Microsoft

Microsoft Dynamics 365 Licensing Guide

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Using This Guide

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

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

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

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

This document applies for users licensed with Dynamics 365 licenses.

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

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

What's new in this licensing guide

This licensing guide was updated to reflect licensing updates and new online service offerings as of October 2018.

Dynamics 365	Description	Change Summary
Customer Engagement/ Unified Operations	Dynamics 365 Team Members	• Realign the "light tasks" use rights intended for the Team Members license • Maintain "read only" access across Dynamics 365 for knowledge sharing • Limit use of custom entities, as part of the designated light weight team member experience
Customer Engagement	Dynamics 365 for Marketing contacts	• Redefined contacts as those only used for a marketing activity • Introduce Additional Contact tiers for customers who need large number of contacts
	Microsoft Relationship Sales solution	• Introduce two new Microsoft Relationship Sales solution (MRSs) SKUs: Microsoft Relationship Sales solution Plus and Microsoft Relationship Sales solution • Retire existing Microsoft Relationship Sales solution promotion
	Dynamics 365 for Customer Service Professional	• Introduce new SKU to deliver core customer support functionality • Align to Dynamics 365 professional SKUs licensing terms
	Portal	• Access to the first included portal now requires the purchase of a minimum of 10 Enterprise user licenses
Unified Operations	Dynamics 365 Unified Operations - Order Lines	• Introduce new SKU providing indirect access to partners, customer, connected automated systems, IoT devices, and bots • Allow indirect access on an 'order line' basis rather than on a per user basis • Alleviate pricing and licensing friction in many common multiplexing scenarios
	Dynamics 365 Talent comprehensive hiring	• Introduce new SKU enabling new capabilities for recruiters, talent specialists, and people managers within the Attract module • Offers tiered pricing based on employee count

Introduction to Dynamics 365

Dynamics 365 is the next generation of intelligent business applications in the cloud. Dynamics 365 unifies CRM and ERP capabilities by delivering new purpose-built applications to help manage specific business functions, including Dynamics 365 for Sales, Dynamics 365 for Marketing, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, Dynamics 365 for Project Service Automation, Dynamics 365 for Finance and Operations, Dynamics 365 for Retail, and Dynamics 365 for Talent. Designed to be personalized, enable greater productivity, deliver deeper insights and adapt to business needs, Dynamics 365 applications help businesses accelerate digital transformation to meet the changing needs of customers and capture the new business opportunities of tomorrow.

Figure 1: Dynamics 365 Plan Overview
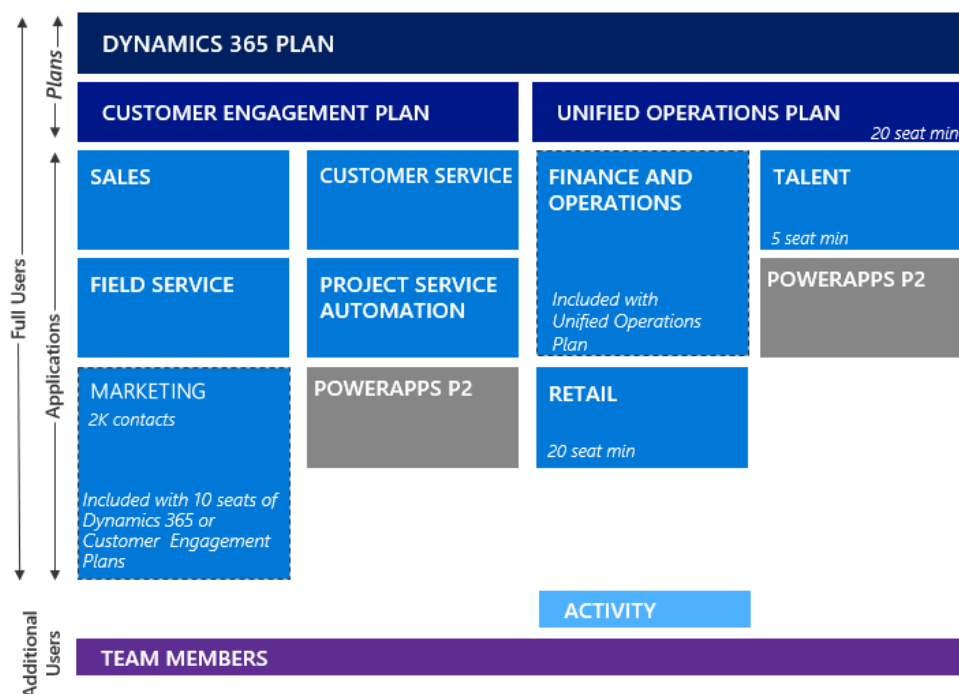
How to buy Dynamics 365

Licensing Programs

Dynamics 365 is licensed through the Microsoft Volume Licensing and the Cloud Solution Provider program (CSP). In Volume Licensing, Dynamics 365 is available through:

- Enterprise Agreement
- Enterprise Agreement Subscription
- Service and Cloud Enrollment
- Enrollment for Education Solutions (under the Campus and School Agreement)
- Microsoft Dynamics Online Government (except Dynamics 365 Unified Operations Plan, Dynamics 365 Unified Operations - Activity and Dynamics 365 Plan)
- Microsoft Products and Services Agreement (MPSA)
- Microsoft Online Subscription Program (MOSP) (except Dynamics 365 Unified Operations Plan, Dynamics 365 Unified Operations - Activity and Dynamics 365 Dynamics 365 Plan)

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

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

International Availability

Country, language, and localization availability for Dynamics 365 is available here.

Minimum License Purchase Requirements

Dynamics 365 Customer Engagement Plan

To activate the paid subscription, new customers enrolling in Dynamics 365 for Customer Engagement Plan Business Applications on the *Academic price list* must purchase a minimum of 20 full user licenses:

- Dynamics 365 Plan
- Customer Engagement Plan
- Dynamics 365 for Sales
- Dynamics 365 for Customer Service
- Dynamics 365 for Field Service
- Project Service Automation

The 20-license minimum license requirement does not apply to existing Academic customers who have previously enrolled on or before October 31, 2016, but these customers are required to maintain at least a 5-seat minimum in accordance with the prior program requirements.

Dynamics 365 Customer Engagement Add-ons

- **Microsoft Relationship Sales solution Plus** and **Microsoft Relationship Sales**: 10-license minimum
- **Dynamics 365 for Marketing Additional Contacts**: To activate the additional contact packs, customer must meet the minimum purchase requirements
  - o Dynamics for Marketing Additional Contacts Tier 3: 2 packs
  - o Dynamics for Marketing Additional Contacts Tier 4: 5 packs
  - o Dynamics for Marketing Additional Contacts Tier 5: 10 packs
  - o All other additional contact packs have no minimum purchase

Dynamics 365 Unified Operations Plan

Seat minimums for Dynamics 365 Unified Operations

User SLs

- 20 Dynamics 365 Plan USLs

or

- 20 Dynamics Unified Operations Plan USLs

or

- 20 Dynamics 365 for Retail USLs

or

- 5 Dynamics 365 for Talent USLs

Use a combination of SLs to satisfy the 20 seat minimum for Finance and Operations and/or Dynamics 365 for Retail

Not permitted in CSP

User SLs | Device SLs

- Dynamics 365 Plan USLs

and/or

- Dynamics Unified Operations Plan USLs

and/or

- Dynamics 365 for Retail USLs

- 2.5 Dynamics 365 Device SLs = 1 required seat

- Example: 10 Dynamics 365 Plan USLs + 25 Dynamics 365 Operations Device SLs (25/2.5 = 10)

Use a combination of SLs to satisfy the 5 seat minimum Dynamics 365 for Talent

Not permitted in CSP

User SLs

- Dynamics 365 Plan USLs

and/or

- Dynamics Unified Operations Plan USLs

and/or

- Dynamics 365 for Talent USLs

Dynamics 365 Unified Operations Add-ons

- **Talent comprehensive hiring:** to get the entitlements included with the Talent comprehensive hiring add-on, customers must satisfy:
  - The 5-seat minimum purchase requirement for the Talent application (standalone, Unified Operations plan, or Dynamics 365)
  - Sufficient number of Talent comprehensive hiring (100 employee pack) add-ons to meet or exceed the number of employees on payroll (e.g. 1500 employees = 15 Tier 2 packs)

How to use Dynamics 365

Licensing Requirements for Internal Users

Customers must purchase Subscription Licenses (SLs) for their organization or their affiliates' employees and on-site agents, vendors or contractors who directly or indirectly access the Dynamics 365 solution.

Dynamics 365 has two types of SLs:

(i) User SLs are assigned on a "named user" basis, meaning each user requires a separate User SL; User SLs cannot be shared but an individual with a User SL may access the service through multiple devices.

(ii) Device SLs are assigned to license a device.

    a. With the Customer Engagement Plan Business Application Device SL any number of users can use the licensed device with a shared login, such as 'truck1@contoso.com' without the need for separate User SLs. Individual users cannot be tracked as they all share one login. Customer Engagement Plan device licenses are full devices – they include the same rights as the equivalent user license.

    b. With the Dynamics 365 Unified Operations - Device SL any number of users can access a licensed device with individual logins without the need for separate User SLs. The Operations device is a limited license with a subset of Unified Operations capabilities.

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

Subscription duration requirements are determined by the licensing program under which a SL is licensed. Short term subscriptions are available exclusively through the MPSA licensing program. More information on MPSA is available here.

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

Figure 2: Basic licensing requirements for Dynamics 365
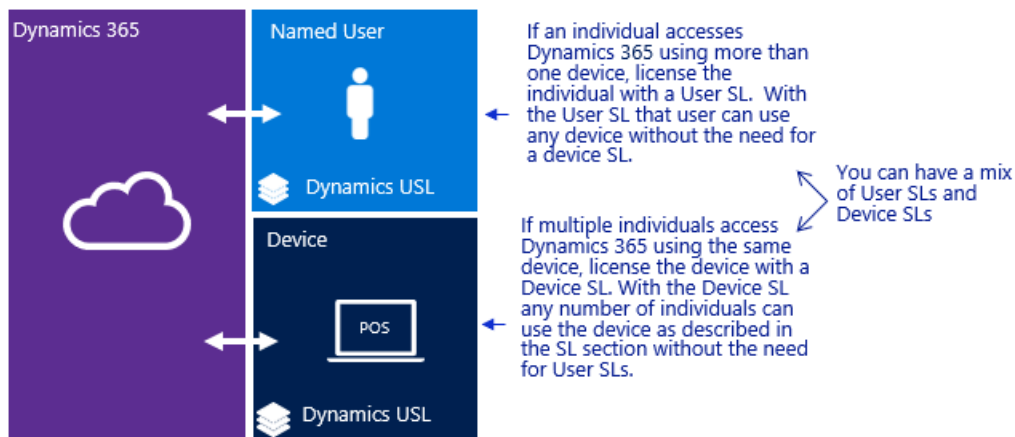
The subscription licenses include access rights to the default Dynamics 365 instances included in the subscription account, and every additional Dynamics 365 instance (production or non-production) associated with the same Azure AD tenant. For more information on Azure AD tenants, please see here.

Licensing Requirements for External Users

External users are end customers and third-party users of the organization or its affiliates and do not require SLs to access Dynamics 365. External user access is included with the organization's internal user SLs. Customer Engagement Applications graphical user interfaces may not be accessed by external users.

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

However, external user access does not extend to the customer or the customer's affiliate's contractors, vendors, or agents providing business processes on the customer's behalf or using Dynamics 365 to manage any portions of their business. In this sense, the customer may not use Dynamics 365 to provide business process outsourcing services to its clients.

Microsoft Social Engagement, a service included as part of select Dynamics 365 licenses, does not distinguish between internal and external users. You must license external users, as well as, internal users who will access services with a Dynamics 365 license.

Figure 3: Internal vs. external users
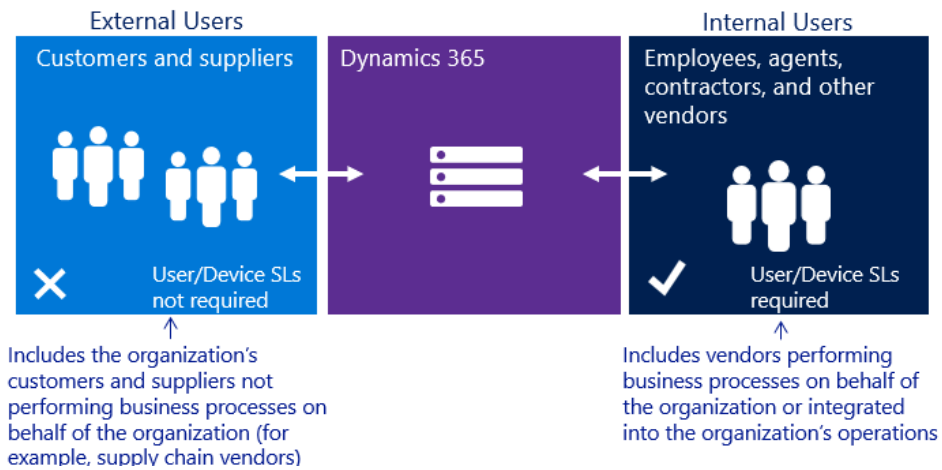
Multiplexing

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

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

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

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

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

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

Figure 4: Multiplexing
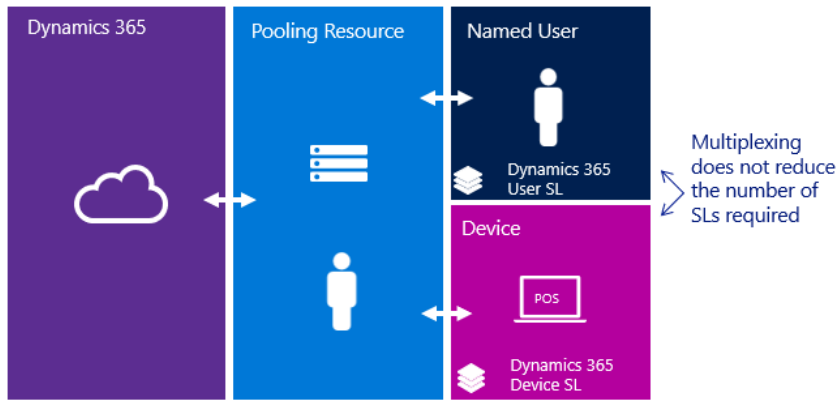
Dual Use Rights

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

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

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

- Dynamics 365 Plan
- Dynamics 365 Customer Engagement Plan
- Dynamics 365 for Sales **Enterprise**
- Dynamics 365 for Customer Service **Enterprise**
- Dynamics 365 Team Members

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

- Dynamics 365 Plan
- Dynamics 365 Unified Operations Plan
- Dynamics 365 for Retail
- Dynamics 365 Unified Operations - Device
- Dynamics 365 Team Members

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

Figure 5: Dual Use Rights

With Dual Use Rights: Dynamics 365 Customer Engagement Plan applications allow access to Dynamics 365 (on-premises)

Dynamics 365 User Subscription License

Dynamics 365 (on-premises) Client Access License*

Client Access License & Server License Included

Dynamics 365

Dynamics 365 Server

*Microsoft Dynamics 365 On-premises Sales, Customer Service and Team Member CALs

With Dual Use Rights: Dynamics 365 Unified Operations Plan applications allows access to Dynamics 365 for Operations on-premises

Dynamics 365 User/Device Subscription License

Client Access License & Server License Included

Dynamics 365

Dynamics 365 for Operations Server*

* Server must be licensed separately for access via Dynamics 365 for Operations on-premises CALs

Field Service on-premises functionality is available for Dynamics 365 Field Service license or a plan that includes the Field Service application

Figure 6: Dual Use Rights Mapping

Dynamics 365 Plan	Dynamics 365 Plan	Dynamics 365 for Sales (on-premises) Dynamics 365 for Customer Service (on-premises) Dynamics 365 for Operations (on-premises)
	Dynamics 365 Customer Engagement Plan	Dynamics 365 for Sales (on-premises) Dynamics 365 for Customer Service (on-premises)
	Dynamics 365 Unified Operations Plan	Dynamics 365 for Operations (on-premises)
Dynamics 365 Applications	Dynamics 365 for Sales	Dynamics 365 for Sales (on-premises)
	Dynamics 365 for Customer Service	Dynamics 365 for Customer Service (on-premises)
	Dynamics 365 for Field Service	Dynamics 365 for Field Service functionality (on-premises)
	Dynamics 365 for Operations	Dynamics 365 for Operations (on-premises)
	Dynamics 365 for Retail	Dynamics 365 for Operations (on-premises)
Dynamics 365 Additional User/Device	Dynamics 365 Team Members	Dynamics 365 for Team Members (on-premises)
	Dynamics 365 Unified Operations - Activity	Dynamics 365 for Operations Activity (on-premises)
	Dynamics 365 Unified Operations - Device	Dynamics 365 for Operations Device (on-premises)

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

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

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

Dynamics 365 Purchase Options

Dynamics 365 simplifies licensing of business applications. The primary licensing is by User SLs, which are assigned on a "named user" basis, meaning each user requires a separate User SL named user subscription. The Dynamics 365 user subscriptions classify users into two types, "full users" and "additional users".

Figure 7: User Types
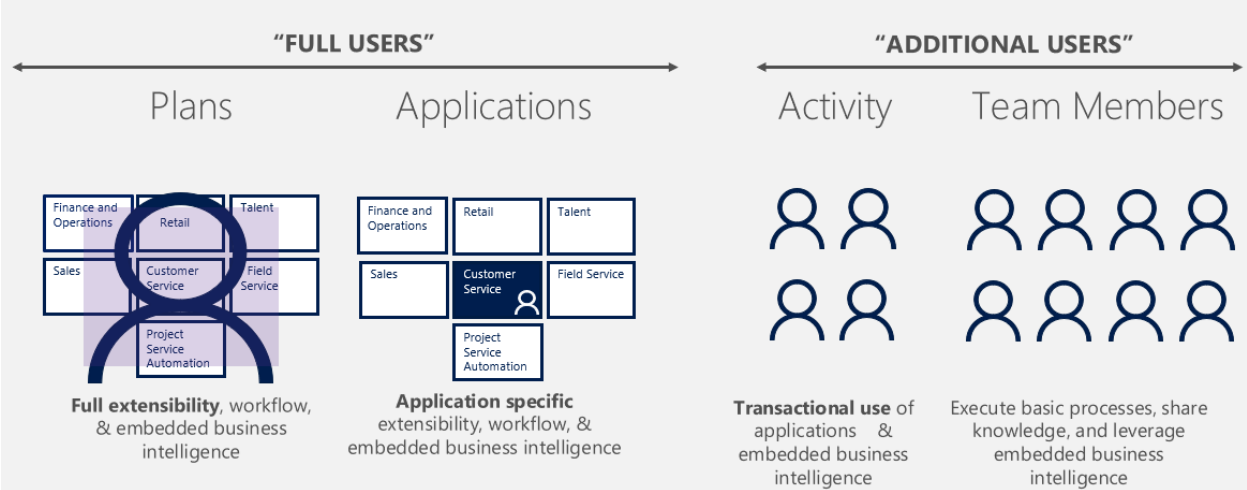
Full users are the users whose work requires use of the feature rich business applications functionality. Examples of full users are sales people, customer service representatives, finance employees, controllers and supply chain managers. These users have also been referred to in the past as Professional users or Power Users. These full users are licensed with a Dynamics 365 Plan, or Dynamics 365 application subscription (not including Dynamics 365 for Talent).

Additional users often represent a large percentage of users in an organization and may consume data or reports from line of business systems, complete light tasks like time or expense entry and HR record updates or be heavier users of the system, but not require full user capabilities. These additional users are licensed with Dynamics 365 Team Members, Dynamics 365 for Operations - Activity or Dynamics 365 for Talent subscriptions.

Device licenses are also available for shared device scenarios. See the Device Subscription License [section](#) for more information.

Dynamics 365 Additional Users Subscriptions

Dynamics 365 for Team Members

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

The Team Members User SL enables users to read Dynamics 365 data generated from Dynamics 365 Unified Operations and Dynamics 365 Customer Engagement Applications and Plans. Full access to these applications is governed through Dynamics 365 Application User and Dynamics 365 Plan User subscription, as described above. Note, at least one full Dynamics 365 user must be assigned to the tenant to administer and configure the individual Team Members applications. A Plan subscription is the

most cost-effective option to provide ultimate flexibility for a user to administer and configure more than one Dynamics 365 application.

The Dynamics 365 Team Members User SL grants a user access to participate in a limited specific set of functionalities, as defined below, from the applications and plans.

Dynamics 365 for Team Member use rights for Dynamics 365 Customer Engagement Plan Applications

The Team Members User SL grants a user the following Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, or Dynamics 365 for Project Service Automation rights for their own use and not for, or on behalf of, other individuals:

    (i)   Create, view, update, and delete contacts, activities, tasks, and notes access to contacts, activities, tasks and notes

    (ii) Record time and expense for Dynamics 365 for Project Service Automation, and apply for projects

    (iii) Update personal employee information

    (iv) User reporting and dashboards

    (v) Participate as an end-consumer of Dynamics 365 services such as responding to surveys

    (vi) A Team Members application module may not be customized with more than 15 custom entities available to the Dynamics 365 Team Members users can be customized against a maximum of up to 15 custom entities*

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

Reference [Appendix B](#) for a detailed list of the Dynamics 365 Customer Engagement Team Members use rights.

Dynamics 365 for Team Members use rights for Dynamics 365 Unified Operations Plan Applications

The Team Members SL grants a user the following Dynamics 365 for Finance and Operations, Dynamics 365 for Retail and Dynamics 365 for Talent rights for their own use and not for, or on behalf of, other individuals:

    (i)   To record any type of time

    (ii) To record any type of expenses

    (iii) Manage personal employee information

    (iv) Manage direct employee and candidate activities for hiring, onboarding, and human resources

    (v) Create requisitions

    (vi) Create or edit the items related to the following capabilities: quality control and departmental budgets

    (vii) Approval of time, expense, invoices

Reference [Appendix C](#) for a detailed list of the Dynamics 365 Unified Operations Team Members use rights.

Dynamics 365 Operations - Activity

The Dynamics 365 Unified Operations - Activity subscription is a named user subscription intended for users who may be heavy users of the application, but do not require the use rights of a full user. Dynamics 365 Unified Operations - Activity use rights include all Dynamics 365 Team Member user rights as well as the right to:

    (i)   Approve all Activity related transactions

    (ii) Create or edit the items related to warehousing, receiving, shipping, orders, vendor maintenance, and all budgets

    (iii) Operate a Point-of-Sale (POS) device, store manager device, shop floor device, or warehouse device.

Please review [Appendix C](#) for a list of the out of the box Dynamics 365 Unified Operations Plan roles and associated user types.

Dynamics 365 Application User Subscriptions

Application subscriptions are named user subscriptions where a user is licensed only for one individual application. This is largely how business applications have traditionally been licensed. Application subscriptions also include use rights to PowerApps for mobile app creation and use against Dynamics 365 data. For more information on Microsoft PowerApps, please see Business Applications Platform [section](#).

Dynamics 365 has the following applications:

- Dynamics 365 for Sales
- Dynamics 365 for Marketing
- Dynamics 365 for Field Service
- Dynamics 365 for Customer Service
- Dynamics 365 for Project Service Automation
- Dynamics 365 for Finance and Operations
- Dynamics 365 for Retail
- Dynamics 365 for Talent

Dynamics 365 for Sales

For your sales team, Dynamics 365 for Sales provides licensed users with access to core Salesforce automation capabilities such as:

(i) Lead and opportunity management

(ii) Products and price lists management

(iii) Quotes, orders and invoices management

(iv) Sales group management functionality

(v) Case for Sales

Each Dynamics 365 for Sales Enterprise User SL also includes rights:

(i) Microsoft Social Engagement

(ii) Voice of the Customer for Microsoft Dynamics 365

(iii) Microsoft Dynamics 365 - Gamification

(iv) Microsoft PowerApps Plan 2

Customers may choose what level of functionality is appropriate for their business with two solution options for licensing Microsoft Dynamics 365 for Sales: Dynamics 365 for Sales Enterprise and Dynamics 365 for Sale Professional. These two services are not meant to be combined within an organization.

The Sales Enterprise and Sales Professional application modules may not be deployed on the same instance; however, they may be deployed on the same tenant (e.g. when a subsidiary sales organization has less complex sales force needs than parent organization). Customers may mix and match Enterprise licenses (e.g. Customer Engagement Plan or Enterprise Applications) with Sales Professional on the same tenant. A user with Sales Professional license is licensed only for that application and therefore may not directly or indirectly access another instance with Sales Enterprise application. Conversely, as Sales Enterprise includes Sales Professional capabilities, a Sales Enterprise user may access the Sales Professional instance. However, the functionality in the Sales Professional application will still be limited to the Sales Professional features.
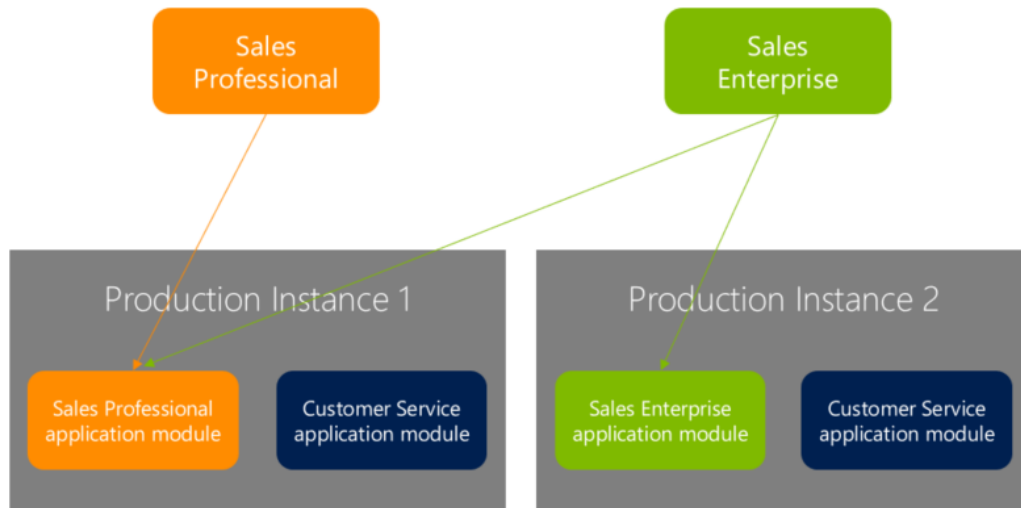
Dynamics 365 for Sales Professional

Dynamics 365 for Sales Professional is for customers who have simpler needs for their sales force automation solution:

(i)   Opportunity management
(ii) Sales planning
(i)   Performance management
(ii) Limited customization*

> *Each of the specific functionalities available to the Dynamics 365 Sales Professional user can be customized against a maximum of up to 15 custom entities

Dynamics 365 for Sales Enterprise

Dynamics 365 for Sales Enterprise goes beyond core sales force automation and meets the needs of more complex sales processes. In addition to all the functionality available in the Dynamics 365 for Sales Professional User SL, Dynamics 365 for Sales Enterprise User SL includes rights:

(i)   Advanced customization and extensibility
(ii)   Embedded intelligence features
(iii) Advanced sales force automation
(iv)   Unified Service Desk for Dynamics 365
(v)   Microsoft Social Engagement
(vi)   Voice of the Customer for Microsoft Dynamics 365
(vii) Dynamics 365 – Gamification
(viii) Microsoft PowerApps Plan 2

Additionally, this license includes rights to configure and administer the Dynamics 365 for Sales Enterprise application.

Use Rights Differences	Sales Professional	Sales Enterprise
Custom entities*	15 max	● (PowerApps P2)
Embedded intelligence		● (online)
Advanced sales force automation		●
Unified Service Desk		●
Microsoft Social Engagement		●
Feedback and surveys (VoC)		●
Dynamics 365 - Gamification (admin/player)		●
Portal		● (10 seat min)
Dual use rights		●

*Actions may be performed only against records corresponding to entities included in the use rights
(online) means no equivalent on-premises functionality for dual use rights

For a detailed view of the use rights associated with Dynamics 365 Sales, refer to .

Dynamics 365 for Marketing

The Marketing application is licensed per organization and is based on contacts in the database. There is no purchase requirement for user licenses. The administrator will be able to assign user licenses through the admin portal for users that need access to the Marketing application. Since Marketing is an organization-based license, customers may install, use, and configure one Dynamics 365 for Marketing application with only one Dynamics 365 instance.

Customer Engagement entitlements are at the tenant level and not included in the Dynamics 365 for Marketing with Customer Engagement Plan, Dynamics 365 for Marketing with Customer Engagement Application, or the Marketing Additional application. Customers get these entitlements with their Dynamics 365 Customer Engagement plan and/or application.

Dynamics 365 Customer Engagement capacity add-ons are not included with the Dynamics 365 for Marketing with Customer Engagement Plan, Dynamics 365 for Marketing with Customer Engagement Application, or the Marketing Additional application. If the customer needs an additional portal or additional production and non-production instance, they may purchase at an additional cost.

Figure 10: Marketing Applications

	Dynamics 365 for Marketing only[1]	Dynamics 365 for Marketing with Customer Engagement Plan[2]	Dynamics 365 for Marketing with Customer Engagement Application[3]	Dynamics 365 for Marketing Additional Application[4]
Base Package (per month)	$1500 (10K Contacts)	Included (2K contacts)	$750 (10K contacts)	$500 (Contacts are pooled at tenant level and not included in this offer)
Additional Contacts (per month)	$250 (5K Contacts)	$600 for 1st 8K $250 (5K contacts)	$250 (5K contacts)	$250 (5K contacts)
Purchase requirements	[1]No Dynamics 365 purchase requirements	[2]Minimum 10 users of Dynamics 365 Customer Engagement Plan and/or Dynamics 365 Plans	[3]With any Customer Engagement application or Customer Engagement plan with fewer than 10 users	[4]If an additional Marketing application instance is required (no portal entitlement)
Entitlements	Customer Engagement entitlements are at the **tenant** level. Customers receive these entitlements **once**, and only when purchasing *Marketing standalone*: • Microsoft Social Engagement • Voice of the Customer for Microsoft Dynamics 365 • 1 Portal • Storage	• Customer Engagement entitlements are at the tenant level and not included in the Dynamics 365 for Marketing with Customer Engagement Plan, Dynamics 365 for Marketing with Customer Engagement Application, or the Marketing Additional application. Customers get these entitlements with their Dynamics 365 Customer Engagement plan and/or application. • Dynamics 365 Customer Engagement capacity add-ons are not included with the Dynamics 365 for Marketing with Customer Engagement Plan, Dynamics 365 for Marketing with Customer Engagement Application, or the Marketing Additional application. If the customer needs an additional portal, storage, production, or non-production instances, they may purchase at an additional cost.		
Entitlement Limits	• Email/month = Up to 10 times the number of contacts purchased • Up to 100 active live segments (count is applied to active Dynamics segments)			

Dynamics 365 Customer Engagement Customers

Dynamics 365 for Marketing with Customer Engagement Plan
Customers with at least 10 seats of Dynamics 365 Customer Engagement Plan and/or Dynamics 365 Plan receive one Marketing Application instance and an entitlement of 2K contacts. Customers who need more than the included 2K contacts, are required to purchase the 8K "Additional Contacts" pack BEFORE purchasing the "Additional Contacts" (5K) pack or the "Additional Contacts" (50K) tier packs.

Dynamics 365 for Marketing with Customer Engagement Application

Customers with less than 10 seats of Dynamics 365 Customer Engagement Plan and/or Dynamics 365 Plan may purchase Dynamics 365 for Marketing with Customer Engagement Application. The base package of Marketing includes 1 Marketing Application instance and an entitlement of 10K contacts. Only one of the "base package" with 10K contacts may be purchased.

New Marketing Customers

Dynamics 365 for Marketing Only Application

Customers who have no Dynamics 365 Customer Engagement applications may purchase the Dynamics 365 for Marketing Only Application. With this application, customers get Microsoft Social Engagement, Voice of the Customer for Microsoft Dynamics 365, 1 Portal, and storage (1GB) instance. The Dynamics 365 for Marketing standalone application is the only Marketing application that includes the Dynamics 365 Customer Engagement entitlements, as these same entitlements are included with the Customer Engagement Plan and/or applications when licensing Dynamics 365 for Marketing with Customer Engagement Plan or Dynamics 365 for Marketing with Customer Engagement Application.

Dynamics 365 for Marketing Customers

Dynamics 365 for Marketing Additional Application

Dynamics 365 for Marketing customers who need an additional Marketing application for non-production use or for a separate instance, may purchase the Marketing Additional Application. With this application, customers get 1 instance of the Marketing Application, contacts are pooled at the tenant level, and not included with this application.

Dynamics 365 for Marketing Marketable Contacts

"Marketable contacts" is based on the contacts used for a marketing activity. Marketing activity includes any contact or engagement via Marketing emails, landing pages, forms, LinkedIn integration, events, surveys and any other custom channel. Dynamics 365 for Marketing currently enables customers to market to their contacts, leads and opportunities that are associated/linked to a contact record in their database. Visit this help documentation to learn more. To understand how to transact tiered pricing refer to the Tier Pricing section.

For a detailed view of the use rights associated with Dynamics 365 Marketing, refer to Appendix B.

Dynamics 365 for Customer Service

Dynamics 365 for Customer Service is the recommended choice for your customer support teams. It provides licensed users with access to core customer service capabilities including:

(i)   Leads (create only)
(ii) Case Management
(iii) Interactive Service Hub
(iv) Unified Service Desk for Microsoft Dynamics 365
(v)   SLAs and Entitlements

Each Dynamics 365 for Customer Service Enterprise User SL also includes rights:

(i)   Microsoft Social Engagement
(ii) Voice of the Customer for Microsoft Dynamics 365
(iii) Microsoft Dynamics 365 - Gamification
(iv) Microsoft PowerApps Plan 2

Customers may choose what level of functionality is appropriate for their business with two solution options for licensing Microsoft Dynamics 365 for Customer Service: Dynamics 365 for Customer Service Enterprise and Dynamics 365 for Customer Service Professional.

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

Figure 11: Instance separation
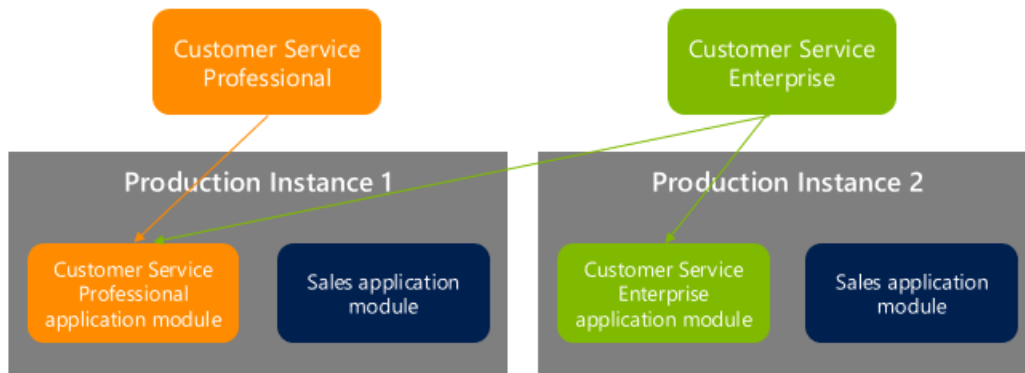
Figure 12: Mix and match deployment

Customer Scenario – 1 Tenant	Comment
Customer Service Enterprise + Customer Service Professional	Customer Service Enterprise users may access all instances on a tenant. Customer Service Enterprise users may access Customer Service Professional instance, but Customer Service Professional may not access Customer Service Enterprise instance
Customer Engagement Plan + Customer Service Professional	Customer Engagement Plan and Dynamics 365 Plan users may access both Customer Service Enterprise and Customer Service Professional instances
Customer Engagement Plan + Customer Service Professional + Team Members	Team member use rights do not change. The Customer Engagement Plan, Customer Service Professional scenario is as listed in the above section

Dynamics 365 for Customer Service Professional

Dynamics 356 for Customer Service Professional is for customers with less complex service scenarios who need streamlined capabilities to provide core support functionality:

(i) Leads (create only)
(ii) Case Management
(iii) Interactive Service Hub
(iv) SLAs and Entitlements
(v) Microsoft Social Engagement
(vi) Limited customization*

*Each of the specific functionalities available to the Dynamics 365 Customer Service Professional user can be customized against a maximum of up to 15 custom entities

Dynamics 365 for Customer Service Enterprise

Dynamics 365 for Customer Service Enterprise goes beyond core support functionality and meets the needs of more complex customer service processes. In addition to all the functionality available in the Dynamics 365 for Customer Service Professional User SL, Dynamics 365 for Customer Service

Enterprise User SL includes rights:

    (i)   Embedded intelligence

    (ii) Unified Service Desk for Microsoft Dynamics 365

    (iii) Voice of the Customer for Microsoft Dynamics 365

    (iv) Dynamics 365 – Gamification

    (v) Portal

    (vi) Microsoft PowerApps Plan 2

Additionally, this license includes rights to configure and administer the Dynamics 365 for Customer Service Enterprise application.

Use Rights Differences	Sales Professional	Sales Enterprise
Custom entities*	15 max	● (PowerApps P2)
Embedded intelligence		● (online)
Advanced sales force automation		●
Unified Service Desk		●
Microsoft Social Engagement		●
Feedback and surveys (VoC)		●
Dynamics 365 - Gamification (admin/player)		●
Portal		● (10 seat min)
Dual use rights		●

*Actions may be performed only against records corresponding to entities included in the use rights
(online) means no equivalent on-premises functionality for dual use rights

For a detailed view of the use rights associated with Dynamics 365 Customer Service, refer to Appendix B.

Dynamics 365 for Field Service

Dynamics 365 for Field Service is the recommended choice for your field-based service teams, leveraging tight integration between Dynamics 365 for Customer Service case management capabilities and field service work orders to deliver business process driven, best in class field service management. It provides licensed users with access to:

    (i)   Field service capabilities including work order management

    (ii) Schedule

    (iii) Dispatch

    (iv) Routing capabilities

    (v) Repairs and returns management

    (vi) Inventory management.

Each Dynamics 365 for Field Service User SL also includes rights to:

    (i)   Microsoft Social Engagement

    (ii) Voice of the Customer for Microsoft Dynamics 365

    (iii) Dynamics 365 Mobile Offline

    (iv) Microsoft Dynamics 365 - Gamification

    (v) Microsoft PowerApps Plan 2

Additionally, this license includes rights to configure and administer the Dynamics 365 for Field Service application.

This User SL also includes the latest version of Field Service Mobile, a Microsoft application that is specifically designed for Dynamics 365 for Field Service, distinct from the Dynamics CRM Mobile Client application. The Field Service Mobile application will no longer limit Field Service custom entities to 10, unlike Field Service Mobile (2016) and Field Service Mobile (2017) applications, which continue to have a maximum of 10 Field Service custom entities limit.

For a detailed view of the use rights associated with Dynamics 365 Field Service, refer to Appendix B.

Dynamics 365 for Project Service Automation

Dynamics 365 for Project Service Automation is designed for professionals who manage projects and the associated customer engagement process end-to-end. This provides licensed users with capabilities required for:

(i)   Setting up a project organization
(ii) Engaging with customers
(iii) Project scheduling and costing
(iv) Managing and approving time and expense
(v)   Closing projects

Each Dynamics 365 for Project Service Automation Service User SL also includes rights to:

(i)   Microsoft PowerApps Plan 2

Additionally, this license includes rights to configure and administer the Dynamics 365 for Project Service Automation application.

This User SL also includes the Microsoft Project Online Premium license. The details for this license can be found on the Microsoft Project Online website.

Note: The SharePoint that comes with Microsoft Project Online plans is a use rights restricted version that only allows SharePoint usage within the scope of Project Online. Please see the Service Description for additional details.

For a detailed view of the use rights associated with Dynamics 365 Project Service Automation, refer to Appendix B.

Dynamics 365 for Finance and Operations

The Dynamics 365 for Finance and Operations includes full read, edit and approval access across the Finance and Operations application plus Microsoft PowerApps. Finance and Operations provides the operations features and capabilities including but not limited to financial, manufacturing and supply chain capabilities that are not included in other standalone Dynamics 365 Unified Operations Plan applications.

The Dynamics 365 for Finance and Operations application cannot be licensed as a standalone application and is licensed exclusively with the Dynamics 365 Unified Operation Plan or Dynamics 365 Plan SLs. For Plan SLs purchase requirements, refer to Dynamics 365 Plans section in this licensing guide document.

Please review Appendix C for a list of the out of the box Dynamics 365 Unified Operations Plan roles and associated user types. For a description of how to create custom roles for Dynamics 365 Unified Operations Plan and how to license them please refer to Appendix D.

Dynamics 365 for Retail

The Dynamics 365 for Retail application is designed to help retailers manage their operations, deliver a connected employee experience, and offer exceptional shopping experiences. By leveraging intelligent forecasting and product recommendations, retailers may:

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

The Retail application is optimized for full users, including headquarter and central operation employees of retail organizations. Depending on the scenario, employees in retail stores will generally be licensed with either the Dynamics 365 Unified Operations - Device SL or Dynamics 365 Unified Operations -

[Activity SL](#). Examples of these scenarios may include store employees, store managers and point of sale devices. For Dynamics 365 Unified Operations – Device and Dynamics 365 Unified Operations - Activity use rights, refer to those license descriptions in this licensing guide document.

There is a 20-seat minimum of Dynamics 365 for Retail (or Dynamics 365 Plan or Unified Operations Plan) SLs required to license the application.

Retail deployments may also utilize the Retail Store Scale Unit, which is a retail server, cloud Point of Sale (POS) website and channel database deployed locally in a store. It maintains connectivity with and extends a Dynamics 365 for Retail deployment, providing improved performance, business continuity and hybrid capabilities in store.

The Retail Store Scale Unit installation and use rights are included with a qualifying minimum purchase of Dynamics 365 Plan, Unified Operations Plan and Retail Application SLs and may be downloaded and installed at no additional cost. All servers, users and devices accessing the Retail Store Scale Unit must be appropriately licensed. The Retail Store Scale Unit is not available as a standalone license. Required hardware, Windows Client or Windows Server and SQL licenses must be acquired and licensed separately.

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

Please review the retail section of [Appendix D](#) for a list of the out of the box retail roles and associated user types. For a description of how to create custom roles for Dynamics 365 for Retail and how to license them please refer to [Appendix D](#).

Dynamics 365 for Talent

The Dynamics 365 for Talent application helps organizations strategically attain, empower and optimize human resources to achieve high-impact, sustainable results for the organization. There are two sets talent experiences:

(i) HR Experience: strategic HR experience to drive operational excellence through intuitive experiences, visibility and collaboration and impactful programs

(ii) Talent Experiences: hire the best talent faster, build high performing agile teams and maximize the potential of your team (includes "Attract" and "Onboard" capabilities).

Both experiences are licensed together in the Dynamics 365 for Talent application. Examples of full users who would be licensed with Talent application SLs would include human resource professionals and recruiters.

Users who sit outside of HR and recruiting, such as employees who need self-serve HR access and hiring managers who will be hiring for their own teams would be licensed through the Team Members SL.

There is a 5-seat minimum of full Dynamics 365 for Talent (or Dynamics 365 Plan or Unified Operations Plan) SLs required to license the Talent application.

For more information on the default capacities included for the Talent subscription, click [here](#).

Please review the Dynamics 365 for Talent section in [Appendix C](#) for a list of the out of the box Dynamics 365 for Talent roles and associated user types. For a description of how to create custom roles for Dynamics 365 for Talent and how to license them please refer to [Appendix D](#).

Talent Modular Applications

Two Talent applications are available:

- Talent: Attract
- Talent: Onboard

These applications allow you to take advantage of Dynamics 365 Application capabilities in a lighter weight, more targeted solution. They represent a subset of the capabilities in Dynamics 365 for Talent but are fully functional standalone experiences that can also integrate with and extend Microsoft and third-party business applications.

The Talent Attract and Onboard applications are sold individually or together as a discounted bundle. Pricing is per user per month with a one-year minimum commitment and there is no minimum purchase requirement.

The capabilities in these applications are targeted at hiring managers. Candidates in the Attract module or new hires in the Onboard module don't need a user license to use Dynamics 365 for Talent application. These capabilities are also included for users who are licensed for Dynamics 365 for Talent. Note, the Attract and Onboard modular applications are not compatible with the Talent Comprehensive Hiring add-on.

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

Dynamics 365 Plan Subscriptions

Plan subscriptions are new with Dynamics 365. With one single user subscription, a Plan subscription is the most cost-effective option to provide ultimate flexibility for a user to have access to any Dynamics 365 functionality to get their job done. Plan subscriptions provide users rights to use functionality across any of the respective Plan applications as well as use of Microsoft PowerApps, the mobile application platform service.

Dynamics 365 Customer Engagement Plan

Dynamics 365 Customer Engagement Plan gives you the flexibility to work with any application functionality. Dynamics 365 Customer Engagement Plan includes flexibility to use:

- Dynamics 365 for Sales
- Dynamics 365 for Marketing
- Dynamics 365 for Field Service
- Dynamics 365 for Customer Service
- Dynamics 365 for Project Service Automation
- Microsoft PowerApps Plan 2

Licensing becomes simpler because all Customer Engagement Plan business application rights are included.

Figure 13: Customer Engagement Plan
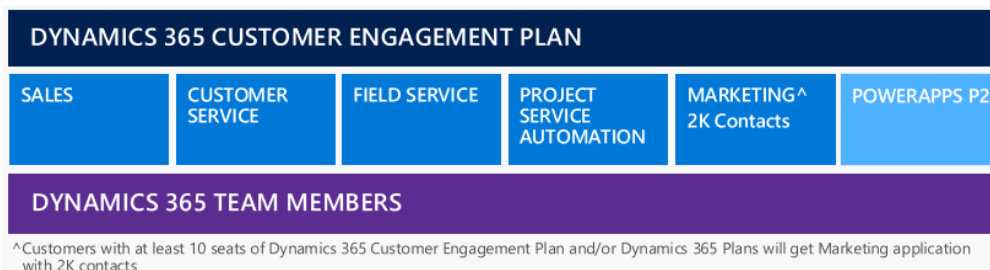
Dynamics 365 Unified Operations Plan

Dynamics 365 Unified Operations Plan includes full read, edit and approval access across the entire ERP solution (formerly known as Dynamics AX) plus Microsoft PowerApps capabilities. Dynamics 365 for Finance and Operations Plan includes flexibility to use Dynamics 365 for Talent, Dynamics 365 for Retail, and PowerApps Plan 2.

Figure 14: Unified Operations Plan
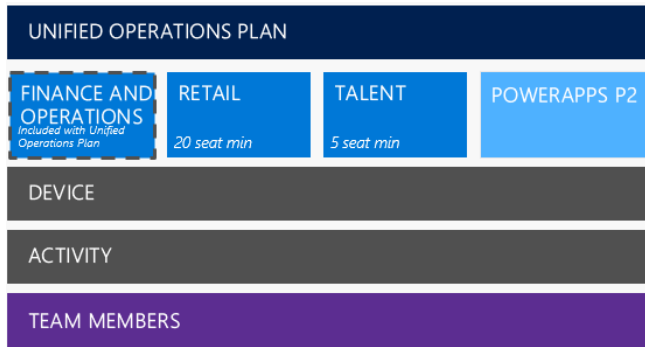
Please review Appendix C for a list of the out of the box Dynamics 365 Unified Operations Plan roles and associated user types. For a description of how to create custom roles for Dynamics 365 Unified Operations Plan and how to license them please refer to Appendix D.

Dynamics 365 Plan

Dynamics 365 Plan includes access to Customer Engagement Plan functionality plus Dynamics 365 Unified Operations Plan.

Figure 15: Dynamics 365
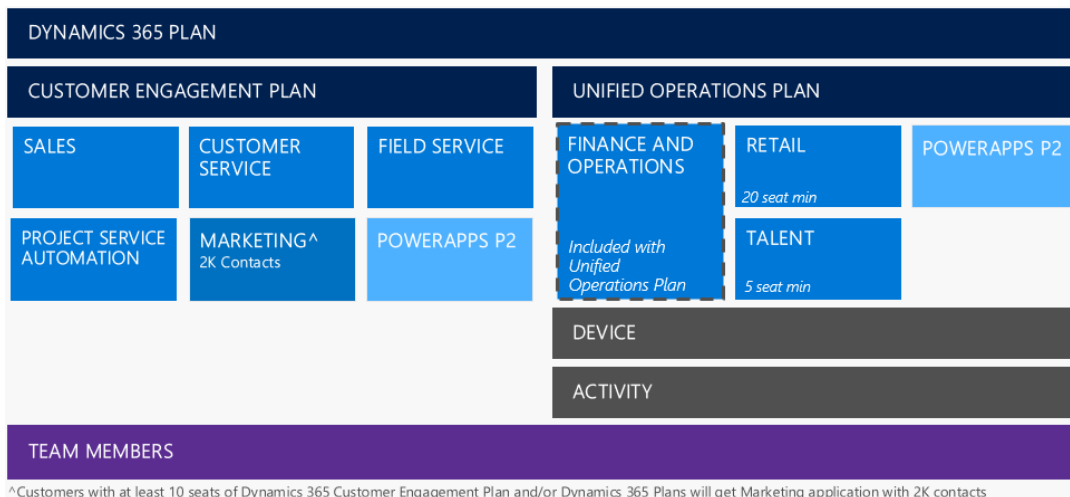
Microsoft Relationship Sales solution

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

Microsoft Relationships Sales solution SKUs:

- Dynamics 365 for Sales Enterprise and LinkedIn Sales Navigator Enterprise
- Dynamics 365 for Sales Enterprise and LinkedIn Sales Navigator Team

Licensing Requirements:

- 10-seat minimum
- MRSs SKUs are non-discountable
- MRSs seats count toward Customer Engagement Plan tier discount
- Customer Engagement Plan seats do not count towards MRSs waterfall discount
- True downs are not allowed

To understand how to transact tiered pricing refer to the Tier Pricing section.

Figure 16: Microsoft Relationship Sale solution waterfall pricing
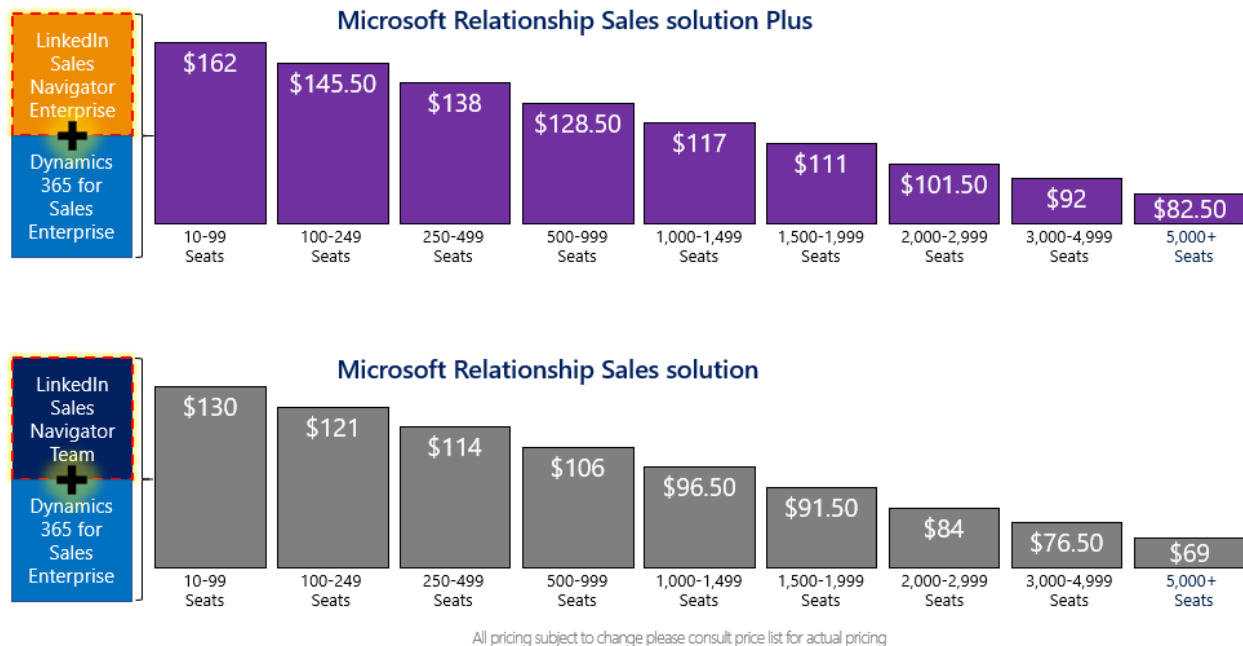
For more information and list of features included with LinkedIn Sales Navigator Enterprise and Sales Navigator Team, see https://business.linkedin.com/sales-solutions/sales-navigator/comparison-table.

Tiered Pricing

For larger Dynamics 365 deployments, customers may qualify for a lower price per user. Tiered pricing applies to Customer Engagement Plan subscriptions, where Customer Engagement Plan and Dynamics 365 Plan seats both count toward Customer Engagement Plan tier qualification.

Additionally, customers may purchase Microsoft Relationship Sales solution with tiered pricing based on number of users for the subscription offer.

Other considerations:

(i) Tiered pricing applies per customer tenant, and do not accumulate across tenants
(ii) Tiered pricing does not apply to Team Members, Operation Activity, any Dynamics 365 Application (e.g. Customer Service) subscriptions or Unified Operations Plan
(iii) Tiered pricing is not available in the Microsoft Online Subscription Program (MOSP), nor for Academic or Charity pricing in any program

Dynamics 365 Device Subscriptions

Customer Engagement Plan Business Applications

With the Dynamics 365 customer Engagement Business Applications Device SLs multiple users can access Dynamics 365 applications through a shared device login. The use rights are equal to the that of the Dynamics 365 User SL, except that access is limited to only the licensed device. Please note there is no Dynamics 365 Customer Engagement Plan Device SL. For a detailed view of the use rights associated with Dynamics 365 for Sales device please refer to Appendix B.

Dynamics 365 for Customer Engagement Business Applications Device SLs:

- (i)   Dynamics 365 for Sales Enterprise
- (ii) Dynamics 365 for Customer Service
- (iii) Dynamics 365 for Field Service

Dynamics 365 Operations - Device SL

With the Dynamics 365 Operations - Device license, multiple users can use a device that is licensed with a Dynamics 365 Unified Operations - Device SL to operate a point of sale device, shop floor device, warehouse device or store manager device. A single device can provide any of the following functionality in any combination.

Device SL	Functionality
Point of Sale	One device located in the Commerce location, used by any individual, for completing customer facing sales of goods or services transactions
Store Manager	One device located in the Commerce location, used by any individual, dedicated to performing the following tasks solely for that Commerce location. Commerce location or Store means a physical location (static or itinerant) operated by you when closing goods or services transactions with customers: • Managing and replenishing inventory • Balancing cash registers and processing daily receipts • Configuring and maintaining menu options displayed by the ISV Devices • Purchasing supplies and services required to run the Commerce Location operations • Managing Commerce Location staff • Processing reports required to analyze and manage Commerce Location results • Managing master data related to Commerce Location operations
Shop Floor	One device used for manufacturing shop-floor functions. Shop Floor Functions: • Clock-in and clock-out • Starting and finishing production jobs (including project activities carried out on the shop floor) • Reporting progress • Materials consumption and completion • Viewing documents and instructions related to production jobs • Viewing worker holiday balances.
Warehouse Device	One device used for Warehousing functions: • Receiving • Putting-away

	• Doing internal stock transfers
	• Picking, packing
	• Capturing product attributes
	• Shipping goods plus performing inventory count checks in the context of a warehouse management system
	• Posting output and materials consumption against production orders when captured as transfers of raw materials and finished goods between a warehouse and a production line (all other types of transactions are excluded).

Note: Dynamics 365 Operations - Device SL use rights are also available to Dynamics 365 Operations - Activity users. When multiple users who only require these use rights work exclusively on shared devices, it will generally be more cost effective to license those devices with the device SL. When a single user utilizes one or more dedicated personal devices, it will be more cost effective to license that user with an Activity USL. Device SLs do not include all the capabilities that Activity User and Full user use rights.

Additional Services and Software

Microsoft offers additional services and software that work in tandem with Dynamics 365.

Dynamics 365 for	Social Engagement	Unified Service Desk	Interactive Services Hub	VoC	Mobile Offline	Gamification
Sales Enterprise	10K posts /month*	✔	✔	✔		✔ +
Sales Professional			✔			✔ ^
Marketing Standalone	10K posts /month*			✔		
Customer Service Enterprise	10K posts /month*	✔	✔	✔		✔ +
Customer Service Professional			✔			✔ ^
Field Service	10K posts /month*		✔	✔	✔	✔ +
Project Service Automation	10K posts /month*		✔	✔		✔ +
Team Members						✔ ^

*Unused posts expire at the end of the month and do not roll over to the next month
+Microsoft Dynamics 365 - Gamification Commissioner, Game Manager and Player rights
^Fan and Spectator rights

Microsoft Social Engagement

Microsoft Social Engagement provides 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. Customers who need more than 10K posts per month per tenant may purchase additional posts as a subscription add-on. For a detailed view of the use rights associated with Dynamics 365 for Sales device please refer to Appendix E.

Microsoft Social Engagement functionality included with select Dynamics 365 applications:

(i)   Social Listening
(ii)   Social sentiment detection
(iii)   Social analytics
(iv)   Activity map
(v)   Trend and post alerts
(vi)   Private messages
(vii)   Export widgets to Excel
(viii) Azure Event Hub integration*

(ix)   Social insights
(x)   Social Engagement
(xi)   Social center: unlimited streams
(xii)   Social center: sharing streams
(xiii) Social center: assign posts to user
(xiv)   Link to Dynamics 365
(xv)   Automation rules
(xvi)   Intention analysis

*Note: Azure Event Hub functionality requires Azure subscription

Unified Service Desk for Microsoft Dynamics 365

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

USD is not available as a standalone license. USD software is installed and run locally on the user's device. The use rights expire upon expiration of the qualifying User SL subscription term or Software Assurance subscription. Only licensed users may use the software.

Interactive Service Hub

Interactive Service Hub provides a modern and intuitive end user experience for Customer Service and knowledge management roles through an online user experience (UX) design. It unifies customer interactions and pulls together all related information, enabling customers to be productive and view what's most relevant 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.

Voice of the Customer for Microsoft Dynamics 365

Voice of the Customer for Microsoft Dynamics 365 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 Customer capabilities are limited to a maximum of 200 concurrent surveys. Additional limitations can be found here.

Dynamics 365 Mobile Offline

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

Dynamics 365 - Gamification

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

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

Dynamics 365 Default Subscription Capacities

Dynamics 365 Customer Engagement Plan Business Applications default subscription capacities will leverage the same tenant and infrastructure will accrue across this one tenant. Unified Operations Plan Applications leverages an entirely different tenant and will have its own set of default capabilities.

Customer Engagement Plan Business Applications

Customer Engagement Plan Business Applications share the same tenant and share infrastructure capacity. If a customer purchases Dynamics 365 Plan they will obtain default access to both the Customer Engagement Plan Business Applications and the Dynamics 365 Unified Operations Plan Application.

Dynamics 365 for	Default Instance per Tenant shared across all Customer Engagement Applications					
	Production Instance	Portal Instance	Non-production Instance	Dynamics 365 Portal^	Dynamics 365 Portal Page Views	Database Storage
Sales Enterprise*	1	1	1	1	1 million/month	10GB
Sales Professional*	1	-	-	-	-	10GB
Marketing Standalone+	1	1	1	1	1 million/month	10GB
Customer Service Enterprise*	1	1	1	1	1 million/month	10GB
Customer Service Professional*	1	-	-	-	-	10GB
Field Service*	1	1	1	1	1 million/month	10GB
Project Service Automation*	1	1	1	1	1 million/month	10GB

*Default instance and infrastructure capacity are shared per tenant, not cumulative
+Marketing Attach licenses share default instance and infrastructure capacity per tenant, not cumulative
^Requires 5-seat minimum of Dynamics 365 Customer Engagement Plan, Customer Engagement Plan Business Applications or a combination

Default Dynamics 365 Portal and Page Views

The Dynamics 365 Portal provides you the capability to extend your Dynamics 365 applications into cloud hosted web portals, each of which is easily configurable for your employees, partners and customers.

A Customer Engagement Plan Business Application subscription is required to administer and configure the portal. Each portal may only be associated with one instance.

Effective October 1, 2018, access to the first included portal for the tenant requires the purchase of a minimum of 10 Full User licenses of Dynamics 365 Customer Engagement Plan, Dynamics 365 Customer Engagement Business Applications (Sales, Customer Service, Field Service or Project Service Automation) or a combination. Existing customers are not impacted with this change until renewal. New customers who need to purchase less than 5 users, may purchase the Portal "Add-on" (see "Dynamics 365 Add-on section" in Appendix E.

Note: Team Member Licenses will not contribute to the minimum user requirement.

Internal users indirectly accessing Dynamics 365 application data via a portal are required to have the appropriate Dynamics 365 license.

Default Database Storage

The tenant for Customer Engagement Plan Business Application subscriptions includes by default 10GB database storage as long at least one instance of the tenant is on v8.2.

Additional storage capacity is granted at no charge as an organization increases the number of full users and is accrued at the rate of 5GB for every 20 full users. For example, for every increment of 20

Dynamics 365 for Sales SLs, the included storage capacity increases by 5GB. A customer with 20 Dynamics 365 for Sales SLs receives a data storage of 15GB (10GB default database storage + 5GB additional database storage). The cap on the amount of free storage that may be earned per tenant is subject to the technical limit of 30TB.

The Customer Engagement Plan applications storage and the Dynamics 365 Unified Operations Plan storage are not shared. See descriptions of the additional capacity Dynamics 365 Add-on in Appendix E.

Figure 17: Additional Database Storage Capacity
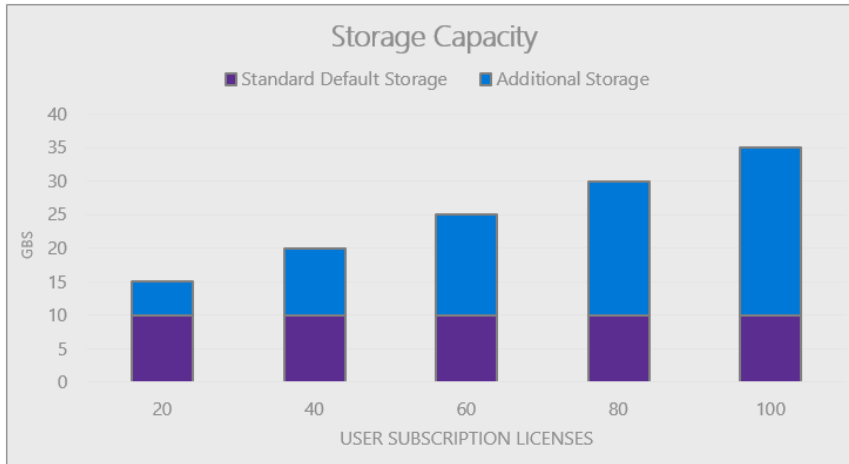
Dynamics 365 Unified Operations Plan Applications

Unified Operations Plan Applications share the same tenant and share infrastructure capacity. If a customer purchases Dynamics 365 Plan they will obtain default access to both the Customer Engagement Plan Business Applications and the Unified Operations Plan Applications.

Default Instance per Tenant shared across all Unified Operations Applications				
Dynamics 365 for	Production Instance	Non-production Instance Capacity	Database Storage	File Storage Capacity
Finance and Operations*^	1	1 Sandbox Tier 1 1 Sandbox Tier 2	10GB	100GB of file/Azure Binary Large Objects (BLOBs)
Retail*	1	1 Sandbox Tier 1 1 Sandbox Tier 2	10GB	100GB of file/Azure Binary Large Objects (BLOBs)

*Default instance and infrastructure capacity are shared per tenant, not cumulative
^Dynamics 365 for Finance and Operations is only licensed with Dynamics 365 Unified Operations Plan subscriptions

Default infrastructure capacity for Dynamics 365 for Talent

Customers who purchase the full Talent User SL (5-seat minimum) are entitled to 2 identical environments/instances for the tenant (not per seat). At any given time, only one of the identical instances may be in production but alternatively both instances may be in non-production (UAT, pre-production). Dynamics 365 for Finance and Operations and Dynamics 365 for Retail sandbox and database storage add-ons are not compatible with Talent. Additional instances cannot be added at this time, but file and database storage can be extended by purchasing additional storage through the PowerApps subscription that is included with the Dynamics 365 for Talent SKU. Dynamics 365 for Finance and Operations and Dynamics 365 for Retail both only support a single production instance per tenant. If multiple instances are needed each instance will need to reside on its own subscription and tenant. Users must then be licensed separately for each of those instances.

Default Production Instance

Each Dynamics 365 Unified Operations Plan subscription offers one production instance per tenant. The production instance comes with disaster recovery and high availability. As a reminder, there is a minimum of 20 Dynamics 365 Unified Operations Plan User SLs and/or equivalent Device SL per tenant. 2.5 Device SLs are equal to 1 Dynamics 365 Unified Operations Plan User SL. For example, 25 device SLs plus 10 Unified Operations would meet the 20-user minimum. Also, the production instance is monitored 24 X 7 for service health. To ensure the environment is used for live operations, we will provision the production instance only after the implementation nears the 'operate' phase after completion of the required activities in the Lifecycle Services (LCS) methodology. See descriptions of the additional capacity Dynamics 365 Add-on in Appendix E.

Default Non-Production Instance Capacity

The Dynamics 365 Unified Operations Plan and Dynamics 365 for Retail Application will come with one Sandbox Tier 1 and one Sandbox Tier 2 environment per customer. Additional non-production instances can be purchased. Subscription duration requirements are determined by the licensing program under which the sandbox is licensed. Short term subscriptions are available exclusively through the MPSA licensing program. More information on MPSA is available here.

(i) **Sandbox Tier 1**: Developer Instance is provided for the life of the tenant. Additional Developer Instances can be purchased separately as an optional add-on. This is a non-production single box instance that customers can use to customize Dynamics 365 Unified Operations Plan and unit test their changes. The Non-Production Developer Instance add-on license does not include any incremental default storage capacity.

(ii) **Sandbox Tier 2**: Standard Acceptance Testing Instance is provided for the life of the tenant. Additional Standard Acceptance Testing Instances can be purchased separately as an optional add-on. This is a non-production multi-box instance that customers can use for User Acceptance Testing, integration testing, and training. The Non-Production Standard Acceptance Testing Instance includes 10GB of default storage at no additional charge.

See descriptions of the additional capacity Dynamics 365 Add-on in Appendix E.

Default Database Storage

The tenant for the Dynamics 365 Unified Operations Plan and Dynamics 365 for Retail Application subscriptions includes by default 10GB database storage. Additional storage capacity is granted at no charge as an organization increases the number of full users and is accrued at the rate of 5GB for every 20 Dynamics 365 Unified Operations Plan, Dynamics 365 Plan or Dynamics 365 for Retail users. The Customer Engagement Plan application storage and the Dynamics 365 Unified Operations Plan storage are not shared between them. See descriptions of the additional capacity Dynamics 365 Add-on in Appendix E.
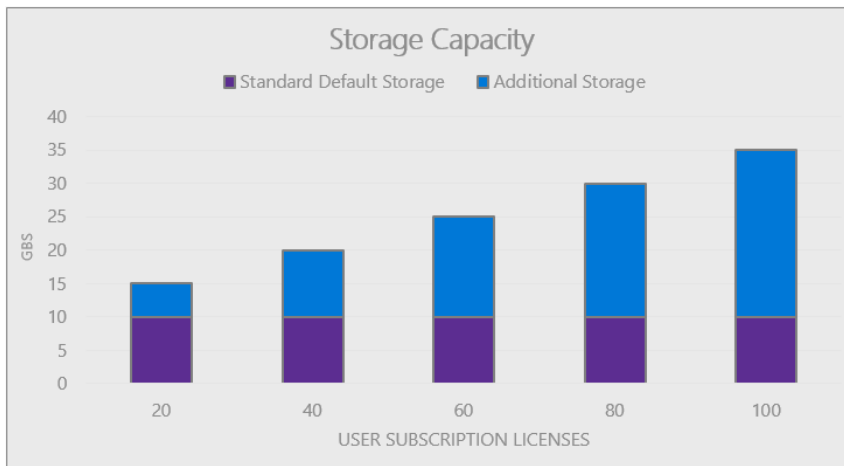
Default File Storage Capacity

Each Dynamics 365 Unified Operations Plan or Dynamics 365 for Retail application customer will receive 100GB of file/Azure Binary Large Objects (BLOBs) cloud storage for files and binary data. Additional file storage if required can be purchased separately. See descriptions of the additional capacity Dynamics 365 Add-on in Appendix E.

Microsoft Power Platform

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

- Extend and customize applications with PowerApps

- Automate business processes and workflow with Microsoft Flow

- Deliver business intelligence with Power BI

Select Dynamics 365 Applications* can be customized using PowerApps and Microsoft Flow capabilities. Dynamics 365 Enterprise Applications+ and Enterprise Plans^ also include PowerApps Plan 2~, offering more advanced customizations as well as the ability to create and run standalone custom applications.

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

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

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

	Select Dynamics 365 Applications*	Dynamics 365 Enterprise Applications+ Dynamics 365 Enterprise Plans^
Service included	PowerApps, Flow and CDS	PowerApps, Flow and CDS
Included PowerApps Plan	PowerApps for Dynamics 365 Applications	PowerApps Plan 2~
Included Flow Plan	Flow for Dynamics 365 Applications	Flow Plan 2~
Included Flow Capacity (Pooled across Tenant)	2,000 Flow runs per user per month	15,000 Flow runs per user per month
Service features	• Extend applications and workflows within the context of Dynamics 365 Application use rights • Use business process flows • Model business data in CDS	• Extend applications and workflows within the context of the Dynamics 365 Application/Plan use rights • Create and run standalone applications • Create and run canvas applications • Use Business process flows • Model business data in the Microsoft Common Data Service (CDS) • Set policy and view usage
Limitations (Use Rights)	• Cannot run standalone canvas or model driven applications • Does not include full PowerApps Plan 1 or PowerApps Plan 2 • If the user runs a customized version of the licensed Dynamics 365 application, the customized version can contain a maximum of 15 custom entities. Further, customizations should be within the context of the application intent	• None

*Includes Dynamics 365 for Sales Professional, Dynamics 365 for Customer Service Professional, Dynamics 365 for Talent, Dynamics 365 for Talent: Attract, Dynamics 365 for Talent: Onboard and Dynamics 365 for Team Members

+Dynamics 365 for Sales Enterprise, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, Dynamics 365 for Project Service Automation and Dynamics 365 for Retail

^Dynamics 365 Customer Engagement Plan, Dynamics 365 Unified Operations Plan, Dynamics 365 Plan

~ Since PowerApps Plan 2 is packaged within a Dynamics 365 Enterprise Application+/Plan^, access to certain Restricted Dynamics 365 entities included within the application/plan use rights is allowed

Microsoft Power BI in Dynamics 365

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

The Dynamics 365 Unified Operations applications themselves may embed Power BI content within the service User Interfaces. This is simply a product feature, and no Power BI licensing is required to access this content. Please consult the Dynamics 365 roadmap for more information on this feature.

Dynamics 365 Customer Engagement Plan and Customer Engagement Plan Business Application subscriptions include an option to embed Power BI content as a product feature but require users to subscribe to Power BI (free user or Power BI Pro depending on content) separately to configure access to this content. More details are available in this article.

Dynamics 365 Trial and Implementation

Free Trial

Customer Engagement Plan Business Application Trial

You can sign-up for a free 30-day trial of Dynamics 365 Customer Engagement Plan Business Applications 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 https://www.microsoft.com/en-us/dynamics365/home.

Dynamics 365 for Finance and Operations Trial

You can sign-up for a free 30-day trial of Dynamics 365 for Finance and Operations through a simple email signup. The trial version of Dynamics 365 for Finance and Operations includes a Getting started

guide that provides a step-by-step task guide, which allows you to view specific scenarios in action. The product is available to explore and exercise scenarios. Demo data is included to ease the use of the product and to make the experience more meaningful. A buy experience can be initiated at that time to complete the purchase. Get details at www.microsoft.com/en-us/dynamics365/operations.

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

Development and Testing with Visual Studio subscriptions

Dynamics 365 Unified Operations Plan development requires a Visual Studio Professional for standard development, customization and extension activities. However, if you want to run performance and load tests, you will need Visual Studio Enterprise. Please note that Visual Studio licenses are not included as part of the Dynamics 365 Unified Operations Plan subscription licenses and must be acquired separately.

Lifecycle Services

Lifecycle Services (LCS) provides a cloud-based collaborative workspace shared between customers and partners that helps organizations improve the predictability and quality of their Unified Operations Plan Applications implementation by simplifying and standardizing the implementation process to realize business value faster. Once you sign up for Dynamics 365 Unified Operations Plan, you are provided with a project workspace including methodologies and services that help you manage the service lifecycle. LCS provides a variety of services to assist and help customers navigate through the various phases of the project including:

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

Dynamics 365 Service Support

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

(iv) Technical support is included in the online subscriptions when a customer chooses to deploy online (Volume Licensing and Web Direct. CSP support is though partner).
(v)   If a customer chooses to deploy with dual-use rights, Microsoft Technical support will assist with support issues resulting with the deployment of dual use rights, however, support is not included for the on-premises deployment.
(vi) Support offerings for on-premises are sold separately when a customer chooses to deploy on-premises. The customer has the following options:
    a.   Seek support from their partner
    b.   Purchase professional support incidents from support.microsoft.com to get support directly from Microsoft

Response times for technical support incidents vary by case severity. Definitions are included in Appendix F. More information about Dynamics 365 Support options can be viewed here.

Premium Support offerings will be available for purchase only for customers enrolled in MOSP, EA, MPSA, EAS, and EES licensing programs

Customers may not mix and match support offerings, Subscription (included with Dynamics 365 subscription and trials), Enhanced or Professional Direct Support rights require **each user** licensed with Dynamics 365 to also be licensed for that support option.

Professional Direct purchase requirement is $180USD per month (equivalent to 20-seats) for Dynamics 365 Customer Engagement and Unified Operations Plans and Applications, and $300USD per month (equivalent to 20-seats) for Dynamics 365 Plan. When purchasing through Volume Licensing, ensure the minimum threshold is entered when placing the order.

Subscription Support Plan

The benefits included in the [Subscription Support Plan](#) are applicable for customers who license Dynamics 365. The benefits included in the Subscription are:

(i)   Unlimited Break/Fix Support

(ii)   CustomerSource

(iii) Dynamics Community

(iv)   "Getting Started Catalog" and Self-Help Resources

Enhanced Support Plan

[Enhanced Support](#) includes all the Support Subscription Plan benefits, plus,
Unlimited Access to Online Training:

(i)   E-learning

(ii)   Training Materials

(iii) Learning Plans

Response time for Severity A cases less than two hours for Severity A, four hours for Severity B, and 8 hours for Severity C. Case Severity definitions are included in [Appendix F.](#)

Professional Direct Services

[Professional Direct Services](#) includes all the Support Subscription Plan benefits, plus:

Response time for Severity A cases less than one hour, two hours for Severity B, and 4 hours for Severity C. Case Severity definitions are included in [Appendix F.](#)

24x7 Support: Available for Severity A cases only. Direct access to tier 2 escalation engineers.

Service Delivery Management
- Escalation Specialists
- Red Carpet Welcome
- Light Advisory Services
- Release Upgrade Readiness
- Monthly Review
- Service Interruption Handling
- Case Wellness
- Product Onboarding Assistance
- Ask the Expert Webinars

Enterprise Solutions - Premier Support Services

Enterprise Solutions - Premier Support is a comprehensive support solution for your large business that helps reduce costs, enhance productivity, and use technology to realize new business opportunities for any stage of the IT lifecycle.

(i)   Proactive services help maintain and improve health of your customers' IT infrastructure and operations.

(ii)   Service Delivery Management facilitates planning and implementation

(iii) Prioritized 24x7 problem resolution services provide rapid response to minimize downtime

(iv) Exclusive access to advanced technical training to improve IT staff productivity

(v) Customized support service add-ons available to meet the specific support needs of your business

For more information, visit Premier Support Services.

Additional Resources

Resource	Internal Link	External Link	Partner Link
Dynamics 365	https://microsoft.sharepoint.com/sites/Infopedia_G01/Pages/Dynamicshub.aspx	https://dynamics.microsoft.com/en-us/	https://mbs.microsoft.com/partnersource/northamerica/products/365Enterprise
Dynamics 365 Licensing & Pricing	https://microsoft.sharepoint.com/sites/Infopedia_G01/Pages/Dynamicshub.aspx#Dynamics%20365:pricing	https://dynamics.microsoft.com/en-us/pricing/	https://mbs.microsoft.com/partnersource/northamerica/pricing-ordering/licensing-policies/Dyn365PricingandLicensing
Dynamics AX Licensing Guide	http://aka.ms/s201h6		
Dynamics CRM Online Licensing Guide	https://mbs.microsoft.com/customersource/global/CRM/learning/documentation/user-guides/CRM-Online-Licensing-Guide		
Dynamics AX 2012 Licensing Guide	http://aka.ms/dujlkm		
Dynamics CRM 2016 Licensing Guide	http://aka.ms/kn26ux		
Dynamics 365 On-premises Licensing Guide	need		
Dynamics 365 for Operations on-premises Licensing guide	https://mbs.microsoft.com/Files/public/365/DynamicsOperationsOnPremEnterprise.pdf		
Dynamics Blog	https://community.dynamics.com/b/msftdynamicsblog		
Microsoft Volume Licensing	www.microsoft.com/licensing		
Software Assurance	http://www.microsoft.com/licensing/software-assurance/default.aspx		
Microsoft License Advisor	http://www.microsoft.com/licensing/mla/default.aspx		
Dynamics 365 Support	https://dynamics.microsoft.com/en-us/support/plans/		
CustomerSource	https://mbs.microsoft.com/customersource/		
PartnerSource	https://mbs.microsoft.com/partnersource/		
Partner Center	https://partnercenter.microsoft.com/en-us/pcv/dashboard/overview		
Microsoft Download Center	http://www.microsoft.com/downloads		
Cloud Solution Provider Program (CSP)	https://mspartner.microsoft.com/en/us/Pages/solutions/cloud-reseller-overview.aspx		
Team Member FAQ	https://microsoft.sharepoint.com/sites/infopedia/pages/layouts/kcdoc.aspx?k=g01kc-2-1590		https://mbs.microsoft.com/partnersource/global/pricing-ordering/licensing-policies/365TeamMembersFAQ

Appendix A: Custom Entities

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

Custom Entity:

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

Dynamics 365 applications and plans offer "out-of-the-box" entities to cover typical scenarios. However, there may be times when customers and partners need to create entities to store data that's specific to your organization – namely custom entities.

Custom entities may be based on entities included in Dynamics 365 or created by a customer or partner to represent business entities/items not present or to replicate those already in included in Dynamics 365.

Custom Entity Use Rights:

1) Dynamics 365 Enterprise Applications and/or Plan full users:
   a. Full access
   b. No limit on number of custom entities
   c. Full Create, Read, Update, and Delete (CRUD) on data records associated with custom entities

2) PowerApps application:
   a. Standard entities that are not restricted - (https://docs.microsoft.com/en-us/powerapps/maker/common-data-service/data-platform-restricted-entities)
      i. If the app requires a restricted entity, then the user needs to be licensed as a full user
   b. No limit on number of custom entities
   c. Full CRUD on data records associated with custom entities

3) Dynamics 365 Team Members/Sales Professional/Customer Service Professional applications:
   a. Additional 15 custom entities in addition to the included "out-of-the-box" entities
   b. Custom entities should be within the context of the application module
   c. Full CRUD on data records associated with custom entities

Figure 19: Team Members access to custom entities
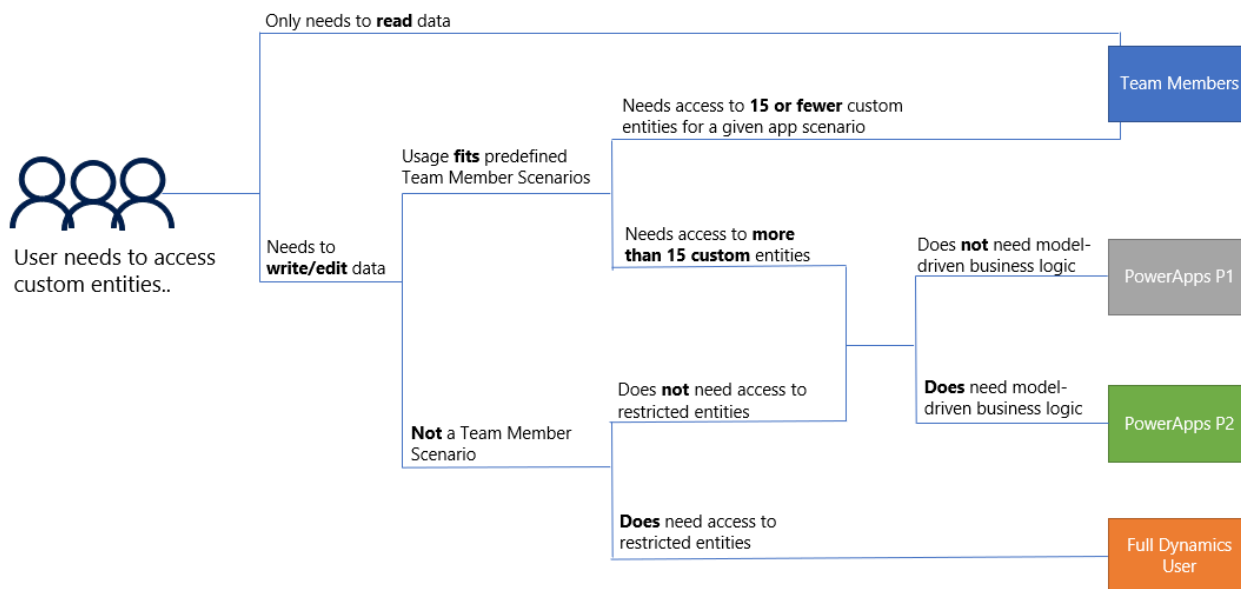
Appendix B: Customer Engagement Plan Applications

The following tables lists the use rights corresponding to the User Subscription Licenses (User SLs) and applicable Device Subscription Licenses available in Dynamics 365 Customer Engagement Plan Business Applications.

To configure and administer Dynamics 365 services a full user license is required (Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, Dynamics 365 for Project Service Automation). A Plan subscription is the most cost-effective option to provide ultimate flexibility for a user to administer and configure more than one Dynamics 365 application.

"For App" means that the user right in question is applicable only for the licensed application and not other applications. Marketing is an organization-based license, "For App" refers to access or execution allowed in the context of Marketing Application alone. If user is also licensed with Team Member or other Dynamics 365 Application licenses, they will continue to have the rights associated with the license type.

Use Rights	Team Members	Sales Enterprise	Customer Service Enterprise	Field Service	Project Service Automation	Marketing
Access						
Dynamics 365 Mobile Client Application	●	●	●	●	●	For App
Microsoft Dynamics 365 for iPad & Windows	●	●	●	●	●	For App
Microsoft Dynamics 365 for Outlook	●	●	●	●	●	For App
Microsoft Dynamics 365 Web application	●	●	●	●	●	For App
Read						
All Dynamics 365 application data	●	●	●	●	●	For App
Custom Entity data	●	●	●	●	●	For App
Approve						
Dynamics 365 Unified Operations Plan functionality: Time, Expense and Invoices	●	●	●	●	●	
Portal or API access only: Create, Read, Update and Delete						
Employee Self Service: Cases	●	●	●	●	●	
Non-Employees Only: Work Orders		●	●	●	●	
Non-Employees Only: Opportunities		●	●	●	●	
Entities: Create, Read, Update and Delete						
Custom entities	15 max^	●^	●^	●^	●^	For App
Dynamics 365 Unified Operations Plan functionality: Time and Expense	●	●	●	●	●	
Dynamics 365 Unified Operations Plan functionality: Requisitions	●	●	●	●	●	
Dynamics 365 Unified Operations Plan functionality: Quality Control	●	●	●	●	●	
Dynamics 365 Unified Operations Plan functionality: Service Orders		●	●	●	●	
Contacts	●	●	●	●	●	For App
Accounts		●	●	●	●	For App
Activities and Notes	●	●	●	●	●	For App
Personal views; Saved Views	●	●	●	●+	●	For App
Shared azure	●	●	●	●	●	For App
Announcements	●	●	●	●	●	
Embedded intelligence: Relationship assistance, auto capture, email engagement		●				
Lead Management		●				For App
Opportunities		●				
Competitors		●				
Product families		●				
Price lists		●				
Quotes		●				
Orders		●				
Invoices		●				
Goals		●				
Territories		●				
Sales literature		●				●
Marketing Lists		●				●
Quick campaigns		●				●
Marketing campaigns		●				●

Use Rights	Team Members	Sales Enterprise	Customer Service Enterprise	Field Service	Project Service Automation	Marketing
Cases			●			
Entities: Create, Read, Update and Delete Records						
Contracts			●			
Entitlements			●			
Facilities/Equipment			●			
Work Orders				●		
Service Agreements				●		
Purchase Orders				●		
Invoices				●		
Customer Assets				●		
Inventory Management				●		
Projects					●	
Project Price Lists					●	
Project Contracts					●	
Project Invoices					●	
Project Expenses and Project Estimates					●	
Email Marketing						Max 10X contacts
Lead Scoring						For App
Active Segments						Max 100
Multi-Channel Campaign Management (Customer Journeys, Marketing Pages, etc.)						●
Event Management						●
Entities: Actions						
Dynamics 365 Unified Operations Plan functionality: Manage Budgets	●	●	●	●	●	
Dynamics 365 Unified Operations Plan functionality: Manage personal info	●	●	●	●	●	
Dynamics 365 Unified Operations Plan functionality: Manage direct reports and candidates	●	●	●	●	●	
Chat with support team (as chat client for self-service, requires 3rd party solution)	●	●	●	●	●	
Use Yammer collaboration requires a Yammer Enterprise license (acquired separately)	●	●	●	●	●	
Add or remove a Connection (stakeholder, sales team) for an Account or Contact	●	●	●	●	●	
Associate a Marketing List with an Account or Contact	●	●	●	●	●	For App
Post & follow activity feeds	●	●	●	●	●	For App
Use a queue item	●+	●+	●+	●+	●+	For App
Start dialog	●+	●+	●+	●+	●+	For App
Perform mail merge	●	●	●	●	●	For App
Create, Publish, Configure Knowledgebase		●	●	●	●	
Submit Time & Expense for Project Service Automation	●	●	●	●	●	
Update Project Tasks for Project Service Automation	●	●	●	●	●	
Update Own Resource Competencies for Project Service Automation	●	●	●	●	●	
Apply for Open Project Position for Project Service	●	●	●	●	●	
Use Project Finder Mobile Application	●	●	●	●	●	
Qualify and convert a Lead to an Opportunity		●				
Convert an activity to an Opportunity		●				
Define and configure business units		●				●
Define and configure teams		●				●
Cases for Sales		●				
Case management: reassign, add to queue, route & resolve cases			●			
Convert an Activity to a Case			●			
Create, update and delete Contract templates			●			
Configure SLA policies			●			
Define and configure services, resources, and work hours						
Schedule & dispatch capabilities: use scheduling assistant, drag & drop assignment, update resource bookings				●		
Field Service Mobile Application				●		
Use Field Service Mobile Application offline sync				●		

Use Rights	Team Members	Sales Enterprise	Customer Service Enterprise	Field Service	Project Service Automation	Marketing
Configure and View Schedule Board				●		
Create and manage Repairs and Returns (RMA/RTV)				●		
Manage Resource Schedule Optimization				●		
Manage Resources (facilities, equipment, people), territories and work hours				●		
Use Resource Availability View and Resource Schedule Management					●	
Approve Project Transactions					●	
Manage Services, Resources, Work Hours, and Competencies					●	
Connector for LinkedIn Lead Gen Forms						●
General System Use: Actions						
Use relationships & connections between records	●+	●+	●+	●+	●+	For App
Search & Advanced find search	●	●	●	●+	●	For App
Export data to Microsoft Excel	●	●	●	●	●	For App
Create, update and delete Email and Word Templates		●	●	●	●	●
Import data in bulk	For App	For App	For App	For App	For App	For App
Configure auditing	For App	For App	For App	For App	For App	For App
Configure duplicate-detection rules	For App	For App	For App	For App	For App	For App
Define connections and relationships between entities	For App	For App	For App	For App	For App	For App
Define and configure queues	For App	For App	For App	For App	For App	For App
Define and configure dialogs	For App	For App	For App	For App	For App	For App
Define and configure workflows	For App	For App	For App	For App	For App	For App
System reports, charts, and dashboards	For App	For App	For App	For App	For App	For App
Customize forms and views	For App	For App	For App	For App	For App	For App
Create Dynamics 365 forms, entities, and fields	For App	For App	For App	For App	For App	For App
Administer Dynamics 365	For App	For App	For App	For App	For App	For App
Additional services and software						
Interactive Service Hub		●	●	●	●	
Dynamics 365 - Gamification Fan & Spectator	●	●	●	●		
Dynamics 365 - Gamification Player & Admin		●	●	●		
Microsoft Social Engagement		●	●	●		●standalone
Voice of Customer		●	●	●		●standalone
Unified Service Desk		●	●			
Microsoft Project Online Essentials*	●	●	●	●	●	
Microsoft Project Online Premium*					●	

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

^Custom entities (either based on entities included in Dynamics 365 or created by a customer or partner) may require a higher CAL or User
  SL, depending on the required access. Customizations can only be performed against entities included in the use rights

*Microsoft Project Online use rights governed by Microsoft Project Online licensing. https://products.office.com/en-us/project/compare-microsoft-project-management-software

'For App' means that the use right in question is applicable only for the licensed application and not other applications

Appendix C: Dynamics 365 Unified Operations Plan Security Roles by User SL Level

Overview of Security Roles

Providing users with access to the solution functionality is done by assigning each user one or more Security Roles. Dynamics 365 Unified Operations Plan Security Roles combine meaningful packages of solution functionality and access rights required to perform actions relevant to that role.

Figure 20: Assigning a Security Role to a user provides access to solution functionality
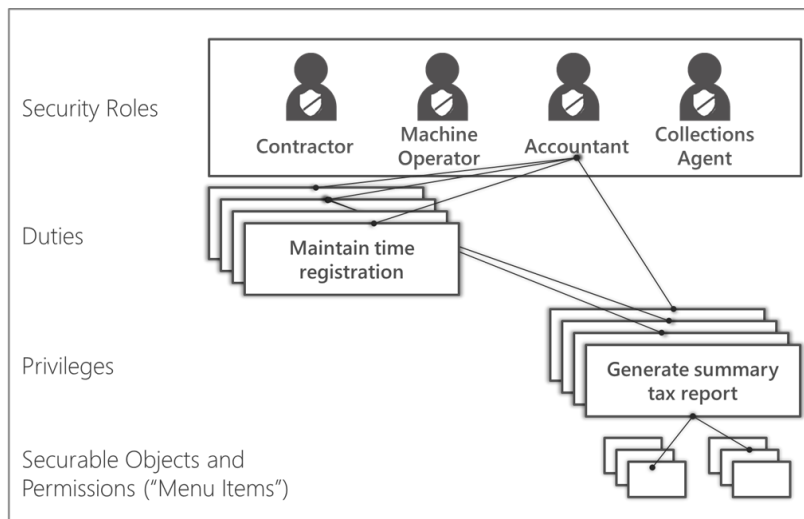
To make it easier to understand the licenses required, each Dynamics 365 Unified Operations Plan Security Role has a pre-determined user type. When you assign Security Roles to users, you then know what User SL those users require.

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

Notes:
- Customers can assign multiple Security Roles to one user, in which case the highest User SL type required covers all the user rights.

- Customers have the flexibility to configure or customize Security Roles. This may impact the license required for the new/modified Security Roles. Please refer to the Appendix C for more information about how such customization can impact licensing requirements.

Out of the box security roles for Dynamics 365 Unified Operations Plan

Role	Description	User SL		
Talent		Team Members	Activity	Unified Operations Plan or Talent
Contractor	Worker in contractor relationship with legal entities	●	●	●
Employee	Worker in employment relationship with legal entities	●	●	●
Pending worker	Worker in pending employment relationship with legal entities	●	●	●
Manager	Supervisor in reporting relationship with subordinates	●	●	●
Compensation and benefits manager	Documents compensation and benefit events, responds to compensation and benefit inquiries and records the financial consequences of compensation and benefit events			●
FMLA administrator	Information and functionality around managing employees who are out an FMLA leave			●
Human resource assistant	Documents human resource events and responds to human resource inquiries			●
Human resource manager	Periodically reviews human resource process performance and enables the human resource process			●
Payroll administrator	Documents payroll events, responds to payroll inquiries and records the financial consequences of payroll events			●
Payroll manager	Authorizes activity in the payroll process			●
Recruiter	Documents recruiting events, responds to recruiting inquiries and records the financial consequences of recruiting events			●
Training manager	Documents training events, responds to training inquiries and records the financial consequences of training events			●
Retail		Team Members	Activity	Unified Operations Plan or Retail
Retail warehouse clerk	The retail warehouse clerk performs picking, receiving, and stock counting in a store or warehouse	●	●	●
Retail store manager	The retail store manager performs store management functions at the store, such as managing sales reports, inventory movements, and inventory counts		●	●
Retail warehouse manager	Manages order picking, shipping and receiving for retail channels		●	●
Retail catalog manager	At the head office, the retail catalog manager maintains and publishes retail catalogs			●
Retail merchandising manager	At the head office, the retail merchandising manager maintains and replenishes retail products and assortments			●
Retail operations manager	At the head office, the retail operations manager is responsible for all non-merchandising operations, such as configuring stores, registers, and staff			●
Retail service	Retail service account			●
Retail store IT	Performs retail point of sale client configuration and installation at the retail store level			●

C-Suite		Team Members	Activity	Unified Operations Plan
Chief executive officer	Reviews the financial and operational performance		•	•
Chief financial officer	Reviews the financial performance		•	•
Budgeting		**Team Members**	**Activity**	**Unified Operations Plan**
Budget contributor	Create, update and approve departmental budget plans.	•	•	•
Budget clerk	Documents budget events and responds to budget inquiries		•	•
Budget manager	Reviews budget process performance and enables the budget process			•
Financials and Accounting		**Team Members**	**Activity**	**Unified Operations Plan**
Positive pay clerk	Document accounts payable positive pay events	•	•	•
Accountant	Documents accounting events and responds to accounting inquiries			•
Accounting manager	Reviews accounting, customer invoice, vendor invoice, and payment process performance and enables those processes			•
Accounting supervisor	Reviews accounting process performance and enables the accounting process			•
Accounts payable centralized payments clerk	Documents accounts payable centralized payment events and responds to centralized payment inquiries			•
Accounts payable clerk	Documents vendor invoice events and responds to vendor inquiries			•
Accounts payable manager	Reviews vendor invoice process performance and enables the vendor invoice process			•
Accounts payable payments clerk	Documents accounts payable payment events and responds to payment inquiries			•
Accounts receivable centralized payments clerk	Documents accounts receivable centralized payment events and responds to centralized payment inquiries			•
Accounts receivable clerk	Documents customer invoice events and responds to customer inquiries			•
Accounts receivable manager	Reviews customer invoice process performance and enables the customer invoice process			•
Accounts receivable payments clerk	Documents accounts receivable payment events and responds to payment inquiries			•
Auditor	This role is designed for in-house or external auditors. It provides read-only access to a majority of the system. It is also used for audit policy management			•
Collections agent	Documents collections events and responds to collections inquiries			•
Collections manager	Reviews collections process performance and enables the collections process			•

Financial controller	Reviews all accounting process performance and enables those processes			•
Tax accountant	Documents fiscal events and responds to fiscal inquires			•
Tax engine developer	Create and manage taxable document model mappings.			•
Tax engine functional consultant	Create and manage generic tax engine components (taxable document and tax document)			•
Treasurer	Documents treasury events and responds to treasury inquiries			•

Project Management		Team Members	Activity	Unified Operations Plan
Project manager, Public sector	Inquire into Purchase order to invoice progress for public sector	•	•	•
Project timesheet delegate	Enables creation and approval of project timesheets	•	•	•
Project timesheet user	Enables creation and approval of project timesheets	•	•	•
Project assistant	Documents project accounting process events and responds to project accounting process inquiries		•	•
Project manager	Documents the project forecast/budget events and responds to project forecast/budget inquiries. Maintains project accounting master information and responds to project accounting master information inquiries. Authorizes project accounting process events		•	•
Resource manager	Maintains project resource tasks		•	•
Project accountant	Maintains project accounting policies			•
Project supervisor	Enables and reviews the project accounting process			•

Procurement		Team Members	Activity	Unified Operations Plan
Vendor contact	Views and responds to purchase orders through Vendor Collaboration, for the vendor accounts where the user is a contact person	•	•	•
Buying agent	Documents purchase events and responds to purchase inquiries		•	•
Vendor account manager	Documents vendor events and responds to vendor inquiries		•	•
Purchasing agent	Documents request for quotation events and responds to request for quotation inquiries. Documents purchasing events and responds to purchasing inquiries. Maintains purchasing agreements and vendor master information			•
Purchasing agent - Public Sector	Documents request for quotation events and responds to request for quotation inquiries. Documents purchasing events and responds to purchasing inquiries			•
Purchasing manager	Reviews purchasing process performance and enables the purchasing process. Maintains purchasing agreements and vendor master information			•

Sales		Team	Activity	Unified

		Members		Operations Plan
Sales clerk	Documents sales events and responds to sales inquiries		•	•
Sales representative	Documents sales events and responds to sales inquiries		•	•
Sales manager	Reviews sales process performance and enables the sales process			•
Customer Service		Team Members	Activity	Unified Operations Plan
Customer service representative	Documents customer service events and responds to customer service inquiries.		•	•
Customer service manager	Reviews customer service process performance and enables the customer service process			•
Marketing		Team Members	Activity	Unified Operations Plan
Marketing coordinator	Produces and distributes marketing materials			•
Marketing manager	Manages product marketing			•
Field Service		Team Members	Activity	Unified Operations Plan
Field service technician	Visits customers in the field to perform service orders		•	•
Service dispatcher	Organizes the service technicians and prioritizes service orders		•	•
Service delivery manager	Reviews and enables the service order process			•
Transportation		Team Members	Activity	Unified Operations Plan
Transportation coordinator	Enables inbound, outbound, rating, routing, and handling of transportation process			•
Transportation logistics manager	Set up, maintain, and configure the network planning that are used in transportation management processes			•
Manufacturing		Team Members	Activity	Unified Operations Plan
Lean waterspider	Responds to inventory needs on the production line	•	•	•
Time registration user	Worker enabled to use advanced features for time registration	•	•	•
Machine operator	Works on production orders and makes registrations in Manufacturing execution		•	•
Shop supervisor	Reviews the time registration process and maintain corrections. Authorizes production feedback registrations and responds to inquiries from production		•	•
Production manager	Reviews the production plan and ensures the proper resources are available			•
Production planner	Schedules and plans productions			•

Production supervisor	Enables the production process. Ensures the day-to-day execution of orders/jobs so Machine operators know what to work on, who is available and can respond to the main requests from Machine operator			•
Distribution		**Team Members**	**Activity**	**Unified Operations Plan**
Receiving clerk	Documents receiving operation events and responds to warehouse receiving operation inquiries		•	•
Shipping clerk	Documents shipping operation events and responds to warehouse shipping operation inquiries		•	•
Warehouse worker	Documents warehouse operation events and responds to warehouse operation inquiries		•	•
Materials manager	Enables and reviews processes, maintains master data, and responds to inquiries within logistics and material management			•
Warehouse manager	Enables and reviews processes, authorizes recordings, maintains master data, and responds to inquiries within warehouse management			•
Warehouse planner	Plans and authorizes warehouse work. Maintains warehouse planning master information and responds to warehouse work planning inquiries			•
Cost Accounting		**Team Members**	**Activity**	**Unified Operations Plan**
Cost object controller	Monitors monetary and non-monetary performance of assigned cost objects	•	•	•
Cost accountant	Implements dimensions, policies, and reporting structures according to the strategy set by the Cost accounting manager			•
Cost accountant clerk	Performs repetitive tasks aligned with predefined policies and reporting structures			•
Cost accounting manager	Sets the overall strategy for how cost accounting is performed in the Enterprise			•
Inventory accountant	Documents costs, inventory valuations, and cost accounting events. Responds to costs, inventory valuations, and cost accounting events inquiries			•
Inventory accountant clerk	Authorizes and maintains costs, inventory valuations, and cost accounting calculations. Responds to costs, inventory valuations, and cost accounting inquiries			•
Engineering		**Team Members**	**Activity**	**Unified Operations Plan**
Product designer	Designs new and modifies existing BOM structures			•
Product design manager	Reviews and authorizes product BOM structures			•
Process engineer	Defines processes to make new products			•
Process engineering manager	Reviews and authorizes new production processes			•
Quality Control		**Team Members**	**Activity**	**Unified Operations Plan**
Quality control clerk	Documents quality control events and responds to quality control inquiries	•	•	•

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

Note: Management Reporter functionality is included in the Dynamics 365 Unified Operations Plan. To get the use rights, the Management Reporter Designers require an Operations App and Management Reporter Viewers require a Team Member.

Appendix D: Operations Customization and Licensing Requirements

Dynamics 365 Unified Operations Plan is fully customizable to provide customers with the right experience for every user. Dynamics 365 Unified Operations Plan has over 10,000 Menu Items which are mapped to the three user types. To make it faster and easier to deploy the solution and determine licensing requirements, these Menu Items are associated with certain Security Roles.

The required SL for a given user is determined by the highest user type classification of the Menu Items to which the user will have access. For example, if you assign an Accountant to a Role that includes access to a Menu Item classified as "Operations App", then that person requires a Dynamics 365 for Operations SL. Menu items that are classified at the "Team Members" level are available to all users to which you have assigned a Team Members User or higher level User.

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

Assigning Multiple Roles to a Single User
The straight forward way to customize which actions a specific employee may perform in Dynamics 365 Unified Operations Plan is by assigning multiple Roles to that employee. For example, an employee could be assigned both the Customer Service Rep and the Field Technician Roles and could therefore perform actions associated with both Roles. In this case, the employee would still only need a single User SL. Since the Customer Service Rep Role is designated at a higher user type level (Operations) than the Field Technician Role (Team Members), the employee would only need the Dynamics 365 Unified Operations Plan User SL to perform actions associated with both Roles.

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

Changing Menu Items Associated with an Individual
Further, customers may assign specific actions to specific users. Following the example above if the customer has 20 employees assigned to the Field Technician Role and wants to allow only five of those employees the ability to approve posting of service orders, they may assign the "posting of service order" Menu Item to those five individuals. Those five individuals would then require the Operations User SL, while the remaining 15 employees assigned to the Field Technician Role would require the Team Members User SL.

Creating Menu Items

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

Notes:

- Roles in Dynamics 365 Unified Operations Plan are not the same as job titles.

- "Menu Item" means an object that allows users to display or view a form, sub-form, or URL in a browser application; run a task that triggers a system class, function, workflow or web-action initiated by a user; or cause an output in the ERP solution or a separate device.

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

Appendix E: Dynamics 365 Add-ons

If you require additional subscription capacity (such as additional instances or storage), you can include these optional add-on licenses with your subscription. Subscription add-ons apply across tenant; they are not tied to a specific user. Subscription add-ons can be purchased at any time and remain a part of the subscription for the remainder of the subscription term. We have broken this add-on section down into all Customer Engagement Plan Business Applications, which will leverage the same tenant and infrastructure will accrue across this one tenant. Dynamics 365 Unified Operations Plan Applications leverages an entirely different tenant and will have its own set of add-on capabilities.

Customer Engagement Plan Business Applications

The following Customer Engagement Plan Business Application subscriptions share the same tenant and share infrastructure capacity:

- Dynamics 365 for Sale
- Dynamics 365 for Field Service
- Dynamics 365 for Customer Service
- Dynamics 365 for Project Service Automation

They will have access to the following Customer Engagement Plan Business Application default subscription capacities, shared across the Customer Engagement Plan Business Applications. If a customer purchases Dynamics 365 Plan they will obtain default access to both the Customer Engagement Plan Business Applications and the Dynamics 365 Unified Operations Plan Application.

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 Dynamics 365 Customer Engagement Plan Business Application subscription can access the default Dynamics 365 Customer Engagement Plan Business Applications instance included in the subscription, and every Dynamics 365 Customer Engagement Plan Business Application additional instance associated with the same tenant, shared across the Customer Engagement Plan Business Applications.

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

Figure 21: Customer Engagement Plan Additional Database Storage Add-on
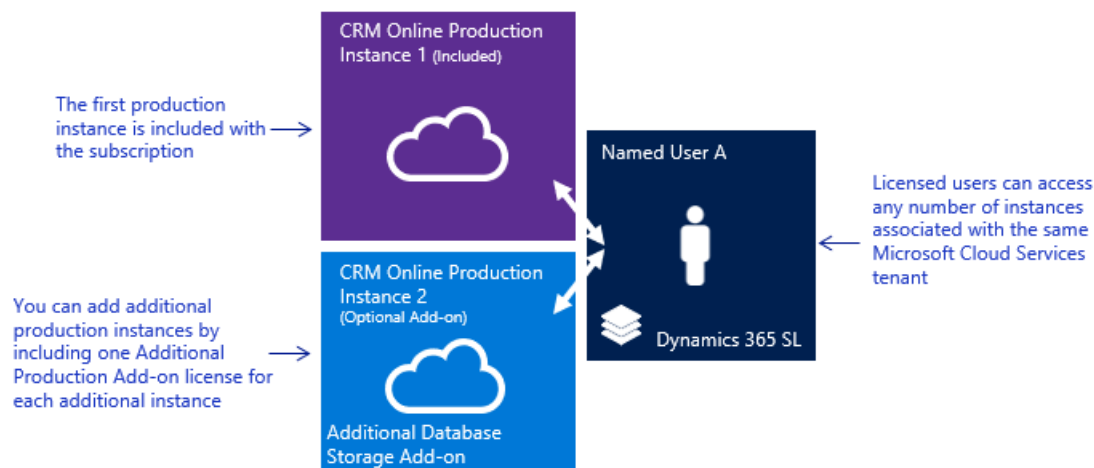
Non-Production Instance Add-on

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 Dynamics 365 Customer Engagement Plan Business Application subscription can access the default Dynamics 365 Customer Engagement Plan Business Application 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 22: Additional Non-Production Instance Add-on
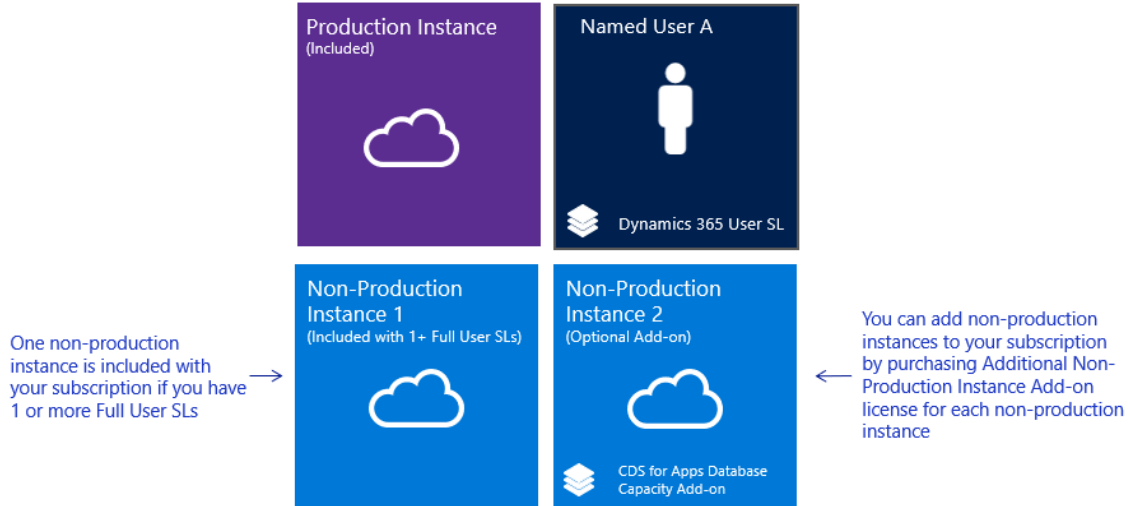
Additional Portals and Page Views

The default Portal provided with Dynamics 365 Customer Engagement Plan business application subscriptions may be extended by purchasing licenses for additional portals, for use as a non-production portal, or additional production portals.

Customers may purchase additional page views.

Subscription Capacity – Per Portal	Included Capacity	Additional Increment
Page views: Access/utilization of the Dynamics 365 Portal	1 million/month	500,000/month

Additional Database Storage Add-on

The Database Additional Storage Add-on provides flexibility to increase the storage capacity associated with your Dynamics Online subscription in increments of 1GB per Additional Storage Add-on license, up to 30TB of storage.

Note: The subscription storage corresponding to a customer subscription is tracked against all the Dynamics 365 Customer Engagement Plan Business Application instances associated with the tenant.

Figure 23: Storage Add-on
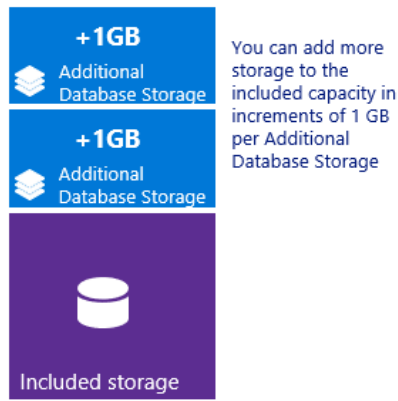
Microsoft Social Engagement Additional Posts Add-on

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

Figure 24: Social Engagement Additional Posts Add-on
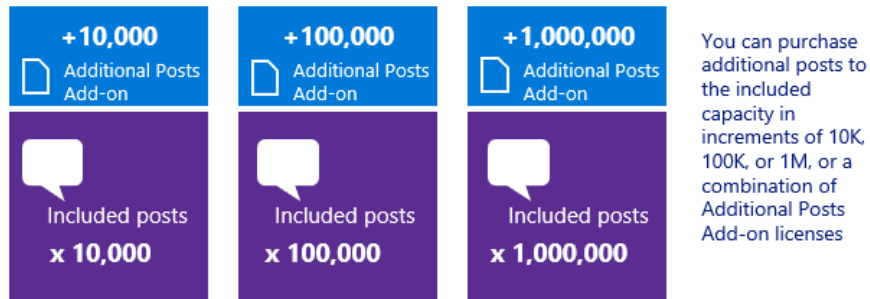
Dynamics 365 for Field Service - Resource Schedule Optimization Add-on

Resource Scheduling Optimization is an Add-on capability for the Dynamics 365 for Field Service application that enables the customer to automatically schedule SharePoint to the most appropriate resources, while simultaneously optimizing appointment setting for travel time, mileage, and many other constraints.

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

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

A Dynamics 365 for Field Service license is required for managing the Resource Schedule Optimization.

Dynamics 365 for Marketing Additional Contacts Add-on

Dynamics 365 for Marketing is based only on the number of contacts intended to be used for marketing activity and not the total number of contacts in database. Minimum purchase quantities must be met to activate packs. Customers with the included Dynamics 365 for Marketing with Customer Engagement Plan application (2K contacts included), are required to purchase the Additional Contacts 8K add-on pack before purchasing any of the other Additional Contacts packs.

Figure 25: Marketing Additional Contacts Add-on

SKU Name	Target Contacts	Min Purchase Quantity	Included Contacts	Pre-requisite
Dyn 365 for Mktg Addl Cntcts 5K Cntcts Addon	< 50K	1	5K	Base offers:
Dyn 365 for Mktg Addnl Cntcts T2	50K - 99K	1	50K	• Dynamics 365 for Marketing with Customer Engagement Plan
Dyn 365 for Mktg Addnl Cntcts T3	100K - 249K	2*	50K	
Dyn 365 for Mktg Addnl Cntcts T4	250K - 499K	5*	50K	• Dynamics 365 for Marketing with Customer Engagement Application
Dyn 365 for Mktg Addnl Cntcts T5	500K+	10*	50K	
Dyn 365 for Mktg Addl Cntcts 8K for Plan only Addon^	NA	1	8K	Dynamics 365 Customer Engagement Plan only

*Minimum purchase quantities must be met to activate the packs

Unified Operations Plan Applications

The following Unified Operations Plan Applications share the same tenant and share infrastructure capacity: Dynamics 365 for Finance and Operations and Dynamics 365 for Retail. They will have access to the following additional capacities, shared across the Unified Operations Plan Applications. If a customer purchases Dynamics 365 Plan they will obtain default access to both the Customer Engagement Plan Business applications and the Dynamics 365 Unified Operations Plan application.

Dynamics 365 Unified Operations - Order Lines Add-on

The Dynamics 365 for Operations - Order Lines Add-on allows customers to extend the use of their business application by providing a transactional licensing mechanism for indirect access by partners, customers, connected automated systems, IoT devices and bots. Dynamics 365 Unified Operations - Order Lines benefits include:

(i)   For qualifying transaction types, customers will be able to license indirect access on a transactional 'order line' basis rather than on a per user basis

(ii)   Alleviates pricing and licensing friction in many common multiplexing scenarios

(iii)   Supports a broader set of external user scenarios

(iv)   Enables licensing of automated systems and devices that do not include users (e.g. IoT scenarios)

(v)   Improves licensing cost transparency and predictability

(vi)   Ties licensing cost more directly with business outcomes

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

For designated order line types, per user licensing is no longer required if dynamics 365 Unified Operations – Order Lines is used. Only the data in the tables designated as qualifying for Order Lines may be updated under Order Lines licensing. Creation of order lines and order lines updates in those tables is counted, deletes will not count against the customer's order line total. All other direct and indirect access requires a user or device subscription license. Order Lines limits are enforced annually e.g. 100K order lines * 12 months = 1.2M order lines that can be consumed at any point in the year. An annual license is required. If the order line limit is reached orders will not blocked but customers will receive warnings and can true-up on anniversary.

Dynamics 365 Unified Operations – Order Lines is an opt-in and opt-out model. Customers opt-in by purchasing the Order Lines SKU. Once a customer opts in, all creation of designated order line types through OData and DIXF will be tracked. Customers who don't purchase Order Lines will, by default,

have opted out and all direct and indirect access must be appropriately licensed with user and device licenses.

Qualifying Order Lines types are captured in the table below. If other tables need to be accessed or other user actions taken, then per user pricing is required. Retail and Manufacturing transactions are not currently supported with the Order Lines SKU but are being investigated for future inclusion. While order line licensing is restricted to designated order line types, additional entity records that are both required to support and are directly referenced by an order line may also be created or updated with the order line without requiring a user or device license. Those additional entity records will not be counted as additional order lines unless the additional entity record is also a designated order line record type, in which case it will also be counted.

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

Dynamics 365 for Talent Comprehensive Hiring Add-on

Dynamics 365 for Talent comprehensive hiring monetizes and expands the Talent "attract" capabilities. The comprehensive hiring add-on enables new capabilities for recruiter-grade features for appropriately licensed recruiters, talent specialists, and people managers.

Recruiters, talent specialists, and people managers: Hiring experience with expanded capabilities

- (i)   Unlimited shareable named talent pools & global pools
- (ii)   Job requisition workflow & additional rules
- (iii)   Career site & job publishing
- (iv)   Offer management
- (v)   Relevant jobs and candidates
- (vi)   Compliance features & reporting
- (vii)   LinkedIn Recruiter System Connect
- (viii)   Enhanced dashboard (KPIs & summary data)
- (ix)   Deeper administrative capabilities (templates, bulk processing, admin-governed security)

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

- The minimum purchase requirement Talent applications (standalone, Unified Operations plan, or Dynamics 365)
- Sufficient number of comprehensive hiring (100 employee pack) add-ons to meet or exceed the number of employees on payroll

To access Talent comprehensive hiring capabilities users must be licensed with the appropriate USL for their role:

- HR pros/recruiters: Unified Operations/Dynamics 365 plan/Talent
- Hiring manager/employees: Team Members (or any Dynamics 365 USL that include Team Members use rights)

Dynamics 365 for Talent comprehensive hiring tier Add-on

Talent comprehensive hiring packs:

Figure 26: Talent comprehensive hiring Add-on

SKU Name	Target Employee Count	Minimum Purchase
Comprehensive Hiring Tier 1	Less than 1K	2 packs
Comprehensive Hiring Tier 2	1K - 5K	10 packs
Comprehensive Hiring Tier 3	5K+	50 packs

Sandbox Tier 1 Add-on (one included with subscription)

This is a non-production single box Developer Instance that customers can use to customize Dynamics 365 Unified Operations Plan and Retail application and unit test their changes. Licensed users associated with a Dynamics 365 Unified Operations Plan or Retail subscription can access the default developer instance included in the subscription, and every additional instance associated with the same customer. The additional Non-Production Developer Instance Add-on license does not include any incremental default storage capacity.

Sandbox Tier 2 Add-on (one included with subscription)

This is a non-production multi-box Standard Acceptance Testing instance that customers can use for User Acceptance Testing, integration testing and training. Licensed users associated with a Dynamics 365 Unified Operations Plan or Retail application subscription can access the default Standard Acceptance Testing instance included in the subscription and every additional instance associated with the same customer. The additional Non-Production Standard Acceptance Testing Instance Add-on license includes 10GB of default storage at no additional charge per instance.

Sandbox Tier 3 Add-on

This is a non-production multi-box Premium Acceptance Testing instance that customers can use for larger scale user acceptance testing, integration testing and training. This sandbox environment can also be used for performance testing for smaller customers or customers with lighter loads. Licensed users associated with a Dynamics 365 Unified Operations Plan or Retail application subscription can access every additional instance associated with the same customer. The additional Non-Production Premium Acceptance Testing Instance Add-on license includes 10GB of default storage at no additional charge per instance.

Sandbox Tier 4 Add-on

This is a non-production multi-box Standard Performance Testing instance that customers can use for performance testing, load testing and staging along with user acceptance testing. This sandbox environment is intended for smaller to medium sized customers or customers with medium load. Licensed users associated with a Dynamics 365 Unified Operations Plan or Retail application subscription can access every additional instance associated with the same customer. The additional Non-Production Premium Acceptance Testing Instance Add-on license includes 10GB of default storage at no additional charge per instance. Additional storage capacity is also granted at no charge per instance as an organization increases the number of Full User and Device SLs. For every increment of 20 Full User SLs (excludes Team Members and Activity Users), the included storage capacity increases by 2.5GB.

Sandbox Tier 5 Add-on

This is a non-production multi-box Premium Performance Testing instance that customers can use for performance testing, load testing and staging along with user acceptance testing. This sandbox environment is intended for larger sized customers or customers with heavier load. Licensed users associated with a Dynamics 365 Unified Operations Plan or Retail application subscription can access every additional instance associated with the same customer. The additional Non-Production Premium Acceptance Testing Instance Add-on license includes 10GB of default storage at no additional charge per instance. Additional storage capacity is also granted at no charge per instance as an organization increases the number of Full User and Device SLs. For every increment of 20 Full User SLs, the included storage capacity increases by 2.5GB.

Additional Database Storage Add-on

The Additional Database Storage Add-on provides flexibility to increase the SQL database storage capacity associated with your Dynamics 365 Unified Operations Plan or Retail application subscription in increments of 1GB per Additional Database Storage Add-on license, for a max of 1TB. This Additional Storage Add-on can be used to increase database storage across the production and/or non-production instances.

Note: The subscription storage corresponding to a customer subscription is calculated as cumulative across Dynamics 365 Unified Operations Plan instances associated with the tenant.

Figure 27: Storage Add-on
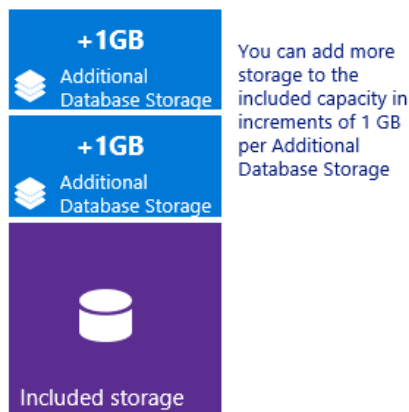
Additional File Storage Capacity

The Additional File Storage Add-on allows Dynamics 365 Unified Operations or Dynamics 365 Retail customers to increase Azure Binary Large Objects (BLOBs) cloud storage capacity by 10GB per Additional File Storage add-on license.

Appendix E: 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$_1$ -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$_2$ -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

[1.] 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.

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

Appendix F: Change Log

Page	Topic	Change	Action	Date
9, 10 & Appendix B	Team Members	Updates	• Realign the "light tasks" use rights intended for the Team Members license • Maintain "read only" access across Dynamics 365 for knowledge sharing • Limit use of custom entities, as part of the designated light weight team member experience	October 2018
48, 49	Marketing contacts	New	Additional Contacts Tier Packs	October 2018
20, 21	Microsoft Relationship Sales solution	New	New Offerings	October 2018
14, 15, 16	Customer Service Professional	New	New Offering	October 2018
25	Portal	Update	1st included portal requires the purchase of a minimum of 10 Full User licenses of Dynamics 365 Customer Engagement Plan, Dynamics 365 Customer Engagement Business Applications	October 2018
49, 50	Order Lines	New	New Offering	October 2018
50, 51	Talent comprehensive hiring	New	New Offering	October 2018
34	*Footnote Sales table	Clarified	Limit to size of 3rd party solution installs Limit to the number of 3rd party solution installs	July 2018
23	Database Storage	Corrected	10K was corrected to read 10GB	July 2018
46	Resource Schedule Optimization	Clarified	Resource Schedule Optimization is licensed per Resource included in the optimization process and will typically be accessed by a scheduler or dispatcher user who will designate any number of resources to be included. Resources may be individuals, such as field technicians or other human resources. ~~equipment, or even designated groups of resources.~~	June 2018
11	Marketing	Removed	"The Administrator may assign relevant users in the organization with a license for access to the Marketing Application."	May 2018
25	PowerApps Table	Clarified	Changed Team Members and Activity PowerApps from PowerApps for Dynamics 365 to PowerApps for Dynamics 365 Teams	May 2018
Various & Appendix B	Dynamics 365 Mobile Offline	Removed	From all applications except Field Service	May 2018
26 & 27	Premium Support	Clarified	Mix and match concept	May 2018
25	PowerApps	Clarified	Clarified language for PowerApps	May 2018
Various	Dynamics 365 Unified Operations	Corrected	Dynamics 365 for Operations Plan was corrected to read Dynamics 365 Unified Operations Plan	May 2018

Appendix H: Team Members License for Existing Customers

Customers with Team Members licenses acquired prior to October 1, 2018, may use their Team Members licenses in accordance with the description below through the duration of their term and any subsequent term begun prior to July 1, 2020, or through June 30, 2023, whichever is earlier. Customers may continue to use their Dynamics 365 for Team Members license as is.