

# Microsoft Dynamics CRM Online

## Licensing and Pricing Guide

Microsoft Dynamics CRM Online  
May 2016



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# What's New in this Edition

This edition of the Microsoft Dynamics CRM Online Licensing and Pricing guide contains the following changes introduced with the Spring Wave 2016 release:

- Microsoft Dynamics Employee Self Service
- Microsoft Dynamics CRM Online - Field Service User Add-On
- Microsoft Dynamics CRM Online - Portal Add-On
- Microsoft Dynamics CRM Online - Additional Portal Page Views
- Mobile offline capabilities with CRM Online Professional

Important notes on these new features:

- To take advantage of these new capabilities, excluding Employee Self Service, you must upgrade to Microsoft Dynamics CRM Online 2016 Update 1.
- A customer will need to have an existing CRM Online subscription in order to enable add-on licenses. Thus, at least one CRM Online Professional USL is required per tenant on any customer scenario to provision the CRM Online tenant and administer CRM Online services.

# Introduction

Microsoft Dynamics CRM provides flexible, high value, and simple-to-understand licensing for Dynamics CRM in the cloud. 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).
- **Choice.** 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.

## 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.

# User-based Subscription Licensing Requirements

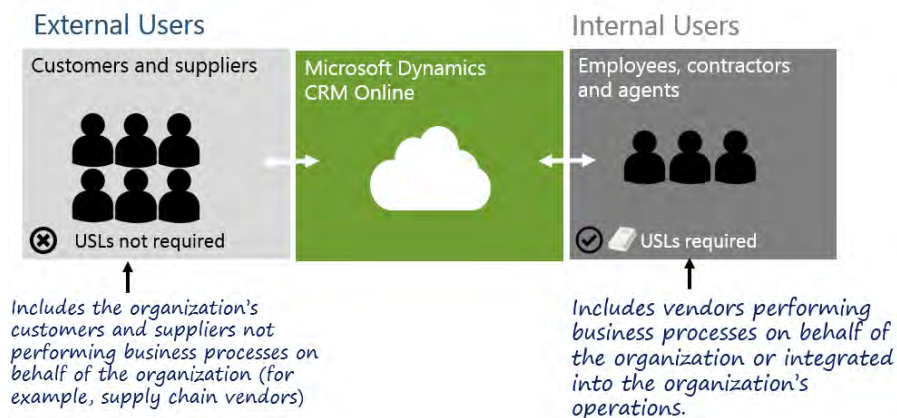
## Internal and External Users

With Microsoft Dynamics CRM Online and Parature, from Microsoft, each internal user who will access the service must be licensed with a User Subscription License (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.

Microsoft Dynamics Marketing and Microsoft Social Engagement do not distinguish internal and external users in their licensing terms. You must license external users as well as internal users who will access these services.

**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





## Licensing Requirements for Internal Users

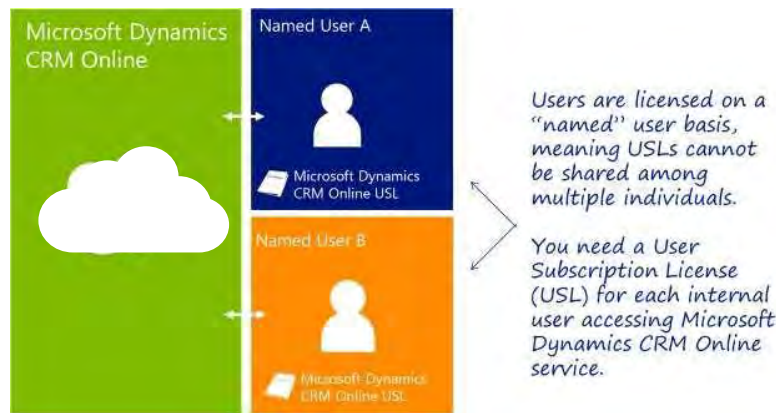
You license access to the Microsoft Dynamics CRM Online service by purchasing a USL for every internal user who will access the service.

**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 may not 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 Azure AD tenant. For more information on Azure AD tenants, please see [here](#).

Figure 3: Accessing multiple instances



## 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. For example, a user needs to be properly licensed for Microsoft Office products to be able to edit Microsoft Excel charts embedded in Microsoft Dynamics CRM Online. The following resources can help you to determine the required products:

Implementation Guide and System Requirements for Microsoft Dynamics CRM 2016:

<http://go.microsoft.com/fwlink/?LinkID=627526>

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.

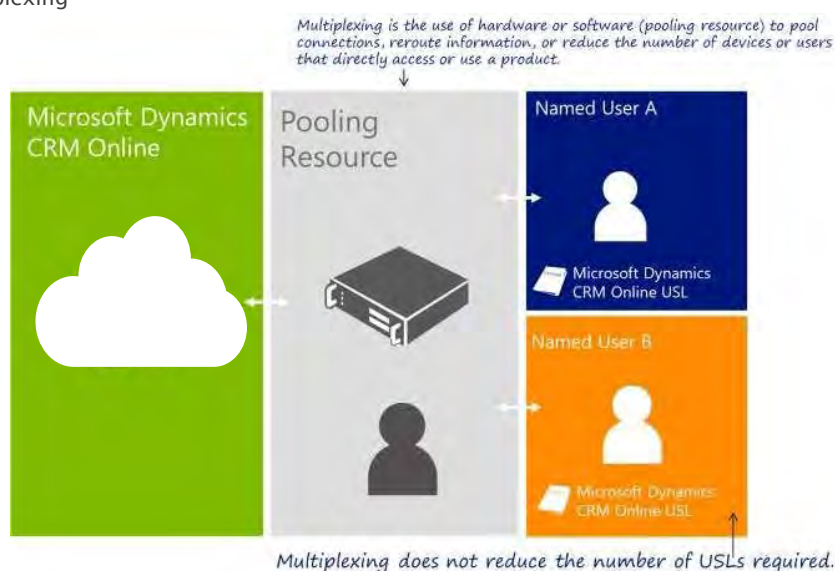
Multiplexing does not reduce the number of licenses required to access the Microsoft Dynamics CRM Online service. Any internal user who accesses the Microsoft Dynamics CRM Online service—whether directly or indirectly—must be properly licensed. For example, internal users accessing Microsoft Dynamics CRM Online data indirectly through a Portal or other service must also be properly licensed.

Pooled connections use a non-interactive user account in Microsoft Dynamics CRM Online that can access the system but only via the web service layer. A non-interactive “user” who is not a person does not need a license. However, all users of the pooled connection do require a license.

**Exception:** Users with a Microsoft Dynamics AX Enterprise USL have the right to indirectly read Microsoft Dynamics CRM Online application data without a Microsoft Dynamics CRM Online USL. They are, however, not licensed to copy such data to Microsoft Dynamics AX, nor access the Microsoft Dynamics CRM Interface.

**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 4: Multiplexing



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

## Dual Use Rights

One of the advantages of Microsoft Dynamics CRM is the option to deploy either in Microsoft’s Cloud as CRM Online or in a private on-premises or partner-hosted cloud with CRM Server. In some cases, customers may want

to deploy both modes simultaneously, for migrating a CRM Server deployment to CRM Online, running private Dev/Test deployments in Azure, or other applications. In the past, customers had to acquire both CALs for CRM Server and CRM Online USL's to allow such hybrid deployments. However, with Dual Use Rights, CRM Online Users no longer need to acquire CALs to access CRM Server instances.

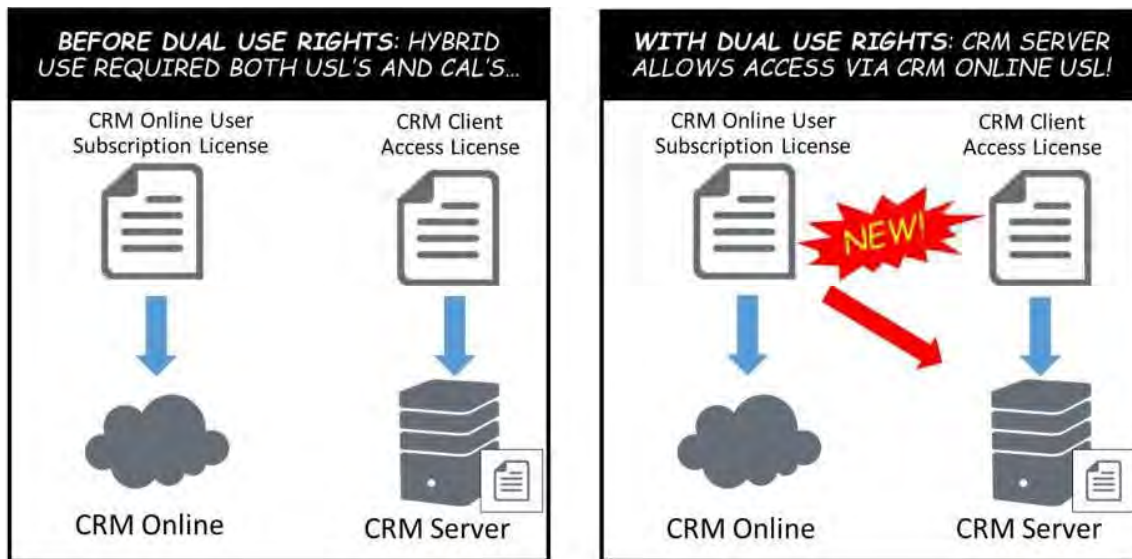
Users licensed with Microsoft Dynamics CRM Online USLs have use rights equivalent to a CAL for the purpose of accessing equivalent on premises workloads. Dynamics CRM Server instances must still be licensed normally, as must all related CALs and supporting servers (e.g., Windows Server and CAL(s)).

Dual Use Rights convey Microsoft Dynamics CRM Server access rights to Microsoft Dynamics CRM Online USL's; Microsoft Dynamics CRM Server CALs have no reciprocal rights to access functionality provided exclusively to Microsoft Dynamics CRM Online USL's, nor do Dual Use Rights imply equivalent capabilities between Microsoft Dynamics CRM Server and Microsoft Dynamics CRM Online licenses. For example, access to Microsoft Social Engagement capabilities are included with Microsoft Dynamics CRM Online Professional USL, but not with Microsoft Dynamics CRM Professional CAL as there are no equivalent CRM Server capabilities.

Qualifying License:	CRM 2016 Server CAL Right:
CRM Online Enterprise USL CRM Online Professional USL CRM Online Professional Add-On to Office 365	CRM 2016 Professional CAL
CRM Online Basic USL	CRM 2016 Basic CAL
CRM Online Essential USL	CRM 2016 Essential CAL
Dynamics Employee Self-Service <sup>1</sup> USL	

<sup>1</sup>Microsoft Dynamics Employee Self-Service USL applies to On-Premises and Online deployments.

Dual Use Rights are conveyed through Microsoft Dynamics CRM 2015 and later Server licenses, so Dual Use Rights may only be exercised with servers licensed with Microsoft Dynamics CRM 2015 or later. However, customers may use downgrade rights to deploy a qualifying server license with an earlier version of Microsoft Dynamics CRM Server and use Dual Use rights to access it with Microsoft Dynamics CRM Online USLs.



## Available USLs for Microsoft Dynamics CRM Online

Microsoft Dynamics CRM Online offers five levels of USLs. To provide you with the flexibility to license the solution based on how your users use Microsoft Dynamics CRM Online functionality you have the ability mix-and-match these licenses within a deployment.

Microsoft Dynamics CRM Online also offers add-on user subscription licenses (add-on USLs), which allow for a user to add additional capabilities to an existing user license. Use of add-on USLs requires a pre-existing CRM Online subscription for the customer tenant, as well as a baseline CRM Online USL to already be assigned to the CRM Online user. User subscription add-ons may not be purchased or assigned without a standalone USL.

### Microsoft Dynamics CRM Online Enterprise

For your marketing and customer service departments, Microsoft Dynamics CRM Online Enterprise provides licensed users with access to all of the capabilities of Microsoft Dynamics CRM Online Professional plus the CRM Online – Field Service Add-on, Microsoft Dynamics Marketing Enterprise, Microsoft Social Engagement Enterprise, and Parature Enterprise functionality.

### Microsoft Dynamics CRM Online Professional

Microsoft Dynamics CRM Online Professional is the recommended choice for your sales teams. It provides licensed users with access to sales, service, and marketing capabilities for a significantly lower price than



comparable offerings from other vendors<sup>1</sup>. Each CRM Online Professional USL includes rights to Microsoft Social Engagement Professional, Microsoft Dynamics Marketing Sales Collaboration, Unified Service Desk, survey results, and Parature Knowledge Management.

Subscriptions licensed through Microsoft Online Services Program (MOSP), Open Program, and Cloud Solution Provider (CSP) Program require a 10-seat minimum purchase of Microsoft Dynamics CRM Online Professional to qualify for Microsoft Social Engagement functionality. There is no minimum purchase of Microsoft Dynamics CRM Online Professional required for Enterprise Agreement customers to qualify for Microsoft Social Engagement functionality. There is a minimum requirement of 5 CRM Online Professional USLs per tenant to qualify for full mobile offline sync functionality.

Users of the Microsoft Dynamics CRM Online Professional and Enterprise USLs may read AX application data, but are not licensed to copy such data to Microsoft Dynamics CRM Online, nor access the Microsoft Dynamics AX interface.

Microsoft Dynamics CRM Online Professional Add-On to Office 365 provides the same set of capabilities and services as Microsoft Dynamics CRM Online Professional, at a discounted price for customers with qualifying Office 365 licenses. Microsoft Dynamics CRM Online Professional Add-On to Office 365 licenses may only be assigned to users to whom a Microsoft Office 365 Plan E3, E4, E5, Business Premium, or Enterprise Cloud Suite license (either full USL or Add-On USL) has also been assigned. Qualifying Office 365 licenses may be purchased and assigned at the same time or prior to the purchase of Microsoft Dynamics CRM Online Add-On to Office 365 and must be assigned to the same users.

## **Microsoft Dynamics CRM Online Basic**

Microsoft Dynamics CRM Online Basic is designed for entry level CRM users who need access to basic CRM functionality such as accounts, contacts, leads, case management, Interactive Service Hub, and reporting and dashboards. This license is also designed for business analysts who require reporting capabilities of Microsoft Dynamics CRM Online.

## **Microsoft Dynamics CRM Online Essential**

Microsoft Dynamics CRM Online Essential is designed for organizational users who are not necessarily tied to sales, services, or marketing functions but require access to activities management, feeds, custom applications, accounts, contacts, and reading knowledge articles.

## **Microsoft Dynamics Employee Self-Service**

Microsoft Dynamics Employee Self Service is a cloud-based knowledge management solution that provides authoritative, accessible and consistent knowledge for all employees to address important and common employee needs and inquiries, for cross-organizational scenarios like Human Resources and IT helpdesk portals, or for role- or function-specific knowledge bases. With an effective knowledgebase, you can deliver the right answer, at the right time, across multiple channels including portals, devices, productivity tools and enterprise applications. This license is intended for employees submitting cases on their own behalf, for self-service as a support client, but does not grant rights to case management as a support agent on behalf of an end customer.

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<sup>1</sup> Microsoft Dynamics CRM Professional U.S. list price of \$65/user/month via MOSP compared to Salesforce.com Enterprise list price of \$125/user/month listed at <http://www.salesforce.com/sales-cloud/overview/> as of April 15, 2016.

A Microsoft Dynamics Employee Self-Service licensed user may access CRM data from online and on-premises Microsoft Dynamics CRM deployments. Capabilities vary by available functionality for a given Online or On-Premises deployment choice. Employee Self-Service knowledgebase capabilities require at least one user to be licensed with either Microsoft Dynamics CRM Online Professional, or Parature Enterprise if Parature is leveraged for the knowledgebase. Microsoft Dynamics Employee Self Service is not licensed for Microsoft Dynamics CRM's user interface and users will not be provisioned as CRM users; access is only allowed via portal or another application.

## Custom Entities

Microsoft Dynamics CRM Online Essential and higher provide the right to use custom entities. Custom entities may be based on entities included in Microsoft Dynamics CRM Online, or created by a customer or partner. If the custom entity is based on or replicates the functionality of entities included in Microsoft Dynamics CRM Online, or if the entity links to entities included in Microsoft Dynamics CRM Online, then users accessing the custom entity must also be licensed to access the included or replicated entity. In other words, customizations may only be performed against entities users are licensed to access.

## USL Comparison

The following provides a summary of the use rights associated with each of the five USL levels. For a detailed comparison, refer to [Appendix A](#).

Figure 5: Available USLs and Capabilities

	Enterprise \$200/u./mo.	Professional or Professional Add-On to Office 365 \$65/\$50 u./mo.	Basic \$30/u./mo.	Essential \$15/u./mo.	Employee Self-Service \$3/u./mo.
Accounts and Contacts	●	●	●	●	○ <sub>5</sub>
Cases	●	●	●	○ <sub>5</sub>	○ <sub>5</sub>
Chat	●	○ <sub>5</sub>	○ <sub>5</sub>	○ <sub>5</sub>	○ <sub>5</sub>
Knowledge Management	●	●	○ <sub>5</sub>	○ <sub>5</sub>	○ <sub>5</sub>
Leads	●	●	●	✗	✗
Custom entities	●	● <sub>4</sub>	● <sub>4</sub>	● <sub>4</sub>	✗
Activities, notes	●	●	●	●	✗
Dual Use Rights for equivalent CRM CAL	●	●	●	●	✗
Run workflows <sup>3</sup>	●	●	○	○	✗
Interactive Service Hub	●	●	●	✗	✗
User reports, dashboards, and charts	●	●	●	✗	✗
System reports, system charts, system dashboards, CRM application data	●	●	○	✗	✗
Opportunities, goals, contracts, quotes, orders, invoices, competitors	●	●	○	✗	✗
Sales Campaigns, quick campaigns, marketing lists, prices lists, product lists	●	●	○	✗	✗
Services, resources, work hours, facility, equipment, articles	●	●	○	✗	✗
Unified Service Desk	●	●	✗	✗	✗
Dynamics Marketing Sales Collaboration	●	●	✗	✗	✗
Microsoft Social Engagement Professional	●	● <sub>2</sub>	✗	✗	✗
Create workflows, bulk data import, and customizations across any entity	●	●	✗	✗	✗
Marketing Enterprise, Parature Enterprise	●	✗	✗	✗	✗
Social Engagement Enterprise, Field Service Add-On	●	✗	✗	✗	✗
AX Application Data	○	○	✗	✗	✗

● Full access rights ○ READ only / Limited access rights ✗ No access rights

See Appendix A for a complete list of capabilities. U.S. list prices through Microsoft Online Services Portal (MOSP) shown.

<sup>1</sup> Microsoft Dynamics CRM Online Add-On to Office 365 may only be assigned to a user to whom an Office 365 Enterprise E3, E4, E5, Business Premium, or Enterprise Cloud Suite license has been assigned.

<sup>2</sup> Ten-seat minimum deployment of CRM Online Professional to qualify when purchasing through MOSP and Open. There is no minimum purchase of Microsoft Dynamics CRM Online Professional required for Enterprise Agreement customers to qualify for Microsoft Social Engagement functionality.

<sup>3</sup> Creating, updating and deleting via workflows can only be performed against entities included in the use rights (i.e. update an opportunity requires Professional).

<sup>4</sup> Custom entities (either based on entities included in CRM or created by a customer or partner) may require a higher CAL or USL, depending on the required access. Customizations can only be performed against entities included in the use rights.

<sup>5</sup> Employee Self Service Rights: No Access to CRM User Interface for the following rights: User may read and write accounts and contacts. User may only create and read own cases as a support client, or initiate chat as a support client. Knowledge base is read-only.

# Additional Services and Software

Microsoft offers additional services and software that work in tandem with Microsoft Dynamics CRM Online, including Microsoft Social Engagement, Microsoft Dynamics Marketing, Parature, from Microsoft, Interactive Service Hub and Unified Service Desk. With the exception of Unified Service Desk, Interactive Service Hub, Voice of the Customer and Mobile Offline capabilities, these are separate services that you can license independently or as part of Microsoft Dynamics CRM Online.

## Microsoft Dynamics CRM Online Field Service Add-On USL

**Microsoft Dynamics CRM Online - Field Service Add-on** is a subscription plan add-on for users who will engage in Field Service activities; leveraging tight integration between CRM case management and field service work orders to deliver business process driven, best in class field service management.

As an add-on, this license requires each field service user to first be licensed with a CRM Online Basic USL or higher for the core CRM Online use rights. For those in need of advanced sales or service capabilities, the user may leverage this license as an add-on to the CRM Online Professional USL.

Users of the Microsoft Dynamics CRM Online – Field Service Add-on USL may read AX application data, but are not licensed to copy such data to Microsoft Dynamics CRM Online, nor access the Microsoft Dynamics AX interface.

Use Right	Field Service Add-On USL
Work Orders	✓
Schedule & Dispatch capabilities: use Scheduling Assistant, Drag & Drop Assignment, update resource bookings	✓
Configure and View Schedule Board	✓
Configure SLAs	✓
Service Agreements	✓
Purchase Orders	✓
Invoices	✓
Customer Assets	✓
Inventory Management	✓
Create and manage Repairs and Returns (RMA/RTV)	✓
Manage Resources (facilities, equipment, people), territories and work hours	✓
Read Dynamics AX application data	✓
Field Service Mobile Application <sup>1</sup>	✓

The Field Service Mobile Application is a Microsoft application that is specific to Field Service, distinct from the Dynamics CRM Mobile Client Application. This application is technically limited to only Field Service entities and a maximum of 10 custom entities.

## Microsoft Social Engagement

**Microsoft Social Engagement Enterprise and Professional** provide volume and sentiment analysis of social networking data and is recommended for sales, marketing and customer service workers interested in social media discussion of their products, competitors and industry.

Microsoft Social Engagement Enterprise functionality is included with the Microsoft Dynamics CRM Online Enterprise USL, and Microsoft Social Engagement Professional functionality is included with the Microsoft Dynamics CRM Online Professional and Enterprise USLs (subject to minimum purchase requirements in some programs as indicated above). Microsoft Social Engagement Professional is also available as a standalone USL or as an Add-On USL for Microsoft Dynamics CRM Professional CALs with Software Assurance. For more on the Add-On USL, please see "Adding Access to Microsoft Dynamics CRM Online for Microsoft Dynamics CRM On-Premises Users via the USL for Software Assurance" [below](#).

Use Right	Social Engagement Enterprise	Social Engagement Professional
Social listening	✓	✓
Social analytics	✓	✓
Activity map	✓	✓
Trends & posts alerts	✓	✓
Private messages	✓	✓
Export widgets to Excel	✓	✓
Azure Event Hub integration*	✓	✓
Social insights	✓	✓
Social Center: streams	Unlimited	2 Streams
Social Center: sharing streams	✓	
Social Center: assign posts to users	✓	
Link2CRM	✓	
Automation rules	✓	
Intention analysis	✓	

\*Note: Azure Event Hub functionality requires Azure subscription



## Microsoft Dynamics Marketing

**Microsoft Dynamics Marketing Enterprise** provides a full suite of data segmentation, behavioral tracking, digital asset management, and brand management capabilities. It is recommended for users in marketing roles, and when delivered as part of Microsoft Dynamics CRM Online Enterprise, allows users to combine Microsoft Dynamics Marketing's capabilities with the marketing and sales capabilities of Microsoft Dynamics CRM Online.

Microsoft Dynamics Marketing Enterprise functionality is included with the Microsoft Dynamics CRM Online Enterprise USL or as a standalone USL. Users configured as Portal users do not require a USL.

Microsoft Dynamics Marketing Enterprise includes rights to the Dynamics Marketing Connector, which provides resources that allow administrators to connect Microsoft Dynamics Marketing with Microsoft Dynamics CRM, install additional languages, and build marketing analytics with Microsoft Excel and Power BI. When Dynamics Marketing is connected with Dynamics CRM or Dynamics CRM Online, Dynamics Marketing users must also have the appropriate Dynamics CRM or CRM Online license. However, the non-interactive user account that connects Dynamics Marketing with Dynamics CRM does not require its own license.

If there is a need for additional storage and/or messages above and beyond what is included with the license, they can be purchased via add-ons. More details are provided below.

**Microsoft Dynamics Marketing Sales Collaboration** provides sales teams with visibility into the marketing calendar. Sales now can offer more insights into campaigns and targeting. Both sales and marketing can share the same view of the customer journey.

Microsoft Dynamics Marketing Sales Collaboration is included with the Microsoft Dynamics CRM Online Professional USL or as a standalone USL. However, customers need at least one USL for either Microsoft Dynamics Marketing Enterprise or CRM Online Enterprise in order to access Microsoft Dynamics Marketing with a Sales Collaboration user. Microsoft Dynamics Marketing Sales Collaboration is not included with Microsoft Dynamics CRM Server Professional CAL (on-premises); the standalone USL must be purchased separately.

**Marketing Connector for Microsoft Dynamics CRM** is provided at no additional cost to licensed Microsoft Dynamics Marketing customers and synchronizes marketing data between Microsoft Dynamics Marketing and Microsoft Dynamics CRM (either online or on-premises). While a prior version of Microsoft Dynamics Marketing Connector required customers to separately purchase Microsoft Azure cloud computing services in order to run the Connector, this separate purchase is no longer necessary for Microsoft Dynamics CRM Online; however, Microsoft Dynamics CRM customers must purchase Microsoft Azure cloud computing services in order to run the Connector.

**Mobile Marketing** provides organizations the ability to deliver marketing messages and campaigns to their customers via SMS. One license of Microsoft Dynamics CRM Online Enterprise or Microsoft Dynamics Marketing Enterprise is required to purchase and enable this functionality. Availability of this capability is initially limited to the United States, Canada, Singapore, and United Kingdom, with plans to offer on a larger scale still being defined. Organizations sending marketing messages and/or campaigns to US or Canadian numbers must purchase their own unique dedicated short code. If they already have a unique dedicated short code, they can re-register it to the Microsoft account at no additional cost. Organizations sending messages to customers in all other countries can access a shared short code through Microsoft at no additional cost.

## Parature, from Microsoft

Parature, from Microsoft delivers multi-channel customer service capabilities. Parature's complete offering of cloud-based, multi-channel customer support solutions is enhanced by seamless integration, robust reporting, a wealth of on-demand support services and affordable pricing.

**Parature Enterprise** functionality is included with the Microsoft Dynamics CRM Online Enterprise USL or as a standalone USL.

**Parature Self-Service** gives tenants the ability to search and read Parature Knowledgebase through a website for self-service applications. This functionality is included with all five Microsoft Dynamics CRM Online USLs.

**Parature Knowledge Management** provides dynamic, read-only access from within Microsoft Dynamics CRM Online's user interface. This functionality is included with Microsoft Dynamics CRM Online Professional, Microsoft Dynamics CRM Online Professional Add-On to Office 365, Microsoft Dynamics CRM Online Enterprise, and Parature Enterprise.

Figure 6: Parature Roles and Use Rights

	Customer	Employee
<b>Self-Service Portal</b> Search and read Parature knowledgebase CRM UI access to KB not permitted Chat with support team	No user license required. Page view additional capacity charges apply.	Dynamics Employee Self-Service (or higher) Page view additional capacity charges apply
<b>Integrated Knowledge</b> Read and author Parature knowledgebase articles. Access knowledgebase from within Dynamics CRM Online's User Interface	N/A	Dynamics CRM Online Professional, or Dynamics CRM Online Enterprise Page view additional capacity charges apply.
<b>All Other Parature Access</b> Parature Administration Customer Service Engagement Chat with customers and employees Publish knowledgebase articles Customer feedback management	N/A	Dynamics CRM Online Enterprise, or Parature Enterprise <i>Note: Parature Enterprise does not include access to Dynamics CRM Online Cases</i> Additional capacity charges apply.

## Unified Service Desk

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

USD installation rights are included with Microsoft Dynamics CRM Online Professional and Enterprise USLs and with Microsoft Dynamics CRM 2015 and above Professional CAL Software Assurance. USD is not available as a standalone license.

USD software is installed and run locally on the user's device. The use rights expire upon expiration of the qualifying USL subscription term or Software Assurance subscription. Only licensed users may use the software.

## Interactive Service Hub

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

Interactive Service Hub is licensed with Microsoft Dynamics CRM Online Basic and higher USLs and Microsoft Dynamics CRM Server 2016 for Basic and Professional CALs.

## Voice of the Customer

**Voice of the Customer** provides general sentiment, contextual feedback, and transactional understanding based on insight captured through feedback and surveys. Customer feedback is captured and leveraged to shape engagements with easy to use, mobile and touch-enabled tools. Feedback is analyzed as part of a single customer record, enabling a direct response to a specific customer concern, or as a whole, so that organizations can better understand their market and programmatically respond to customer needs.

Voice of the Customer capabilities are licensed with Microsoft Dynamics CRM Online Professional and higher USLs. Customers must have at least one Enterprise license in order to design and publish surveys. A Professional license provides access to send published surveys as a direct email, and read-only access to survey results and response outcomes in the Voice of the Customer menu. Voice of the Customer will be available to purchase in all Programs with the exception of Government Community Cloud (GCC).

Voice of Customer capabilities are limited to a maximum of 200 concurrent surveys. Additional limitations can be found [here](#).

## Mobile Offline

**Mobile Offline capabilities** enable offline entities, provides auto-reply for offline actions, a strong security model and offline views and offline search.

Mobile offline is available as part of the Microsoft Dynamics CRM Online Professional USL upon purchase of five or more Professional USLs, regardless of licensing program. No minimum purchase quantity is required for Microsoft Dynamics CRM Online Enterprise users.

## Recent Acquisitions

Microsoft recently acquired FieldOne, Adxstudio, and Fantasy Sales Team (FST). The Dynamics CRM Online Portal Add-On capability, and Field Service Add-On USL are available through Volume Licensing agreements. Fantasy Sales Team, and on-premises versions FieldOne and Adxstudio, are not available through Volume License agreements at this time. Licensing details will be made available prior to general availability of these capabilities.

# Subscription Capacities and Optional Add-ons for Microsoft Dynamics CRM Online

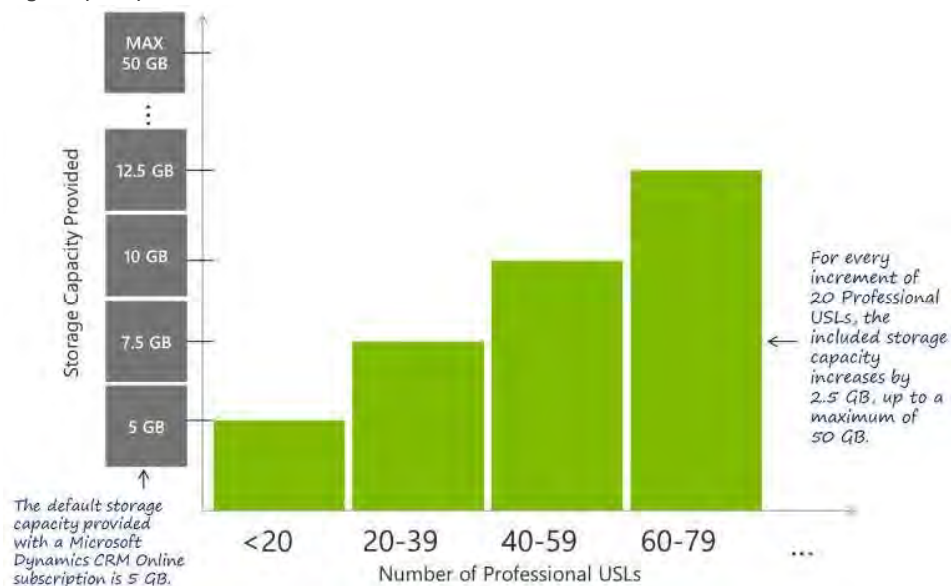
Each customer enrolled in a Microsoft Dynamics CRM Online subscription receives default storage and one production instance of Microsoft Dynamics CRM Online.

## Subscription Capacities

### DEFAULT STORAGE CAPACITY

At a minimum, Microsoft Dynamics CRM Online subscription includes 5 GB of storage at no additional charge per tenant. 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 is 10 GB, and so on. The maximum default storage included in a subscription is capped at 50 GB per tenant.

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 or Enterprise USLs.

## MICROSOFT DYNAMICS MARKETING ENTERPRISE CAPACITY

Microsoft Dynamics Marketing has the same Default Storage Capacity policy as Dynamics CRM Online, scaling with the number of Dynamics Marketing Enterprise users to a maximum included capacity of 50GB. However, included subscription capacity for CRM Online and Dynamics Marketing are calculated and allocated independently of one another, as the services are run from distinct data centers.

Microsoft Dynamics Marketing offers one non-production instance per customer with a minimum purchase of 25 Marketing Enterprise or CRM Online Enterprise USLs. Additional information may be found [here](#). There is no ability to purchase additional non-production instances.

Microsoft Dynamics Marketing deployments include 50,000 messages per month, per tenant. Unused message capacity expires at the end of the month; they do not roll over to the next month. Additional messaging capacity is available for purchase as a subscription add-on to Microsoft Dynamics CRM Online Enterprise USL or Microsoft Dynamics Marketing Enterprise stand-alone USL in increments of 10,000 additional messages per month.

## PARATURE ENTERPRISE CAPACITY

Parature, from Microsoft deployments include the following capacities for each tenant, with additional capacity available for purchase as a subscription add-on to Microsoft Dynamics CRM Online Enterprise USL or Parature Enterprise stand-alone USL in the increments shown below. Unused capacity expires at the end of the month and does not roll over to the next month.

Subscription Capacity	Included Capacity	Additional Increment
<b>File Storage:</b> Applicable to downloadable files and ticket attachments stored in Parature	2GB	1GB
<b>Records:</b> Total number of tickets submitted (including emails converted to tickets, articles, contacts, accounts, product/assets, etc.) stored by Parature	1 million/month	500,000/month
<b>Page views:</b> Access/utilization of the Parature Support Portal	1 million/month	500,000/month
<b>Departments</b>	1 Department	1 Department

## MICROSOFT SOCIAL ENGAGEMENT PROFESSIONAL CAPACITY

Microsoft Social Engagement deployments include 10,000 posts per month, per tenant. Unused posts expire at the end of the month and do not roll over to the next month. Additional capacity is available for purchase as a subscription add-on to Microsoft Dynamics Online Professional USL or Microsoft Social Engagement Professional stand-alone USL in increments of 10,000, 100,000 and 1 million additional posts per month.

## 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.



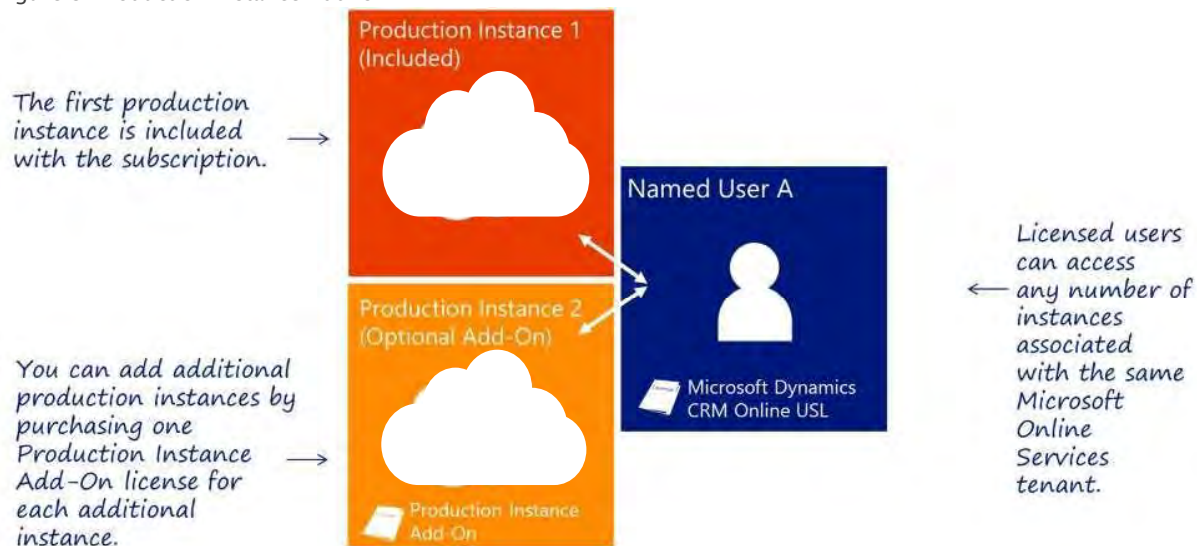
Subscription add-ons apply across an entire organization; they are not tied to a specific user. Subscription add-ons can be purchased at any time and remain a part of the subscription for the remainder of the subscription term.

## 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.

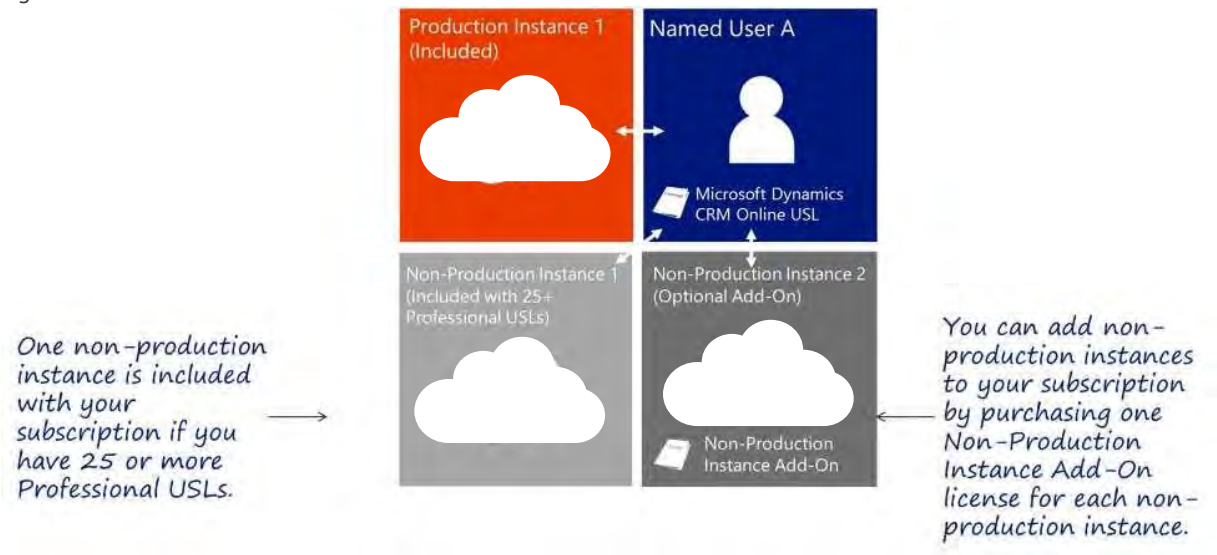
Figure 8: Production Instance Add-on



## 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 Non-Production instance included in the subscription, and every additional Non-Production 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



## MICROSOFT DYNAMICS CRM ONLINE PORTAL ADD-ON

The **Dynamics CRM Online Portal Add-On** provides you the capability to extend your CRM scenarios into cloud hosted web portals, each of which is easily configurable for your employees, partners and customers.

This is available as an add-on subscription license sold on a per-portal basis, for production or non-production use. This add-on requires a pre-existing Microsoft Dynamics CRM Online subscription. Each Portal may only be associated with one instance and one language.

Internal users indirectly accessing Microsoft Dynamics CRM Online application data via a Portal are required to have the appropriate Microsoft Dynamics CRM Online license.

The Microsoft CRM Online Portal Add-On includes the following capacity for each portal, with additional capacity available for purchase as a subscription add-on to Microsoft Dynamics CRM Online Professional or Enterprise USLs in the increments shown below. Unused capacity expires at the end of the month and does not roll over to the next month.

Subscription Capacity – Per Portal	Included Capacity	Additional Increment
<b>Page views:</b> Access/utilization of the CRM Online Portal	1 million/month	500,000/month

## DYNAMICS CRM ONLINE, DYNAMICS MARKETING, AND PARATURE ADDITIONAL STORAGE ADD-ONS

The Additional Storage Add-On provides flexibility to increase the storage capacity associated with your Microsoft Dynamics Online subscription in increments of 1 GB per Additional Storage Add-On license, up to 5,000 GB (5 TB) of storage.

**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



## DYNAMICS MARKETING EXTRA MESSAGES ADD-ON

The Extra Messages Add-On provides additional capacity to a Microsoft Dynamics Marketing subscription in increments of 10,000 email messages per month. On the first day of the month, the number of purchased extra messages are added to the included capacity of 50,000 messages. All unused messages expire at the end of each month.

Figure 11: Additional Messages Add-On



## DYNAMICS MARKETING MOBILE MARKETING ADD-ON

The Mobile Marketing Add-On provides capacity to a Microsoft Dynamics Marketing or Microsoft Dynamics CRM Online Enterprise subscription in increments of 10,000 credits per month. The redemption rate of credits per SMS varies depending on the destination country, and is subject to change based on prevailing SMS messaging rates.

Figure 12: Dynamics Marketing Mobile Marketing Credit Redemption Rate (Subject to change)

SMS Destination	Uses X Credits	SMS Messages
North America	1 credit	10,000 messages
Asia	5 credits	2,000 messages
Europe	9 credits	1,111 messages

## DYNAMICS MARKETING MOBILE MARKETING DEDICATED SHORT CODES

For SMS messages sent to the US or Canada, purchase of a dedicated short code is required before they can be sent. This can be purchased through Microsoft, with an additional customer amendment obtained through Microsoft's Business Desk, or if a customer pre-owns a dedicated short code, they can use that.

Once a dedicated short code is obtained and configured, keywords can be created and customer numbers can be collected. For dedicated short codes, there is no limitation on keywords. For SMS messages sent to UK and Singapore, a shared short code can be used. The number of available keywords is based on total credits purchased. This is counted as total active keywords at one time.

Figure 13: Dynamics Marketing Mobile Keyword Allocation – Shared Short Codes

# Credits	# Keywords
10,000–49,999	10
50,000–99,999	20
100,000–199,999	30
200,000–499,999	50
500,000–999,999	80
>1,000,000	100

## SOCIAL ENGAGEMENT ADDITIONAL POSTS ADD-ON

The Additional Posts Add-On provides additional capacity to a Microsoft Social Engagement subscription in increments of 10,000, 100,000, and one million posts per month. On the first day of the month, the number of purchased additional posts is added to the included capacity of 10,000 posts. All unused posts expire at the end of each month.

Figure 14: Social Engagement Additional Posts Add-on



## PREMIUM SUPPORT OFFERINGS

Microsoft Dynamics CRM Online, Microsoft Dynamics Marketing, Microsoft Social Engagement, and Parature, from Microsoft offers four levels of subscription support offerings—Subscription, Enhanced Support, Professional Direct Services and Premier Services—each of which provides increasing benefits. The support offering allows you the flexibility to choose the offering that best fits your support needs.



- **Subscription:** Support is included in the base subscription for all Dynamics CRM Online, Microsoft Dynamics Marketing, Microsoft Social Engagement and Parature, from Microsoft customers, and provides small and medium businesses with unlimited technical support incidents, accelerated response times and access to subject matter experts to help creatively solve technical issues.
- **Enhanced Support:** Provides support for small and medium businesses, providing faster response times, and E-Learning development materials.
- **Professional Direct Support:** Provides first-class support designed especially for mid-sized customers that require elevated support, access to experts, Service Delivery Management, case wellness, enhanced service interruption event handling, limited onboarding services, advisory cases and educational events.
- **Premier Support:** Provides support for complex or business-critical applications with mentoring, technical account management, dedicated support engineers and onsite services.

The following provides a summary of the benefits associated with each of the support levels, with price points in U.S. Dollars.

Figure 15: Microsoft Dynamics CRM Online Support Offerings

Features	Subscription* <a href="#">Details here</a>	Enhanced support <a href="#">Details here</a>	Professional Direct support <a href="#">Details here</a>	Premier support <a href="#">Learn about Premier</a>
Community Forums	X	X	X	X
Service Dashboard	X	X	X	X
Web and Phone Support Incident Submission	X	X	X	X
Access to self-help customer portals	X	X	X	X
Unlimited Break/Fix incidents	X	X	X	X
24x7 Support			X	X
Fastest Response Time	Next Business Day	< 2 hours	< 1 hour	< 1 hour
Deliverability Services	X	X	X	X
Unlimited online training	Get Started and Self-Help Resources	X	X	X
Technical Account Management			Pooled	Assigned
Priority Handling			X	X
Escalation Phone Line			X	X
Advisory Support			Limited	Full
Monthly Review			X	X
Onsite Services				X
Cost	Included	\$5 user/month	\$9 user/month Min \$900/month	Starts at \$30K/year

**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 Premium Support offering. Mixing and matching support offerings is not allowed.

- Enhanced or Professional Direct Support rights require each user licensed with Microsoft Dynamics CRM Online USL (or equivalent service) to also be licensed for that 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 when purchasing via MOSP, to meet the minimum threshold for the support offering. When purchasing through Volume Licensing, ensure the minimum threshold is entered when placing the order.
- Premium Support offerings are available with the following configurations:
  - Stand-alone for Parature, from Microsoft, Microsoft Dynamics Marketing, Microsoft Social Engagement or Microsoft CRM Online
  - Sold with Microsoft Dynamics CRM Online Enterprise, which also unlocks capabilities for Microsoft Dynamics Marketing, Microsoft Social Engagement and Parature, from Microsoft
  - Sold with Microsoft Dynamics CRM Online Professional, which also includes support for Microsoft Social Engagement (if customer has greater than 10 CRM Online Professional USLs)
    - Example: Customer purchases 15 Professional USLs for Microsoft Dynamics CRM Online and receives an equivalent amount of Microsoft Social Engagement USLs. Customer purchases Enhanced Support for Microsoft Dynamics CRM Online. Customer will receive the Enhanced Support benefits across all both services.

## 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
- Microsoft Dynamics Marketing Step-Up from Enhanced Support for Microsoft Dynamics Marketing to Professional Direct Support for Microsoft Dynamics Marketing
- Microsoft Social Engagement Step-Up from Enhanced Support for Microsoft Dynamics Social Engagement to Professional Direct Support for Microsoft Social Engagement
- Parature, from Microsoft Step-Up from Enhanced Support for Microsoft Dynamics Social Engagement to Professional Direct Support for Parature, from Microsoft

## Support Policies

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

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

# Pricing and Availability

## International Pricelist

Country availability and MOSP pricing for Dynamics CRM Online is available here:

<http://www.microsoft.com/en-us/dynamics/pricing-list.aspx>

### Notes:

- Enhanced support offering is available in all countries where Microsoft Dynamics CRM Online, Microsoft Social Engagement, Microsoft Dynamics Marketing or Parature, from Microsoft service is currently available.
- Professional Direct service is currently available in Canada, United States, and EMEA regions only.

## Availability by Language

Localized/translated versions of Microsoft Dynamics CRM Online USLs are available. Detailed information on language and country availability can be found [here](#).

# 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. 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.](#)
- **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 one software license 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. Microsoft Dynamics CRM Online Professional with Social Engagement and USD, Microsoft Dynamics CRM Online Basic, and Microsoft Dynamics CRM Essential are all available for purchase in Open License. [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 your 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.](#)
- **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.](#)
- **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 Products and Services Agreement (MPSA)** – The new Microsoft Products and Services Agreement (MPSA) is a single agreement for your Online Services, software, and Software Assurance purchases across your organization. It can save time and money by combining purchase points for the best price level and reducing the administrative overhead associated with managing multiple agreements. [Learn more.](#)
- **Microsoft Dynamics CRM Online Government** – Microsoft's Government Community Cloud (GCC) is a cloud-

based solution, that is delivered on federally certified cloud data centers and intended for United States federal, state, and local government customers and government authorized entities helping leaders, policy makers and those they serve to achieve greater impact within their communities. The GCC brings together the Microsoft Cloud platform and productivity applications with an easy-to-use CRM solution. GCC helps U.S. government organizations streamline infrastructure and management, get greater insights from their data, enable greater communication and collaboration, and better engage with constituents through new services. [Learn more.](#) Access to CRM Online Government plans is restricted to the offerings described in [Appendix B](#) below; each plan is offered as a monthly subscription and can be licensed to an unlimited number of users.

- Parature Enterprise Government (Note: Parature Enterprise Government does not run in Government Community Cloud datacenters. Parature Enterprise Government provides pricing and support policies aligned to GCC. More details are available through Microsoft Public Sector sales representatives.)

## Cloud Solution Provider Program (CSP)

A managed services offer intended for SMB and mid-market customers who want to outsource the deployment, management, and support of their online services. This Program allows the Partner to own the customer relationship, to service the complete customer lifecycle, and to attach Partner Services.

### MINIMUM LICENSE PURCHASE REQUIREMENT FOR CLOUD SOLUTION PROVIDER PROGRAM

New customers enrolling in Microsoft Dynamics CRM Online subscription must purchase a minimum of 5 Professional 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.

## Microsoft Online Subscription Program (MOSP)

Customers not purchasing through one of the Programs listed above can purchase Microsoft Dynamics CRM Online directly through the Microsoft Online Subscription Program.

### MINIMUM LICENSE PURCHASE REQUIREMENT FOR MICROSOFT ONLINE SUBSCRIPTION PROGRAM

- New customers enrolling in Microsoft Dynamics CRM Online subscription must purchase a minimum of 5 CRM Online Professional or 1 CRM Online Enterprise user licenses to activate the paid subscription. Upon meeting this requirement, customers can add any number of CRM Online Basic and CRM Online Essential user licenses to the online service subscription.
- The 5-license minimum CRM Online 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 SUBSCRIPTION PROGRAM

- The term of a CRM Online subscription is twelve months. Extra users or capacity added mid-term renew at the end of the original subscription term.
- 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 Microsoft Dynamics 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 SUBSCRIPTION PROGRAM

- Cancellation fees plus applicable taxes per user will be applicable after the first month of a new Microsoft Dynamics 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.

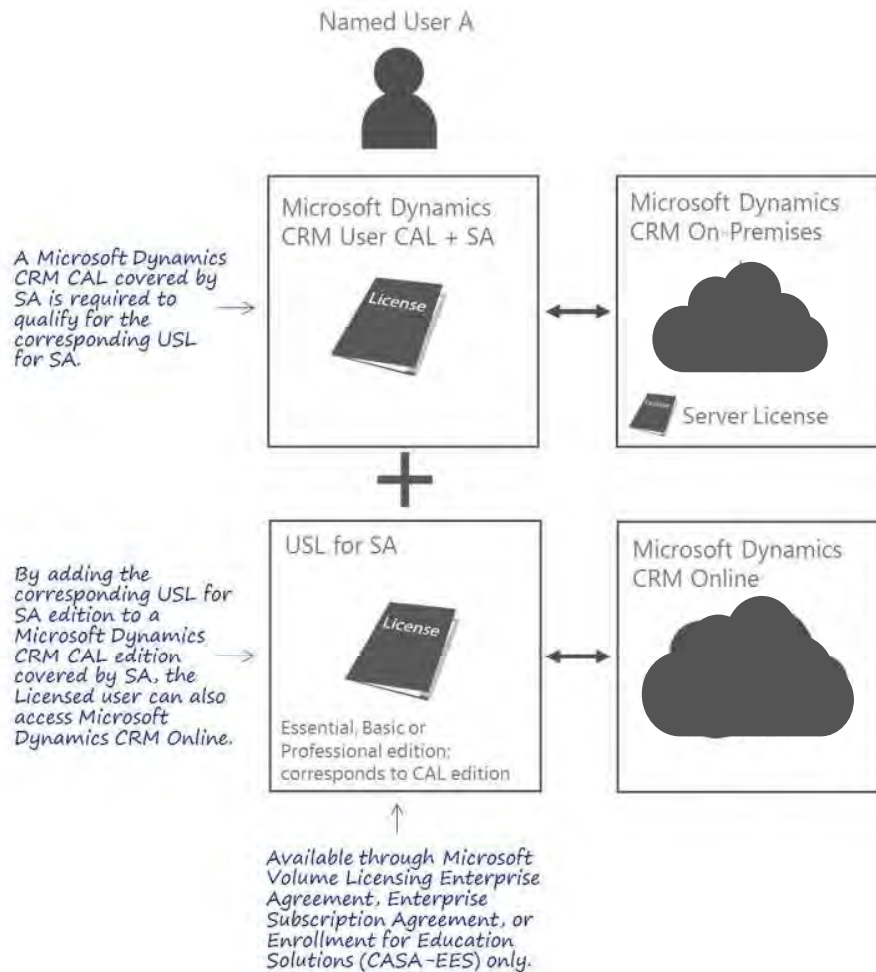
USLs for SA are available for purchase through the Microsoft Volume Licensing Enterprise Agreement, Enterprise Subscription Agreement, and Enrollment for Education Solutions (under a Campus and School Agreement).

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 for SA must be used for the same user of the User CAL. The USL for SA cannot subsequently be transferred to another user unless the corresponding CAL is also transferred to the new user.
- The USL for SA 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 16: 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 with SA	Enterprise USL for SA Professional USL for SA Social Engagement Add-on for SA Professional Add-On to Office 365 USL for SA

Basic CAL with SA	Basic USL for SA
Essential CAL with SA	Essential USL for SA

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

As part of ongoing efforts to simplify licensing and respond to partner and customer feedback, Transitions have been removed from November 2015 Enterprise Agreement Enrollments. CRM Online "For SA" Add-ons, which recognize customer investments in on-premises licensing, are the recommended path for customers interested in licensing Microsoft Dynamics CRM Online services during the term of their Enrollment. Transitions will remain available as quoted for customers with active Enrollments (versions 2011 through 2014) for the remainder of their Enrollment term.

## 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](http://crm.dynamics.com)

CRM Connection Blog

<https://community.dynamics.com/crm/b/crmconnection/default.aspx>

Microsoft Volume Licensing	<a href="http://www.microsoft.com/licensing">www.microsoft.com/licensing</a>
Software Assurance	<a href="http://www.microsoft.com/licensing/software-assurance/default.aspx">http://www.microsoft.com/licensing/software-assurance/default.aspx</a>
Activate Software Assurance Benefits	<a href="http://www.microsoft.com/licensing/sa/activate.msp">http://www.microsoft.com/licensing/sa/activate.msp</a>
Microsoft License Advisor	<a href="http://www.microsoft.com/licensing/mla/default.aspx">http://www.microsoft.com/licensing/mla/default.aspx</a>
Contact a Licensing Specialist	<a href="http://www.microsoft.com/licensing/contact/default.msp">www.microsoft.com/licensing/contact/default.msp</a>
Microsoft Dynamics Premium Support	<a href="http://www.microsoft.com/en-us/dynamics/dynamics-online-support.aspx">http://www.microsoft.com/en-us/dynamics/dynamics-online-support.aspx</a>
CustomerSource	<a href="https://mbs.microsoft.com/customersource/">https://mbs.microsoft.com/customersource/</a>
Microsoft Download Center	<a href="http://www.microsoft.com/downloads">http://www.microsoft.com/downloads</a>
PartnerSource	<a href="https://mbs.microsoft.com/partnersource/northamerica/pricing-ordering/price-sheets/dynCRMpricesheet">https://mbs.microsoft.com/partnersource/northamerica/pricing-ordering/price-sheets/dynCRMpricesheet</a>
Pricing and Country Availability	<a href="http://go.microsoft.com/fwlink/p/?LinkId=396679">http://go.microsoft.com/fwlink/p/?LinkId=396679</a>
Cloud Solution Provider Program (MPN)	<a href="https://mspartner.microsoft.com/en-us/Pages/solutions/cloud-reseller-overview.aspx">https://mspartner.microsoft.com/en-us/Pages/solutions/cloud-reseller-overview.aspx</a>
Dynamics Customer Center	<a href="http://www.microsoft.com/en-us/dynamics/crm-customer-center/default.aspx">http://www.microsoft.com/en-us/dynamics/crm-customer-center/default.aspx</a>
CRM Trust Center	<a href="http://www.microsoft.com/en-us/trustcenter/CloudServices/Dynamics">http://www.microsoft.com/en-us/trustcenter/CloudServices/Dynamics</a>

# Appendix A: Use Rights by Microsoft Dynamics CRM Online USL

The following tables lists the use rights corresponding to the Client Access Licenses (CALs) that are available in Microsoft Dynamics CRM 2015 and User Subscription Licenses (USLs) available in Microsoft Dynamics CRM Online.

Use Right	Dynamics Employee Self Service
Update Accounts and Contacts	✓*
Submit cases and read/update Cases user has submitted	✓*
Chat with support team (as chat client for self-service)	✓*
Articles & Feedback Entities (participate in self-service Forums, leave Ratings & Comments)	✓*
Read Knowledgebase Articles	✓*
Respond to Voice of the Customer Surveys	✓**
Dynamics CRM Online User Interfaces	No CRM UI Access – Portal or other access only

\*One or more licenses of Parature Enterprise or Microsoft Dynamics CRM Online Professional is required

\*\*One or more licenses of Microsoft Dynamics CRM Online Enterprise is required

Use Right	Enterprise	Professional	Basic	Essential
Employee Self Service USL	✓*	✓*	✓*	✓*
Accounts and Contacts	✓	✓	✓	✓
Activities	✓	✓	✓	✓
Notes	✓	✓	✓	✓
Post & follow activity feeds	✓	✓	✓	✓
Yammer collaboration***	✓	✓	✓	✓
Use a queue item	✓	✓	✓**	✓**
Start dialog	✓	✓	✓**	✓**
Read articles	✓	✓	✓	✓
Shared Calendar	✓	✓	✓	✓
View Announcements	✓	✓	✓	✓
Run as an on-demand process	✓	✓	✓**	✓**



Use Right	Enterprise	Professional	Basic	Essential
Run an automated workflow	✓	✓	✓**	✓**
Use relationships and connections between records	✓	✓	✓**	✓**
Write custom entity records	✓	✓****	✓****	✓****
Read custom entity data	✓	✓	✓	✓
Saved views	✓	✓	✓	✓
Create personal views	✓	✓	✓	✓**
Search	✓	✓	✓	✓**
Advanced find search	✓	✓	✓	✓**
Export data to Microsoft Excel	✓	✓	✓	✓
Perform mail merge	✓	✓	✓	✓
Dynamics CRM Mobile Client Application	✓	✓	✓	✓
Microsoft Dynamics CRM for iPad & Windows 8	✓	✓	✓	✓
Microsoft Dynamics CRM for Outlook	✓	✓	✓	✓
Microsoft Dynamics CRM Web application	✓	✓	✓	✓
Lead capture	✓	✓	✓	
Lead scoring, routing, assignment	✓	✓	✓	
Qualify and convert a Lead to an Account or Contact	✓	✓	✓	
Associate an Opportunity with an Account or Contact	✓	✓	✓	
Associate a Marketing List with an Account or Contact	✓	✓	✓	
Interactive Service Hub	✓	✓	✓	
Case management	✓	✓	✓	
Convert an Activity to a Case	✓	✓	✓	
View SLAs	✓	✓	✓	
Add or remove a Connection (stakeholder, sales team) for an Account or Contact	✓	✓	✓	
Create and update announcements	✓	✓	✓	
User reports, charts, and dashboards	✓	✓	✓	
Create, update, customize, and run Reports	✓	✓	✓	
User Interface integration for Microsoft Dynamics CRM	✓	✓	✓	
Import data in bulk	✓	✓		

Use Right	Enterprise	Professional	Basic	Essential
Configure auditing	✓	✓		
Configure duplicate-detection rules	✓	✓		
Define connections and relationships between entities	✓	✓		
Define and configure queues	✓	✓		
Define and configure dialogs	✓	✓		
Define and configure workflows	✓	✓		
System reports, charts, and dashboards	✓	✓		
Customize forms and views	✓	✓		
Create Dynamics CRM forms, entities, and fields	✓	✓		
Administer CRM	✓	✓		
Opportunities	✓	✓		
Qualify and convert a Lead to an Opportunity	✓	✓		
Convert an activity to an Opportunity	✓	✓		
Competitors	✓	✓		
Products	✓	✓		
Price Lists	✓	✓		
Quotes	✓	✓		
Orders	✓	✓		
Invoices	✓	✓		
Goals	✓	✓		
Territories	✓	✓		
Sales literature	✓	✓		
Marketing Lists	✓	✓		
Quick campaigns	✓	✓		
Marketing campaigns	✓	✓		
Contract templates	✓	✓		
Contracts	✓	✓		
Configure SLA policies	✓	✓		
Entitlements	✓	✓		

Use Right	Enterprise	Professional	Basic	Essential
Unified Service Desk	✓	✓		
Create and Publish Knowledgebase Articles	✓	✓		
View and Use Knowledgebase in CRM GUI	✓	✓		
Article templates	✓	✓		
Create and Publish Articles	✓	✓		
Facilities/Equipment	✓	✓		
Define and configure business units	✓	✓		
Define and configure teams	✓	✓		
Define and configure services, resources, and work hours	✓	✓		
Full Mobile Offline sync	✓	✓		
Read AX application data	✓	✓		
Email published Voice of the Customer Surveys	✓	✓ <sup>+</sup>		
View Voice of the Customer Survey Results and Survey Outcomes in Voice of the Customer Menu	✓	✓ <sup>+</sup>		
Create & Publish Voice of the Customer Surveys	✓			

\*See additional requirements for Employee Self Service in the preceeding table

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

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

\*\*\*\* Custom entities (either based on entities included in Microsoft CRM Online or created by a customer or partner) may require a higher CAL or USL, depending on the required access. Customizations can only be performed against entities included in the use rights.

\*oOne or more licenses of Microsoft Dynamics CRM Online Enterprise is required.

# Appendix B: Microsoft Dynamics CRM Online Product Offerings

		Direct (MOSP)				Volume Licensing (EA, EA-S, MPSA, EES)				Volume Licensing (Open)				Cloud Solution Provider			
		Comm	Pub Gov't	Edu	Charity	Comm/ Pub Gov	GCC	Edu	Charity	Comm/ Pub Gov	GCC	Edu	Charity	Comm/ Pub Gov	GCC	Edu	Charity
CRM	Enterprise	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
	Professional	Y	Y	Y	Y	Y	Y	Y	N	Y	N	Y	N	Y	N	N	N
	Basic	Y	Y	Y	Y	Y	Y	Y	N	Y	N	Y	N	Y	N	N	N
	Essential	Y	Y	Y	Y	Y	Y	Y	N	Y	N	Y	N	Y	N	N	N
	Employee Self Service	Y	Y	N	N	Y	Y	Y	N	N	N	N	N	Y	N	N	N
	Field Service User Add-On	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	Y	N	N	N
	Additional Storage	Y	Y	Y	Y	Y	Y	Y	N	Y	N	Y	N	Y	N	N	N
	Portal Add-On	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	Y	N	N	N
	Additional Portal Page Views	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	Y	N	N	N
	Additional Prod Instance	Y	Y	Y	Y	Y	Y	Y	N	Y	N	Y	N	Y	N	N	N
	Add'l Non-Prod Instance	Y	Y	Y	Y	Y	Y	Y	N	Y	N	Y	N	Y	N	N	N
	Enhanced Support	Y	Y	Y	Y	Y	Y	Y	N	Y	N	Y	N	N	N	N	N
Marketing	Pro Direct Support	Y	Y	Y	Y	Y	Y	Y	N	Y	N	Y	N	N	N	N	N
	Enterprise	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
	Sales Collaboration	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
	Additional Storage	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
	Additional Email Messages	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
	Mobile Marketing Credits	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
	Short Code (US)	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
	Short Code (Canada)	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
Social	Enhanced Support	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
	Pro Direct Support	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
	Enterprise	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
	Professional	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
	Additional Posts (min 10k)	Y	Y	Y	Y	Y	N	Y	N	Y	N	Y	N	Y	N	N	N
	Additional Posts (min 100k)	Y	Y	Y	Y	N	N	N	N	N	N	N	N	Y	N	N	N
Parature	Additional Posts (min 1M)	Y	Y	Y	Y	N	N	N	N	N	N	N	N	Y	N	N	N
	Enhanced Support	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
	Pro Direct Support	Y	Y	Y	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
	Enterprise	Y	Y	Y	Y	Y	Y*	Y	N	N	N	N	N	N	N	N	N
	Additional Departments	Y	Y	Y	Y	Y	Y*	Y	N	N	N	N	N	N	N	N	N
	Additional Records	Y	Y	Y	Y	Y	Y*	Y	N	N	N	N	N	N	N	N	N
Parature	Additional Page Views	Y	Y	Y	Y	Y	Y*	Y	N	N	N	N	N	N	N	N	N
	Additional File Storage	Y	Y	Y	Y	Y	Y*	Y	N	N	N	N	N	N	N	N	N
	Enhanced Support	Y	Y	Y	Y	Y	Y*	Y	N	N	N	N	N	N	N	N	N
	Pro Direct Support	Y	Y	Y	Y	Y	Y*	Y	N	N	N	N	N	N	N	N	N

\* These offers will be transacted like GCC and support will be done by US citizens only but the service will NOT be provisioned in the GCC.

# Appendix C: Support Policies

SEVERITY	CUSTOMER'S SITUATION	EXPECTED MICROSOFT RESPONSE	EXPECTED CUSTOMER RESPONSE
A	Critical business impact: -Customer's business has significant loss or degradation of services. -Needs immediate attention	Initial response: -1 hour or less for Professional Direct and Premier -2 hours or less for Enhanced -Next business day for Subscription	-Allocation of appropriate resources to sustain continuous efforts all day, every day <sup>1</sup> -Accurate contact information on case owner
B	Moderate business impact: -Customer's business has moderate loss or degradation of services but work can reasonably continue in an impaired manner	Initial response: -2 hours or less for Professional Direct and Premier -4 hours or less for Enhanced -Next business day for Subscription	-Allocation of appropriate resources to sustain continuous effort unless customer requests to opt-out of 24x7 <sup>2</sup> -Accurate contact information on case owner
C	Minimum business impact: -Customer's business is substantially functioning with minor or no impediments of services	Initial response: -4 hours or less for Professional Direct and Premier -8 hours or less for Enhanced -Next business day for Subscription	-Accurate contact information on case owner

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

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

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