Supply Chain Management, and Retail

The tenant Finance, Supply Chain Management, and Retail subscriptions includes by default 20GB for database capacity. For every 1GB of database capacity customers receive 1GB of Production Database, 1GB of Reporting Database, and 1GB of Entity Store Database.

## Default File Capacity for Finance, Supply Chain Management, and Retail

The tenant for Finance, Supply Chain Management, and Retail subscriptions includes by default 40GB for File capacity.

## Default Production Instance

Each Finance, Supply Chain Management, and Retail subscription offers one production instance per tenant. The production instance comes with disaster recovery and high availability. See the Minimum License Purchase Requirements [section](#) for more details. Also, the production instance is monitored 24x7 for service health.

Additional production instances for Finance, Supply Chain Management, and Retail are not available for purchase. Contact your Microsoft Partner or seller if an additional production instance is required.

Note, to ensure the environment is used for live operations, we will provision the production instance only after the implementation nears the 'operate' phase after completion of the required activities in the Lifecycle Services (LCS) methodology.

Default Capacity per Tenant shared across Finance, SCM, & Retail- not cumulative				
Dynamics 365	Production Instance	Non-production Instance	Database Capacity	File Capacity
Finance	1	1 Sandbox Tier 1 1 Sandbox Tier 2	20GB	40GB
Supply Chain Management	1	1 Sandbox Tier 1 1 Sandbox Tier 2	20GB	40GB
Retail	1	1 Sandbox Tier 1 1 Sandbox Tier 2	20GB	40GB

Additional database and file capacity are accrued and granted at no charge at a rate of 500MB and 4GB, respectively for Finance, Supply Chain Management, and Retail users. Additional database and file capacities are accrued and granted at no charge for Operations – Activity, and Operations - Device subscriptions at the reduced rate of 500MB and 4GB, respectively, for every 4 Activity users and every 2.5 Device licenses.

Default and Accrued Capacity Allocation	Finance, SCM, Retail	Finance, SCM, Retail	4 Activity	2.5 Device
	Default/tenant	Accrued/Enterprise USL	Accrued/User SL	Accrued/Device SL
Database	20GB	500MB	500MB	500MB
File	40GB	4GB	4GB	4GB

*Scenario: 10 Full USLs (Finance, Supply Chain Management, and Retail), 12 Operations - Activity, and 5 Operations - Device SLs)*

- *Default: per tenant*
- *Accrued: per user*

Default and Accrued Capacity Allocation	Finance, SCM, Retail	10 Finance, SCM, Retail	12 Activity	5 Device
	Default/tenant	Accrued/ USL	Accrued/User SL	Accrued/Device SL
Database	20GB	10*500MB = 5000MB	3*500MB = 1500MB	2*500MB = 1000MB
File	40GB	10*4GB = 40GB	3*4GB = 12GB	2*4GB = 8GB

### Default Capacity for Talent

Talent full User SL are entitled to 2 identical Talent environments/instances for the tenant (not per user). At any given time, only one of the identical instances may be in production but alternatively both instances may be in non-production (UAT, pre-production).

Default Capacity per Tenant shared for Talent – not cumulative				
Dynamics 365	Common Data Service Instance (Prod/Non-Prod)	AOS Instance (Prod/Non-Prod)	Database capacity	File Capacity
Talent	2	2	20GB	40GB

### Default Common Data Service Capacity for Finance, Supply Chain Management, and Retail

In addition to the Finance, Supply Chain Management, and Retail default entitlements, these application licenses also receive Microsoft PowerApps entitlements, which include Common Data Service capacity.

Figure 14: Common Data Service Capacity

Capacity	Purpose
Database	Stores and manages entity definitions and data
File	Store attachments to notes or emails in Customer Engagement applications and PowerApps. These include documents, image files, videos, PDF files and other crucial files needed in an organization.

Default Capacity per Tenant shared across Finance, SCM, & Retail - not cumulative			
Dynamics 365	Common Data Service Database Capacity	Common Data Service File Capacity	Common Data Service Log Capacity
Finance	10GB	20GB	2GB
Supply Chain Management	10GB	20GB	2GB
Retail	10GB	20GB	2GB
Talent	10GB	20GB	2GB

## Dynamics 365 Customer Insights

If a customer purchases Dynamics 365 Customer Insights the default capacity is provisioned in a separate instance. Dynamics 365 Customer Insights may be deployed in the same tenant but doesn't share the same instance as Customer Engagement, Finance, Supply Chain Management, and Retail applications.

### Default Profile Capacity

The tenant for Dynamics 365 Customer Insights subscriptions includes by default 100K Profiles each month. Additional profile capacity may be purchased but the additional capacities do not increase the number of Segments/KPIs or allowed data injection refreshes.

### Default Segments/KPIs Capacity

The tenant for Dynamics 365 Customer Insights subscriptions includes by default 20 segments/KPIs. Customers may define up to 20 segments/KPIs at any given time. Additional segments may not be created.

### Default Data Injection Refresh Capacity

The tenant for Dynamics 365 Customer Insights subscriptions includes by default 4 data injection refreshes each day. Each refresh takes approximately 4 hours allowing 16 hours of data injection refreshes a day.

Default Capacity per Tenant shared – not cumulative			
Dynamics 365	Profile Capacity	Segments/KPIs	Data Injection Refresh
Customer Insights	100K	20	4/day

## Microsoft Forms Pro

Customers entitled with Microsoft Forms Pro capabilities receive default capacity of 2K Survey Responses per tenant. Microsoft Forms Pro may be deployed in the same tenant but doesn't share the same instance as Customer Engagement, Finance, Supply Chain Management, and Retail applications.

Default Capacity per Tenant shared – not cumulative	
Microsoft	Survey Responses
Forms Pro	2K

## Dynamics 365 Trial and Implementation

### Free Trial

#### Customer Engagement Application Trial

You can sign-up for a free 30-day trial of Dynamics 365 applications via the Customer Engagement Plan for up to 25 users through Microsoft Online Services. Note, even though the trial is for the Customer Engagement Plan, only the applications are available for trial and purchase. At any time during your trial you can activate your subscription and keep your data and customizations. Get details at <https://www.microsoft.com/en-us/dynamics365/home>.

#### Finance and Supply Chain Trial

You can sign-up for a free 30-day trial of Finance and Supply Chain Management via the Dynamics 365 Unified Operations trial through a simple email signup. The trial version of Finance and Supply Chain Management via Unified Operations includes a Getting started guide that provides a step-by-step task guide, which allows you to view specific scenarios in action. The product is available to explore and exercise scenarios. Demo data is included to ease the use of the product and to make the experience

more meaningful. A buy experience can be initiated at that time to complete the purchase. Get details at [www.microsoft.com/en-us/dynamics365/operations](http://www.microsoft.com/en-us/dynamics365/operations).

**Note:** Support included for Trial is the same as what customers receive when purchasing Dynamics 365 services. Premium level support options are not available for purchase during the trial period.

## Development and Testing with Visual Studio subscriptions

Finance, Supply Chain Management, Retail, and Talent development requires a Visual Studio Professional for standard development, customization and extension activities. However, if you want to run performance and load tests, you will need Visual Studio Enterprise. Please note that Visual Studio licenses are not included as part of Finance, Supply Chain Management, Retail, or Talent subscription licenses and must be acquired separately.

## Lifecycle Services

[Lifecycle Services \(LCS\)](#) provides a cloud-based collaborative workspace shared between customers and partners that helps organizations improve the predictability and quality of their Finance, Supply Chain Management, Retail, and Talent application implementation by simplifying and standardizing the implementation process to realize business value faster. Once you sign up for one or more of these applications, you are provided with a project workspace including methodologies and services that help you manage the service lifecycle. LCS provides a variety of services to assist and help customers navigate through the various phases of the project including:

- (i) Defining your business processes and any customization needed
- (ii) Develop additional functionality using best practices
- (iii) Help operate their environment to reduce the time it takes to resolve issues to realize greater return on investment, while reducing the total cost of ownership

# Dynamics 365 Service Support

## Support Plans

The benefits included in the [Subscription Support Plan](#) are applicable for customers who license Dynamics 365 via MOSP, EA, MPSA, EAS, and EES. Premium Support offerings are available for purchase:

- [Professional Direct Support](#) is a Dynamics 365 specific support plan providing a cohesive support experience with exceptional tools and resources to accommodate any needs during all stages of the Dynamics 365 lifecycle. Fast response times for customers' most critical issues, proactive advisory services and much more.
- Enterprise Solutions - [Unified Support](#) is a comprehensive support solution for your large business that helps reduce costs, enhance productivity, and use technology to realize new opportunities for any stage of the IT lifecycle.

Microsoft guarantees support in International English and provides local language support in select markets around the world wherever possible.

- (i) Technical support is included in the online subscriptions when a customer chooses to deploy online (Volume Licensing and Web Direct). When purchasing through the CSP program, support is required to be provided by your partner.
- (ii) If a customer chooses to deploy with dual-use rights, Microsoft Technical support will assist with support issues resulting with the deployment of dual use rights, however, support is not included for the on-premises deployment.

- (iii) Support offerings for on-premises are sold separately when a customer chooses to deploy on-premises. The customer has the following options:
  - a. Seek support from their partner
  - b. Purchase professional support incidents from support.microsoft.com to get support directly from Microsoft

Response times for technical support incidents vary by case severity. Definitions are included in [Appendix I](#). More information about Dynamics 365 Support options can be viewed [here](#).

Support offerings may not be mixed on a tenant. Each **Dynamics 365 user** must be licensed with the same support offering, i.e. if the customer purchases Professional Direct support, all their users must be licensed with Professional Direct.

## Additional Resources

Resource	Link
Dynamics 365	<a href="https://dynamics.microsoft.com/en-us/">https://dynamics.microsoft.com/en-us/</a>
Dynamics 365 Licensing and Pricing	<a href="https://dynamics.microsoft.com/en-us/pricing/">https://dynamics.microsoft.com/en-us/pricing/</a>
Dynamics 365 Business Central Licensing Guide	<a href="https://go.microsoft.com/fwlink/?LinkId=871590&amp;clcid=0x409">https://go.microsoft.com/fwlink/?LinkId=871590&amp;clcid=0x409</a>
Microsoft PowerApps and Flow Licensing Guide	<a href="https://go.microsoft.com/fwlink/?linkid=2085130">https://go.microsoft.com/fwlink/?linkid=2085130</a>
Dynamics 365 Mixed Reality Licensing Guide	<a href="https://go.microsoft.com/fwlink/?LinkId=2090495&amp;clcid=0x409">https://go.microsoft.com/fwlink/?LinkId=2090495&amp;clcid=0x409</a>
Dynamics AX Licensing Guide	<a href="http://aka.ms/s201h6">http://aka.ms/s201h6</a>
AX 2012 Retail Licensing Scenarios	<a href="http://aka.ms/Sumqjx">http://aka.ms/Sumqjx</a>
Dynamics CRM Online Licensing Guide	<a href="https://mbs.microsoft.com/customersource/global/CRM/learning/documentation/user-guides/CRM-Online-Licensing-Guide">https://mbs.microsoft.com/customersource/global/CRM/learning/documentation/user-guides/CRM-Online-Licensing-Guide</a>
Dynamics AX 2012 Licensing Guide	<a href="http://aka.ms/dujlkx">http://aka.ms/dujlkx</a>
Dynamics CRM 2016 Licensing Guide	<a href="http://aka.ms/kn26ux">http://aka.ms/kn26ux</a>
Dynamics 365 (On-Premises) Licensing Guide	<a href="https://mbs.microsoft.com/Files/public/365/Dynamics365EnterpriseEditionOnPremisesLicensingGuide.pdf">https://mbs.microsoft.com/Files/public/365/Dynamics365EnterpriseEditionOnPremisesLicensingGuide.pdf</a>
Dynamics 365 for Operations on-premises Licensing Guide	<a href="https://mbs.microsoft.com/Files/public/365/DynamicsOperationsOnPremEnterprise.pdf">https://mbs.microsoft.com/Files/public/365/DynamicsOperationsOnPremEnterprise.pdf</a>
Microsoft Volume Licensing	<a href="http://www.microsoft.com/licensing">www.microsoft.com/licensing</a>
Software Assurance	<a href="http://www.microsoft.com/licensing/software-assurance/default.aspx">http://www.microsoft.com/licensing/software-assurance/default.aspx</a>
Microsoft License Advisor	<a href="http://www.microsoft.com/licensing/mla/default.aspx">http://www.microsoft.com/licensing/mla/default.aspx</a>
Dynamics 365 Support	<a href="https://dynamics.microsoft.com/en-us/support/plans/">https://dynamics.microsoft.com/en-us/support/plans/</a>
PartnerSource	<a href="https://mbs.microsoft.com/partnersource/">https://mbs.microsoft.com/partnersource/</a>
Partner Center	<a href="https://partnercenter.microsoft.com/en-us/pcv/dashboard/overview">https://partnercenter.microsoft.com/en-us/pcv/dashboard/overview</a>
Cloud Solution Provider Program (CSP)	<a href="https://mspartner.microsoft.com/en/us/Pages/solutions/cloud-reseller-overview.aspx">https://mspartner.microsoft.com/en/us/Pages/solutions/cloud-reseller-overview.aspx</a>

# Appendix A: Team Members Overview

This table provides an overview of the Team Members use rights by Customer Engagement, Finance, Supply Chain Management, Retail, and Talent applications. Reference [Appendix B](#) for a detailed list of the Customer Engagement Team Members and [Appendix C](#) for a detailed list of the Finance, Supply Chain Management, Retail, and Talent Team Members use rights.

Use Rights	Description	Customer Engagement	Finance, SCM, Retail, Talent
	Service		
Access			
	Access Anywhere: Web App, Mobile App, Tablet App, via Outlook	●	
Read			
	Dynamics 365 Applications: full read across	●	●
General System Use			
Common across Customer Engagement Applications	Activities: create, view, update, and delete	●	
	Announcements: create, view, update, and delete	●	
	Contacts: create, view, update, and delete	●	
	Dynamics 365 Mobile Client Application: use (for iPad, Windows) except for Field Service	●	
	Gamification: access as a fan and spectator	●	
	Microsoft excel: export data and access user reports, charts and dashboard	●	
	Notes: create, view, update, and delete	●	
	Forms Pro: respond to surveys	●	
	Yammer: collaboration (needs Yammer license)	●	
Edit/Actions			
Customer Engagement	Custom Entities*	15 max	
Customer Service	Employee Self Serve: start personal support chat and cases and view knowledge articles (Portal or API access only)	●	
Project Service Automation	Apply for Project, report Time & Expense for Projects, update Project Tasks, Update Own Resource Competencies for Project	●	

Use Rights	Description	Customer Engagement	Finance, SCM, Retail, Talent
Finance & Supply Chain Management	Accounts Payable: view positive pay events		•
	Cost Accounting		•
	Cost Objects: monitor monetary and non-monetary performance of assigned cost objects		•
	Department Budget: create and edit		•
	Distribution		•
	Employee Self Serve: record and update personal information, record time and expense		•
	Engineering		•
	Expense: approve		•
	Invoice: approve		•
	Inventory: respond to inventory needs on production line		•
	Manager Self Service: manage direct reports, record and update employee information		•
	Manufacturing		•
	Procurement		•
	Purchase Orders: respond to vendors PO when listed as contact person		•
	Requisitions: create and edit		•
	Quality Control: create and edit		•
	Sales Order		•
	Time: approve		•
	Transportation		•
Retail	Employee Self Serve: record and update personal information, record time and expense		•
	Expense: approve		•
	Invoice: approve		•
	Manager Self Service: manage direct reports, record and update employee information		•
	Picking: perform in store or warehouse		•
	Receiving: perform in store or warehouse		•
	Requisitions: create and edit		•
	Stock Counting: perform in store or warehouse		•
	Time: approve		•
Talent	Absence and Leave: approve		•
	Attract: create and share onboarding guide, add applicants and jobs, schedule and manage interviews		•
	Employee Self Service: record and update personal information, and request leave and absence		•
	Manager Self Service: manage direct reports, record and update employee information, perform hiring and onboarding for direct reports		•

\*Actions can be performed only against records corresponding to entities included in the use rights

# Appendix B: Customer Engagement Application Use Rights

The following tables lists the use rights corresponding to the User Subscription Licenses (User SLs) and applicable device subscription Licenses available in Customer Engagement Applications.

To configure and administer Dynamics 365 services a full enterprise user license is required (Sales, Customer Service, Field Service, Project Service Automation).

Use Rights	Team Members	Sales		Customer Service		Field Service	Project Serv Auto	Marketing
		Pro	Ent	Pro	Ent			
Access								
Dynamics 365 Mobile Client Application		•	•	•	•	•	•	•
Microsoft Dynamics 365 for iPad & Windows	•	•	•	•	•	•	•	•
Microsoft Dynamics 365 for Outlook	•	•	•	•	•	•	•	•
Microsoft Dynamics 365 Web application	•	•	•	•	•	•	•	•
Read								
All Dynamics 365 application data	•	•	•	•	•	•	•	•
Custom Entity data	•	•	•	•	•	•	•	•
Approve								
Time, Expense and Invoices (applies to non-Customer Engagement Applications)	•							
Access via Portal or API: Create, Read, Update, Delete								
Employee Self Service: Cases	•	•	•	•	•	•	•	
Non-Employees Only: Work Orders			•		•	•	•	
Non-Employees Only: Opportunities			•		•	•	•	
Entities: Create, Update, Delete								
Activities	•	•	•	•	•	•	•	•
Announcements	•	•	•	•	•	•	•	•
Calendar: share	•	•	•	•	•	•	•	•
Contacts	•	•	•	•	•	•	•	•
Custom Entities (see Appendix D)	15 max	15 max	•	15 max	•	•	•	•
Notes	•	•	•	•	•	•	•	•
Personal Views	•	•	•	•	•	•	•	•
Saved Views	•	•	•	•	•	•	•	•
Quality Control (applies to non-Customer Engagement applications)	•							
Requisitions (applies to non-Customer Engagement applications)	•							
Service Orders (applies to non-Customer Engagement applications)	•							
Time and Expense (applies to non-Customer Engagement applications)	•							

Use Rights	Team Members	Sales		Customer Service		Field Service	Project Serv Auto	Marketing
		Pro	Ent	Pro	Ent			
Accounts		•	•	•	•	•	•	•
Cases for Sales: Create cases with limited edit capability. No case business process flow, SLAs, entitlements, or case routing. Users only licensed with Sales application license cannot act as customer service agents and resolve cases.		•	•					
Competitors			•					
Embedded Intelligence			•		•			
Forecasting			•					
Invoices		•	•			•		
Lead Management		•	•					•
Marketing Campaigns			•					•
Marketing List			•					•
Opportunities		•	•					
Orders		•	•					
Price lists		•	•					
Product		•	•					
Product Bundles		•	•					
Product Families			•					
Product Hierarchies			•					
Product Relationships			•					
Quick Campaigns			•					•
Quotes		•	•					
Sales Goals			•					
Sales Hub			•					
Sales Literature			•					•
Territories			•			•		
Customer Service Hub				•	•			
Entitlements				•	•			
Facilities/Equipment					•			
Leads (create with limited edit capabilities)				•	•			
Resources				•	•	•		
Service (Service Scheduling)					•			
Work Hours				•	•	•		
Customer Assets						•		
Dispatch						•		
Inventory Management						•		
Purchase Orders						•		
Repairs and Returns Management						•		
Routing Capabilities						•		
Schedule						•		
Service Agreements						•		
Work Order Management						•		

Use Rights	Team Members	Sales		Customer Service		Field Service	Project Serv Auto	Marketing
		Pro	Ent	Pro	Ent			
Project Contracts							•	
Project Estimates							•	
Project Expenses							•	
Project Invoices							•	
Project Management							•	
Project Price Lists							•	
Project Transaction Approval							•	
Resource Availability View							•	
Resource Schedule Management							•	
Campaign Management (customer journeys, marketing pages, etc.): multi-channel								•
Email Marketing								Max 10x contacts
Event Management								•
Lead Scoring								•
<b>Entities: Actions</b>								
Activity Feeds: post & follow activity feeds	•	•	•	•	•	•	•	•
Activity: convert to a case				•	•			
Activity: convert to an opportunity		•	•					
Add or remove a Connection (stakeholder, sales team) for an Account or Contact	•	•	•	•	•	•	•	
Business card scanning (10/user/month: pooled at tenant level)			•					
Business Units: define and configure			•		•	•	•	•
Case Management: reassign, add to queue, route & resolve cases				•	•			
Chat with support team (as chat client for self-service, requires 3rd party solution)	•	•	•	•	•	•	•	
Connector for LinkedIn Lead Gen Forms								•
Dialog: start dialog	•	•	•	•	•	•	•	•
Field Service Mobile Application						•		
Field Service Mobile Application Offline Sync: use						•		
Knowledgebase: create, update, publish, configure, search (basic)			•	•	•	•	•	
Knowledgebase: relevance search					•	•	•	
Lead: qualify and convert to an opportunity			•					
Mail merge: perform mail merge	•	•	•	•	•	•	•	•
Manage Services, Resources, Work Hours, and Competencies							•	
Marketing List: associate a Marketing List with an Account or Contact	•	•	•	•	•	•	•	•

Use Rights	Team Members	Sales		Customer Service		Field Service	Project Serv Auto	Marketing
		Pro	Ent	Pro	Ent			
Open Project Position: apply for Open Project Position for Project Service	•	•	•	•	•	•	•	
Project Tasks: update Project Tasks status for Project Service Automation	•	•	•	•	•	•	•	
Project Transactions: approve							•	
Queue: use a queue item	•	•	•	•	•	•	•	•
Repairs: create and manage (RMA)						•		
Resource Competencies: update own Resource Competencies for Project Service Automation	•	•	•	•	•	•	•	
Resource Schedule Optimization: manage						•	•	
Resources (facilities, equipment, people): manage					•	•	•	
Resources: define & configure						•		
Returns: create and manage Returns (RTV)						•		
Schedule & Dispatch Capabilities: use scheduling assistant, drag & drop assignment, update resource bookings					•	•	•	
Schedule Board: configure and View					•	•	•	
Services: define & configure						•	•	
SLA Policies: configure				•	•			
Teams: define and configure			•		•	•	•	•
Territories: manage							•	
Time & Expense: submit Time & Expense for Project Service Automation							•	
Talent: manage direct reports and candidates	•							
Talent: manage personal info	•							
Finance functionality: manage budgets	•							
Use Resource Availability View and Resource Schedule Management							•	
Work Hours: define & configure						•		
Work Hours: manage					•	•	•	
Yammer: use Yammer collaboration requires the appropriate license (acquired separately)	•	•	•	•	•	•	•	•

Use Rights	Team Members	Sales		Customer Service		Field Service	Project Serv Auto	Marketing
		Pro	Ent	Pro	Ent			
General System Use: Actions								
Auditing: configure		●	●	●	●	●	●	●
Business Processes: customize (see Appendix D)		5 max	●	5 max	●	●	●	●
Dialogs: define and configure		●	●	●	●	●	●	●
Duplicate Detection: configure rules		●	●	●	●	●	●	●
Dynamics 365 Forms, Entities, and Fields: create		●	●	●	●	●	●	●
Dynamics 365: administer		●	●	●	●	●	●	●
Email: create, update and delete templates	●	●	●	●	●	●	●	
Entities: define connections and relationships between entities		●	●	●	●	●	●	●
Forms and Views: customize (see Appendix D)		2 max	●	2 max	●	●	●	●
Import data in bulk		●	●	●	●	●	●	●
Microsoft Excel: export data to Excel	●	●	●	●	●	●	●	●
Queue: define and configure (see Appendix D)		15 max	●	15 max	●	●	●	●
Records: use relationships & connections between records	●	●	●	●	●	●	●	●
Search and advanced find: use	●	●	●	●	●	●	●	●
System reports, charts, and dashboards: create and update (see Appendix D)		5 max	●	5 max	●	●	●	●
System reports, charts, and dashboards: customize (see Appendix D)			●		●	●	●	
Word: create, update and delete templates	●	●	●	●	●	●	●	
Workflows: define and configure		●	●	●	●	●	●	●
Additional Services and Software								
Dynamics 365 - Gamification Fan & Spectator	●	●	●	●	●	●		
Dynamics 365 - Gamification Player & Admin			●		●	●		
Interactive Service Hub			●		●	●	●	
Microsoft Forms Pro			●		●	●		standalone
Microsoft PowerApps			●		●	●	●	
Project Desktop Client*							●	
Project Web App**							●	
Timesheet management via Project Web App**	●	●	●	●	●	●		
Unified Service Desk					●			

\*Project Online Desktop Client (PODC) is the fully installed, up-to-date subscription version of the Project desktop application.

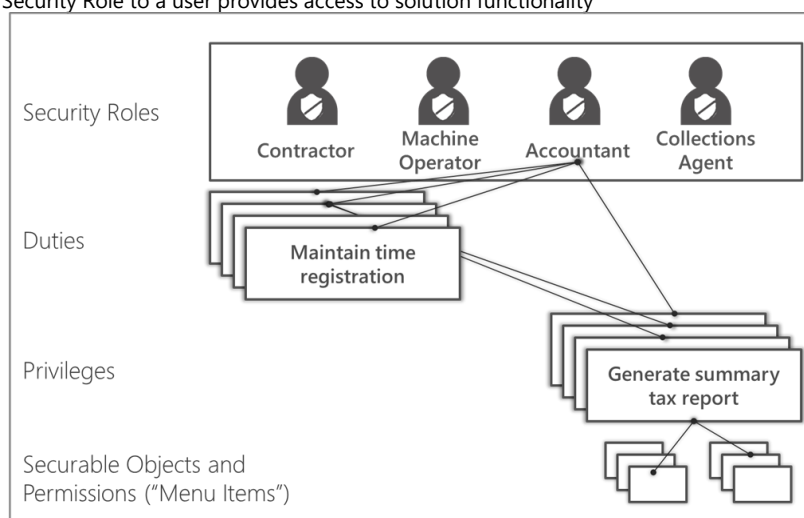
\*\*Project Web App (PWA) is an online collaborative project, timesheet, and portfolio management solution (includes Timesheet Management), based on the SharePoint platform.

# Appendix C: Finance, Supply Chain Management, Retail and Talent Security Roles by User SL Level

## Overview of Security Roles

Providing users with access to the solution functionality is done by assigning each user one or more Security Roles. Finance, Supply Chain Management, Retail, and Talent application Security Roles combine meaningful packages of solution functionality and access rights required to perform actions relevant to that role.

Figure 15: Assigning a Security Role to a user provides access to solution functionality



To make it easier to understand the licenses required, each Finance, Supply Chain Management, Retail, and Talent application Security Role has a pre-determined user type. When you assign Security Roles to users, you then know what User SL those users require.

For example, in a manufacturing organization, the Accountants and Field Service Technicians require different use rights. By assigning those user groups to the appropriate Security Role, they get the functionality they need, and you know the User SL type that is required.

### Notes:

- Customers can assign multiple Security Roles to one user, in which case the highest User SL type required covers all the user rights.
- Customers have the flexibility to configure or customize Security Roles. This may impact the license required for the new/modified Security Roles. Please refer to the [Appendix E](#) for more information about how such customization can impact licensing requirements.
- Financial reporting functionality is included in select Dynamics 365 applications. To get the use rights, Financial reporting Designers require a Finance USL and Financial reporting Viewers require a Team Member USL.
- Admin rights apply across Finance, Supply Chain Management, and Retail applications. For example, if you have a Finance license, you have the admin rights for Finance, as well as Supply Chain Management, and Retail applications.

## Dynamics 365 Finance Security Roles

Role	Security Role Description	Team Members	Activity	Finance
<b>C-Suite</b>				
Chief executive officer	Reviews the financial and operational performance		•	•
Chief financial officer	Reviews the financial performance		•	•
<b>Budgeting</b>				
Budget contributor	Create, update and approve departmental budget plans.	•	•	•
Budget clerk	Documents budget events and responds to budget inquiries		•	•
Budget manager	Reviews budget process performance and enables the budget process			•
<b>Financials and Accounting</b>				
Positive pay clerk	Document accounts payable positive pay events	•	•	•
Accountant	Documents accounting events and responds to accounting inquiries			•
Accounting manager	Reviews accounting, customer invoice, vendor invoice, and payment process performance and enables those processes			•
Accounting supervisor	Reviews accounting process performance and enables the accounting process			•
Accounts payable centralized payments clerk	Documents accounts payable centralized payment events and responds to centralized payment inquiries			•
Accounts payable clerk	Documents vendor invoice events and responds to vendor inquiries			•
Accounts payable manager	Reviews vendor invoice process performance and enables the vendor invoice process			•
Accounts payable payments clerk	Documents accounts payable payment events and responds to payment inquiries			•
Accounts receivable centralized payments clerk	Documents accounts receivable centralized payment events and responds to centralized payment inquiries			•
Accounts receivable clerk	Documents customer invoice events and responds to customer inquiries			•
Accounts receivable manager	Reviews customer invoice process performance and enables the customer invoice process			•
Accounts receivable payments clerk	Documents accounts receivable payment events and responds to payment inquiries			•
Auditor	This role is designed for in-house or external auditors. It provides read-only access to a majority of the system. It is also used for audit policy management			•
Collections agent	Documents collections events and responds to collections inquiries			•
Collections manager	Reviews collections process performance and enables the collections process			•
Financial controller	Reviews all accounting process performance and enables those processes			•
Tax accountant	Documents fiscal events and responds to fiscal inquiries			•
Tax engine developer	Create and manage taxable document model mappings.			•
Tax engine functional consultant	Create and manage generic tax engine components (taxable document and tax document)			•
Treasurer	Documents treasury events and responds to treasury inquiries			•

## Dynamics 365 Finance Security Roles

Role	Security Role Description	Team Members	Activity	Finance
<b>Project Management</b>				
Project manager, Public sector	Inquire into purchase order to invoice progress for public sector	•	•	•
Project timesheet delegate	Enables creation and approval of project timesheets	•	•	•
Project timesheet user	Enables creation and approval of project timesheets	•	•	•
Project assistant	Documents project accounting process events and responds to project accounting process inquiries		•	•
Project manager	Documents the project forecast/budget events and responds to project forecast/budget inquiries. Maintains project accounting master information and responds to project accounting master information inquiries. Authorizes project accounting process events		•	•
Resource manager	Maintains project resource tasks		•	•
Project accountant	Maintains project accounting policies			•
Project supervisor	Enables and reviews the project accounting process			•
<b>Talent</b>				
Hcm Manager	The Manager role represents a direct line manager with in HR. This role is responsible for managing employees based on reporting relationships defined by the position hierarchy and grants access to the My team page within Employee self-service			•

## Dynamics 365 Finance Security Roles – Admin

Role	Security Role Description	Team Members	Activity	Finance
<b>Administrator</b>				
System user	System role for all users	•	•	•
Data management operation user	Provides access to all data management workspace menu items. Note that this role does not control access to any of the entity privileges that are required to actually perform the data operation. As such this role can be assigned to any other application role for users that require access to specific entity sets or can be added to any custom roles where users can simply only perform data activities for a restricted set of entities	•	•	•
Data management administrator	Super user for the data management activities in the system. In addition to the capabilities of the DataManagementMigrationUser and DataManagementOperationsUser, this role provides access to the DataManagementITWorkspace - an operational workspace to monitor all data management activities			•
Data management migration user	User that controls permission to all entities in the system. This role is extended in all models where entities exist and need to be provisioned for data management activities for users. The current pattern is to create - per Entity View and Maintain privileges and then add it to the entity's category bound View and Maintain duties defined in that model. These duties are all part of the DataManagementMigrationUser extension that will be defined in the model.			•
Electronic reporting developer	Maps database to adversary data models			•
Electronic reporting functional consultant	Maps data models to formats			•
Information technology manager	Maintains servers and software for Dynamics AX. Maintains and configures settings for batch servers, load balancing, databases, Enterprise Portal, Services, and Workflow			•
Security administrator	Maintains user and security setup in Dynamics AX, grants the ability to create and maintain security roles, duties, and privileges and the ability to assign users to roles, define role assignment rules, and maintain data security policies			•
System administrator	System Administrator role for Dynamics AX			•
System document branding administrator	Controls access to the Document Branding Management forms			•

## Dynamics 365 Supply Chain Management

Role	Security Role Description	Team Members	Activity	SCM
<b>Cost Accounting</b>				
Cost object controller	Monitors monetary and non-monetary performance of assigned cost objects	•	•	•
Cost accountant	Implements dimensions, policies, and reporting structures according to the strategy set by the Cost accounting manager			•
Cost accountant clerk	Performs repetitive tasks aligned with predefined policies and reporting structures			•
Cost accounting manager	Sets the overall strategy for how cost accounting is performed in the Enterprise			•
Inventory accountant	Documents costs, inventory valuations, and cost accounting events. Responds to costs, inventory valuations, and cost accounting events inquiries			•
Inventory accountant clerk	Authorizes and maintains costs, inventory valuations, and cost accounting calculations. Responds to costs, inventory valuations, and cost accounting inquiries			•
<b>Customer Service</b>				
Customer service representative	Documents customer service events and responds to customer service inquiries.		•	•
Customer service manager	Reviews customer service process performance and enables the customer service process			•
<b>Engineering</b>				
Process engineer	Defines processes to make new products			•
Process engineering manager	Reviews and authorizes new production processes			•
Product designer	Designs new and modifies existing BOM structures			•
Product design manager	Reviews and authorizes product BOM structures			•
<b>Distribution</b>				
Receiving clerk	Documents receiving operation events and responds to warehouse receiving operation inquiries		•	•
Shipping clerk	Documents shipping operation events and responds to warehouse shipping operation inquiries		•	•
Warehouse worker	Documents warehouse operation events and responds to warehouse operation inquiries		•	•
Materials manager	Enables and reviews processes, maintains master data, and responds to inquiries within logistics and material management			•
Warehouse manager	Enables and reviews processes, authorizes recordings, maintains master data, and responds to inquiries within warehouse management			•
Warehouse planner	Plans and authorizes warehouse work. Maintains warehouse planning master information and responds to warehouse work planning inquiries			•
<b>Field Service</b>				
Field service technician	Visits customers in the field to perform service orders		•	•
Service dispatcher	Organizes the service technicians and prioritizes service orders		•	•
Service delivery manager	Reviews and enables the service order process			•

## Dynamics 365 Supply Chain Management

Role	Security Role Description	Team Members	Activity	SCM
<b>Marketing</b>				
Marketing coordinator	Produces and distributes marketing materials			•
Marketing manager	Manages product marketing			•
<b>Manufacturing</b>				
Lean waterspider	Responds to inventory needs on the production line	•	•	•
Time registration user	Worker enabled to use advanced features for time registration	•	•	•
Machine operator	Works on production orders and makes registrations in Manufacturing execution		•	•
Shop supervisor	Reviews the time registration process and maintain corrections. Authorizes production feedback registrations and responds to inquiries from production		•	•
Production manager	Reviews the production plan and ensures the proper resources are available			•
Production planner	Schedules and plans productions			•
Production supervisor	Enables the production process. Ensures the day-to-day execution of orders/jobs so Machine operators know what to work on, who is available and can respond to the main requests from Machine operator			•
<b>Procurement</b>				
Vendor contact	Views and responds to purchase orders through Vendor Collaboration, for the vendor accounts where the user is a contact person	•	•	•
Buying agent	Documents purchase events and responds to purchase inquiries		•	•
Vendor account manager	Documents vendor events and responds to vendor inquiries		•	•
Purchasing agent	Documents request for quotation events and responds to request for quotation inquiries. Documents purchasing events and responds to purchasing inquiries. Maintains purchasing agreements and vendor master information			•
Purchasing agent - Public Sector	Documents request for quotation events and responds to request for quotation inquiries. Documents purchasing events and responds to purchasing inquiries			•
Purchasing manager	Reviews purchasing process performance and enables the purchasing process. Maintains purchasing agreements and vendor master information			•
Vendor admin (external)	This role is given to a user that represents the vendor and should have permission to do admin related activities on behalf of the vendor. Such as maintaining vendor information and vendors contact person information, raising new user request and view RFQ's.			•
Vendor prospect (external)	The role is given to a user that participates in the vendor onboarding process. This role gives the permission to run and enter data in the new vendor onboarding wizard.			•

## Dynamics 365 Supply Chain Management

Role	Security Role Description	Team Members	Activity	SCM
<b>Quality Control</b>				
Quality control clerk	Documents quality control events and responds to quality control inquiries	•	•	•
Quality control manager	Enables and reviews processes, maintains master data, and responds to inquiries within quality control			•
<b>Sales</b>				
Sales clerk	Documents sales events and responds to sales inquiries		•	•
Sales representative	Documents sales events and responds to sales inquiries		•	•
Sales manager	Reviews sales process performance and enables the sales process			•
<b>Talent</b>				
Hcm Manager	The Manager role represents a direct line manager with in HR. This role is responsible for managing employees based on reporting relationships defined by the position hierarchy and grants access to the My team page within Employee self-service			•
<b>Transportation</b>				
Transportation coordinator	Enables inbound, outbound, rating, routing, and handling of transportation process			•
Transportation logistics manager	Set up, maintain, and configure the network planning that are used in transportation management processes			•

## Dynamics 365 Supply Chain Management - Admin

Role	Security Role Description	Team Members	Activity	SCM
<b>Administrator</b>				
System user	System role for all users	•	•	•
Data management operation user	Provides access to all data management workspace menu items. Note that this role does not control access to any of the entity privileges that are required to actually perform the data operation. As such this role can be assigned to any other application role for users that require access to specific entity sets or can be added to any custom roles where users can simply only perform data activities for a restricted set of entities	•	•	•
Data management administrator	Super user for the data management activities in the system. In addition to the capabilities of the DataManagementMigrationUser and DataManagementOperationsUser, this role provides access to the DataManagementITWorkspace - an operational workspace to monitor all data management activities			•
Data management migration user	User that controls permission to all entities in the system. This role is extended in all models where entities exist and need to be provisioned for data management activities for users. The current pattern is to create - per Entity View and Maintain privileges and then add it to the entity's category bound View and Maintain duties defined in that model. These duties are all part of the DataManagementMigrationUser extension that will be defined in the model.			•
Electronic reporting developer	Maps database to adversary data models			•
Electronic reporting functional consultant	Maps data models to formats			•
Information technology manager	Maintains servers and software for Dynamics AX. Maintains and configures settings for batch servers, load balancing, databases, Enterprise Portal, Services, and Workflow			•
Security administrator	Maintains user and security setup in Dynamics AX, grants the ability to create and maintain security roles, duties, and privileges and the ability to assign users to roles, define role assignment rules, and maintain data security policies			•
System administrator	System Administrator role for Dynamics AX			•
System document branding administrator	Controls access to the Document Branding Management forms			•

## Dynamics 365 Retail

Role	Security Role Description	Team Members	Activity	Retail
<b>Retail</b>				
Retail warehouse clerk	The retail warehouse clerk performs picking, receiving, and stock counting in a store or warehouse	•	•	•
Retail store manager	The retail store manager performs store management functions at the store, such as managing sales reports, inventory movements, and inventory counts		•	•
Retail warehouse manager	Manages order picking, shipping and receiving for retail channels		•	•
DOM Administrator	Responsible to define & maintain the parameters, rules, fulfillment profile & frequency of DOM executions for the Distributed Order Management feature in Retail			•
Electronic reporting for retail developer	Electronic reporting for Retail developer			•
Retail catalog manager	At the head office, the retail catalog manager maintains and publishes retail catalogs			•
Retail merchandising manager	At the head office, the retail merchandising manager maintains and replenishes retail products and assortments			•
Retail operations manager	At the head office, the retail operations manager is responsible for all non-merchandising operations, such as configuring stores, registers, and staff			•
Retail service	Retail service account			•
Retail store IT	Performs retail point of sale client configuration and installation at the retail store level			•
<b>Talent</b>				
Hcm Manager	The Manager role represents a direct line manager with in HR. This role is responsible for managing employees based on reporting relationships defined by the position hierarchy and grants access to the My team page within Employee self-service			•

## Dynamics 365 Retail - Admin

	Security Role Description	Team Members	Activity	Retail
System user	System role for all users	•	•	•
Data management operation user	Provides access to all data management workspace menu items. Note that this role does not control access to any of the entity privileges that are required to actually perform the data operation. As such this role can be assigned to any other application role for users that require access to specific entity sets or can be added to any custom roles where users can simply only perform data activities for a restricted set of entities	•	•	•
Data management administrator	Super user for the data management activities in the system. In addition to the capabilities of the DataManagementMigrationUser and DataManagementOperationsUser, this role provides access to the DataManagementITWorkspace - an operational workspace to monitor all data management activities			•
Data management migration user	User that controls permission to all entities in the system. This role is extended in all models where entities exist and need to be provisioned for data management activities for users. The current pattern is to create - per Entity View and Maintain privileges and then add it to the entity's category bound View and Maintain duties defined in that model. These duties are all part of the DataManagementMigrationUser extension that will be defined in the model.			•
Electronic reporting developer	Maps database to adversary data models			•
Electronic reporting functional consultant	Maps data models to formats			•
Information technology manager	Maintains servers and software for Dynamics AX. Maintains and configures settings for batch servers, load balancing, databases, Enterprise Portal, Services, and Workflow			•
Security administrator	Maintains user and security setup in Dynamics AX, grants the ability to create and maintain security roles, duties, and privileges and the ability to assign users to roles, define role assignment rules, and maintain data security policies			•
System administrator	System Administrator role for Dynamics AX			•
System document branding administrator	Controls access to the Document Branding Management forms			•

## Dynamics 365 Talent

Role	Security Role Description	Team Members	Activity	Talent
Contractor	Worker in contractor relationship with legal entities	•	•	•
Employee	Worker in employment relationship with legal entities	•	•	•
Pending worker	Worker in pending employment relationship with legal entities	•	•	•
Manager	Supervisor in reporting relationship with subordinates	•	•	•
Compensation and benefits manager	Documents compensation and benefit events, responds to compensation and benefit inquiries and records the financial consequences of compensation and benefit events			•
FMLA administrator	Information and functionality around managing employees who are out an FMLA leave			•
Hcm Manager	The Manager role represents a direct line manager with in HR. This role is responsible for managing employees based on reporting relationships defined by the position hierarchy and grants access to the My team page within Employee self-service			•
Human resource assistant	Documents human resource events and responds to human resource inquiries			•
Human resource manager	Periodically reviews human resource process performance and enables the human resource process			•
Payroll administrator	Documents payroll events, responds to payroll inquiries and records the financial consequences of payroll events			•
Payroll manager	Authorizes activity in the payroll process			•
Recruiter	Documents recruiting events, responds to recruiting inquiries and records the financial consequences of recruiting events			•
Training manager	Documents training events, responds to training inquiries and records the financial consequences of training events			•

# Appendix D: Custom Entities

Dynamics 365 Application subscriptions provide the right to use custom entities.

## Custom Entity Overview:

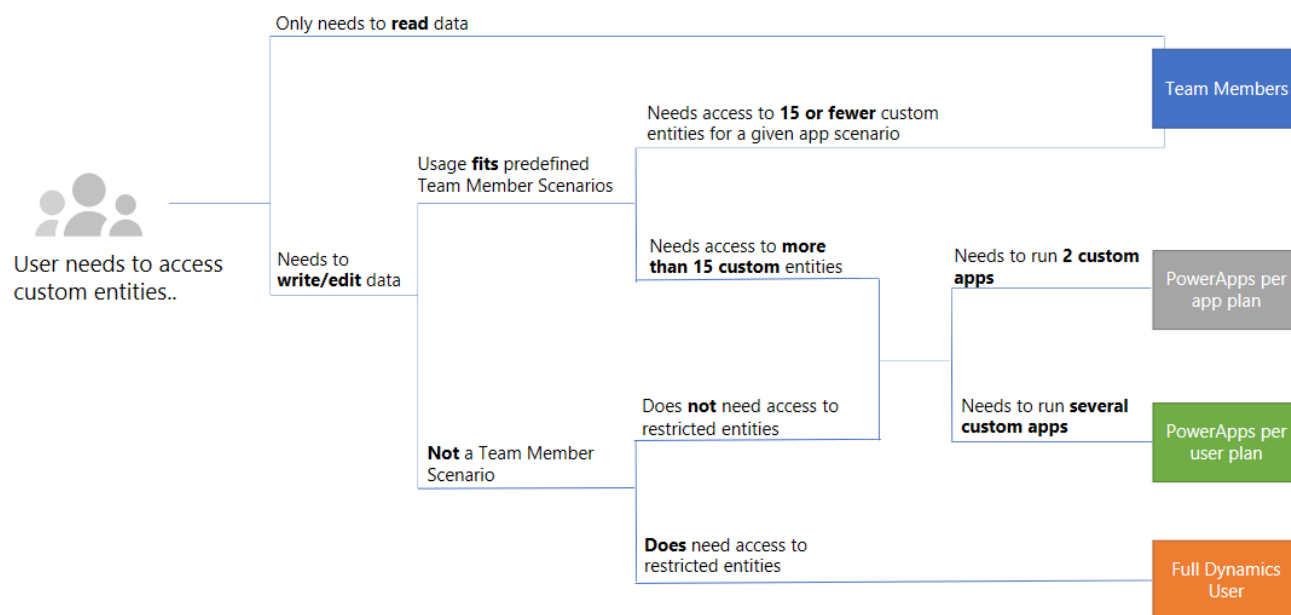
An entity defines information that you want to track in the form of records, which typically include properties such as company name, location, products, email, and phone.

Dynamics 365 applications offer "out-of-the-box" entities to cover typical scenarios. However, there may be times when customers and partners need to create entities to store data that is specific to your organization – namely custom entities. Note, adding a field to existing standard entities does not make it a custom entity.

Custom entities may be created by a customer or partner. These custom entities can either map to existing Dynamics 365 entities (directly change Dynamics 365 entities) or they can create brand new entities.

Dynamics 365 Application	Custom Entity Use Rights
Enterprise Applications Full Users	<ol style="list-style-type: none"> <li>1. Full access</li> <li>2. No limit on number of custom entities</li> <li>3. Full Create, Read, Update, and Delete (CRUD) on data records associated with custom entities</li> </ol>
Sales Professional, Customer Service Professional, Team Members, Operations - Activity	<ol style="list-style-type: none"> <li>1. Create and modify up to 15 custom entities (per application) in addition to the included "out-of-the-box" entities               <ol style="list-style-type: none"> <li>a. There is no limit on read rights for custom entities</li> </ol> </li> <li>2. Customize/extend applications and workflows within the context of Dynamics 365 application use rights</li> <li>3. Full CRUD on data records associated with custom entities</li> </ol>

Figure 16: Team Members access to custom entities



# Appendix E: Customization/Licensing Requirements

Finance, Supply Chain Management, Retail, and Talent applications are fully customizable to provide customers with the right experience for every user and have over 10,000 Menu Items which are mapped to Full, Operations - Activity, or Team Members users. To make it faster and easier to deploy the solution and determine licensing requirements, these Menu Items are associated with certain Security Roles.

The required SL for a given user is determined by the highest user type classification of the Menu Items to which the user will have access. For example, if you assign an Accountant to a role that includes access to a Menu Item classified as "Operations App", then that person requires a full user SL. Menu Items that are classified at the "Team Members" level are available to all users to which you have assigned a Team Members user SL or higher level user SL.

For an even better fit in their organizations, customers can change which actions may be performed by specific individuals or roles. When customizing, it is important to remember that the license required is determined by the highest-level Menu Item to which that individual has access.

## Note:

- Roles in Finance, Supply Chain Management, Retail, and Talent applications are not the same as job titles
- "Menu Item" means an object that allows users to display or view a form, sub-form, or URL in a browser application; run a task that triggers a system class, function, workflow or web-action initiated by a user; or cause an output in the ERP solution or a separate device

Menu Items are classified at one of the User SL types. Users with a given SL have access to each Menu Item classified at—or below—that User SL type.

## Assigning Multiple Roles to a Single User

The straight forward way to customize which actions a specific employee may perform in Finance, Supply Chain Management, Retail, or Talent applications is by assigning multiple roles to that employee. For example, an employee could be assigned both the Customer Service Rep and the Field Technician roles and could therefore perform actions associated with both roles. In this case, the employee would still only need a single user SL. Since the Customer Service Rep role is designated at a higher user type level (full user SL) than the Field Technician role (Team Members), the employee would only need the Finance, Supply Chain Management, Retail, or Talent user SL to perform actions associated with both roles.

## Changing Menu Items Associated with a Role

Another way to customize what actions users may perform is by changing which Menu Items are associated with a role. For example, if a customer wants everyone who is assigned the Field Technician role to be able to also approve posting of service orders (which is designated as a Finance, Supply Chain Management, Retail, or Talent user SL level action), then they can customize the role to include the "Approve posting of service order" Menu Item. Because the required SL is determined by the highest-level action the user may perform, all users assigned to the Field Technician role would then require a full user SL.

## Changing Menu Items Associated with an Individual

Further, customers may assign specific actions to specific users. Following the example above if the customer has 20 employees assigned to the Field Technician role and wants to allow only five of those employees the ability to approve posting of service orders, they may assign the "posting of service order" Menu Item to those five individuals. Those five individuals would then require a full user SL, while the remaining 15 employees assigned to the Field Technician role would require the Team Members user SL.

## Creating Menu Items

Partners and customers may also create Menu Items to fit specific customer scenarios. When doing so, those new Menu Items must be mapped to the user SL type that best matches the type of use based on the definitions of user SLs found in this document.

# Appendix F: Dynamics 365 Capacity Add-ons

Subscription add-ons apply across a single tenant; they are not tied to a specific user. Subscription add-ons can be purchased at any time and remain a part of the subscription for the remainder of the subscription term. We have broken this add-on section down into all Customer Engagement applications, which will leverage the same tenant and infrastructure will accrue across this one tenant. Finance, Supply Chain Management, Retail, and Talent applications leverages an entirely different tenant and will have its own set of add-on capabilities. Note, add-ons may only be purchased by customers with a valid base offer (paid licenses).

Capacity add-ons are available for purchase with paid licenses. Unpaid licenses (e.g., demo/dev or Internal Use Rights (IUR)) don't qualify as a valid base offer.

## Power Platform capacity add-ons

Reference the PowerApps and Flow Licensing [Guide](#) for PowerApps Portals, AI Builder, and PowerApps and Flow add-ons licensing details.

## Customer Engagement capacity add-ons

Customer Engagement applications share the same tenant and infrastructure capacity. They have access to the Customer Engagement application default subscription capacities, shared across the Customer Engagement applications. Refer to the Default Subscription Capacities [section](#) for more details.

Dynamics 365	Database Capacity	File Capacity	Log Capacity
Sales Enterprise	•	•	•
Sales Professional	•	•	•
Marketing	•	•	•
Customer Service Enterprise	•	•	•
Customer Service Professional	•	•	•
Field Service	•	•	•
Project Service Automation	•	•	•

## Additional Common Data Service Capacity Add-ons

Common Data Service platform capacity add-ons continue to provide flexibility to increase the storage capacity associated with your PowerApps subscription in increments of 1GB per additional capacity add-on license.

Note, subscription storage corresponding to a customer subscription is tracked against all the Customer Engagement application instances associated with the tenant.

The following add-on capacity licenses are available:

- Additional Common Data Service Capacity Add-on
- Additional Common Data Service File Capacity Add-on
- Additional Common Data Service Log Capacity Add-on

Subscription Capacity	Included Capacity	Additional Increment	Max
Common Data Service Database Capacity	10GB	1GB	4TB
Common Data Service File Capacity	20GB	1GB	-
Common Data Service Log Capacity	2GB	1GB	-

### Dynamics 365 Call Intelligence Add-on

Dynamics 365 Call Intelligence is a capacity add-on for Sales Insights that enables organizations to analyze additional hours of call recordings. Customers may purchase additional capacity (1k hours/tenant/month)

Subscription Capacity	Included Capacity	Additional Increment
Conversation Intelligence	3 Hours/user/month (pooled at tenant level)	Call Intelligence: 1K Hours/tenant/month

### Dynamics 365 Marketing Additional Application

Marketing customers who need an additional Marketing application for production use on a separate instance, may purchase the Marketing Additional Application. With this application, customers get 1 instance of the Marketing Application. No additional marketing contacts are included with this application. Customer may continue to use their pool of marketing contacts from the tenant level.

*Scenario:*

*An existing Marketing customer has opened a subsidiary business in another region and needs a separate application, they would license the Marketing Addition Application.*

*Scenario:*

*Customer has multiple Dynamics 365 or Dynamics CRM instances in his tenant and only buys 1 Marketing application.*

*Customer can only install the application on one Dynamics 365 or Dynamics CRM instance. To install Marketing applications on other instances the customer needs to buy additional Marketing applications, as only 1 application can only be installed on one instance.*

### Dynamics 365 Marketing Additional Non-Production Application

Marketing customers who need an additional Marketing application for non-production use on a separate instance, may purchase the Marketing Additional Non-Production Application. No additional marketing contacts are included with this application. Customer may continue to use their pool of marketing contacts from the tenant level.

### Dynamics 365 Marketing Additional Contacts Add-on

Marketing is based only on the number of contacts intended to be used for marketing activity and not the total number of contacts in database. Minimum purchase quantities must be met to activate packs.

Add-on Name	Target Contacts	Min Purchase	Included Contacts	Pre-requisite
Dyn 365 for Mktg Addl Contcts 5K Cntcts Addon	< 50K	1	5K	Base offers: <ul style="list-style-type: none"><li>• Marketing (paid - standalone)</li><li>• Marketing Attach</li><li>• Marketing Additional Application</li><li>• Marketing Additional Non-Production Application</li></ul>
Dyn 365 for Mktg Addl Contcts T2	50K - 99K	1	50K	
Dyn 365 for Mktg Addl Contcts T3	100K - 249K	2	50K	
Dyn 365 for Mktg Addl Contcts T4	250K - 499K	5	50K	
Dyn 365 for Mktg Addl Contcts T5	500K+	10	50K	

### Dynamics 365 Customer Service Insights Additional Cases Add-on

Additional Cases add-ons apply across a single tenant and are not tied to a specific user.

Subscription Capacity	Included Capacity	Additional Increment
Customer Service Insights Additional Cases	100K Cases/user/month (pooled at tenant level)	500K Cases/tenant/month

### Microsoft Social Engagement Additional Posts Add-on

The Additional Posts Add-on may be purchased in increments of 10,000, 100,000, or 1,000,000 posts per month. On the first day of the month, the number of purchased additional posts is added to the included quantity of 10,000 posts. All unused posts expire at the end of each month.

Subscription Capacity	Included Capacity	Additional Increment
Posts	10K	10K, 100K, or 1M

## Finance, Supply Chain Management, and Retail capacity add-ons

Finance, Supply Chain Management, and Retail share the same tenant and infrastructure capacity. They have access to the following additional capacities, shared across the Finance, Supply Chain Management, and Retail Applications.

### Dynamics 365 Operations - Order Lines Add-on

The Operations - Order Lines add-on allows customers to extend the use of their application by providing a transactional licensing mechanism for indirect access by partners, customers, connected automated systems, IoT devices and bots. Operations - Order Lines benefits include:

- (i) For qualifying transaction types, customers will be able to license indirect access on a transactional 'order line' basis rather than on a per user basis
- (ii) Alleviates pricing and licensing friction in many common multiplexing scenarios
- (iii) Supports a broader set of external user scenarios
- (iv) Enables licensing of automated systems and devices that do not include users (e.g. IoT scenarios)
- (v) Improves licensing cost transparency and predictability
- (vi) Ties licensing cost more directly with business outcomes

Note, if users need direct access to Dynamics 365 or are accessing indirectly with a transaction type or action that is not covered by the qualifying order lines types a user SL or device SL is required.

To be eligible for 'order lines' licensing a transaction must:

- (i) Be an indirect transaction that utilizes an OData or DIXF integration. Direct usage of the Dynamics application or integrations outside of OData or DIXF may not utilize 'Operations - Order Lines' licensing.
- (ii) Only update data in the tables designated as qualifying for Operations - Order Lines

Creation of order lines and order lines updates in those tables is counted, deletes will not count against the customer's order line total. All other direct and indirect access requires a user or device subscription license. Operations - Order Lines limits are enforced annually e.g. 100K order lines \* 12 months = 1.2M order lines that can be consumed at any point in the year. An annual license is required. If the order line limit is reached orders will not be blocked but customers will receive warnings and can true-up on anniversary.

Operations – Order Lines is an opt-in and opt-out model. Customers opt-in by purchasing the Operations - Order Lines SKU. Once a customer opts in, all creation of designated order line types through OData and

DIXF will be tracked. Customers who don't purchase Operations - Order Lines will, by default, have opted out and all direct and indirect access must be appropriately licensed with user or device licenses.

Qualifying order line types are captured in the table below. If other tables need to be accessed or other user actions taken, then per user pricing is required.

Order Line	Order Line Type	Operations Table
Sales	Sales Order Lines	SALESLINE
Invoicing	Free Text Invoice	CUSTINVOICELINE
Invoicing	Vendor Invoice	VENDINVOICEINFOLINE
Purchasing	Purchase Order	PURCHLINE
Accounting	General Journal	LEDGERJOURNALTRANS
Cost Accounting	Cost Entries	CAMDATAACOSTOBJECTCOSTENTRY

**Note on Retail and Manufacturing:** In previous versions it was stated that Retail and Manufacturing transactions are not supported with the Operations - Order Lines SKU. If a Retail or Manufacturing transaction includes a qualifying order line type and utilizes OData or DIXF for integration, then use of order line licensing is permitted. Additional support for Retail and Manufacturing scenarios beyond those limitations is also being investigated for future inclusion but not currently supported.

While order line licensing is restricted to designated order line types, additional entity records that are both required to support and are directly referenced by an order line may also be created or updated with the order line without requiring a user or device license. Those additional entity records will not be counted as additional order lines unless the additional entity record is also a designated order line record type, in which case it will also be counted.

### Sandbox Add-ons

The Non-Production Instance Add-on is well suited for deployments such as test environments, training applications, and sandbox environments configured within an organization.

Licensed users associated with a Finance, Supply Chain Management, and Retail subscriptions can access the instance included in the subscription, and every additional instance associated with the same customer.

Sandbox	Sandbox (non-production) Description	Purpose	Customer/ Load Size	Included Capacity (no charge)
Tier 1*	Developer - single box	Customize applications and unit testing	Any	NA
Tier 2*	Standard Acceptance Testing – multi box	User acceptance, integration testing and training	Any	10GB/ instance
Tier 3	Premium Acceptance Testing – multi box	Large scale user acceptance testing, integration testing and training	Small/ light load	10GB/ instance
Tier 4	Standard Performance Testing – multi box	Performance, load, and staging with user acceptance testing	Small to medium/ medium load	10GB/ Instance^
Tier 5	Premium Performance Testing – multi box	Performance, load, and staging with user acceptance testing	Large/ heavy load	10GB/ Instance^

\*Included for Finance, SCM, and Retail users, additional instances may be purchased. Not included for Talent Users.

^Additional storage capacity is also granted at no charge per instance as an organization increases the number of Full User and Device SLs. For every increment of 20 Full User SLs (excludes Team Members and Activity users), the included storage capacity increases by 2.5GB.

### Finance, Supply Chain Management, and Retail - Additional Database Capacity Add-on

The Additional Database Capacity Add-on provides flexibility to increase the SQL database storage capacity associated with your Finance, Supply Chain Management, or Retail application subscriptions in increments of 1GB per Additional Database Storage Add-on license. This Additional Storage Add-on can be used to increase database storage across the production and/or non-production instances.

Subscription Capacity	Included Capacity	Additional Increment	Max
Database Capacity	20GB	1GB	4TB*

\*4TB maximum may not be available in all regions

**Note:** The subscription storage corresponding to a customer subscription is calculated as cumulative across Finance, Supply Chain Management, and Retail instances associated with the tenant.

### Finance, Supply Chain Management, and Retail - Additional File Storage Capacity

The Additional File Storage Add-on allows Finance, Supply Chain Management, or Retail customers to increase cloud storage capacity by 1GB per Additional File Storage add-on license.

Subscription Capacity	Included Capacity	Additional Increment	Max
File Capacity	40GB	1GB	NA

### Additional Common Data Service Capacity Add-ons

On top of the additional Finance, Supply Chain Management, and Retail capacities, customers may purchase Common Data Service capacity. Common Data Service platform capacity add-ons continue to provide flexibility to increase the storage capacity associated with your PowerApps subscription in increments of 1GB per additional capacity add-on license.

The following add-on capacity licenses are available:

- Additional Common Data Service Database Capacity Add-on
- Additional Common Data Service File Capacity Add-on

Subscription Capacity	Included Capacity	Additional Increment	Max
Common Data Service Database Capacity	10GB	1GB	4TB
Common Data Service File Capacity	20GB	1GB	-

## Customer Insights capacity add-on

### Dynamics 365 Customer Insights Additional Profiles Add-on

The Dynamics 365 Customer Insights Additional Profiles may be purchased per tenant. Purchasing additional capacities does not increase the number of Segments/KPIs or allowed data injection refreshes. This is no minimum purchase requirement.

Subscription Capacity	Included Capacity	Additional Increment	Max
Additional Profiles	100K	100K	-

## Customer Service Insights capacity add-on

Refer to the Customer Engagement [section](#) for details.

## Microsoft Forms Pro Additional Responses capacity add-on

### Microsoft Forms Pro Additional Responses Add-on

The Microsoft Forms Pro Additional Responses may be purchased per tenant. Microsoft Forms Pro Additional Responses may be purchased as a standalone application for Sales Professional, Customer Service Professional, or Office 365 Forms customers and/or as additional capacity for customers who currently have the application and need more responses. There is no limit to the number of Additional Responses customers may purchase.

Figure 17: Forms Pro Use Rights

Capabilities / Capacity	Forms	Dynamics 365	Additional Responses Office 365/Dynamics 365
<b>Create Surveys</b>			
Intelligent suggestions	•	•	•
Multi-language support	•	•	•
Skip a question branching logic	•	•	•
Toggle question branching topic		•	•
Show / hide question branching logic		•	•
Navigate branching logic		•	•
Logo and background	•	•	•
Custom header and footer		•	•
Data piping		•	•
<b>Send Survey</b>			
Send survey via email		•	•
Personalized email invitation		•	•
Unique survey link		•	•
Unsubscribe		•	•
Send survey via Microsoft Flows		•	•
Embed survey in web / app with context data		•	•
Share survey link	•	•	•
Share survey via QR code	•	•	•
<b>Analyze Results</b>			
Export results to Excel	•	•	•
View last 5 responses for each question	•		
Summary report for each question		•	•
Sentiment analysis and key phrases		•	•
Correlation analysis	•	•	•
CDS / Dynamics / Power BI Integration		•	•
<b>Capacity</b>			
Responses	Unlimited	2K	2K

## Fraud Protection Additional Assessment capacity add-on

### Dynamics 365 Fraud Protection Additional Assessment Add-on

Fraud Protection Additional Assessments may be purchased per tenant.

Subscription Capacity	Included Capacity	Additional Increment	Max
Fraud Protection Additional Assessments	100K	100K	-

# Appendix G: Licensing Channel & Segment Availability

## Customer Engagement Applications

Dynamics 365	Channel						Segment						
	EA	EAS	EES	CSP	MPSA	MOSP	CORP	EDU	FAC	GOV	GCC	NFP	STU
Case Management	•	•	•	•	•	•		•	•	•	•		•
Customer Service Chat	•	•	•	•	•	•	•	•	•	•	•	•	•
Customer Service Enterprise	•	•	•	•	•	•	•	•	•	•	•	•	•
Customer Service Device	•	•	•	•	•	•	•	•	•	•	•	•	•
Customer Service Insights	•	•	•	•	•	•	•	•	•			•	
Customer Service Professional	•	•	•	•	•	•	•	•	•	•	•	•	•
Field Service	•	•	•	•	•	•	•	•	•	•	•	•	•
Field Service Device	•	•	•	•	•	•	•	•	•	•	•	•	•
Marketing	•	•	•	•	•	•	•	•	•			•	•
Microsoft Relationship Sales solution	•	•					•						
Project Service Automation	•	•	•	•	•	•	•	•	•	•	•	•	•
Resource Schedule Optimization	•	•	•	•	•	•	•	•	•		•	•	
Sales Device	•	•	•	•	•	•	•	•	•	•	•	•	•
Sales Enterprise	•	•	•	•	•	•	•	•	•	•	•	•	•
Sales Insights (AI for Sales)	•	•	•	•	•	•	•	•	•			•	•
Sales Professional	•	•	•	•	•	•	•	•	•	•	•	•	•
Team Members	•	•	•	•	•	•	•	•	•	•	•	•	•

## Customer Engagement Capacity

Dynamics 365	Channel						Segment						
	EA	EAS	EES	CSP	MPSA	MOSP	CORP	EDU	FAC	GOV	GCC	NFP	STU
Call Intelligence	•	•	•	•	•	•	•	•	•	•	•	•	•
Customer Service Insights Additional Cases	•	•	•	•	•	•	•	•	•			•	
Common Data Service Database Capacity	•	•	•	•	•	•	•	•	•	•	•	•	•
Common Data Service File Capacity	•	•	•	•	•	•	•	•	•	•	•	•	•
Common Data Service Log Capacity	•	•	•	•	•	•	•	•	•	•	•	•	•
Marketing Additional Contacts	•	•	•	•	•	•	•	•	•	•			•
Marketing Additional Application	•	•	•	•	•	•	•	•	•	•			•
Marketing Additional Non-Production Application	•	•	•	•	•	•	•	•	•	•			•
Microsoft Social Engagement Additional Posts													

## Finance, Supply Chain Management, Retail, and Talent Applications

Dynamics 365	Channel						Segment						
	EA	EAS	EES	CSP	MPSA	MOSP	CORP	EDU	FAC	GOV	GCC	NFP	STU
Asset Management Add-in for Supply Chain Management	•	•	•	•	•		•	•	•	•			•
Finance	•	•	•	•	•		•	•	•	•	•		
Operations - Activity	•	•	•	•	•		•	•	•	•	•		
Operations - Device	•	•	•	•	•		•	•	•	•	•		
Retail	•	•	•	•	•		•	•	•	•	•		
Supply Chain Management	•	•	•	•	•		•	•	•	•	•		
Talent	•	•	•	•	•		•	•	•	•	•		
comprehensive Hiring	•	•	•	•	•		•	•	•	•	•		
Talent: Onboard						•	•						
Team Members	•	•	•	•	•	•	•	•	•	•	•	•	•

## Finance, Supply Chain Management, Retail, and Talent Capacity

Dynamcis 365	Channel						Segment							
	EA	EAS	EES	CSP	MPSA	MOSP	CORP	EDU	FAC	GOV	GCC	NFP	STU	
Asset Management Add-in for Supply Chain Management	●	●	●	●	●		●	●	●	●			●	
Common Data Service Database Capacity	●	●	●	●	●		●	●		●	●			
Common Data Service File Capacity	●	●	●	●	●		●	●		●	●			
Operations - Order Lines	●	●	●	●	●		●			●	●		●	
Sandbox	●	●	●	●	●		●	●	●	●	●			

## Dynamics 365 Capability and Capacity

Dynamcis 365	Channel						Segment							
	EA	EAS	EES	CSP	MPSA	MOSP	CORP	EDU	FAC	GOV	GCC	NFP	STU	
Customer Insights	●	●		●	●		●	●	●	●		●		
Customer Insights Additional Profiles	●	●		●	●		●	●	●	●		●		
Fraud Protection	●	●	●	●	●		●	●	●	●			●	
Fraud Protection Additional Assessments	●	●	●	●	●									
Forms Pro Additional Responses	●	●	●	●	●		●	●	●	●		●	●	

## Appendix H: Base and Attach SKU Mapping

Dynamics 365 Business Applications	Base SKU per user/month	Attach SKUs per user/month										
		Sales Ent	Sales Pro	MRSs	Customer Service Ent	Customer Service Pro	Field Service	PSA	Finance	SCM	Retail	Talent
Sales Enterprise	•	-	-	NA	•	•	•	NA	NA	NA	NA	NA
Sales Professional	•	-	-	NA	-	•	-	NA	NA	NA	NA	NA
Microsoft Relationship Sales solution Plus <sup>1</sup>	•	-	-	NA	•	•	•	NA	NA	NA	NA	NA
Microsoft Relationship Sales solution <sup>1</sup>	•	-	-	NA	•	•	•	NA	NA	NA	NA	NA
Customer Service Enterprise	•	•	•	NA	-	-	•	NA	NA	NA	NA	NA
Customer Service Professional	•	-	-	NA	-	-	-	NA	NA	NA	NA	NA
Field Service <sup>2</sup>	•	•	•	NA	•	•	-	NA	NA	NA	NA	NA
Project Service Automation	•	•	•	NA	•	•	•	NA	NA	NA	NA	NA
Supply Chain Management	•	•	•	NA	•	•	•	NA	•	-	•	NA
Finance	•	•	•	NA	•	•	•	NA	-	•	•	NA
Retail	•	•	•	NA	•	•	•	NA	•	•	-	NA
Talent	•	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA

<sup>1</sup>To purchase a Customer Engagement Attach license the Microsoft Relationship Sales solution base license must be the higher priced SKU

<sup>2</sup>Effective November 1, 2019, Dynamics 365 Remote Assist (Mixed Reality) will be available as an Attach license only to Field Service

# Appendix I: Support Policies

SEVERITY	CUSTOMER'S SITUATION	EXPECTED MICROSOFT RESPONSE	EXPECTED CUSTOMER RESPONSE
A	Critical business impact: <ul style="list-style-type: none"> <li>Customer's business has significant loss or degradation of services.</li> <li>Needs immediate attention</li> </ul>	Initial response: <ul style="list-style-type: none"> <li>1 hour or less for Professional Direct and Unified Support</li> <li>Next business day for Subscription</li> </ul>	<ul style="list-style-type: none"> <li>Allocation of appropriate resources to sustain continuous efforts all day, every day<sup>1</sup></li> <li>Accurate contact information on case owner</li> </ul>
B	Moderate business impact: <ul style="list-style-type: none"> <li>Customer's business has moderate loss or degradation of services, but work can reasonably continue in an impaired manner</li> </ul>	Initial response: <ul style="list-style-type: none"> <li>2 hours or less for Professional Direct and Unified Support</li> <li>Next business day for Subscription</li> </ul>	<ul style="list-style-type: none"> <li>Allocation of appropriate resources to sustain continuous effort unless customer requests to opt-out of 24x7<sup>2</sup></li> <li>Accurate contact information on case owner</li> </ul>
C	Minimum business impact: <ul style="list-style-type: none"> <li>Customer's business is substantially functioning with minor or no impediments of services</li> </ul>	Initial response: <ul style="list-style-type: none"> <li>4 hours or less for Professional Direct and Unified Support</li> <li>Next business day for Subscription</li> </ul>	<ul style="list-style-type: none"> <li>Accurate contact information on case owner</li> </ul>

<sup>1</sup>24x7 support is only available for Professional Direct and Unified Support. Unified customers login to Microsoft Online to [submit](#).  
 24x7 support for Severity B incidents is only available for Unified.

<sup>2</sup>Microsoft may downgrade the severity level if the customer is not able to provide adequate resources or responses to enable Microsoft to continue with problem resolution efforts.

## Appendix J: Change Log

Page	Topic	Change	Action	Date
5	How to license	Updated	Explain the new Base and Attach sales motion	October 2019
various	Dynamics 365 Plan	Removed	Removed Dynamics 365, Customer Engagement, and Unified Operations Plan for all channels	October 2019
various	Dynamics 365 Applications	Updated	Removed 'for' from applications names	October 2019
16	Sales Insights	Updated	Use rights	October 2019
7 & 17	Marketing Attach	Updated	New minimum purchase requirements	October 2019
57	Marketing Additional Non-Production App	Added	New additional application	October 2019
29	Market Insights	Added	New free service	October 2019
19, 26, 31, 57, 60	Customer Service Insights	Added	Added capability	October 2019
21	Finance	Added	New workload	October 2019
22	Supply Chain Management	Added	New workload	October 2019
22	Asset Management Add-in for Supply Chain Management	Added	New capability	October 2019
27 & 61	Fraud Protection	Added	New AI service	October 2019
28	PowerApps & Flow	Updated	Use rights table	October 2019
29	Market Insights	Added	New free service	October 2019
33 & 34	Trial Information	Updated	Plan trials will only allow customer to try and purchase the applications	October 2019
36 & 37	Appendix A	Updated	User rights table	October 2019
38 - 42	Appendix B	Updated	Use rights	October 2019
43 - 53	Appendix C	Updated	Use rights	October 2019
62 & 63	Appendix G	Updated	Availability	October 2019
64	Appendix H	Added	New Base and Attach SKU mapping	October 2019
15	AI for Sales	Updated	Name change to Dynamics 365 Sales Insights	August 2019
27	Forms Pro	Clarified	Survey respondents don't need a license providing the survey creator has a license on the tenant.	August 2019
30	Talent	Removed	Stated in error "Talent customers may purchase additional Sandbox Tier 1 (non-production instances)"	August 2019
52	Call Intelligence	New	New Call Intelligence capacity add-on for Sales Insights	August 2019
60	Premier Support	Updated	Name change to Unified Support	August 2019
6	External Users	Added	Dynamics 365 customers have the option to license a Portal to provide access to business processes or internal data for external users.	July 2019
25, 26, 31, & 56	Microsoft Forms Pro	New	New capability and capacity add-on	July 2019
30	Default Capacity	Added	Talent	July 2019
52	Customer Service Chat	New	New capability add-on	July 2019
54	Talent Sandbox	Clarified	Tier 1 and 2 are included for Finance and Operations and Retail users. Not included for Talent users	July 2019
58	Support	Removed	Enhanced support has been retired	July 2019

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