

Microsoft
Dynamics
CRM Online

Licensing and Pricing Guide

Microsoft



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Using This Guide

Use this guide to improve your understanding of how to license Microsoft Dynamics CRM Online. 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

With the release of Microsoft Dynamics CRM Online Fall 2013 Update, Microsoft Dynamics CRM provides flexible, high value, and simple-to-understand licensing for Dynamics CRM in the cloud. The new 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.

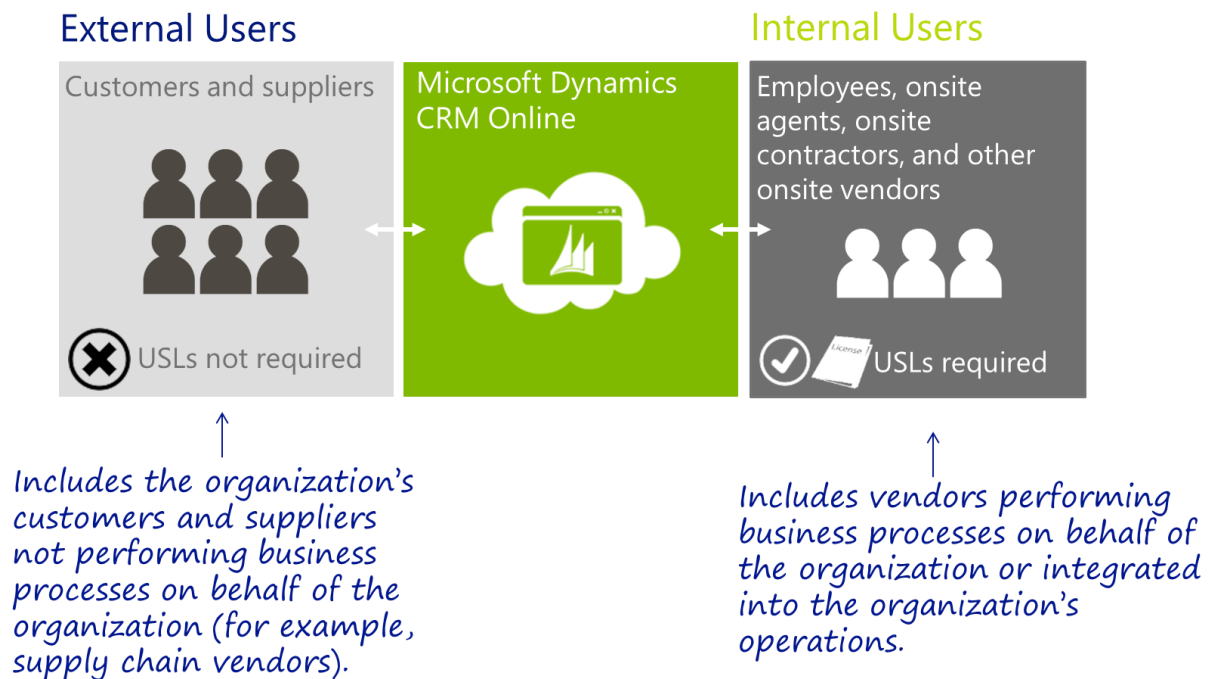
User-based Subscription Licensing Requirements

Internal and External Users

With Microsoft Dynamics CRM Online, you must license each internal user who will access the service with a USL. Access by external (third party) users is included with the subscription; these users do not require USLs unless using Microsoft Dynamics CRM client applications and graphical user interface (GUI). Third party users are users that are not either (i) the customer's or the customer's affiliates' employees, or (ii) the customer's or the customer's affiliates' contractors or agents. In this sense, the definition of third party users does not extend to onsite contractors, vendors, and users performing business processes on the customer's behalf.

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 1: Internal vs. external users



Basic Licensing Requirements for Internal Users

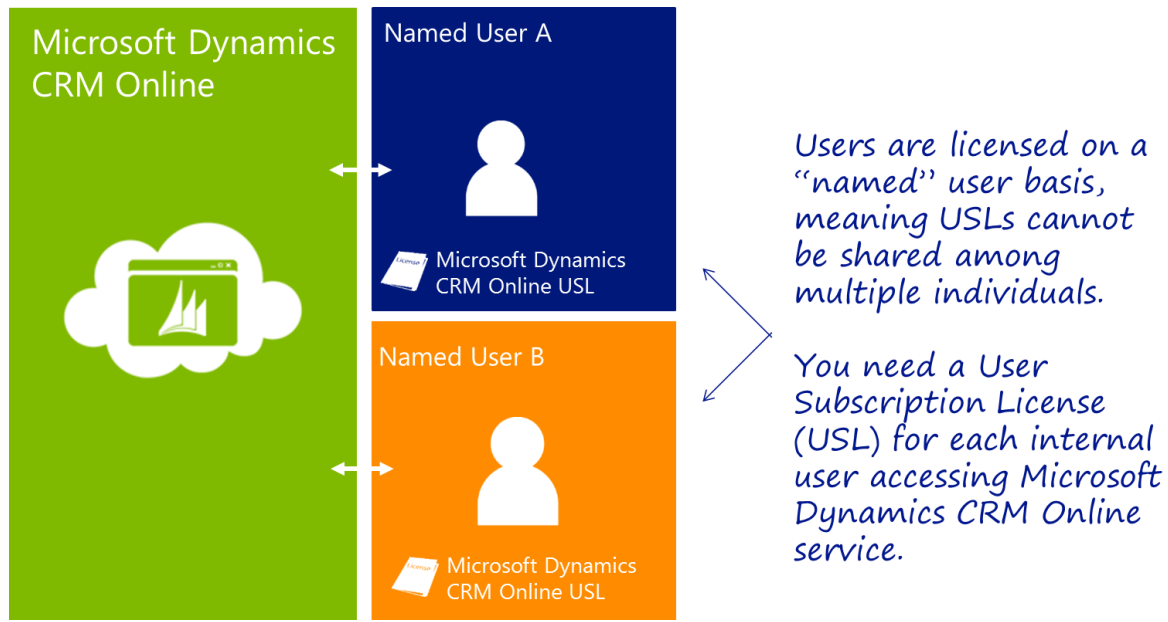
You license access to the Microsoft Dynamics CRM Online service by purchasing a USL for every internal user who will access the service.

Note: Microsoft Dynamics CRM Online does not support device-based licensing.

USLs are assigned on a "named user" basis, meaning each user requires a separate USL; USLs cannot be shared.

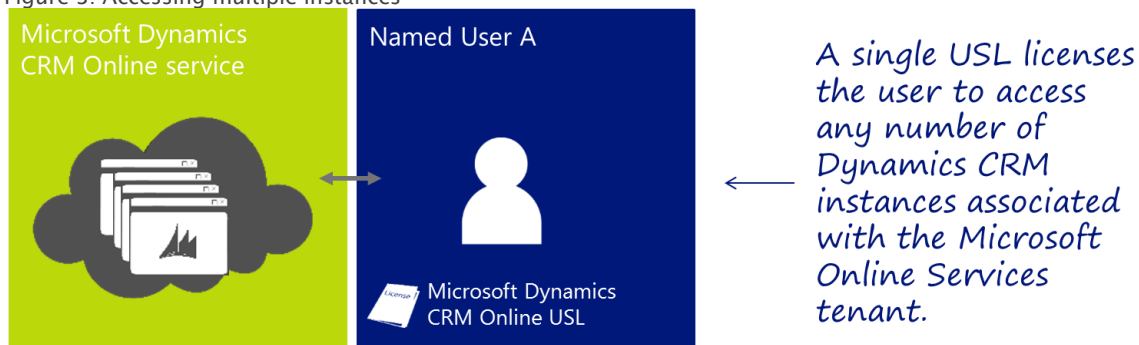
The USL grants users non-perpetual rights (with no buy-out rights) to the use of the Microsoft Dynamics CRM Online service. As long as you are current on your subscription payments and adhere to the Terms of Service, you will have access to the most up-to-date version of Microsoft Dynamics CRM Online.

Figure 2: Basic licensing requirements for Microsoft Dynamics CRM Online



The license includes access rights to the default Microsoft Dynamics CRM Online instance included in the subscription account, and every additional Microsoft Dynamics CRM Online instance associated with the same tenant.

Figure 3: Accessing multiple instances



Available USLs

Microsoft Dynamics CRM Online offers three levels of user subscription licenses (USL)—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 Dynamics CRM functionality, and mix- and-match these licenses within a deployment. These USLs and the associated use rights align to the three CAL levels for on-premises 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

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.

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

	Professional	Basic	Essential
Customize and administer Dynamics CRM	•		
Manage System dashboards, charts, workflows & dialogs	•		
Customer service automation	•		
Sales automation	•		
Marketing campaigns and lists	•		
Reporting, personal dashboards, and visualizations	•	•	
Basic CRM: Read and Write Accounts, Contacts, Cases, and Leads	•	•	
Read and write custom application data	•	•	•
Activity management, activity feeds	•	•	•
Access using Microsoft Dynamics CRM desktop apps and mobile apps	•	•	•

NOTES:

- Basic and Essential licenses are available only to new and existing customers who have upgraded to Microsoft Dynamics CRM Online Fall 2013 service update.
- A User licensed on any Microsoft Dynamics CRM Online USL can access the online service 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 user license, with no additional license fees for mobile access.
- Your use of Bing Maps within Microsoft Dynamics CRM Online is governed by the [Bing Maps End User Terms of Use](#) and the [Bing Maps Privacy Statement](#).
- Subscription licenses for Microsoft Dynamics CRM Online do not include use rights for Yammer or

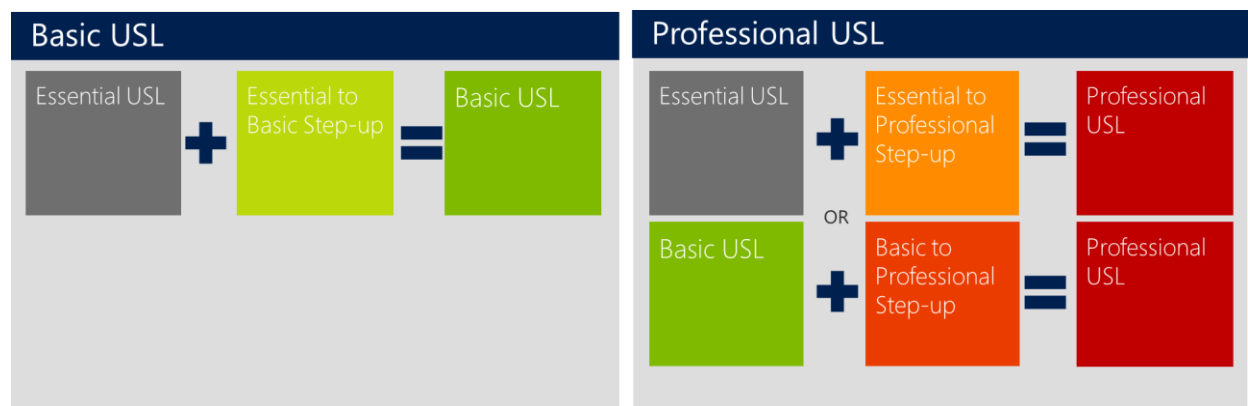
Skype. If your deployment integrates Dynamics CRM Online with any of these products, product licensing rights for Yammer and/or Skype must be established separately. To learn more about Yammer's terms of use, visit <https://www.yammer.com/about/terms/>

Stepping-up to a Higher Level USL

Volume Licensing customers enrolled in Enterprise Agreement, Enterprise Subscription Agreement, or Enrollment for Education Solutions can step-up from a lower level USL to higher level USL using step-up licenses. The following step-up licenses are available through the [applicable Volume Licensing programs](#).

- Microsoft Dynamics CRM Online Basic Step-Up from Microsoft Dynamics CRM Online Essential
- Microsoft Dynamics CRM Online Professional Step-Up from Microsoft Dynamics CRM Online Essential
- Microsoft Dynamics CRM Online Professional Step-Up from Microsoft Dynamics CRM Online Basic

Figure 5: Stepping-up to a higher level USL



Other Product Licenses

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

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

<http://go.microsoft.com/fwlink/?LinkID=306081>

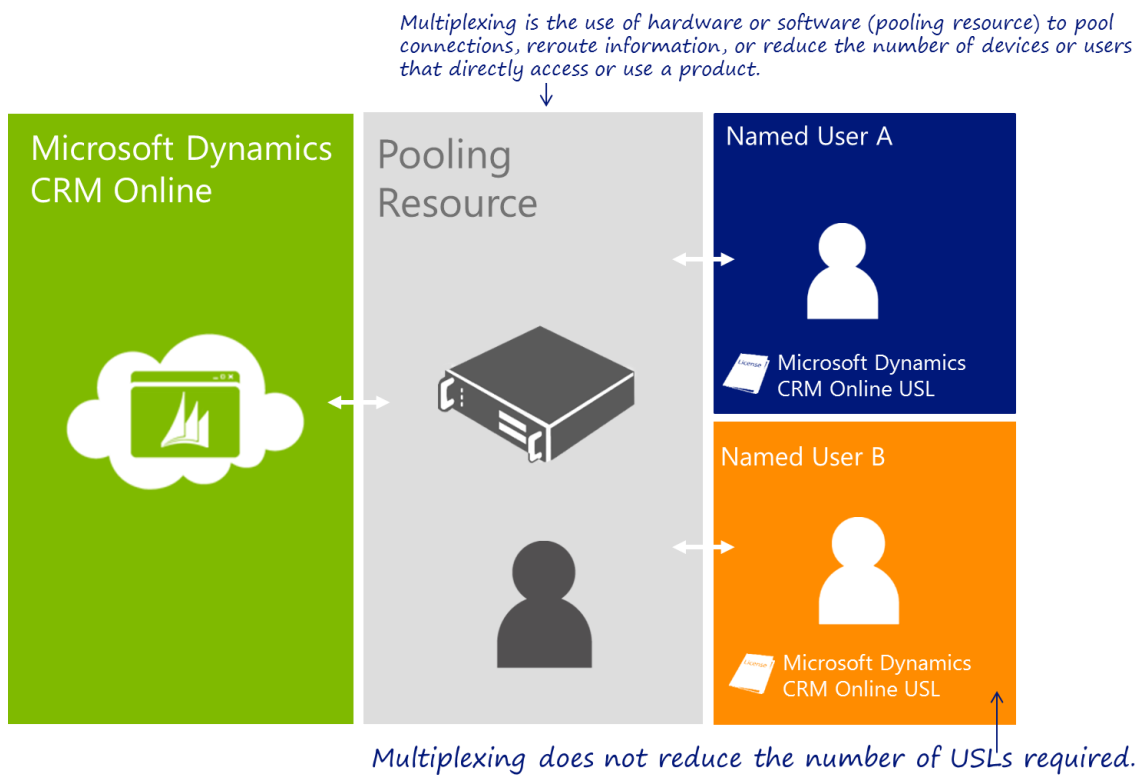
Microsoft License Advisor Tool: <http://mla.microsoft.com/default.aspx>

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 Online service by pooling connections. Multiplexing does not reduce the number of licenses required to access the Microsoft Dynamics CRM Online service. Any internal user who accesses the Microsoft Dynamics CRM Online service—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 Online service. This scenario is not considered to be multiplexing.

Figure 6: Multiplexing



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

Subscription Capacities and Optional Add-ons

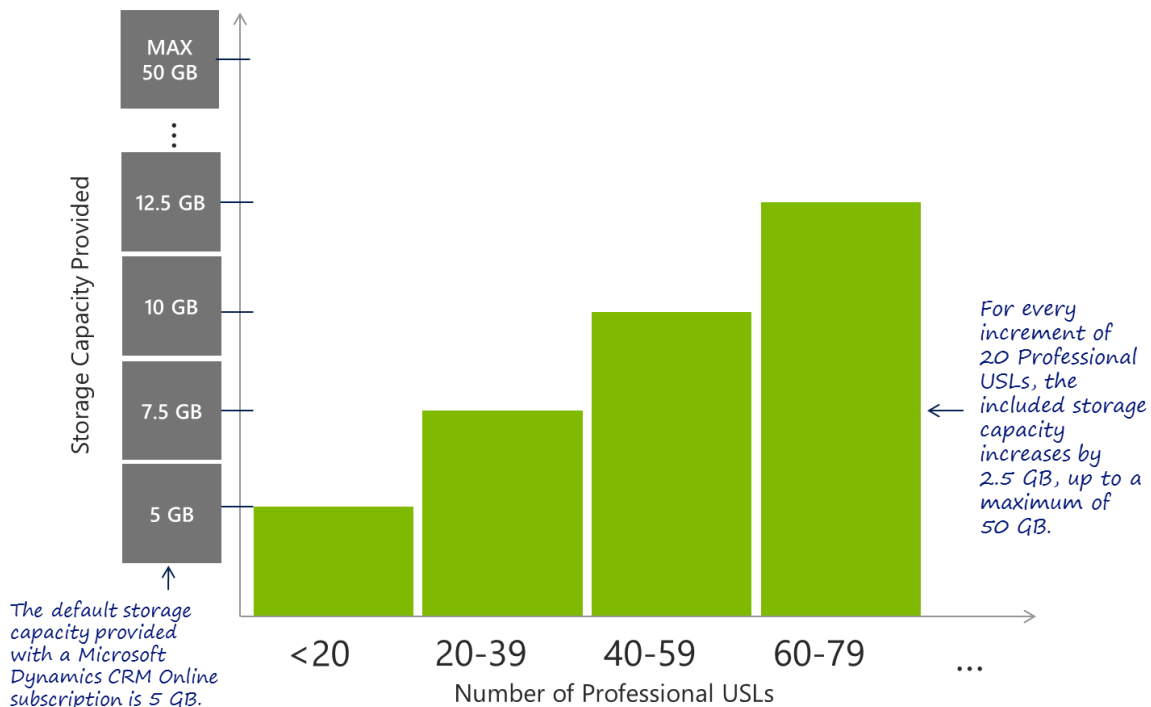
Each customer enrolled in a Microsoft Dynamics CRM Online subscription receives default storage, and one production instance of Microsoft Dynamics CRM Online.

Subscription Capacities

DEFAULT STORAGE CAPACITY

At a minimum, Microsoft Dynamics CRM Online subscription includes 5 GB of storage at no additional charge. Additional storage capacity is granted at no charge as an organization increases the number of Professional USLs. For every increment of 20 Professional USLs, the included storage capacity increases by 2.5 GB. So a customer with 20 Professional USLs receives a default storage capacity of 7.5 GB. At 40 Professional USLs, the included storage capacity increases of 10 GB, and so on. The maximum default storage included in a subscription is capped at 50 GB per customer.

Figure 7: Storage Capacity



DEFAULT PRODUCTION INSTANCE CAPACITY

Microsoft Dynamics CRM Online subscription offers one production instance per tenant.

DEFAULT NON-PRODUCTION INSTANCE CAPACITY

Microsoft Dynamics CRM Online subscription offers one non-production instance per customer with a minimum purchase of 25 Professional USLs.

Optional Add-ons

If you require additional subscription capacity (such as additional instances, or storage), you can include the add-on licenses to your subscription.

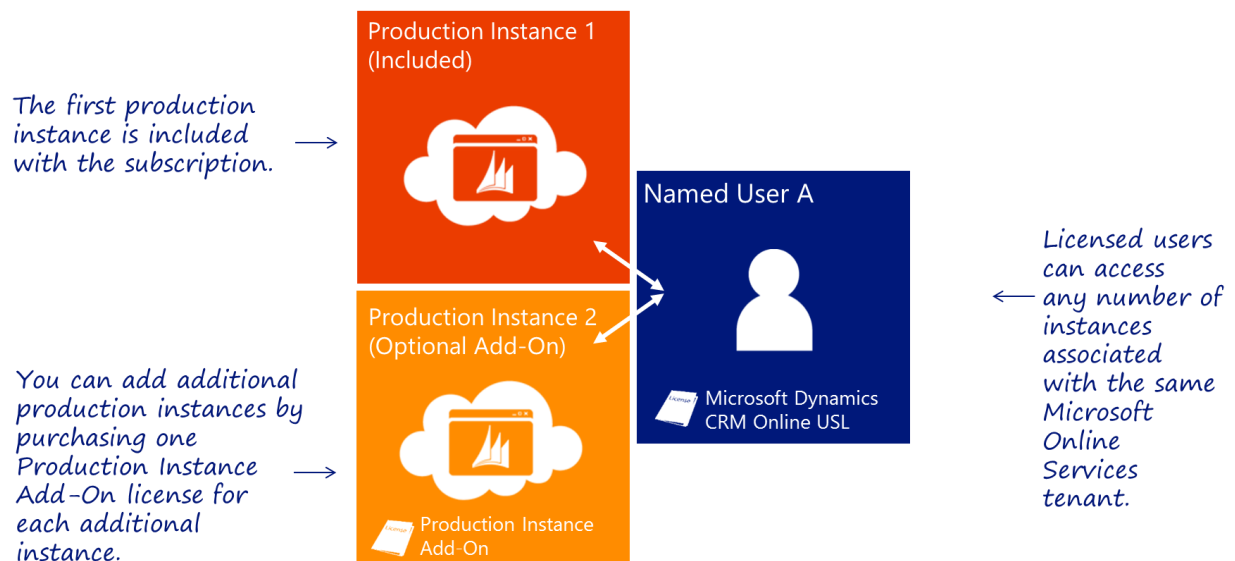
Subscription add-ons apply across your entire organization; they are not tied to a specific user. You can purchase subscription add-ons at any time, and they will remain a part of your subscription for the remainder of your subscription term.

PRODUCTION INSTANCE ADD-ON

The Production Instance Add-On is well suited for multi-instance deployments such as departmental applications configured within an organization. Licensed users associated with a Microsoft Dynamics CRM Online subscription can access the default Microsoft Dynamics CRM Online instance included in the subscription, and every Microsoft Dynamics CRM Online additional instance associated with the same tenant.

The Production Instance Add-On license does not include any default storage capacity.

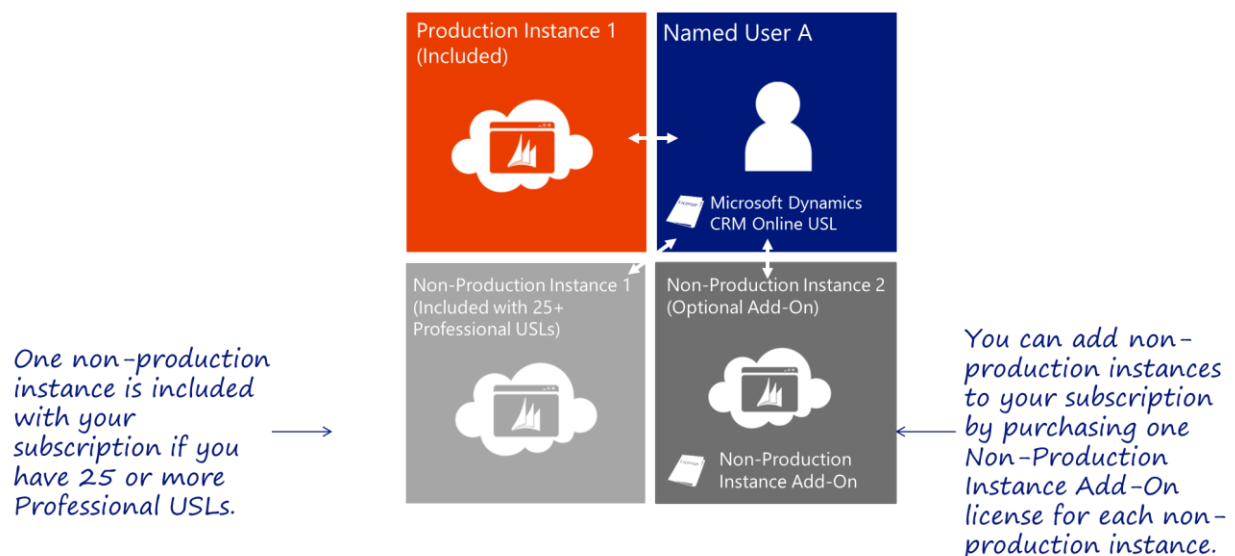
Figure 8: Production Instance Add-on



NON-PRODUCTION INSTANCE ADD-ON

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 Microsoft Dynamics CRM Online subscription can access the default Microsoft Dynamics CRM Online instance included in the subscription, and every Microsoft Dynamics CRM Online additional instance associated with the same tenant. The additional Non-Production Instance Add-On license does not include any default storage capacity.

Figure 9: Non-Production Instance Add-On

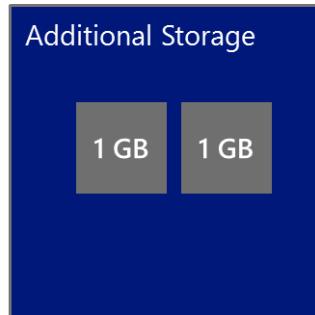


STORAGE ADD-ON

The Storage Add-On provides flexibility to increase the storage capacity associated with your Microsoft Dynamics Online subscription in increments of 1 GB per Storage Add-On license.

Note: The subscription storage corresponding to a customer subscription is tracked against all the Microsoft Dynamics CRM Online instances associated with the tenant.

Figure 10: Storage Add-On



You can add more storage by including one Storage Add-On license for every 1 GB of additional storage you need.

Premium Support Offerings

Microsoft Dynamics CRM Online offers three levels of subscription support offerings—Subscription, Enhanced Support, and Professional Direct—each of which provides increasing benefits. The support offering allows the customer flexibility to choose the offering that best fits their support needs.

- **Subscription:** Support is included for all Dynamics CRM Online customers, and provides small and medium businesses with unlimited technical support incidents, accelerated response times and access to Dynamics CRM Online subject matter experts to help creatively solve technical issues.
- **Enhanced:** Provides support for small and medium businesses, providing faster response times, and professional development materials.
- **Professional Direct:** Provides first-class support designed especially for mid-sized customers that require elevated support, access to experts, Service Delivery Management, and top-rated educational events.

The following provides a summary of the benefits associated with each of the three support levels.

Figure 11: Microsoft Dynamics CRM Online Support Offerings

CRMOL Support SKU Add-Ons		Premier*	Professional Direct	Enhanced	Default Paid/Trial Subscription
		Varies	\$9**	\$5	Included
Self-Service Capabilities	Community Forums	•	•	•	•
	Service Health Dashboard	•	•	•	•
	Customer Source, CRM Customer Center	•	•	•	•
Reactive Support	Response Times	Sev A: 1h Sev B: 2h Sev C: 4h	Sev A: 1h Sev B: 2h Sev C: 4h	Sev A: 2h Sev B: 4h Sev C: 8h	Sev A: Next Biz Day Sev B: Next Biz Day Sev C: Next Biz Day
	Web & Phone Submission	•	•	•	•
	Billing & Subscription Support	•	•	•	•
	Unlimited Technical Break-Fix Incidents	•	•	•	•
	Callback Available	•	•	•	•
	24x7 Technical Support	•	•	•	•
	Priority Handling	•	•	•	•
	Critical Situation Support	•	•	•	•
Proactive Services	Training Materials	+ Full access to Premier Catalog	+ Customizable Training Materials	+ Full access to eLearning and Training Manuals	Getting Started Catalog
	Advisory Support	Full	Basic		
Service Delivery Management	Technical Account Management	Assigned	Pooled		
	Enhanced Reporting & Diagnostics	•	•		
	Escalation Phone Line	•	•		
	1:1 Mentoring	•	•		
	Onsite Services	•	•		

*New enhancements to Premier Support for CRMOL are out of scope for Orion release of support offerings, but will be assessed for subsequent release.

**Professional Direct has a minimum purchase price of 100 seats.

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Notes:

- Premium Support offerings will be available for purchase only for customers enrolled in MOSP, EA, EAS, and EES licensing programs.
- Customer can only choose one (1) Premium Support offering. Mixing and match of support offerings is not allowed.
- If Enhanced or Professional Direct is a chosen option, each user licensed with Microsoft Dynamics CRM Online USL must also be licensed for the chosen support option.
 - Example: Customer purchases 3 Essential, 2 Basic and 5 Professional USLs for Microsoft Dynamics CRM Online for a total of 10 seats of CRM Online. The customer's needs best fit the Enhanced Support plan. The purchase must include 10 seats of Enhanced Support.
 - Example: Customer purchases 55 Professional and 5 Essential USLs for a total of 60 seats of CRM Online. The customer's needs best fit the Professional Direct Support plan. The customer will be automatically charged for 100 seats of Professional Direct support, to meet the minimum threshold for the support offering.

Stepping-up to a Higher Level Support Plan

Volume Licensing customers can step-up from a lower level plan to higher level plan using step-up licenses. The following step-up licenses are available through the applicable Volume Licensing programs:

- Microsoft Dynamics CRM Online Step-Up from Enhanced Support for Microsoft Dynamics CRM Online to Professional Direct Support for Microsoft Dynamics CRM Online

Availability

Availability by Geography

Microsoft Dynamics CRM Online is currently available in the following 42 countries:

- Brazil
- Canada
- Colombia
- Costa Rica
- Chile
- Mexico
- Peru
- Puerto Rico
- Trinidad and Tobago
- United States
- Austria
- Belgium
- Cyprus
- Czech Republic
- Denmark
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Israel
- Italy
- Luxembourg
- Netherlands
- Norway
- Poland
- Portugal
- Romania
- Russia
- Spain
- Sweden
- Switzerland
- United Kingdom
- Australia
- Hong Kong
- India
- Japan
- Korea
- Malaysia
- New Zealand
- Singapore

Notes:

- Enhanced support offering is available in all countries where Microsoft Dynamics CRM Online service is currently available.
- Professional Direct support for Microsoft Dynamics CRM Online is currently available in Canada, United States, and United Kingdom only.

Availability by Language

Localized/translated versions of Microsoft Dynamics CRM Online 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: www.microsoft.com/downloads.

Licensing Programs

Microsoft Dynamics CRM Online is licensed through the Microsoft Volume Licensing and Microsoft Online Services Program channels.

Microsoft Volume Licensing

WHAT IS VOLUME LICENSING?

Microsoft Volume Licensing is the most cost-effective, flexible, and manageable way to license Microsoft software and cloud services. Simply stated, volume licensing makes it easier and more affordable to use software and online services across an organization.

Licensing online services through your Volume Licensing agreement allows you to:

- Transition to cloud services at your own pace
- Match and adjust online service plans to meet users' needs

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.](#)

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.

Eligible Volume Licensing Programs

Microsoft Dynamics CRM Online is available through the following Volume Licensing programs:

- **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 flexibility to transition to cloud services at your own pace, and simplified license management through a single company-wide agreement. [Learn more.](#)
- **Enterprise Subscription Agreement** – An option under the Enterprise Agreement that provides 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.](#)
- **Enrollment for Education Solutions (under the Campus and School Agreement)** – The Enrollment for Education Solutions (EES) is a subscription licensing offering 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.](#)

Microsoft Online Services Program

Customers not purchasing through one of the Volume Licensing programs listed above can purchase Microsoft Dynamics CRM Online directly through the [Microsoft Online Services Program](#).

MINIMUM LICENSE PURCHASE REQUIREMENT FOR MICROSOFT ONLINE SERVICES PROGRAM

- New customers enrolling in Microsoft Dynamics CRM Online subscription should purchase a minimum of 5 Professional user licenses to activate the paid subscription. Upon meeting this requirement, customers can add any number of Basic and Essential user licenses to the online service subscription.
- The 5-minimum Professional license requirement does not apply to existing customers who have previously enrolled in Microsoft Dynamics CRM Online subscription on or before September 30, 2013.

CANCELLATION POLICY FOR MICROSOFT ONLINE SERVICES PROGRAM

- Cancellation fees plus applicable taxes per user will be applicable after the first month of a new CRM Online subscription. Local pricing and currency varies by geography.
- Microsoft will not charge a cancellation fee if the cancellation occurs during the first and last month of the purchased subscription. This also applies to new subscriptions which occur as a result of a renewal.
- Microsoft will not charge a cancellation fee when a customer migrates from a 12-month subscription plan to an on premises version of Microsoft Dynamics CRM.
- There is no fee for customers who cancel the trial subscription before the end of the 30 day trial period.
- When customers cancel their subscription they are given a 30 day grace period and a 90 day data retention period.
 - The grace period allows additional time for customers to reactivate their subscription should they decide to continue with CRM Online.
 - The 90 day data retention period also provides the customer a window in which they can export their data.
 - If a customer reactivates their subscription within the 30 day grace period any cancellation fees which were charged will be refunded.
- Cancellation fees applies to all paid Microsoft Dynamics CRM Online subscriptions
- No cancellation fees charged if subscription is cancelled in the last month of a commitment term.

USER REDUCTION POLICY FOR MICROSOFT ONLINE SERVICES PROGRAM

- Cancellation fees plus applicable taxes per user will be applicable after the first month of a new CRM Online subscription. Local pricing and currency varies by geography.
- No fees charged if the customer reduces users within the first month of the subscription.
- Cancellation fees apply to all paid Microsoft Dynamics CRM Online subscriptions.

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.

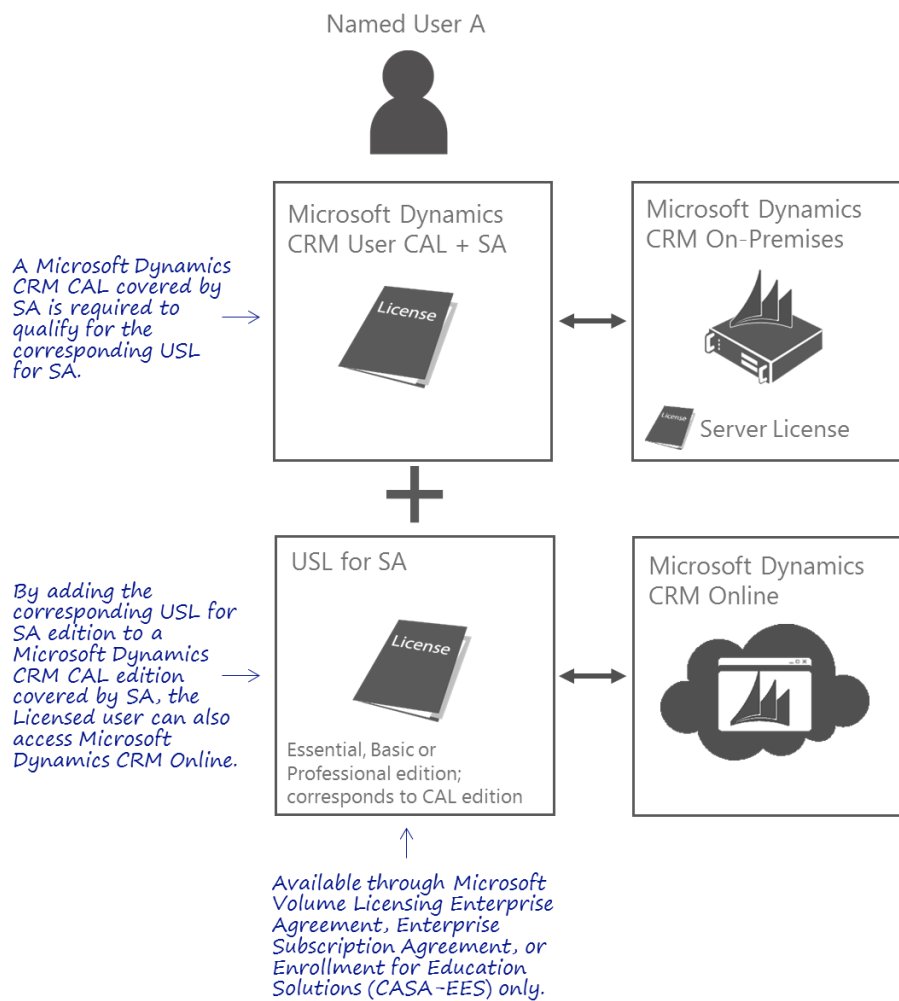
USLs for SA are available for purchase through the Microsoft Volume Licensing Enterprise Agreement, Enterprise Subscription Agreement, and Enrollment for Education Solutions (under a Campus and School Agreement).

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 your 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 12: 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 active on 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 license 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 is the Level A U.S. estimated retail price **per month*** for the Microsoft Dynamics CRM Online service and optional add-ons through the Microsoft Enterprise Agreement.

Base Subscription	Professional	Basic	Essential
User Subscription License (USL)*	\$63.05 per user	\$29.10 per user	\$14.55 per user
Optional Add-ons			
Production Instance Add-on		\$532.53 per instance	
Test Instance Add-on		\$145.50 per instance	
Storage Add-on		\$9.69 per GB	
Premium support offerings			
Enhanced		\$5 per user	
Professional Direct		\$9 per user	

*Prices may vary by geography. Actual customer prices are determined by the Microsoft reseller.

Microsoft Online Services Program

The following is the U.S. estimated price **per month** for the Microsoft Dynamics CRM Online service and optional add-ons through the Microsoft Online Subscription Program.

Base Subscription	Professional	Basic	Essential
User Subscription License (USL)*	\$65 per user	\$30 per user	\$15 per user
Optional Add-ons			
Production Instance Add-on		\$549 per instance	
Test Instance Add-on		\$150 per instance	
Storage Add-on		\$9.99 per GB	
Premium support offerings			
Enhanced		\$5 per user	
Professional Direct		\$9 per user*	

Notes:

- The above pricing will come into effect for new customers on October 1, 2013.
- Existing customers who have previously enrolled in licensing agreements before October 1, 2013 will continue to pay the price applicable to their licensing agreement until its expiration date. The pricing changes will then apply immediately upon agreement renewal.
- Professional Direct for Microsoft Dynamics CRM Online has a purchase price of \$9 per user per month, with a minimum purchase of 100 seats to meet the minimum threshold.

Free Trial

You can sign-up for a free 30-day trial of Microsoft Dynamics CRM Online for up to 25 users through Microsoft Online Services. At any time during your trial you can activate your subscription and keep your data and customizations. Get details at <http://www.microsoft.com/en-us/dynamics/crm-free-trial-overview.aspx>.

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

Links for Additional Information

Microsoft Dynamics CRM	crm.dynamics.com
CRM Connection Blog	https://community.dynamics.com/crm/b/crmconnection/default.aspx
Microsoft Volume Licensing	www.microsoft.com/licensing
Software Assurance	http://www.microsoft.com/licensing/software-assurance/default.aspx
Activate Software Assurance benefits	http://www.microsoft.com/licensing/sa/activate.mspix
Microsoft License Advisor	http://www.microsoft.com/licensing/mla/default.aspx
Contact a Licensing Specialist	www.microsoft.com/licensing/contact/default.mspix
Microsoft Dynamics CRM Support	http://www.microsoft.com/en-us/dynamics/support.aspx
CustomerSource	https://mbs.microsoft.com/customersource/
Microsoft Downloads Center	http://www.microsoft.com/downloads

Appendix A – Use Rights by Microsoft Dynamics CRM Online USL

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	✓	✓	

Use Right	Professional	Basic	Essential
Qualify and convert a lead to a contact	✓	✓	
Contacts	✓	✓	
Lead scoring, routing, assignment	✓	✓	
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 workhours	✓		

*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)

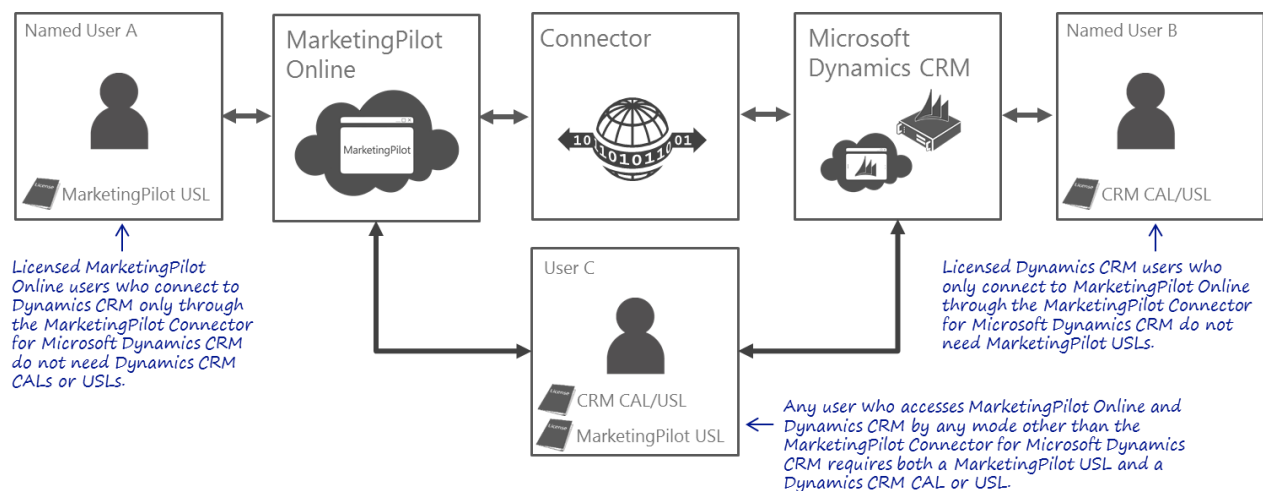
Appendix B – MarketingPilot Connector for Microsoft Dynamics CRM

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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