Microsoft Dynamics CRM 2013 On-Premises

Volume Licensing and Pricing Guide

Microsoft Dynamics CRM

August 2013

Using This Guide

Use this guide to improve your understanding of how to license Microsoft Dynamics CRM 2013 for on-premises deployments. It is not intended to guide you in choosing your products and services. The examples presented in this guide are illustrative. Microsoft Corporation reserves the right to revise the existing version without prior notice.

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 Dynamics Certified Partner or your Microsoft account team.

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

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Introduction

Microsoft Dynamics CRM 2013 provides flexible, high value, and simple-to-understand licensing for your on-premises deployments. The multi-tiered licensing model offers a variety of benefits, including:

- **Flexibility**. Customers can mix and match various types of user licenses within a deployment to accommodate the specific needs of their businesses.
- **High value**. Customers can choose from highly competitive licensing offerings to optimize the Total Cost of Ownership.
- **Easy-to-Understand**. Customers can obtain licenses based on the functionality that users require (rather than how users access the application).
- **Parity**. Equivalency in the licensing use rights of online and on-premises licenses makes it easier for customers to compare and decide what works best for them.

How to License Microsoft Dynamics CRM 2013 for On-Premises Deployment

For on-premises deployment (meaning you will run the solution on your own server hardware), Microsoft Dynamics CRM 2013 is licensed under the Server + Client Access License (CAL) model, which requires that you license the server(s) running the software as well as the users and/or devices that connect to the solution.

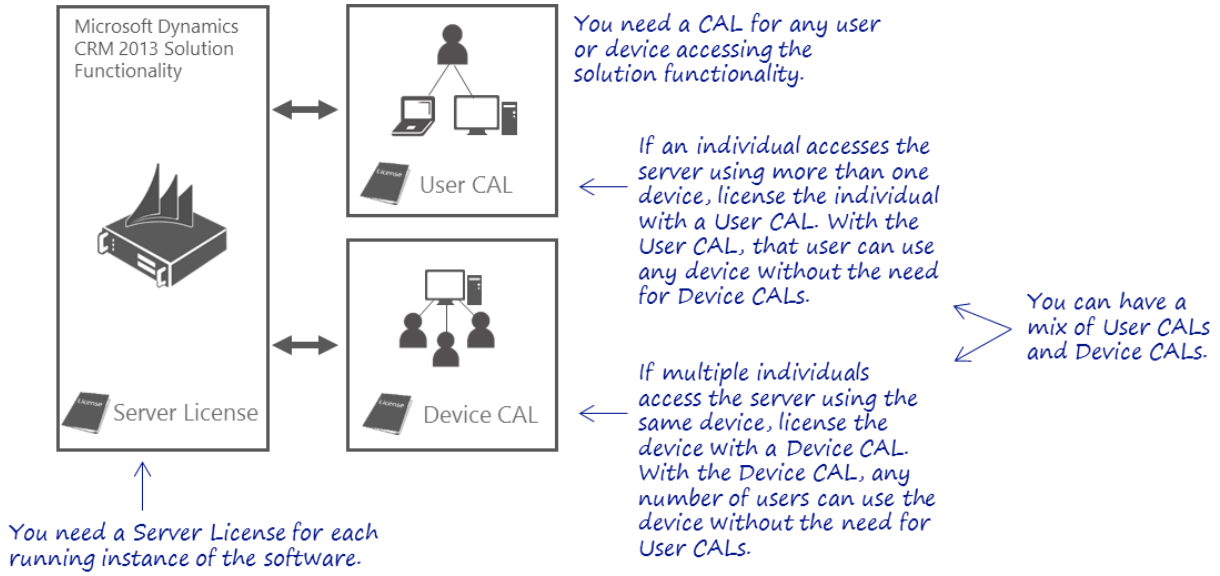
Note: For very small deployments (not exceeding five users) see Licensing Microsoft Dynamics CRM Workgroup Server 2013 for Small Deployments.

Basic Licensing Requirements

All Microsoft Dynamics CRM 2013 customers need to license:

- Microsoft Dynamics CRM 2013 solution functionality running on the server(s), which is (are) licensed through the Microsoft Dynamics CRM Server 2013 server license(s)
- Access to the Microsoft Dynamics CRM 2013 solution functionality by users or devices, which is licensed through CALs.

Figure 1: Server/CAL licensing model



Licensing the Microsoft Dynamics CRM 2013 Solution Functionality

The Microsoft Dynamics CRM solution functionality is provided by the Microsoft Dynamics CRM Server 2013 software. Microsoft Dynamics CRM Server 2013 offers a rich feature set supporting multi-tenant deployments.

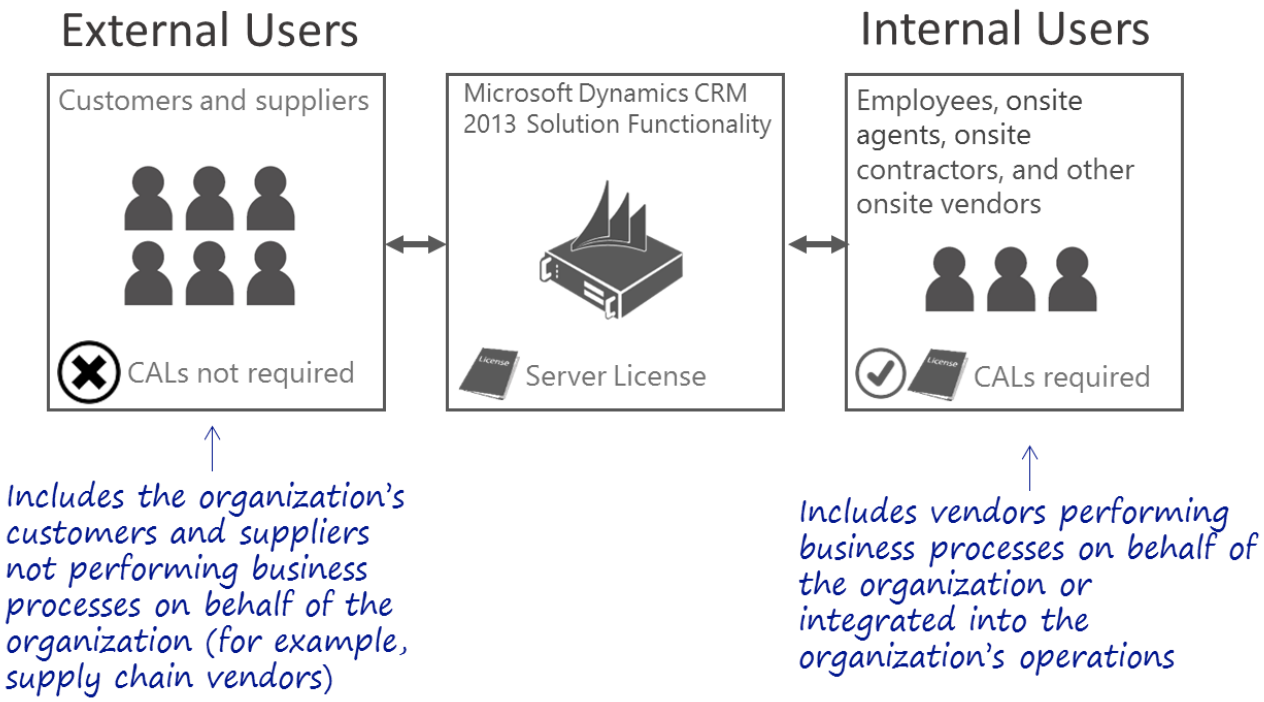
Before you run any instance of the Microsoft Dynamics CRM Server 2013 software under a Server License, you must assign that license to one of your servers. That server is the licensed server for that particular license.

Access by External Users

External users are users that are not either your or your affiliates' employees, or your or your affiliates' onsite contractors or onsite agents. Access by external (third party) users is included with the Server License; you do not need CALs for external users unless using Microsoft Dynamics CRM client applications and graphical user interface (GUI).

Note: Offsite vendors are considered external users when their time is shared in between multiple customer organizations (for example, IT support service vendors serving multiple customer organizations) and they are not in an employee-like relationship.

Figure 2: Internal vs. external users



Access by Internal Users

You license access to the Microsoft Dynamics CRM 2013 solution functionality by internal users through CALs. Any time an internal user directly or indirectly accesses the solution functionality, that user must be licensed by a User CAL (which licenses a specific user for access via multiple devices) or the device being used must be licensed by a Device CAL (which licenses access through a specific device by any user).

With the **User CAL**, you purchase a CAL for every user who accesses the server to use services such as file storage or printing, regardless of the number of devices they use for that access. Purchasing a User CAL might make more sense if your company employees need to have roaming access to the corporate network using multiple devices, or from unknown devices, or simply have more devices than users in your organization.

With a **Device CAL**, you purchase a CAL for every device that accesses your server, regardless of the number of users who use that device to access the server. Device CALs may make more economic and administrative sense if your company has workers who share devices, for example, on different work shifts.

Only the user or the device requires a CAL, not both. If the user of a device is licensed with a User CAL, then the device does not need a Device CAL. Likewise, if the device is licensed with a Device CAL, then the user does not need a User CAL.

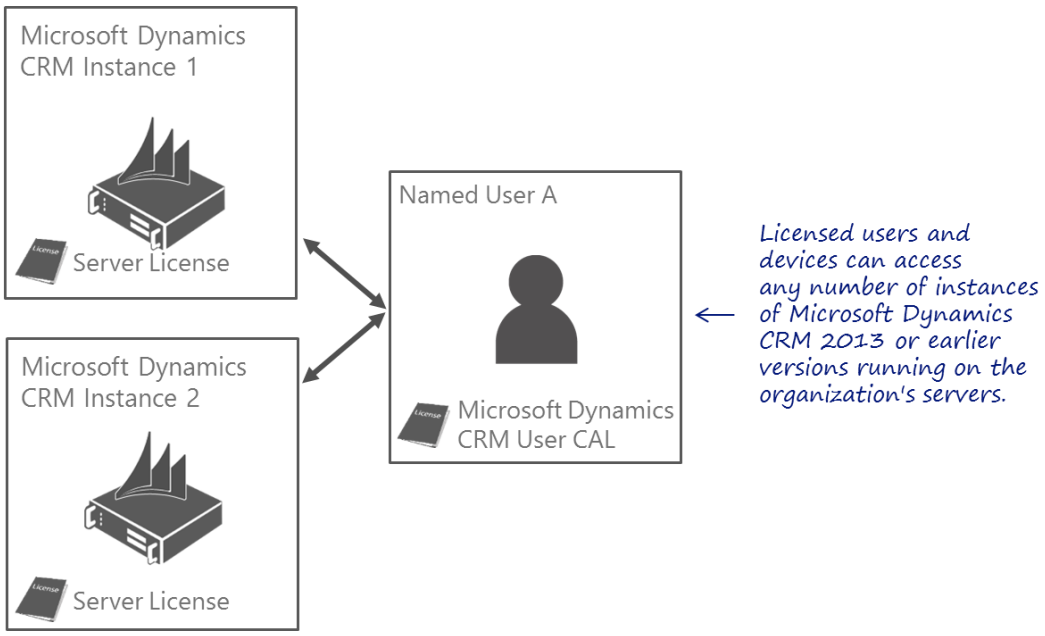
A user or device licensed with a CAL may access any number of instances of Microsoft Dynamics CRM 2013 or earlier versions running on the organization's servers.

You can mix both User CALs and Device CALs within your deployment.

Note: A Microsoft Dynamics CRM User is defined as any user who accesses the Microsoft Dynamics CRM server, files, data content or "Microsoft Dynamics CRM functionality". "Microsoft Dynamics CRM functionality" is any service or feature of Microsoft Dynamics CRM that allows a user to view, manipulate, input, query, or otherwise structure "live data". "Live data" is information that, via user action, dynamically writes to or reads from (or synchronizes with)

Microsoft Dynamics CRM, whether it is accessed directly or indirectly. Microsoft Dynamics CRM Users are required to have the appropriate client accesses licenses, regardless of their direct or indirect connection to the product.

Figure 3: Accessing multiple instances



Available Server Editions

Two Server Editions are available for Microsoft Dynamics CRM 2013:

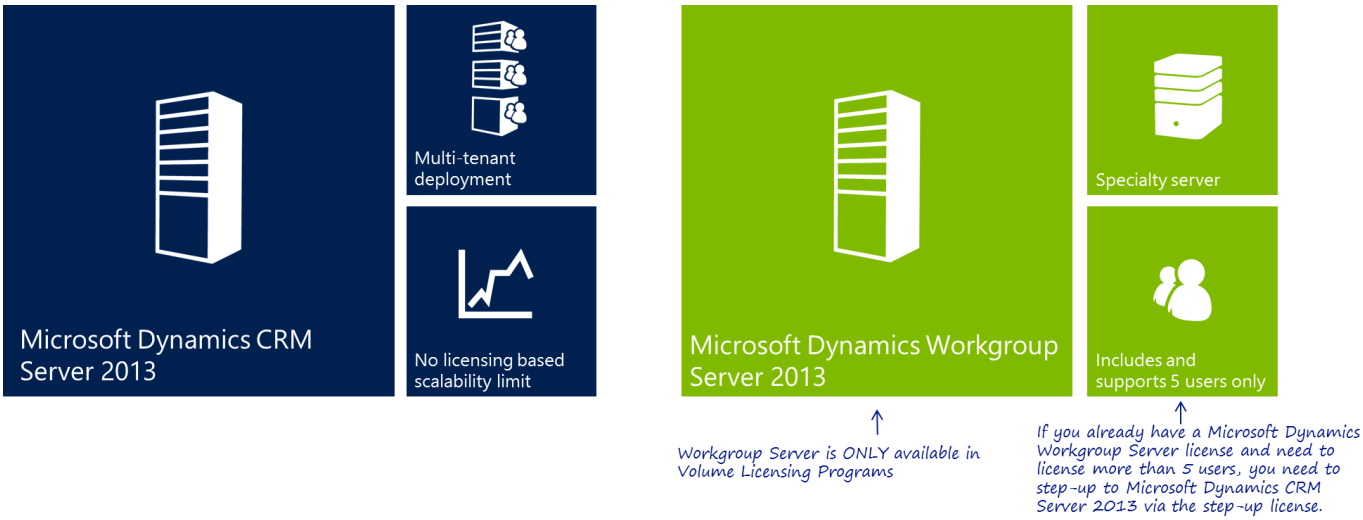
Microsoft Dynamics CRM Server 2013

Microsoft Dynamics CRM Server 2013 offers a rich feature set and supports multi-tenant deployments. It is licensed under the Server + CAL licensing model, and you can add users at any time by purchasing additional CALs. There is no licensing limit on the number of users; the number of users is only limited by your server capacity.

Microsoft Dynamics CRM Workgroup Server 2013

Microsoft Dynamics CRM Workgroup Server 2013 offers an alternative solution for small deployments. Microsoft Dynamics CRM Workgroup Server 2013 offers the same rich feature set as Microsoft Dynamics CRM Server 2013, but includes and supports a maximum of five users. Customers who deploy Microsoft Dynamics CRM Workgroup Server 2013 and later need to support more than five users can purchase a Step-Up license to Microsoft Dynamics CRM Server 2013 through the Microsoft Volume Licensing Open Value, Select Plus, or Enterprise Agreement programs, and then purchase the additional CALs they require.

Figure 4: Available server editions



Available CALs

Microsoft Dynamics CRM 2013 offers three levels of CALs—Essential, Basic, and Professional—each of which grants an increasingly wider spectrum of use rights. This licensing flexibility enables customers to license the solution based on how their users use Microsoft Dynamics CRM functionality and mix-and-match these licenses within a deployment. These CALs and the associated use rights align to the three User Subscription License (USL) levels for cloud deployments.

Professional: The most comprehensive license designed for users who are engaged in end-to-end customer relationship management scenarios. Licensed users can access full sales, service, and marketing capabilities within Microsoft Dynamics CRM. This license is highly recommended for CRM and extended CRM scenarios.

Basic: The license is designed for entry level CRM users who need access to basic CRM functionality such as account, contact, lead, and case management. This license is also designed for business analysts who require reporting capabilities of Microsoft Dynamics CRM. Finally, this license is suited for users who are engaged in end-to-end custom application scenarios.

Essential: The license is designed for organizational users who are not necessarily tied to sales, services, or marketing functions but still require light-weight access to custom applications.

The following provides a summary of the use rights associated with each of the three CAL levels. (See Appendix A for a detailed list of the specific use rights associated with each CAL.)

Figure 5: Available CALs

As you progress from the lowest level CAL (Essential) to the highest level CAL (Professional), the user/device is licensed to use the solution in ways that will provide more value. You therefore have the flexibility to decide which level of investment to make for any given individual based upon the functions that user/device is performing on behalf of the organization.

Notes:

- A user or device licensed with any Microsoft Dynamics CRM 2013 CAL can access the solution functionality using Microsoft Dynamics CRM client applications such as Microsoft Dynamics CRM for Outlook, Microsoft Dynamics CRM web application, Microsoft Dynamics CRM Mobile express, and Microsoft Dynamics CRM for iPad & Windows 8.
- Access to Microsoft Dynamics CRM through Microsoft Dynamics CRM for iPad & Windows 8 is included with every CAL, with **no additional license fees for mobile access.**

Stepping-up to a Higher Level CAL

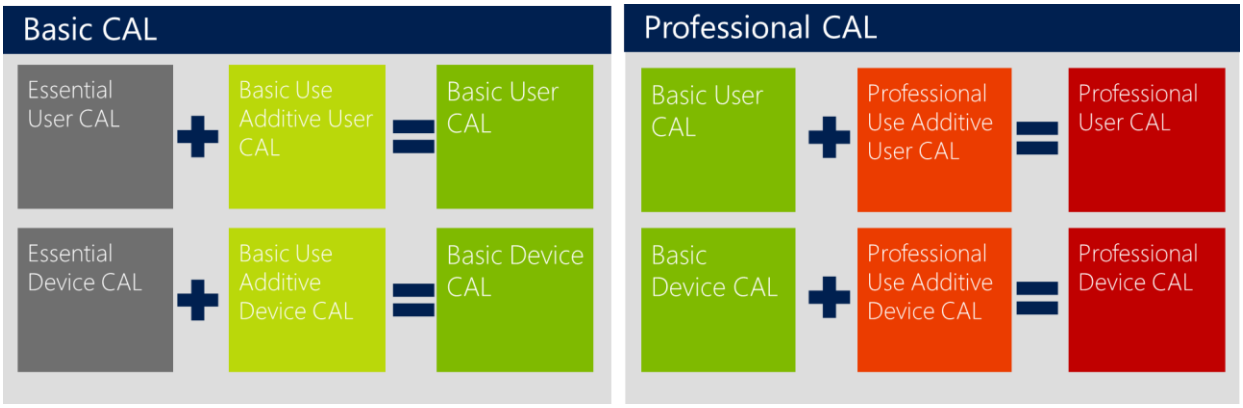
Microsoft Dynamics CRM 2013 enables step-up from a lower level CAL to higher level CAL using Additive CALs. The following Additive CALs are available.

- **Basic Use Additive CAL –** Used to step-up an existing Essential CAL to Basic CAL. Basic Use Additive CALs may never exceed the total number of Essential CALs in an environment or organization, and a user can never have a Limited Use Additive CAL without also having an ESS CAL.
- **Professional Use Additive CAL –** Used to step-up an existing Basic CAL to Professional CAL. Professional Use Additive CALs may never exceed the total number of Basic CALs in an environment or organization, and a user can never have a Professional Use Additive CAL without also having a Basic CAL.

Notes:

- To step-up from an existing Essential CAL to Professional CAL, add a Basic Use Additive CAL and Professional Use Additive CAL to the Essential CAL.
- Professional CALs, Professional Use Additive CALs, Basic CALs, Basic Use Additive CALs, and ESS CALs may be mixed within an environment.
- User can convert CALs from Device CALs to User CALs, or vice versa, on their Software Assurance anniversary date/renewal. If their CALs are not covered under Software Assurance, they cannot switch, because the choice is permanent.

Figure 6: Stepping–up to a higher level CAL



Administrative Users

Microsoft Dynamics CRM Server 2013 allows for up to two separate devices or users to access instances of the server software only to administer those instances, which do not consume CALs.

Microsoft Dynamics CRM Workgroup Server 2013 allows for separate management or administrative users of the server software, which do not consume any of the 5 users permitted with Workgroup.

Other Product Licenses

Please refer to the Microsoft Dynamics CRM 2013 implementation guide for documentation on technical requirements for running Microsoft Dynamics CRM 2013. Licenses for Microsoft Dynamics CRM 2013 do not include licenses for other products that may be required for your installation; product licensing rights for these must be established separately.

View Implementation Guide and System Requirements for Microsoft Dynamics CRM 2013 on TechNet:

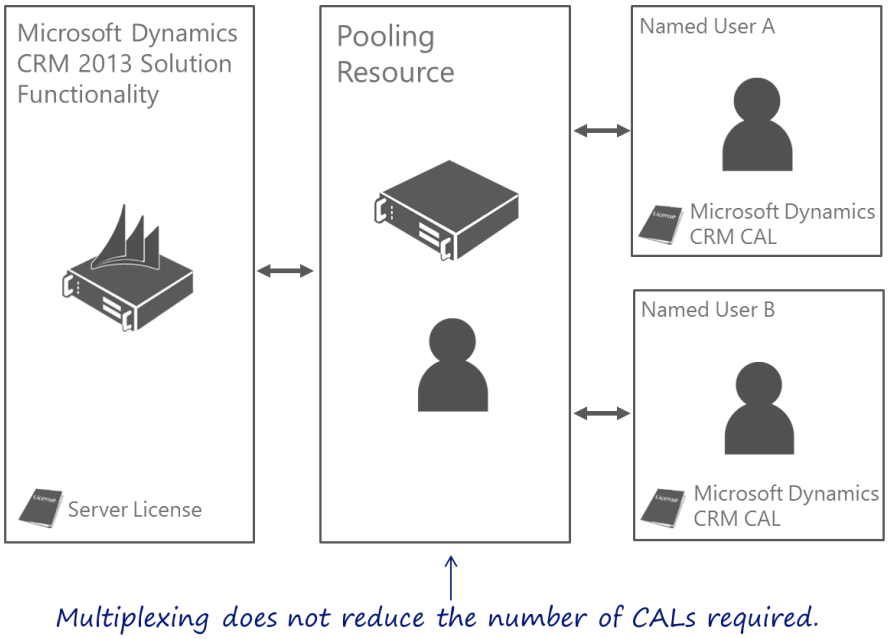
The Microsoft License Advisor Tool can help you determine the licenses you need

Multiplexing

Multiplexing is the use of hardware or software (including manual procedures) to reduce the number of devices or individuals that access or use the Microsoft Dynamics CRM 2013 solution functionality by pooling connections. Multiplexing does not reduce the number of licenses required to access the Microsoft Dynamics CRM 2013 solution functionality. Any internal user who accesses the Microsoft Dynamics CRM 2013 solution functionality —whether directly or indirectly—must be properly licensed.

Note: Licensed users may manually rekey information (when coming from non-licensed users) into the Microsoft Dynamics CRM 2013 solution functionality. This scenario is not considered to be multiplexing.

Figure 7: Multiplexing



Note: For additional information about Multiplexing please refer to the Microsoft Volume Licensing Brief Multiplexing—Client Access License (CAL) Requirements.

Availability by Language

Localized/translated versions of Microsoft Dynamics CRM 2013 are available for the following languages (alphabetic listing):

- Arabic
- Basque
- Bulgarian
- Chinese (Hong Kong)
- Chinese (PRC)
- Chinese (Taiwan)
- Catalan
- Croatian
- Czech
- Danish
- Dutch
- English
- Estonian
- Finnish
- French
- Galician
- German
- Greek
- Hebrew
- Hindi
- Hungarian
- Italian
- Japanese
- Kazakh
- Korean
- Latvian
- Lithuanian
- Norwegian
- Polish
- Portuguese (Br)
- Portuguese (Ptg)
- Romanian
- Russian
- Serbian (Latin)
- Slovak
- Slovenian
- Spanish
- Swedish
- Thai
- Turkish
- Ukrainian

Downloads are available at the Microsoft Download Center.

Trials

New customers and partners not already enrolled in a Microsoft Volume Licensing program can access Microsoft Dynamics CRM 2013 trial software.

Trials for all editions of Microsoft Dynamics CRM 2013 are available at the Microsoft Download Center.

The **Microsoft Dynamics CRM Workgroup Server 2013 Trial:**

- Contains a maximum of 5 users licenses - no additional users may be added
- Is time limited to 90 days
- May be converted to a full version by applying a commercial product key in Microsoft Dynamics CRM Deployment Manager.

The **Microsoft Dynamics CRM Server 2013 Trial**:

- Contains license keys for up to 100,000 Microsoft Dynamics CRM Server 2013 Users
- Is time limited to 90 days
- May be converted to a full version by applying a commercial product key in Microsoft Dynamics CRM Deployment Manager.

Notes:

- Trial License Keys are posted on the Trial download site.
- IMPORTANT: Users will not be warned of impending trial expiration, so be sure that you decide well before day 90 whether to convert to a commercial license. The 90-day trial limit cannot be extended.
- If customers or partners need more than 90 Days for their evaluation, they may purchase a Microsoft Dynamics CRM Server 2013 server license and the appropriate number of CALs.

The Trial software may be converted to Volume Licensing, BRL, MSDN, TechNet, MPN, MAPS or ISV licenses in accordance with the following table.

WG = Microsoft Dynamics CRM Workgroup Server 2013
CRM Server = Microsoft Dynamics CRM Server 2013

To:

From:		MSDN & TechNet		Volume Licensing & MPN		ISV Royalty	SPLA	BRL/ DPL	MAPS
		WG	CRM Server	WG	CRM Server	CRM Server	Service Provider	CRM Server	WG
Time Limited or 90 Day Trial	WG	✓	✓	✓	✓	✓	✓	✓	✓
	CRM Server		✓		✓	✓	✓	✓	
MSDN & TechNet	WG		✓	✓	✓	✓	✓	✓	✓
	CRM Server		✓		✓	✓	✓	✓	
Volume Licensing & MPN	WG				✓	✓	✓	✓	✓
	CRM Server					✓	✓	✓	
ISV Royalty	CRM Server				✓		✓	✓	
SPLA	Service Provider				✓	✓		✓	
BRL /DPL	CRM Server				✓	✓	✓		
MAPS	WG			✓	✓	✓	✓	✓	

Licensing Programs

Microsoft Dynamics CRM 2103 is licensed through the Microsoft Volume Licensing programs and Microsoft Dynamics price lists.

Microsoft Volume Licensing

Microsoft Volume Licensing is the most cost-effective, flexible, and manageable way to license Microsoft software and cloud services. Microsoft offers several Volume Licensing programs, each tailored to the needs of different sizes of businesses and types of organizations. To find the right program for your organization, you'll first need to determine the type and size of your organization, the software that you want to license, and how you will use it. Learn more about how Volume Licensing works.

Software Assurance is also included or available for purchases with licenses. This comprehensive maintenance offering can help organizations get the most out of their software investment. It combines the latest software with phone support and IT tools. 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.

Applicable Volume Licensing Programs

Microsoft Dynamics CRM 2103* is available through all Volume Licensing programs (including Government, Academic, Health, and Charity agreements). Below is an overview of each program.

*Microsoft Dynamics CRM Workgroup Server 2013 is not available through all academic licensing agreements.

- **Enterprise Agreement -** The Microsoft Enterprise Agreement (EA) is the best licensing program for commercial and government organizations that want to standardize IT across the enterprise yet retain the flexibility to choose from on-premises and cloud services. The EA includes attractive volume pricing, the full benefits of Software Assurance, the flexibility to transition to cloud services at your own pace, and simplified license management though a single company-wide agreement. Learn more.
- **Enterprise Subscription Agreement –** An enrollment under the EA, EA Subscription provides a lower initial cost based on a three-year subscription, the ability to increase or decrease subscription counts on an annual basis, and non-perpetual licenses that end with your subscription term. Learn more.
- **Select Plus** - Select Plus is a cost-effective way to make transactional purchases and offers many additional benefits, including the ability to manage assets more easily with visibility across the entire organization and centralized reporting because all affiliate purchases are tied to their own unique customer IDs; get more value out of licensing with automatic price savings for purchases across the entire organization and the full value of Microsoft Software Assurance coverage, no matter when you purchase it; and streamline the contract process with a single organization-wide agreement that never expires, Software Assurance alignment, and licensing consolidation. Learn more.
- **Open License** - Open License is a good choice if you are a corporate, academic, charitable, or government organization that wants to pay as you go. You must have a minimum initial purchase of five software licenses for an Open License agreement, but you can obtain additional licensed products through Open License in any quantity at any time during the two-year agreement term. Learn more.

- **Open Value** – Open Value is the recommended program if you have a small to midsize organization with five or more desktop PCs and want to simplify license management, manage software costs, and get better control over your investment. It also includes Software Assurance, providing access to valuable benefits such as training, deployment planning, software upgrades, and product support help you boost the productivity of your entire organization. Learn more.
- **Open Value Subscription** – Open Value Subscription provides the lowest up-front costs of the Open Program options with the flexibility to reduce the total licensing costs in years when the desktop PC count declines This option gives your organization the rights to run the software throughout your organization only during the term of the agreement with Microsoft. You also have the ability to add the single platform option to an Open Value Subscription agreement. Learn more.
- **Enrollment for Education Solutions** – The Enrollment for Education Solutions (EES) is available to both primary/secondary and higher education institutions and offers the simplicity of counting people instead of PCs/devices and the flexibility to add additional products in any quantity as needed. Learn more.
- **School Enrollment** – The School Enrollment is for primary/secondary schools and preschools and offers the simplicity of licensing all products organization-wide where you can order any product for a quantity that matches the annual count of your organization's PCs/devices. Learn more.
- **ISV Royalty** - The Microsoft ISV Royalty Licensing Program is a worldwide software licensing program that offers Independent Software Vendors (ISVs) a convenient way to license Microsoft products and integrate them into a software business application. The Microsoft ISV Royalty Licensing Program is a worldwide software licensing program that offers ISVs a convenient way to license Microsoft products and integrate them into a software business application. Learn more.
- **SPLA** - The Microsoft Services Provider License Agreement (SPLA) is for services providers and independent software vendors (ISVs) to license the latest Microsoft software to provide software services and hosted applications to customers. Learn more.

Microsoft Dynamics Price List

Microsoft Dynamics CRM 2013 licenses are available to order by Microsoft Dynamics Certified Partners from the Microsoft Dynamics Price List using OrderCentral.

Notes:

- Microsoft Dynamics CRM can be licensed standalone via the Microsoft Dynamics Price Lists for a maximum of 200 licenses.
- IMPORTANT: Microsoft Dynamics CRM 2013 licenses will become available for purchase on Microsoft Dynamics Price Lists in January 2014.

The following matrix shows the specific price lists and fulfillment channels for Microsoft Dynamics CRM 2013.

Program & Distribution Type	90 Day Time Limited Version	MSDN/TechNet	Microsoft Action Pack (MAPS)	Microsoft Partner Network	Open Academic	Open	Open Donations	Open Charity	Open Government	Open Local Government	Open Value	Open Value Subscription	Select Non-Specific	Student Select	Select Local	Enterprise 6 (*Additional Product)	Enterprise Subscription (*Additional Product)	Campus 3	Campus Student Media	School Non-Specific	School 3 Student Media	US Government	Fulfillment	Fulfillment Student Media	SPLA	ISV Royalty	OEM (System Builder)	OEM Royalty	Dynamics Price List	Dynamics Price List – Academic	Microsoft Online Services Program
License Agreement	--	--	--	--	NS	NS	NS	NS	NS	NS	CG	C G	ACG	A	AGC	CG LG	CG LG	A	A	A	A	G	NS	A	C A	C A			C A	A	
Microsoft Dynamics CRM Server 2013	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓		✓		✓	✓		✓	✓			✓	✓	
Microsoft Dynamics CRM Workgroup Server 2013 (5 Users)	✓	✓	✓			✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓						✓								

License Agreement Key:
A=Academic C=Corporate G=Government LG=Local Government NS=Non-Specific TOS= Terms of Service

Adding Access to Microsoft Dynamics CRM Online for Microsoft Dynamics CRM On-Premises Users via the USL for Software Assurance

If you have Microsoft Dynamics CRM CALs covered by active Software Assurance (SA), you can add access to Microsoft Dynamics CRM Online by acquiring the USL for SA licenses, thus protecting your on-premises investments in Microsoft licensing, and permitting you to maintain non-perpetual rights to online service for the duration of your service agreement.

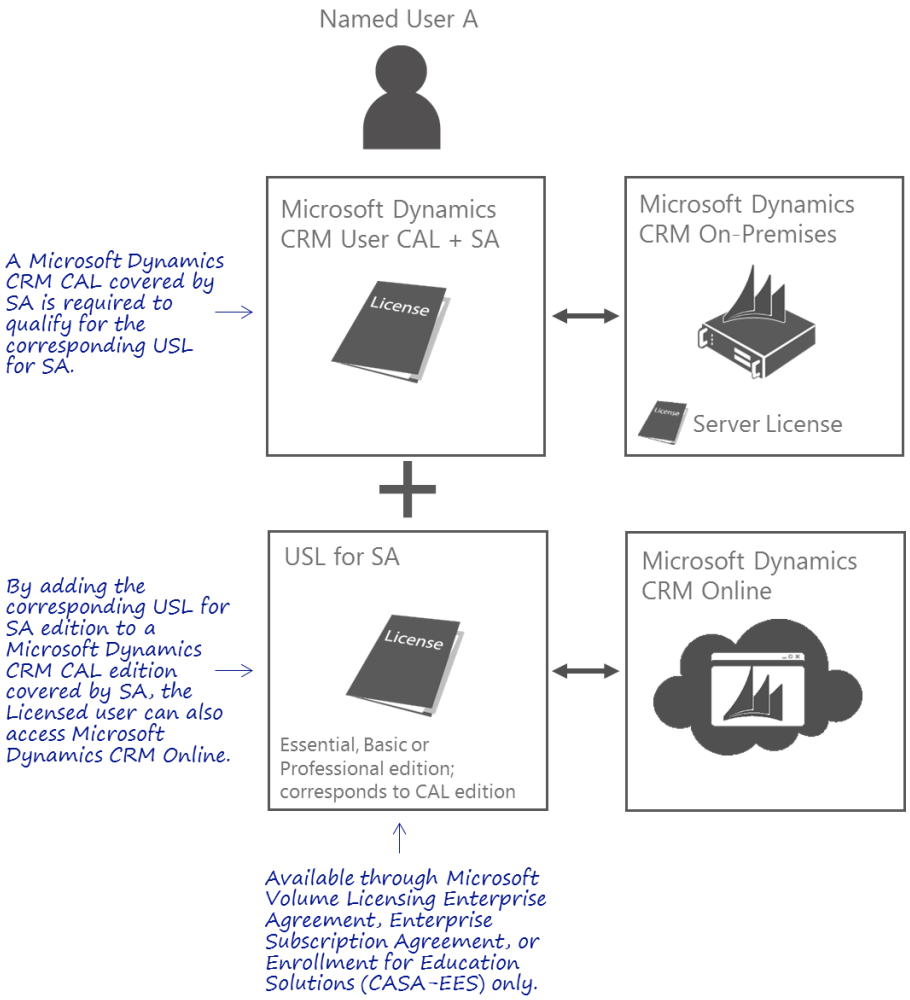
USLs for SA are available for purchase through the Microsoft Volume Licensing Enterprise Agreement, Enterprise Subscription Agreement, and Enrollment for Education Solutions (under a Campus and School Agreement).

For each User CAL or Device CAL to which you assign a USL for SA, you will receive a CRM Online USL. Pricing for the USL for SA is set to provide credit for you SA investment.

Notes:

- The USL must be used for the same user of the User CAL. The USL cannot subsequently be transferred to another user unless the corresponding CAL is also transferred to the new user.
- The USL level will correspond to the CAL level. For instance, a Professional CAL with USL for SA will be granted the Professional USL use rights.
- Device CALs that you have purchased as part of an Enterprise Agreement or Enrollment qualify USL for SA on a 1:1 basis: One Device CAL qualifies for one USL for SA.

Figure 10: USL for Software Assurance



The USL for SA model includes two parallel agreements:

1. A new or existing Software Assurance agreement that the customer will continue to maintain and renew, and
2. An additional USL for SA License Agreement that provides rights to the Microsoft Dynamics CRM Online service.

The following Microsoft Dynamics CRM Online USL for SA licenses are available for Microsoft Dynamics CALs with active Software Assurance:

Qualifying License:	Qualifies for:
Professional CAL	Professional USL for SA
Basic CAL	Basic USL for SA
Essential CAL	Essential USL for SA

Transitioning from Microsoft Dynamics CRM CALs to USLs under the Enterprise Agreement

Microsoft Enterprise Agreement offers a seamless way for you to license both on-premises software and cloud services in the same agreement. This can help you license software and cloud services for different user types and optimize your technology spend to fit your IT and user needs.

If you have an Enterprise Enrollment (sometimes called a Desktop EA or Platform EA), you can maintain your Enterprise-wide coverage and related discounted price levels, with a mix of Enterprise Products and/or equivalent Enterprise Online Services. You can also purchase Enterprise Online Services with a 250 order minimum and with no companywide commitment required.

This new flexibility of choice requires new license types and terminology to both enable and describe what licensing coverage is required should you move workers and workloads to the cloud. The following describes the presence and purpose of new terms found in the 2011 EA.

Updated EA Terms for Cloud Services

As you consider moving to the cloud, you can do so gradually or quickly, as suits your organization. As an example, you might move workers to cloud services in one division or one department at a time. To support this move, Transitions have been established to help you move users to Microsoft Dynamics CRM Online, Office 365, and Windows Intune services, and not pay twice for similar capabilities.

- The main benefit of this is to allow you to move to cloud services, at your own pace, and not face a perceived double payment for both on-premises and online services licenses. When this transition period ends on your next agreement anniversary date, it is then that you begin to pay full subscription license costs for Microsoft Dynamics CRM Online, Office 365 (Plan E1-E4), and/or Windows Intune services, and no longer pay for the on-premises licenses and Software Assurance (SA) coverage from which you transitioned.
- The notion of online services equivalents also helps preserve your volume pricing levels for Enterprise Products, as both Enterprise Products [e.g. Office Professional Plus, Windows operating system upgrades and Client Access License (CAL) Suites] and their equivalent Enterprise Online Services (Office 365 Plans E2-E4), and Microsoft Dynamics CRM Online and Windows Intune are considered when complying with companywide licensing commitments.

Taking advantage of transitions does not require you to forego use rights to perpetual licenses you have at time of transition, even if you have not yet deployed said licenses. This supports your ability to "transition back" from cloud services using your perpetual (on-premises) licenses, should your IT landscape change.

Minimum orders for Enterprise Online Services have been established to help you license cloud services for new users with no companywide commitment. This option may be especially attractive to customers who have not yet chosen an EA because of its companywide licensing requirement for Office Professional Plus, Windows desktop operating system upgrade, and CAL Suites.

Online Services Step-Up Licenses now exist which allow you to move up to greater value licenses of Microsoft Dynamics CRM Online [e.g. from a Basic license to a Professional license] with the price reflected as a delta between lower- and higher-level service.

License Reservations make Microsoft Dynamics CRM Online, Office 365, and Windows Intune available to you for use without requiring a purchase order up front. This process is unique to the EA and enables you to equip users with online services as needed, and account for these subscription licenses at your next agreement anniversary via new True-up provisions. This aligns with the True-up process for on-premises software.

Online Services Extended Terms now exist to help ensure continuity of your business-critical online services in cases of an unforeseen delay in renewal or no renewal.

The impact of these updated terms is that the 2011 EA now gives you:

- A way to transition to cloud services when it makes sense for your organization.
- The flexibility to move your users between on-premises and cloud services as business requirements and expectations change.
- The ability to match workloads of different types of users and fully use the capabilities of Microsoft cloud services.
- The opportunity to adjust volume and mix of cloud services annually to meet fluctuations in workforce, including a way to scale up or down the number of licenses for temporary workers.
- A no-cost grace period when you are moving your users onto cloud services, during the agreement year in which you transition.

License Transition Eligibility

The following licenses are eligible to transition to/from under 2011 EA.

From:	To:
Microsoft Dynamics CRM Professional User CAL	Microsoft Dynamics CRM Online Professional USL
Microsoft Dynamics CRM Professional Device CAL	Microsoft Dynamics CRM Online Professional USL
Microsoft Dynamics CRM Basic User CAL	Microsoft Dynamics CRM Online Basic USL
Microsoft Dynamics CRM Basic Device CAL	Microsoft Dynamics CRM Online Basic USL
Microsoft Dynamics CRM Essential User CAL	Microsoft Dynamics CRM Online Essential USL
Microsoft Dynamics CRM Essential Device CAL	Microsoft Dynamics CRM Online Essential USL

Estimated Pricing

Volume Licensing

The following are U.S. Estimated Retail Prices for licenses purchased under the Microsoft Volume Licensing Enterprise Agreement Level A. Actual pricing is determined by your Microsoft Partner.

License	Estimated Retail Price
Microsoft Dynamics CRM Server 2013	$4922
Microsoft Dynamics CRM Workgroup Server 2013 (with 5 users)	$2462
Microsoft Dynamics CRM Professional User CAL	$983
Microsoft Dynamics CRM Professional Device CAL	$787
Microsoft Dynamics CRM Basic User CAL	$342
Microsoft Dynamics CRM Basic Device CAL	$236
Microsoft Dynamics CRM Essential User CAL	$79
Microsoft Dynamics CRM Essential Device CAL	$79
Professional Use Additive User CAL	$642
Professional Use Additive Device CAL	$552
Basic Use Additive User CAL	$263
Basic Use Additive Device CAL	$157

The following are U.S. Estimated Retail Prices for licenses purchased under the Microsoft Volume Licensing Enterprise Agreement Level D. Actual pricing is determined by your Microsoft Partner.

License	Estimated Retail Price
Microsoft Dynamics CRM Server 2013	$3888
Microsoft Dynamics CRM Workgroup Server 2013 (with 5 users)	$1944
Microsoft Dynamics CRM Professional User CAL	$776
Microsoft Dynamics CRM Professional Device CAL	$621
Microsoft Dynamics CRM Basic User CAL	$270
Microsoft Dynamics CRM Basic Device CAL	$187
Microsoft Dynamics CRM Essential User CAL	$63
Microsoft Dynamics CRM Essential Device CAL	$63
Professional Use Additive User CAL	$507
Professional Use Additive Device CAL	$436
Basic Use Additive User CAL	$208
Basic Use Additive Device CAL	$125

Media Fulfillment

You can use the Volume Licensing Service Center (VLSC) to download licensed products, access product keys, and manage your Volume Licensing agreements and license acquisition activity—all in one online location. You can purchase physical media from your Microsoft reseller.

License Keys & Product Activation

Microsoft Dynamics CRM 2013 media obtained under Volume Licensing programs include license keys embedded on the media (Media is 'Pre-Keyed*'). The license keys will no longer need to be entered upon installation. If you have downloaded a Trial or time limited version of Microsoft Dynamics CRM, and later purchase Volume License media and do not wish to re-install, you may input the license key from your purchased media within the Microsoft Dynamics CRM Deployment Manager.

The License Key may be located by searching the installation files contained on the media for the \server\amd64\license.txt file.

Where to obtain License Keys for each channel

WG = Microsoft Dynamics CRM Workgroup Server 2013
CRM Server = Microsoft Dynamics CRM Server 2013

	90 Day Trial License Keys	MSDN/ TechNet	MPN	Action Pack	Volume Licensing	BRL / DPL	SPLA	ISV Royalty
Edition	WG Server CRM Server	WG Server CRM Server	CRM Server	WG Server	WG Server CRM Server	CRM Server & Academic Alliance	Service Provider (CRM Server)	CRM Server
License Key	Not Pre-Keyed*	Not Pre-Keyed	Not Pre-Keyed	Not Pre-Keyed	Pre-Keyed	Not Pre-Keyed	Pre-Keyed	Pre-Keyed
How license key is obtained	Users download media from MS Trial Downloads website. 90 day license keys are posted on the web site.	Users download media from MSDN Subscriber Downloads only, and obtain license key from MSDN / TechNet download site. A product key button on the site will take them to their list of product keys. That page will list the Workgroup & CRM Server keys.	Partners will download from partner digital distribution portal, MSDN, or TechNet. The licenses keys are posted on the partner digital distribution portal.	Partners will download from partner digital distribution portal.	The license key is embedded in the Media. (It is not printed on the media or a sticker on the media, and is not available on VLSC as a VLK).	The Partner/ Customer will obtain the license key(s) in VOICE.	The license key is embedded in the Media. Media is ordered through explore.ms	The license key is embedded in the Media. Media is ordered through explore.ms
Media	Download only	Download only MSDN TechNet	Download only MSPPDD MSDN TechNet	DVD	DVD and Download	Download only	DVD and Download	DVD and Download

Registration	Not Required	Not Required	Not Required	Not Required	Not Required	Not Required	Not Required	Not Required
Re-Registration on Upgrade	Not Required	Not Required	Not Required	Not Required	Not Required	Not Required	Not Required	Not Required
User Experience	User Downloads Trial from MS Downloads - Trial product keys are posted on the download site.	User purchases MSDN subscription and receives software by downloading from Xena Download site.	Partner receives welcome kit, product keys are on PMC for internal use. Partner may also keys from MSDN or TechNet for development and evaluation, respectively.	Action Pack ships up to 2 media kits within a partner's subscription. Partners have two ways of obtaining their software benefits through our program: 1) Downloading the software and keys online via our Partner Digital Download site and/or 2) if they opted in for a physical kit. Note, product keys are no longer shipped in the kits.	Media can be downloaded through VLSC. Physical media (DVD) can be ordered through the reseller.	Customer purchases from Partner, downloads media and obtains key via VOICE. Editions are neutral, one build, User enters product key to install.	Service Provider signs SPLA, Customer contracts with SP for service - Service Provider reports monthly usage in MOET (Microsoft Online Order Entry Tool).	ISV orders fulfillment media through explore.ms (MOET), creates "Unified build", product key is on media.
Upgrade Experience	Three upgrade paths: **Migration upgrade** 1. Run Microsoft Dynamics CRM server 2013 setup, 2. Enter Microsoft Dynamics CRM Server 2013 product key 3. Select the option "create new deployment" which will create a new CRM 2013 configuration database. 4. Use the Microsoft Dynamics CRM 2013 Deployment Manager in the new deployment to run an import on the CRM 2011 organization database which will simultaneously upgrade the org db. **Connect to existing upgrade** 1. Run Microsoft Dynamics CRM server 2013 server setup, 2. Enter Microsoft Dynamics CRM 2013 product key 3. Select the option "Connect to an existing deployment". Microsoft Dynamics CRM 2011 configuration database and Microsoft Dynamics CRM 2011 default organization will be upgraded to CRM 2013 during the server installation. 4. After the installation, you will be able to (1) upgrade the remaining orgs in the deployment and/or (2) import and upgrade org databases into this deployment from a different CRM 2011 deployment. **In place upgrade** 1. Run Microsoft Dynamics CRM server 2013 server setup on an existing Microsoft Dynamics CRM 2011 server 2. Enter Microsoft Dynamics CRM 2013 product key during setup. Microsoft Dynamics CRM 2011 configuration database and Microsoft Dynamics CRM 2011 default organization database will be upgraded. 3. After installation, you will be able to (1) upgrade the remaining orgs in the deployment and/or (2) import and upgrade org databases into this deployment from a different CRM 2011 deployment.							
Languages	All Languages	All Languages	All Languages	All Languages	All Languages	All Languages	All Languages	All Languages

Notes:

- IMPORTANT! Microsoft Dynamics CRM 2013 license keys will not appear in the license key product listing that appears for some products in VLSC. The product keys are embedded in the VLSC downloads and on the physical media, so there is no need to enter a product key, except in the event a TRIAL version has been installed first.(If this is the case - see the TRIALs section.)
- All Programs do not require registration of Microsoft Dynamics CRM 2013 Server/CAL licenses.

On Premises Upgrades & Migration

Technical Upgrade Path for Dynamics CRM 2011 Customers

Microsoft Dynamics CRM 2011 server editions may be upgraded to Microsoft Dynamics CRM 2013 server editions as outlined in the table below.

WG = Microsoft Dynamics CRM Workgroup Server 2013
CRM Server = Microsoft Dynamics CRM Server 2013

To Microsoft Dynamics CRM 2013:

From Microsoft Dynamics CRM 2011:		Time Limited or 90 Day Trial		MSDN & TechNet		Volume Licensing & MPN		ISV Royalty	SPLA	BRL/ DPL	MAPS
		WG	CRM Server	WG	CRM Server	WG	CRM Server	CRM Server	Service Provider	CRM Server	WG
Time Limited or 90 Day Trial	WG		✓	✓	✓	✓	✓	✓	✓	✓	✓
	CRM Server		✓		✓		✓	✓	✓	✓	
MSDN & TechNet	WG	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	CRM Server		✓		✓		✓	✓	✓	✓	
Volume Licensing & MPN	WG		✓	✓	✓	✓	✓	✓	✓	✓	✓
	CRM Server		✓		✓		✓	✓	✓	✓	
ISV Royalty	CRM Server		✓		✓		✓	✓	✓	✓	
SPLA	Service Provider		✓		✓		✓	✓	✓	✓	
BRL /DPL	CRM Server		✓		✓		✓	✓	✓	✓	
MAPS	WG		✓	✓	✓	✓	✓	✓	✓	✓	✓

License Upgrade Path for Microsoft Dynamics CRM 2011 Customers

Customers who are current on their Software Assurance Plan as of October 1, 2013 are entitled to upgrade the licenses from Microsoft Dynamics CRM 2011 to Microsoft Dynamics CRM 2013 as shown below:

Qualifying Microsoft Dynamics CRM 2011 Licenses	Corresponding Microsoft Dynamics CRM 2013 Licenses
Microsoft Dynamics CRM 2011 CAL	1 Microsoft Dynamics CRM 2013 Professional CAL
Microsoft Dynamics CRM 2011 Full Use Additive CAL	1 Microsoft Dynamics CRM 2013 Professional Use Additive CAL
Microsoft Dynamics CRM 2011 Limited CAL	1 Microsoft Dynamics CRM 2013 Basic CAL
Microsoft Dynamics CRM 2011 Limited Use Additive CAL	1 Microsoft Dynamics CRM 2013 Basic Use Additive CAL
Microsoft Dynamics CRM 2011 ESS CAL	1 Microsoft Dynamics CRM 2013 Essential CAL PLUS 1 Microsoft Dynamics CRM 2013 Basic Use Additive CAL[2]
Microsoft Dynamics CRM Workgroup Server 2011	1 Microsoft Dynamics CRM Workgroup Server 2013
Microsoft Dynamics CRM Server 2011	1 Microsoft Dynamics CRM Server 2013
Microsoft Dynamics CRM 2011 External Connector[1]	1 Microsoft Dynamics CRM Server 2013

[1]External user related licensing rights are included in Microsoft Dynamics CRM Server 2013 license. 1 Microsoft Dynamics CRM Server 2013 license will be granted for every 1 Microsoft Dynamics CRM 2011 External Connector license active on SA as of General Availability of Microsoft Dynamics CRM 2013.
[2]You have the option to drop the Microsoft Dynamics CRM 2013 Basic Use Additive CAL at renewal.

Customers' right to use Microsoft Dynamics CRM 2013 software is evidenced by this product condition note and evidence of their corresponding licenses and Software Assurance for Microsoft Dynamics CRM 2011. A customer's right to use Microsoft Dynamics CRM 2013 software under this grant is subject to the terms and conditions of its volume licensing agreement. That right expires upon the expiration or termination of the right to use Microsoft Dynamics CRM 2011 under the corresponding qualifying Microsoft Dynamics CRM 2011 licenses. Upon expiration of SA coverage on the Microsoft Dynamics CRM 2011 licenses, the customer may renew SA for the granted Microsoft Dynamics CRM 2013 licenses.

For Enterprise Agreement customers eligible for these complimentary licenses and rights as described above, Microsoft Dynamics CRM 2011 licenses that are as part of a customer's annual true-up process during the current enrollment term are also qualifying licenses.

For Enterprise Subscription, Campus and School, and Open Value Subscription Agreements, the same rights are granted on a temporary basis until the end of the license enrollment term, as long as the Licenses and Software Assurance are valid during the grant period and the customer maintains continuous subscription coverage. These rights only become permanent upon exercise of the buy-out option, and remain subject to all the terms and conditions of the customer's license agreement.

Carefully Consider Your Upgrade Path

Customers need to be aware of possibilities, limitations and consequences when choosing their upgrade

path.

Software Assurance Renewals occurring after General Availability of Microsoft Dynamics CRM 2013 in the relevant language version will be calculated based on the price of the relevant Microsoft Dynamics CRM 2013 part number.

Customers with Expired Software Assurance

Customers with expired Software Assurance will need to obtain Microsoft Dynamics CRM 2013 licenses under standard pricing programs, and license it like a new customer.

The only time Software Assurance can be acquired alone is if it is being renewed from a prior agreement.

Upgrade Path for Microsoft Dynamics CRM 4.0 Customers

Microsoft Dynamics CRM 4.0 Users must upgrade to Microsoft Dynamics CRM 2011, before proceeding to upgrade to Microsoft Dynamics CRM 2013 editions. There is no direct technical upgrade path from Microsoft Dynamics CRM 4.0 to Microsoft Dynamics CRM 2013.

The licensing upgrade path for Microsoft Dynamics CRM 4.0 users to Microsoft Dynamics CRM 2011; and from Microsoft Dynamics CRM 2011 to Microsoft Dynamics CRM 2013 is as follows:

Volume Licensing Upgrade Path Program Summary

Microsoft Dynamics CRM 4.0 License	Microsoft Dynamics CRM 2011 All VL Programs	Microsoft Dynamics CRM 2013 All VL Programs
Microsoft Dynamics CRM 4.0 WorkGroup Server	1 Microsoft Dynamics CRM WorkGroup Server 2011	1 Microsoft Dynamics CRM Workgroup Server 2013
Microsoft Dynamics CRM 4.0 Professional Server	1 Microsoft Dynamics CRM Server 2011	1 Microsoft Dynamics CRM Server 2013
Microsoft Dynamics CRM 4.0 Enterprise Server	1 Microsoft Dynamics CRM Server 2011	1Microsoft Dynamics CRM Server 2013
Microsoft Dynamics CRM 4.0 Limited CAL	1 Microsoft Dynamics CRM 2011 Limited CAL	1 Microsoft Dynamics CRM 2013 Basic CAL
Microsoft Dynamics CRM 4.0 CAL	1 Microsoft Dynamics CRM 2011 CAL	1 Microsoft Dynamics CRM 2013 Professional CAL

Downgrade Paths: Microsoft Dynamics CRM 2011

Customers with Microsoft Dynamics CRM 2013 licenses may use Microsoft Dynamics CRM 2011 in place of Microsoft Dynamics CRM 2013. Their Microsoft Dynamics CRM 2013 licenses may be deployed as Microsoft Dynamics CRM 2011 licenses as follows:

Volume Licensing Downgrade Path Summary

Qualifying Microsoft Dynamics CRM 2013 Licenses	Corresponding Microsoft Dynamics CRM 2011 Licenses
Microsoft Dynamics CRM Server 2013	1 Microsoft Dynamics CRM Server 2011
Microsoft Dynamics CRM Workgroup Server 2013	1 Microsoft Dynamics CRM Workgroup Server 2011
Microsoft Dynamics CRM 2013 Professional CAL	1 Microsoft Dynamics CRM 2011 CAL
Microsoft Dynamics CRM 2013 Professional Use Additive CAL	1 Microsoft Dynamics CRM 2011 Full Use Additive CAL
Microsoft Dynamics CRM 2013 Basic CAL	1 Microsoft Dynamics CRM 2011 Limited CAL
Microsoft Dynamics CRM 2013 Basic Use Additive CAL	1 Microsoft Dynamics CRM 2011 Limited Use Additive CAL
Microsoft Dynamics CRM 2013 Essential CAL	1 Microsoft Dynamics CRM 2011 ESS CAL

A customer's right to use Microsoft Dynamics CRM 2011 is subject to the terms and conditions of a customer's license agreement, the product use rights for Microsoft Dynamics CRM 2011 and these terms. That right expires upon the expiration or termination of their right to use Microsoft Dynamics CRM 2013 under their qualifying Microsoft Dynamics CRM 2013 licenses.

To add additional CALs to a Microsoft Dynamics CRM Server 2011 server, Microsoft Dynamics CRM 2013 CALs must be purchased. Downgrade rights provide the path to add additional users.

Software Assurance

Software Assurance includes a core set of benefits to help improve workforce productivity, streamline software deployment, and reduce costs. A distinctive set of benefits, such as new software versions, planning services, 24x7 phone and Web support, training, and more—all designed to help you get the most from your organization's Volume Licensing purchase.

When you purchase through the Open License or Select Plus programs, Software Assurance is available as an optional add-on to your license purchases.

When you purchase through the Open Value, Open Value Subscription, Enterprise Agreement, Enterprise Subscription Agreement, or Enrolment for Education Solutions, Software Assurance is automatically included with your licenses.

Your specific Software Assurance benefits vary according to the Volume Licensing program. Refer to the resources and tools below to learn more about the Software Assurance benefits available to your organization.

To learn more about the Software Assurance benefits for Microsoft Dynamics CRM customers, visit http://www.microsoft.com/dynamics/customer/en-us/service-plans.aspx to view an interactive benefit chart detailing the benefits of the Software Assurance benefits for Microsoft Dynamics CRM or www.microsoft.com/licensing/software-assurance/check-your-benefits.aspx to check customers benefits post-purchase.

To access information, links to support, community and eLearning benefits visit the Microsoft Dynamics CRM Customer Center at: http://rc.crm.dynamics.com/rc/

Links for Additional Information

Microsoft Dynamics CRM: http://crm.dynamics.com

CRM Connection Blog: https://community.dynamics.com/crm/b/crmconnection/default.aspx

Microsoft Volume Licensing: www.microsoft.com/licensing

Software Assurance: www.microsoft.com/licensing/software-assurance/default.aspx

Activate Software Assurance benefits: www.microsoft.com/licensing/sa/activate.mspx

Microsoft License Advisor: www.microsoft.com/licensing/mla/default.aspx

Microsoft Dynamics CRM Support: www.microsoft.com/en-us/dynamics/support.aspx

CustomerSource https://mbs.microsoft.com/customersource/

Microsoft Downloads Center: www.microsoft.com/downloads

Appendix A – Use Rights by Microsoft Dynamics CRM 2013 CAL

The following table lists the use rights corresponding to the Client Access Licenses (CALs) that are available in Microsoft Dynamics CRM 2013 and User Subscription Licenses (USLs) available in Microsoft Dynamics CRM Online.

Use Right	Professional	Basic	Essential
View Announcements	✓	✓	✓
Manage saved views	✓	✓	✓
Use relationships between records	✓	✓*	✓*
Create personal views	✓	✓	✓*
Advanced Find search	✓	✓	✓*
Search	✓	✓	✓*
Use a queue item	✓	✓*	✓*
Export data to Microsoft Excel	✓	✓	✓
Perform Mail Merge	✓	✓	✓
Start dialog	✓	✓*	✓*
Run as an On-demand process	✓	✓*	✓*
Run an automated workflow	✓	✓*	✓*
Read articles	✓	✓	✓
Notes	✓	✓	✓
Activity management	✓	✓	✓
Yammer collaboration**	✓	✓	✓
Post activity feeds	✓	✓	✓
Follow activity feeds	✓	✓	✓
Shared calendar	✓	✓	✓
Write custom entity records	✓	✓	✓
Read custom application data	✓	✓	✓
Microsoft Dynamics CRM Mobile Express	✓	✓	✓
Microsoft Dynamics CRM for iPad & Windows 8	✓	✓	✓
Microsoft Dynamics CRM for Outlook	✓	✓	✓
Microsoft Dynamics CRM Web application	✓	✓	✓
Manage user reports, user charts, and user dashboards	✓	✓	
Run reports	✓	✓	
Create, update, and customize Reports	✓	✓	
Create and update announcements	✓	✓	
Read Dynamics CRM application data	✓	✓	
User dashboards	✓	✓	
User charts	✓	✓	
User Interface Integration for Microsoft Dynamics CRM	✓	✓	
Convert an activity to a case	✓	✓	
Case management	✓	✓	
Add or remove a customer relationship for a contact	✓	✓	
Associate an opportunity with a contact	✓	✓	
Qualify and convert a lead to a contact	✓	✓	
Contacts	✓	✓	
Lead scoring, routing, assignment	✓	✓	

Use Right	Professional	Basic	Essential
Lead capture	✓	✓	
Add or remove a customer relationship for an account	✓	✓	
Associate an opportunity with an account	✓	✓	
Qualify and covert a lead to an account	✓	✓	
Accounts	✓	✓	
Import data in bulk	✓		
Configure auditing	✓		
Configure duplicate-detection rules	✓		
Define relationships between entities	✓		
Define and configure queues	✓		
Define and configure dialogs	✓		
Define and configure workflows	✓		
System reports, system charts, and system dashboards	✓		
Customize forms and views	✓		
Create Microsoft Dynamics CRM forms, entities, and fields	✓		
Administer CRM	✓		
Article templates	✓		
Create and publish articles	✓		
Goal management	✓		
Contract templates	✓		
Contract management	✓		
Territory management	✓		
Sales literature	✓		
Quote management	✓		
Price lists	✓		
Product tracking	✓		
Order management	✓		
Invoice management	✓		
Competitor tracking	✓		
Qualify and convert a lead to an opportunity	✓		
Convert an activity to an opportunity	✓		
Opportunity tracking	✓		
Marketing lists	✓		
Quick campaigns	✓		
Marketing campaigns	✓		
Facility/Equipment management	✓		
Define and configure business units	✓		
Define and configure teams	✓		
Define and configure services, resources, and work hours	✓		

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

**Use of Yammer within the Dynamics CRM application requires a Yammer Enterprise license (acquired separately)

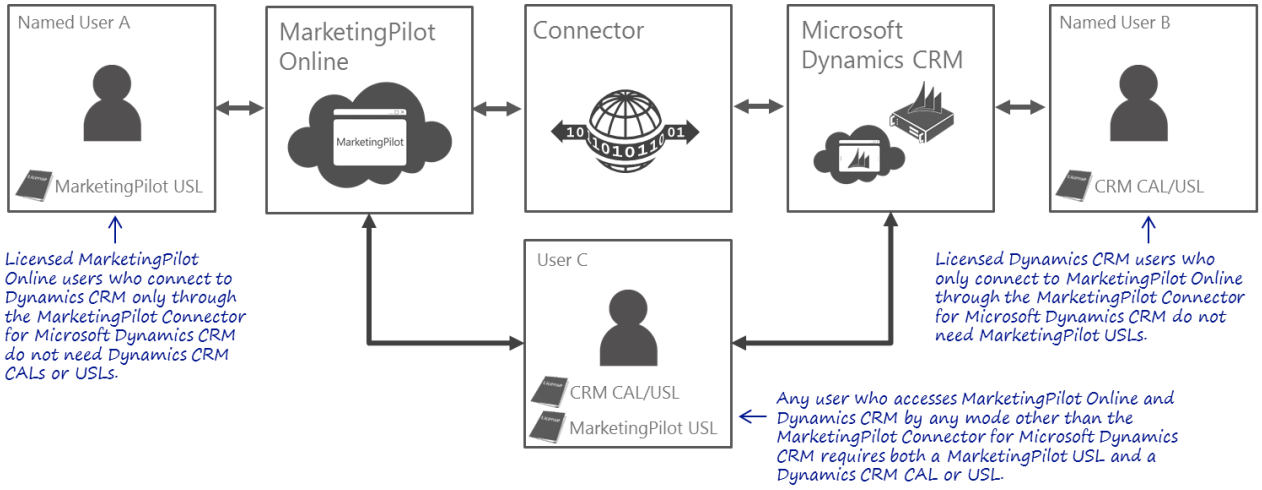
Appendix B – MarketingPilot Connector for Microsoft Dynamics CRM

MarketingPilot Online connects to Microsoft Dynamics CRM using the MarketingPilot Connector for Microsoft Dynamics CRM data connector software. Through this software, relevant data that is entered in MarketingPilot is automatically updated in Microsoft Dynamics CRM (and vice versa).

Licensed MarketingPilot users who connect indirectly to Microsoft Dynamics CRM only through the MarketingPilot Connector for Microsoft Dynamics CRM do not need Microsoft Dynamics CRM Client Access Licenses (CALs) or USLs. Likewise, licensed Microsoft Dynamics CRM users who only connect indirectly to MarketingPilot Online through the MarketingPilot Connector for Microsoft Dynamics CRM do not need MarketingPilot Online USLs.

Any user who accesses MarketingPilot Online and Microsoft Dynamics CRM by any mode other than the MarketingPilot Connector for Microsoft Dynamics CRM requires both a MarketingPilot Online USL and a Microsoft Dynamics CRM CAL or USL.

Figure 13: MarketingPilot Connector for Microsoft Dynamics CRM Online



For more information, refer to the MarketingPilot Online Licensing and Pricing Guide.

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