

Microsoft Dynamics 365 Licensing Guide



Table of Contents

Using This Guide.....	1
What's new in this licensing guide	2
Introduction to Dynamics 365.....	2
How to buy Dynamics 365.....	2
Licensing Programs.....	2
International Availability.....	3
Minimum License Purchase Requirements.....	3
How to License Dynamics 365.....	4
Licensing Requirements for Internal Users.....	4
Licensing Requirements for External Users	6
Multiplexing.....	7
Dual Use Rights	8
Dynamics 365 Subscriptions	10
Dynamics 365 Plan	10
Dynamics 365 Customer Engagement Plan	10
Dynamics 365 Unified Operations Plan.....	10
Dynamics 365 Applications	11
Dynamics 365 Additional Users.....	11
Dynamics 365 Device.....	12
Product Licensing	14
Dynamics 365 for Sales	14
Dynamics 365 for Marketing	16
Dynamics 365 for Customer Service.....	18
Dynamics 365 for Field Service.....	20
Dynamics 365 for Project Service Automation.....	20
Dynamics 365 for Finance and Operations.....	21
Dynamics 365 for Retail	21
Dynamics 365 for Talent.....	22
Dynamics 365.....	24
Dynamics 365 Customer Insights	24
Additional Services and Software	24
Dynamics 365 Default Subscription Capacities	26
Customer Engagement Plan Applications.....	26
Dynamics 365 Unified Operations Plan Applications.....	28
Dynamics 365 Customer Insights	30
Dynamics 365 Trial and Implementation	31
Dynamics 365 Service Support	31
Tiered Pricing	32
Additional Resources	33
Appendix A: Team Members Overview by Plan	34
Appendix C: Dynamics 365 Unified Operations Plan Security Roles by User SL Level	41
Appendix D: Custom Entities	48
Appendix E: Operations Customization and Licensing Requirements	49
Appendix F: Dynamics 365 Capacity Add-ons	50
Customer Engagement Plan and Applications capacity add-ons.....	50
Unified Operations Plan and Applications capacity add-ons.....	52
Customer Insights capacity add-ons.....	55
Appendix G: Licensing Channel & Segment Availability.....	56
Appendix H: Support Policies	58
Appendix I: Change Log.....	59

Using This Guide

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

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

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

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

This document applies for users with Dynamics 365 licenses.

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

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

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

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

What's new in this licensing guide

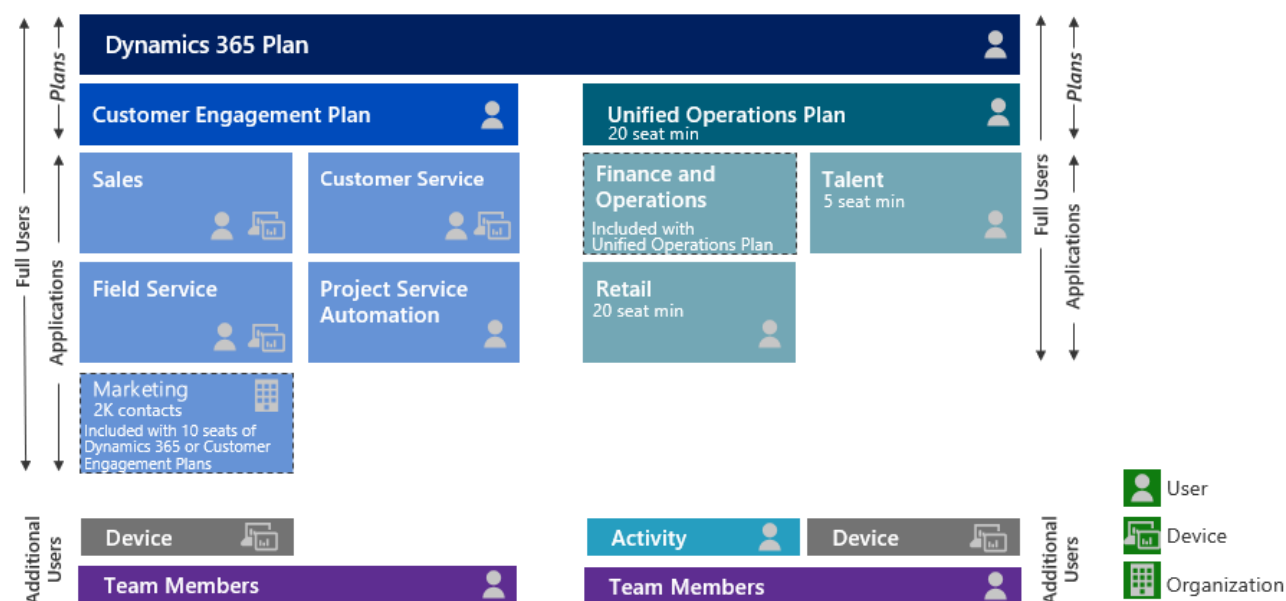
This licensing guide was updated to reflect licensing updates and new online service offerings as of May 2019. Here is a look at what is coming.

Effective	Dynamics 365	Description	Change Summary
May 1	Customer Engagement	Dynamics 365 Customer Service Insights	New capability
Target May	Dynamics 365	China Launch	Dynamics 365 solutions available in China - Available via 3 rd -party
July 1	Customer Engagement	Dynamics 365 for Customer Service Chat	New capability

Introduction to Dynamics 365

Microsoft Dynamics 365 (Dynamics 365) is the next generation of intelligent business applications in the cloud. Dynamics 365 unifies Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) capabilities by delivering new purpose-built applications to help manage specific business functions, 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

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

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

Additional channels:

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

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

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

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

International Availability

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

Minimum License Purchase Requirements

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

Dynamics 365 Customer Engagement

Portal

Effective October 2018, access to the first included portal for the tenant requires the purchase of a minimum of 10 Enterprise user licenses of Dynamics 365 Customer Engagement Plan, Dynamics 365 Customer Engagement applications (Sales Enterprise, Customer Service Enterprise, Field Service or Project Service Automation) or a combination.

Academic SKUs

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

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

This 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.

Microsoft Relationship Sales solution Plus and Microsoft Relationship Sales:

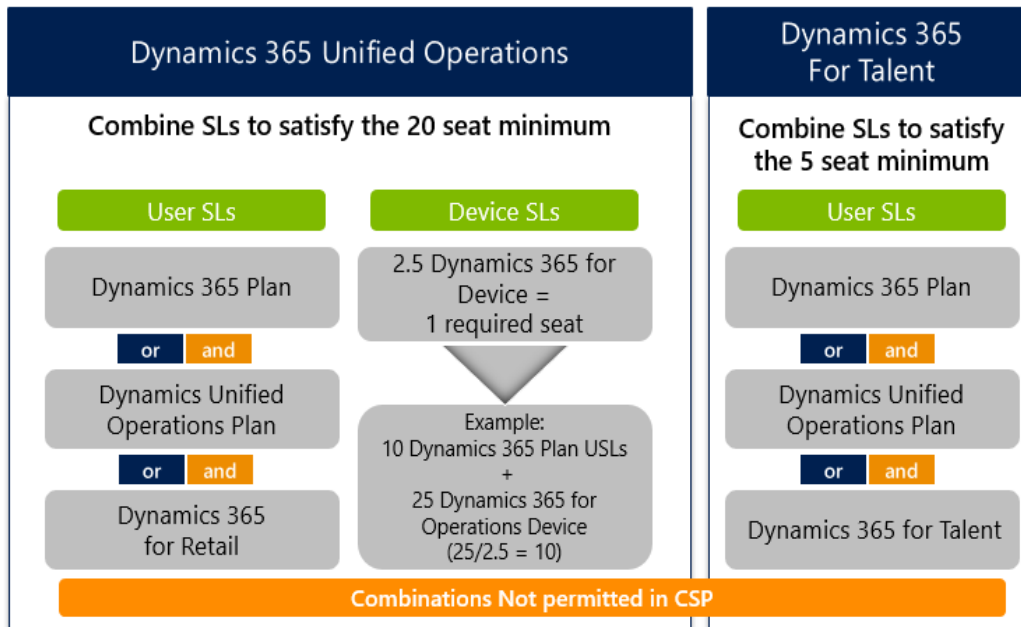
- 10-seat minimum

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

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

Dynamics 365 Unified Operations

Minimum purchase requirements:



Note, each instance of Dynamics 365 Finance and Operations must meet the minimum license requirement.

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

- The 5-seat minimum purchase requirement for the Talent application (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 License 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.

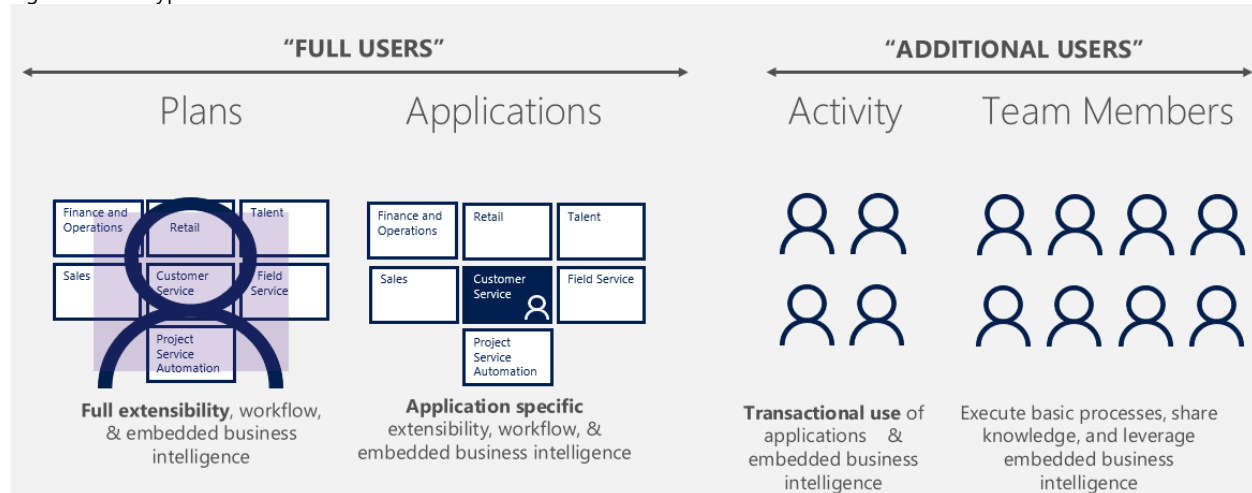
For qualifying indirect transaction types, the Operations Order Lines SKU may also be used by internal or external users in indirect access scenarios such that a user or device license is not required. Please see the Order Lines [section](#) for more details.

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

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

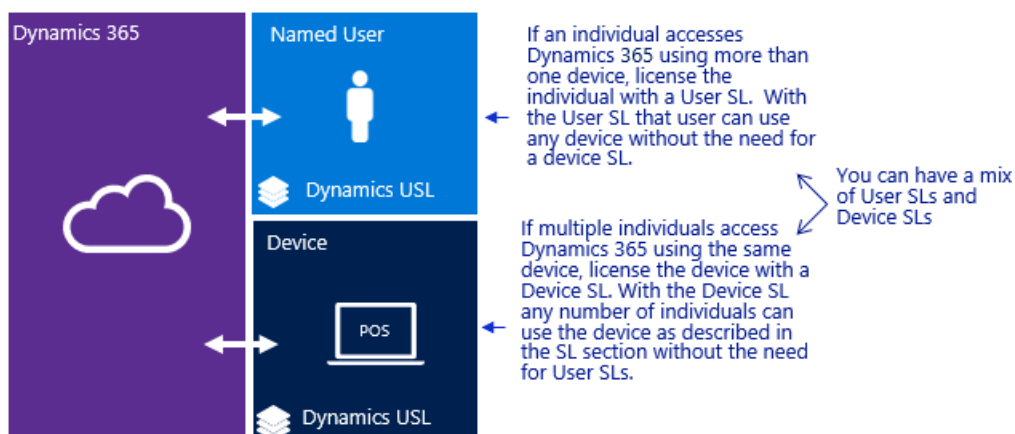
- **Full users:** are the users whose work requires use of the feature rich business applications functionality. Examples of full users are sales people, customer service representatives, finance employees, controllers and supply chain managers. These users have also been referred to in the past as Professional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

Figure 2: User Types



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

Figure 3: Basic licensing requirements for Dynamics 365



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

For qualifying indirect transaction types, 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.

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

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

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

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

Licensing Requirements for External Users

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

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

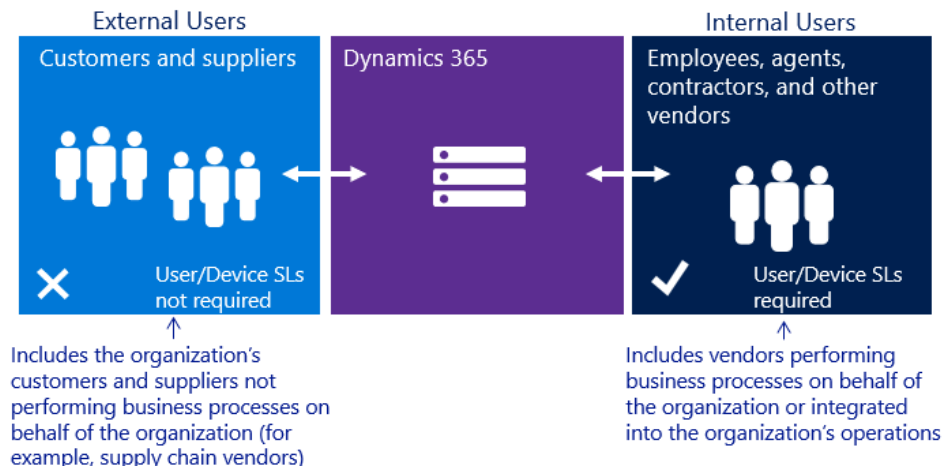
However, external user access does not extend to the customer or the customer's affiliate's contractors, vendors, or agents providing business processes on the customer's behalf or using Dynamics 365 to manage any portions of their business (e.g. accounting, payroll, HR, telemarketing, data recording,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

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

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

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

Figure 4: 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 as Microsoft Outlook must also be properly licensed, regardless of if they are set up as a Dynamics 365 user in the service, for example:

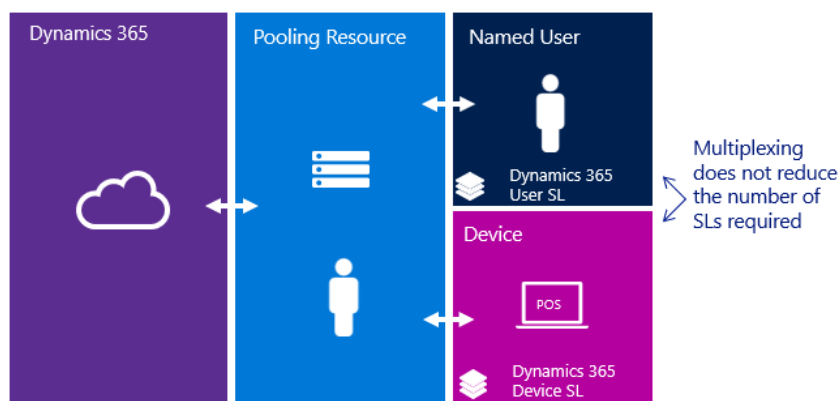
- Internal users and devices access Dynamics 365 data indirectly through a PowerApps must still be properly licensed for Dynamics 365
- Any user or device that accesses the service, files, data, or content provided by the service that is made available through an automated process requires a Dynamics 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 5: Multiplexing



Dual Use Rights

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

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

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

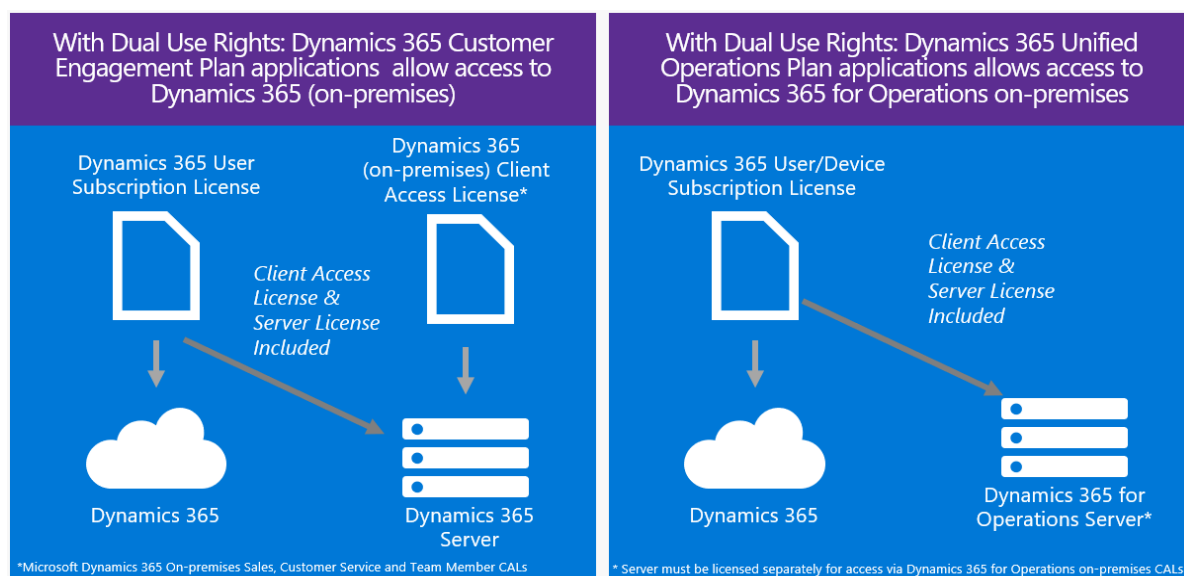
- Dynamics 365 Plan
- Dynamics 365 Customer Engagement Plan
- Dynamics 365 for Sales **Enterprise**
- Dynamics 365 for Customer Service **Enterprise**
- Dynamics 365 Team Members

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 licensed with on-premises CALs.

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)

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

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

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

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

Dynamics 365 Subscriptions

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. 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 Plan

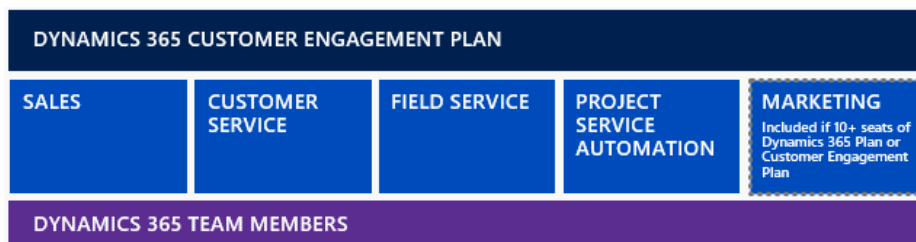
Dynamics 365 Plan includes access to Customer Engagement Plan functionality plus Dynamics 365 Unified Operations Plan. If a customer purchases Dynamics 365 Plan they will obtain default access to both the Customer Engagement Plan applications and the Dynamics 365 Unified Operations Plan Application. Dynamics 365 Plans can be licensed by User or Device SL for Dynamics 365 Unified Operations (see Device Subscription License [section](#) for more information).

Dynamics 365 Customer Engagement Plan

Dynamics 365 Customer Engagement Plan gives you the flexibility to work with any application functionality within the plan. Academic customers see the Minimum License Purchase Requirements [section](#) for purchase guidelines. 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

Figure 7 : Customer Engagement Plan

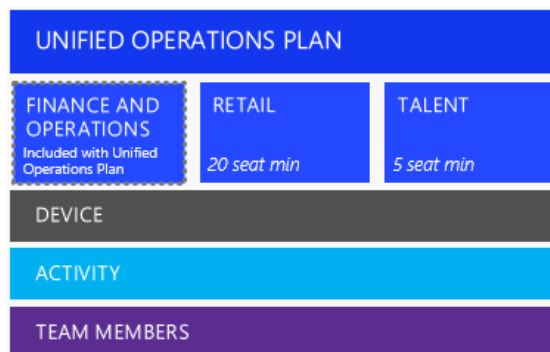


Dynamics 365 Unified Operations Plan

Dynamics 365 Unified Operations Plan includes full read, edit and approval access across the entire ERP solution. Dynamics 365 Unified Operations Plan includes flexibility to use:

- Dynamics 365 for Talent
- Dynamics 365 for Retail
- Microsoft PowerApps Plan 2

Figure 8: Unified Operations Plan



Dynamics 365 Applications

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

- Dynamics 365 for Sales Enterprise
- Dynamics 365 for Sales Professional
- Dynamics 365 for Marketing
- Dynamics 365 for Customer Service Enterprise
- Dynamics 365 for Customer Service Professional
- Dynamics 365 for Field Service
- Dynamics 365 for Project Service Automation
- Dynamics 365 for Retail
- Dynamics 365 for Talent

Dynamics 365 Additional Users



Dynamics 365 Team Members

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 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 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 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 license*

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

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

Dynamics 365 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
- (viii) Team Members application module may not be customized with more than 15 custom entities available to the Dynamics 365 Team license. This only applies to entities that sit on Common Data Service Platform (Talent – Attract) *

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

Reference [Appendix C](#) for a detailed list of the Dynamics 365 Unified Operations Plan Security Roles by User SL Level.

Dynamics 365 Operations - Activity

The Dynamics 365 Unified Operations - Activity subscription is a named user subscription intended for users who require more capabilities than the Team Members license, but do not require the use rights of a full user. 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 Dynamics 365 Unified Operations Plan Security Roles by User SL Level.

Dynamics 365 Device

Dynamics 365 for Customer Engagement Device SL

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

Dynamics 365 for Customer Engagement applications Device SLs options:

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

Dynamics 365 Unified Operations - Device SL

With the Dynamics 365 Unified 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: <ul style="list-style-type: none">• 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: <ul style="list-style-type: none">• 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: <ul style="list-style-type: none">• 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 Unified Operations - Device SL use rights are also available to Dynamics 365 Unified 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. For a detailed view of the use rights associated with Dynamics 365 Unified Operations - Device please refer to [Appendix C](#).

Product Licensing

Dynamics 365 for Sales



General information:

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

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

Dynamics 365 for Sales Enterprise

With Dynamics 365 for Sales Enterprise customers go beyond sales force automation and meet the needs of more complex sales processes. Sales Enterprise provides customization, extensibility and embedded intelligence, in addition to all the functionality available in Dynamics 365 for Sales Professional.

Dynamics 365 for Sales Professional

Dynamics 365 Sales Professional provides core sales force automation or SFA that is used by an organization without a complex sales organization.

The Sales Enterprise and Sales Professional applications are not meant to be combined within an organization and may not be deployed on the same instance; however, they may be deployed on the same tenant (e.g. when a subsidiary sales organization has less complex sales force needs than parent organization). Customers may mix and match Enterprise licenses (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.

Figure 9: Instance separation

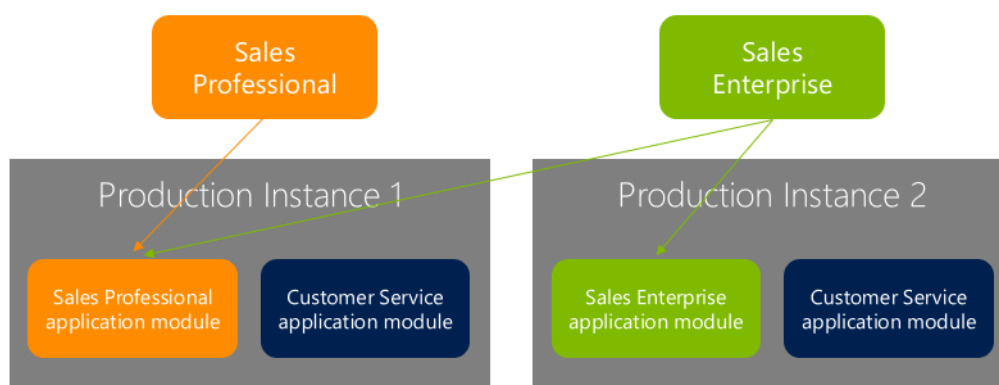


Figure 10: Mix and match deployment

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

Microsoft Relationship Sales solution

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

- **Microsoft Relationship Sales solution Plus:** Dynamics 365 for Sales Enterprise and LinkedIn Sales Navigator Enterprise
- **Microsoft Relationship Sales solution:** Dynamics 365 for Sales Enterprise and LinkedIn Sales Navigator Team

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

Dynamics 365 Sales Insights

Dynamics 365 Sales Insights, licensed per user, improves engagement and decision-making with prebuilt and embedded insights to businesses that are quick to deploy and easy to act upon. Customers are required to have a Dynamics 365 for Sales Enterprise or Microsoft Relationship Sales solution (MRSs) license to enable Dynamics 365 Sales Insights features.

Dynamics 365 Sales Insights adds:

- | | |
|-----------------------------|--------------------|
| (i) Predictive lead scoring | (iv) Insight |
| (ii) Relationship analytics | (v) Talking points |
| (iii) Notes analysis | (vi) Connection |

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

Dynamics 365 for Marketing



General information:

Licensing	Per organization
Purchase requirements	To receive the “included” Marketing Application customers must have and maintain at least 10 full users of Customer Engagement or Dynamics 365 Plans, or a combination of the two plans. For additional information, see How to Buy
Default Capacity	Default Capacities Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant (Marketing standalone only)
Application Add-on	Marketing application add-ons: <ul style="list-style-type: none"> • Marketing Attach • Marketing Additional Application
Capacity Add-on	For details, see Add-ons
Entitlements/Use Rights	For details of entitlements and use rights, see Use Rights

The Marketing application is licensed per organization and is based on contacts used in Dynamics 365 for Marketing. 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.

Figure 11: Marketing Applications

	Dynamics 365 for Marketing (standalone)	Dynamics 365 for Marketing	Dynamics 365 for Marketing Attach	Dynamics 365 for Marketing Additional Application
Base Package (per month)	10K Contacts	2K Contacts	10K Contacts	Contacts are pooled at tenant level and not included in this offer
Additional Contacts (per month)	5K or 50K Contacts	1st purchase 8K Subsequent purchases of 5K or 50K additional contacts allowed	5K or 50K Contacts	5K contacts
Purchase requirements	No Dynamics 365 purchase is required for this standalone application	Included for customers with 10 or more full users of Dynamics 365 Customer Engagement and/or of Dynamics 365 plans	Available for customers with fewer than 10 full users of Dynamics 365 Customer Engagement Plan/Applications or of Dynamics 365 Plan	If an additional Marketing application instance is required (no portal entitlement)

Dynamics 365 for Marketing (standalone)

Customers who don't have any Dynamics 365 Customer Engagement applications may purchase the Dynamics 365 for Marketing (standalone) application. Customers receive Customer Engagement entitlements once, providing these entitlements are not already on the customer's account, and only when purchasing Marketing standalone application:

- (i) Portal
- (ii) Common Data Service Database Capacity
- (iii) Common Data Service File Capacity
- (iv) Common Data Service Log Capacity
- (v) Voice of the Customer for Microsoft Dynamics 365

Dynamics 365 for Marketing

Customers with at least 10 full users of Dynamics 365 Customer Engagement Plan, Dynamics 365 Plan, or a combination of the two plans receive one Dynamics 365 for Marketing Application with an entitlement of 2K contacts at no charge. Customers have the right to this Marketing Application provided they maintain their license of at least 10 full users of Dynamics 365 Customer Engagement and/or Dynamics 365 Plan. Customer who have single business applications (Sales, Customer Service, etc.) do not qualify for this Marketing application. Note, customers with unpaid licenses (e.g., demo/dev or Internal Use Rights (IUR)) don't qualify for this included Marketing application.

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, or the Marketing Additional Application. Customer Engagement entitlements are at the tenant level; therefore, they are not included with this application.

Note: existing qualifying customers must submit a [Support Request](#) to request Dynamics 365 for Marketing be added to their account.

Dynamics 365 for Marketing Attach

Customers with fewer than 10 full users (enterprise and/or professional) of Dynamics 365 Customer Engagement Plan or applications and/or of Dynamics 365 Plan, who aren't eligible to receive Dynamics 365 for Marketing (2K contacts), may purchase Dynamics 365 for Marketing Attach. The base pack of Dynamics 365 for Marketing includes 1 Marketing Application instance and an entitlement of 10K contacts. Only one of the "base packs" with 10K contacts may be purchased. Customer Engagement entitlements are at the tenant level; therefore, they are not included with this application.

Scenario:

Customer has less than 10 Dynamics 365 plan or Customer Engagement plan/applications users and purchases Dynamics 365 for Marketing Attach.

- *Customer has already received a free Dynamic 365 portal as part of Dynamics 365 Customer Engagement purchase. Customer will not receive another free portal with their Marketing application purchase. They must either purchase a new portal OR reset an existing portal OR bring own portal.*

Scenario:

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

- *Customer may purchase Dynamics 365 Marketing Attach with the understanding that it is an online solution only.*

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.

Scenario:

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

Note, customer will not receive a free portal with Dynamics 365 for Marketing Additional Application Add-on sandbox instance. They must either purchase a new portal OR reset an existing portal OR bring own portal.

Scenario:

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

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

Marketing Contacts: Marketing Contacts are based on the contacts used for a marketing activity. Marketing activity includes any contact or engagement via Marketing emails, landing pages, forms, LinkedIn integration, events, surveys and any other custom channel. 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. All marketable contacts used in a tenant are counted irrespective of instance (production and non-production). Customers will only be charged for Contacts that are engaged in marketing activities using the D365 for Marketing application OR capabilities delivered as part of the application. Visit this [help documentation](#) to learn more.

Dynamics 365 for Customer Service



General information:

Licensing	User subscription and/or device (Enterprise SLs only) subscription
Purchase requirements	No purchase requirements. Entitled with Customer Service Enterprise and Customer Engagement Plan. For additional information, see How to Buy
Default Capacity	Default Capacities Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-on	Customer Service application add-on: <ul style="list-style-type: none">Customer Service Insights<ul style="list-style-type: none">Add-on for Customer Services ProfessionalStandalone for non-Dynamics & Dynamics on-premises
Capacity Add-on	For details, see Add-ons
Entitlements/Use Rights	For details of entitlements and use rights, see Use Rights

Customers may choose what level of functionality is appropriate for their business with two solution options for licensing Microsoft Dynamics 365 for Customer Service. Note, these two services are not meant to be combined within an organization.

Dynamics 365 for Customer Service Enterprise

Dynamics 365 for Customer Service Enterprise for more complex, configurable, and intelligent capabilities, Microsoft Dynamics 365 for Customer Service empowers businesses to provide a branded, personalized self-service experience that leverages an organized, searchable knowledge base to deliver consistent, up-to-date answers.

Dynamics 365 for Customer Service Professional

Dynamics 365 for Customer Service Professional for less complex scenarios with streamlined capabilities to provide core support functionality.

The Customer Service Enterprise and Customer Service Professional application modules may not be deployed on the same instance; however, they may be deployed on the same tenant (e.g. when a subsidiary customer service organization has less complex needs than parent organization). Customers may mix and match Enterprise licenses (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 12: Instance separation

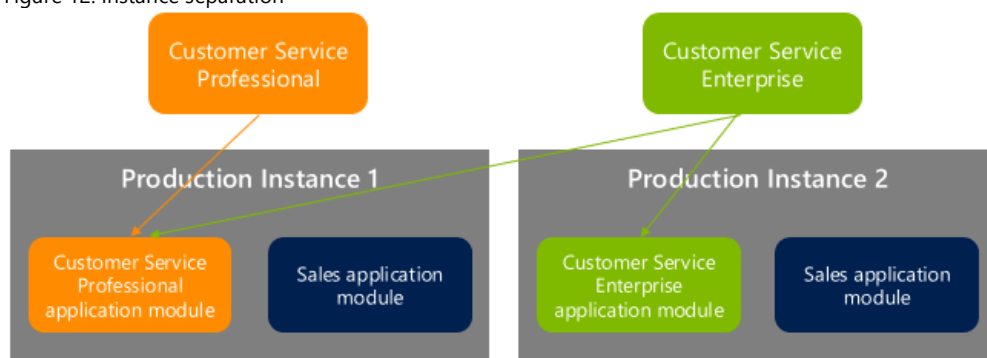


Figure 13: Mix and match deployment

Customer Scenario – 1 Tenant	Comment
Customer Service Enterprise + Customer Service Professional	Customer Service Enterprise users may access to all instances on a tenant. Customer Service Enterprise users may access Customer Service Professional instance but Customer Service Professional may not access Customer Service Enterprise instance
Customer 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 and Customer Service Professional scenario is as listed in the above section

Dynamics 365 Customer Service Insights

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

Customers, who are not entitled to Dynamics 365 Customer Service Insights, may purchase the application:

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

Dynamics 365	Customer Service Insights (standalone)	Customer Service Insights	Customer Service Insights Additional Application
Availability	For purchase	Included (see purchase requirements)	For purchase
Purchase requirements	No Dynamics 365 purchase is required for this standalone application	Included for customers with Customer Service Enterprise (via application or plan)	Customer Service Professional customers may purchase as an additional application add-on
Default Capacity	Cases: 100K/tenant/month		
Capacity Add-on (per tenant/month)	Cases: 500K/tenant/month		

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

Dynamics 365 for Field Service



General information:

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

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.

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 365 Mobile Client application. The Field Service Mobile application will no longer have a limit on the number of custom entities that can be used so long as the application is being used in the context of Dynamics 365 for Field Service. The Field Service Mobile (2016) and Field Service Mobile (2017) applications continue to have a maximum limit of 10 custom entities.

Dynamics 365 for Project Service Automation



General information:

Licensing	User subscription
Purchase requirements	No purchase requirements. For additional information, see How to Buy
Default Capacity	Default Capacities Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-on	NA
Capacity Add-on	For details, see Add-ons
Entitlements/Use Rights	For details of entitlements and use rights, see Use Rights

Dynamics 365 for Project Service Automation is designed for professionals who manage projects and the associated customer engagement process end-to-end.

Dynamics 365 for Finance and Operations



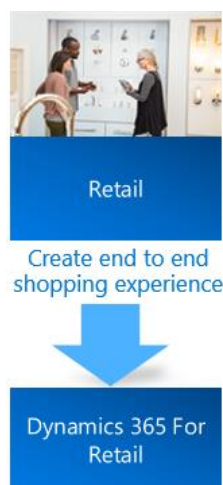
General information:

Licensing	User subscription
Purchase requirements	Unified Operations or Dynamics 365 Plans. For additional information, see How to Buy
Default Capacity	Default Capacities Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-on	NA
Capacity Add-on	For details, see Add-ons
Entitlements/Use Rights	For details of entitlements and use rights, see Use Rights
Custom Roles	How to create and license custom roles

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.

Dynamics 365 for Retail



General information:

Licensing	User subscription
Purchase requirements	No purchase requirements. For additional information, see How to Buy
Default Capacity	Default Capacities Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-on	NA
Capacity Add-on	For details, see Add-ons
Entitlements/Use Rights	For details of entitlements and use rights, see Use Rights
Custom Roles	How to create and license custom roles

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.

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.

Dynamics 365 for Talent



General information:

Licensing	User subscription
Purchase requirements	No purchase requirements. For additional information, see How to Buy
Default Capacity	Default Capacities Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-on	Talent application add-on: <ul style="list-style-type: none"> comprehensive hiring
Capacity Add-on	For details, see Add-ons
Entitlements/Use Rights	For details of entitlements and use rights, see Use Rights
Custom Roles	How to create and license custom roles

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 or hiring managers who will be hiring for their own teams need to be licensed with the Team Members or Activity SLs.

Dynamics 365 for Talent comprehensive hiring Additional Application

Dynamics 365 for Talent 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

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

Talent comprehensive hiring packs:

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

Talent Modular Application

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

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

The “Onboard” capabilities are included for users who are licensed for Dynamics 365 for Talent.

- The capabilities are targeted at hiring managers
- New hires don’t need a user license to use Dynamics 365 for Talent application
- New hires don’t need an Onboard license to use its capabilities

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

Note, the **Onboard modular application** purchased directly via the web are not compatible with the Talent comprehensive hiring add-on application and therefore not supported.

Dynamics 365

Dynamics 365 Customer Insights



General information:

Licensing	Per organization
Purchase requirements	No purchase requirements. For additional information, see How to Buy
Default Capacity	Default Capacities Default subscription capacities leverage the same tenant and infrastructure and will accrue across one tenant
Application Add-on	NA
Capacity Add-on	For details, see Add-ons

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

Additional Services and Software

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

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

- **Microsoft PowerApps:** Extend and customize applications
- **Microsoft Flow:** Automate business processes and workflow
- **Microsoft Power BI:** Deliver business intelligence

Select Dynamics 365 Applications* can be customized using PowerApps and 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.

Figure 14: PowerApps Use Rights

	Select Dynamics 365 Applications*, Dynamics 365 Team Members, and Dynamics 365 Activity	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	<ul style="list-style-type: none"> Extend applications and workflows within the context of Dynamics 365 Application use rights Use business process flows Model business data in CDS 	<ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> Cannot run <u>standalone</u> 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 	<ul style="list-style-type: none"> None

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

+Dynamics 365 for Sales Enterprise, Microsoft Relationship Sales solution, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, Dynamics 365 for Project Service Automation, Dynamics 365 for Talent, 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

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.

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

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 group, 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 that can be published. Additional limitations can be found [here](#).

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

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

Microsoft Power BI in Dynamics 365 - Dynamics 365 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 (e.g. view embedded tables and charts). Please consult the [Dynamics 365 roadmap](#) for more information on this feature.

Dynamics 365 Customer Engagement Plan and Customer Engagement Plan 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 Default Subscription Capacities

Dynamics 365 Customer Engagement Plan applications default subscription capacities leverage the same tenant and infrastructure and will accrue across the one tenant. Unified Operations Plan applications leverages an entirely different tenant and will have its own set of default capacities. The Customer Engagement and Unified Operations plan applications' capacities are not shared. If a customer purchases Dynamics 365 Plan they will obtain default access to both the Customer Engagement Plan applications and the Dynamics 365 Unified Operations Plan application.

Customer Engagement Plan Applications

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

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. The Portal includes 1 million-page views, with additional page view bundles available for purchase.

A Customer Engagement Plan Application subscription is required to administer and configure the portal. Each portal may only be associated with one instance. Internal users indirectly accessing Dynamics 365 application data via a portal are required to have the appropriate Dynamics 365 license.

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 Applications (Sales Enterprise, Sales Professional, Customer Service Enterprise, Customer Service Professional, Field Service or Project Service Automation) or a combination. Note: Team Member Licenses will not contribute to the minimum user requirement.

Customers who have less than 10 users, may purchase the Portal "Add-on" (see "Dynamics 365 Add-on section" in [Appendix F](#)).

Default Common Data Service Database Capacity

Common Data Service Database Capacity stores and manages entity definitions and data. The tenant for Dynamics 365 Customer Engagement plan and application subscriptions includes by default 10GB for database capacity. The database capacity per tenant limit is 4TB.

Default Common Data Service File Capacity

Common Data Service File Capacity is used to store attachments to notes or emails in Dynamics 365 Customer Engagement applications and PowerApps. These include documents, image files, videos, PDF files and other crucial files needed in an organization. The default size for attachments is 5MB per attachment which can be increased to 32MB per attachment. The tenant for Customer Engagement plan and application subscriptions include by default 20GB for log capacity. There is no file capacity limit per tenant.

Default Common Data Service Log Capacity

Common Data Service Log Capacity records entity and attribute data changes over time for use in analysis and reporting purposes. Log capacity is designed to help organizations meet their auditing, compliance, and governance policies. Customers may delete audit change history for a record or a data range to reduce the log storage size. Users who have "View Audit History" and "View Audit Summary" security privileges may retrieve and display audit history. The tenant for Dynamics 365 Customer Engagement plan and application subscriptions includes by default 2GB for log capacity. There is no limit on how many year or audit log information that can be stored.

Default Capacity per Tenant shared across Customer Engagement Applications – not cumulative							
Dynamics 365 for	Portal [^]	Page Views/ month	Production Instance	Non-Production Instance	Database Capacity	File Capacity	Log Capacity
Sales Enterprise	1	1M	1	1	10GB	20GB	2GB
Sales Professional	1	-	1	1	10GB	20GB	2GB
Marketing	-	-	1	1	-	-	-
Marketing (standalone)	1	1M	1	1	10GB	20GB	2GB
Customer Service Enterprise	1	1M	1	1	10GB	20GB	2GB
Customer Service Professional	1	-	1	1	10GB	20GB	2GB
Field Service	1	1M	1	1	10GB	20GB	2GB
Project Service Automation	1	1M	1	1	10GB	20GB	2GB

[^] Requires 10-seat minimum of Dynamics 365 Customer Engagement Plan, Customer Engagement Plan Applications or a combination

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

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

Scenario:

Default and accrued capacity: 10 Enterprise USLs

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

See descriptions of the additional capacity Dynamics 365 Add-on in [Appendix F](#).

Default Dynamics 365 Customer Service Insights Case Capacity

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

Default Capacity Allocation	Default/tenant
Cases	100K Cases/tenant/month

See descriptions of the additional capacity Dynamics 365 Add-on in [Appendix F](#).

Dynamics 365 Unified Operations Plan Applications

Finance and Operations and Retail user subscriptions receive default tenant allocations of all capacity types.

Default Database Capacity

The tenant for Dynamics 365 Unified Operations plan and Retail subscriptions includes by default 20GB for database capacity. For every 1GB of database capacity customers receive 1GB of Production Database, 1GB of Reporting Database, and 1GB of Entity Store Database. The database capacity per tenant limit is 4TB.

Default File Capacity

The tenant for Unified Operations plan and Retail subscriptions includes by default 40GB for File capacity. Each Dynamics 365 Unified Operations Plan or Dynamics 365 for Retail application customer will receive 40GB. There is no file capacity limit per tenant.

Default Capacity per Tenant shared across Unified Operations Applications – not cumulative				
Dynamics 365 for	Production Instance	Non-production Instance	Database Capacity	File Capacity
Finance and Operations*	1	1 Sandbox Tier 1 1 Sandbox Tier 2	20GB	40GB
Retail	1	1 Sandbox Tier 1 1 Sandbox Tier 2	20GB	40GB

*Dynamics 365 for Finance and Operations is only licensed with Dynamics 365 Unified Operations Plan subscriptions

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

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

Scenario:

Default and accrued capacity: 10 Full USL (Unified Operations/Retail), 40 Activity SL, 25 Device SL

Default and Accrued Capacity Allocation	Unified Ops Plan, Retail	Unified Ops Plan, Retail	40 Activity, 25 Device
	Default/tenant	Accrued/10 Enterprise USL	Accrued/User/Device SL
Database Capacity	20GB	5000MB	5000MB
File Capacity	40GB	40GB	40GB

In addition to the Unified Operations default entitlements, Dynamics 365 for Finance and Operations and Retail application licenses also get PowerApps Plan 2 entitlements, which include Common Data Service capacity.

Default Common Data Service Database Capacity

Common Data Service Database Capacity stores and manages entity definitions and data. The tenant for Dynamics 365 Unified Operations plan and application full user subscriptions includes by default 20GB for database capacity. For every 1GB of database capacity customers receive 1GB of Production Database, 1GB of Reporting Database, and 1GB of Entity Store Database. The database capacity per tenant limit is 4TB.

Default Common Data Service File Capacity

Common Data Service File Capacity is used to store attachments to notes or emails in Dynamics 365 Unified Operations applications and PowerApps. These include documents, image files, videos, PDF files and other crucial files needed in an organization. The default size for attachments is 5MB per attachment which can be increased to 32MB per attachment.

Default Capacity per Tenant shared across Unified Operations Applications – not cumulative			
Dynamics 365 for	Common Data Service Database Capacity	Common Data Service File Capacity	Common Data Service Log Capacity
Finance and Operations*	10GB	20GB	2GB
Retail	10GB	20GB	2GB

*Dynamics 365 for Finance and Operations is only licensed with Dynamics 365 Unified Operations Plan subscriptions

Default Capacity for Finance and Operations / Retail

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 Capacity for Talent

Customers who purchase the full Talent User SL (5-seat minimum) are entitled to 2 identical Core HR environments/instances for the tenant (not per user). At any given time, only one of the identical instances may be in production but alternatively both instances may be in non-production (UAT, pre-production). Additional Core HR instances and storage cannot be added at this time and Dynamics 365 for Finance and Operations and Dynamics 365 for Retail sandbox, database, and file capacity add-ons are not compatible with Talent.

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. See the Minimum License Purchase Requirements [section](#) for more details. Also, the production instance is monitored 24 X 7 for service health.

For information about additional production instance, refer to Dynamics 365 Add-on in [Appendix F](#).

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

Default 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 tenant.

- (i) **Sandbox Tier 1:** Developer Instance is a non-production single box instance that customers can use to customize Dynamics 365 Unified Operations Plan and unit test their changes. It is provided for the life of the tenant.
- (ii) **Sandbox Tier 2:** Standard Acceptance Testing Instance is a non-production multi-box instance that customers can use for User Acceptance Testing, integration testing, and training. It is provided for the life of the tenant. The Non-Production Standard Acceptance Testing instance includes 10GB of default storage at no additional charge.

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

Dynamics 365 Customer Insights

If a customer purchases Customer Insights the default capacity is provisioned in a separate instance. Customer Insights may be deployed in the same tenant but don't share the same instance as Dynamics 365 Customer Engagement Plan and Unified Operations Plan applications.

Default Profile Capacity

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

Default Segments/KPIs Capacity

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

Default Data Injection Refresh Capacity

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

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

Dynamics 365 Trial and Implementation

Free Trial

Customer Engagement Plan Trial

You can sign-up for a free 30-day trial of Dynamics 365 Customer Engagement Plan 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

Support Plans

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

- [Professional Direct Support](#) is a Dynamics 365 specific support plan providing a cohesive support experience with exceptional tools and resources to accommodate any needs during all stages of

the Dynamics 365 lifecycle. Fast response times for customers' most critical issues, proactive advisory services and much more.

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

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

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

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

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

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 (MRSs) with tiered pricing based on number of users for the subscription offer.

Microsoft Relationship Sales solution Plus and Microsoft Relationship Sales:

- 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

Other considerations:

- (i) Tiered pricing applies per customer tenant, and do not accumulate across tenants
- (ii) Tiered pricing does not apply to Team Members, Operations 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

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 and 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
Microsoft PowerApps and Flow Licensing Guide	https://go.microsoft.com/fwlink/?linkid=2085130		
Dynamics AX Licensing Guide	http://aka.ms/s201h6		
AX 2012 Retail Licensing Scenarios	http://aka.ms/Sumqjx		
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/dujlkx		
Dynamics CRM 2016 Licensing Guide	http://aka.ms/kn26ux		
Dynamics 365 (On-Premises) Licensing Guide	https://microsoft.sharepoint.com/sites/infopedia/pages/layouts/kcdoc.aspx?k=g01kc-1-20258		https://mbs.microsoft.com/Files/public/365/Dynamics365EnterpriseEditionOnPremisesLicensingGuide.pdf
Dynamics 365 for Operations on-premises Licensing Guide	https://mbs.microsoft.com/Files/public/365/DynamicsOperationsOnPremEnterprise.pdf		
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/		
PartnerSource	https://mbs.microsoft.com/partnersource/		
Partner Center	https://partnercenter.microsoft.com/en-us/pcv/dashboard/overview		
Cloud Solution Provider Program (CSP)	https://mspartner.microsoft.com/en-us/Pages/solutions/cloud-reseller-overview.aspx		

Appendix A: Team Members Overview by Plan

This table provides an overview of the Team Members use rights by Dynamics 365 Customer Engagement Plan and Dynamics 365 Unified Operations Plan. Reference [Appendix B](#) for a detailed list of the Dynamics 365 Customer Engagement Team Members and [Appendix C](#) for a detailed list of the Dynamics 365 Unified Operations Team Members use rights.

Use Rights for plan and applications	Description	Customer Engagement	Unified Operations
Access			
	Access Anywhere: Web App, Mobile App, Tablet App, via Outlook	•	
Read			
	Dynamics 365 Applications: full read across	•	•
General System Use			
Common across Customer Engagement Applications	Activities: view and edit	•	
	Announcements: view and edit	•	
	Contacts: Team Members user may create, read and update	•	
	Dynamics 365 Mobile Client Application: use (for iPad, Windows) except for Field Service	•	
	Gamification: access as a fan and spectator	•	
	Microsoft Excel: export data and access user reports, charts and dashboard	•	
	Notes: view and edit	•	
	Voice of Customer Surveys: respond to	•	
	Yammer: collaboration (needs Yammer license)	•	
Edit/Actions			
Customer Engagement	Custom Entities*	15 max	
Customer Service	Employee Self Serve: start personal support chat and cases and view knowledge articles (Portal or API access only)	•	
Project Service Automation	Apply for Project, report Time & Expense for Projects, update Project Tasks, Update Own Resource Competencies for Project	•	
Finance & Operations	Cost Objects: monitor monetary and non-monetary performance of assigned cost objects		•
	Accounts Payable: view positive pay events		•
	Department Budget: create and edit		•
	Employee Self Serve: record and update personal information, record time and expense		•
	Expense: approve		•
	Inventory: respond to inventory needs on production line		•
	Invoice: approve		•
	Manager Self Service: manage direct reports, record and update employee information		•
	Purchase Orders: respond to vendors PO when listed as contact person		•
	Quality Control: create and edit		•
	Requisitions: create and edit		•
	Time: approve		•

Use Rights for plan and applications	Description	Customer Engagement	Unified Operations
Retail	Employee Self Serve: record and update personal information, record time and expense		•
	Expense: approve		•
	Invoice: approve		•
	Manager Self Service: manage direct reports, record and update employee information		•
	Picking: perform in store or warehouse		•
	Receiving: perform in store or warehouse		•
	Requisitions: create and edit		•
	Stock Counting: perform in store or warehouse		•
	Time: approve		•
Talent	Absence and Leave: approve		•
	Attract: create and share onboarding guide, add applicants and jobs, schedule and manage interviews		•
	Employee Self Service: record and update personal information, and request leave and absence		•
	Manager Self Service: manage direct reports, record and update employee information, perform hiring and onboarding for direct reports		•

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

Appendix B: Customer Engagement Plan Applications

Use Rights

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 Applications.

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

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

Use Rights	Team Members	Sales		Customer Service		Field Service	Project Serv Auto	Marketing
		Pro	Ent	Pro	Ent			
Accounts		•	•	•	•	•	•	•
Cases for Sales		•	•					
Competitors			•					
Embedded Intelligence			•		•			
Forecasting			•					
Invoices		•	•			•		
Lead Management		•	•					•
Marketing Campaigns			•					•
Marketing List			•					•
Opportunities		•	•					
Orders		•	•					
Price lists		•	•					
Product		•	•					
Product Bundles		•	•					
Product Families			•					
Product Hierarchies			•					
Product Relationships			•					
Quick Campaigns			•					•
Quotes		•	•					
Sales Goals			•					
Sales Hub			•					
Sales Literature			•					•
Territories			•			•		
Customer Service Hub				•	•			
Entitlements				•	•			
Facilities/Equipment					•			
Leads (create only)				•	•			
Resources				•	•	•		
Service (Service Scheduling)					•			
Work Hours				•	•	•		
Customer Assets						•		
Dispatch						•		
Inventory Management						•		
Purchase Orders						•		
Repairs and Returns Management						•		
Routing Capabilities						•		
Schedule						•		
Service Agreements						•		
Work Order Management						•		

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

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

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

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

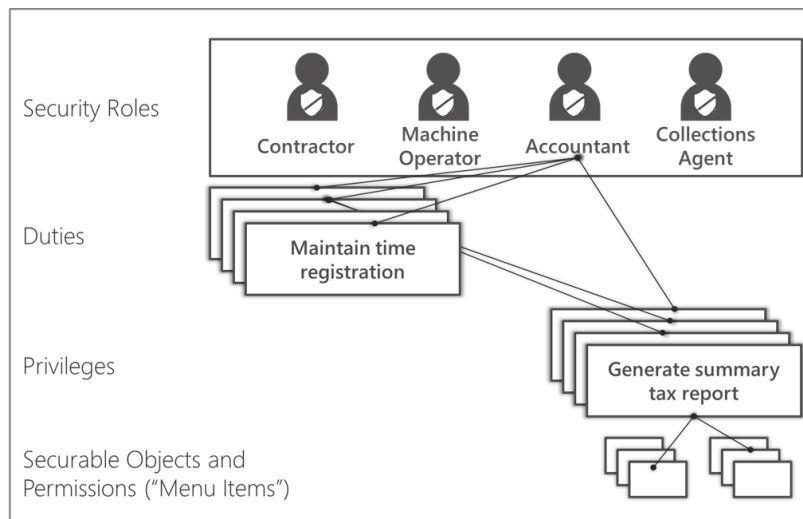
**Project Online Desktop Client (PODC) is the fully installed, up-to-date subscription version of the Project desktop application

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 15: 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 E](#) for more information about how such customization can impact licensing requirements.

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

Role	Security Role Description	Team Members	Activity	United Operations Plan or Talent
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			•
Role	Security Role Description	Team Members	Activity	United Operations Plan or Retail
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			•

Role	Security Role Description	Team Members	Activity	United Operations Plan
C-Suite				
Chief executive officer	Reviews the financial and operational performance		•	•
Chief financial officer	Reviews the financial performance		•	•
Budgeting				
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				
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			•

Role	Security Role Description	Team Members	Activity	United Operations Plan
Financial controller	Reviews all accounting process performance and enables those processes			•
Tax accountant	Documents fiscal events and responds to fiscal inquiries			•
Tax engine developer	Create and manage taxable document model mappings.			•
Tax engine functional consultant	Create and manage generic tax engine components (taxable document and tax document)			•
Treasurer	Documents treasury events and responds to treasury inquiries			•
Project Management				
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				
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			•

Role	Security Role Description	Team Members	Activity	United Operations Plan
Sales				
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				
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				
Marketing coordinator	Produces and distributes marketing materials			•
Marketing manager	Manages product marketing			•
Field Service				
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				
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				
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			•

Role	Security Role Description	Team Members	Activity	United Operations Plan
Distribution				
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				
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				
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				
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			•

Role	Security Role Description	Team Members	Activity	United Operations Plan
Administrator				
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 Application and Management Reporter Viewers require a Team Member.

Appendix D: Custom Entities

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

Custom Entity Overview:

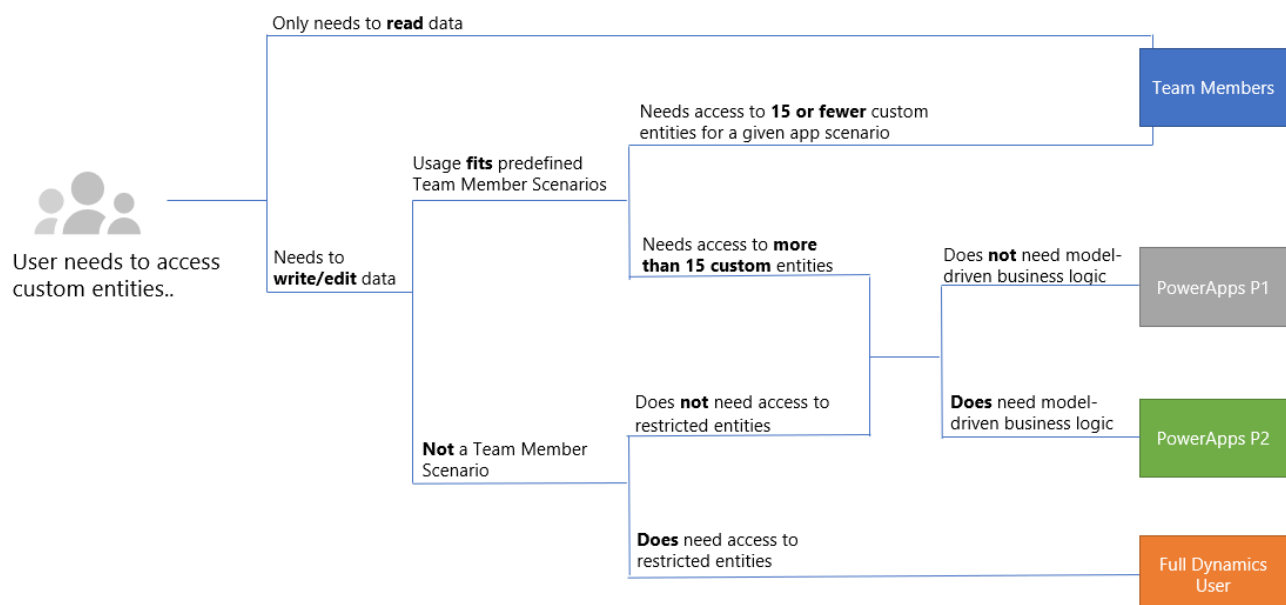
An entity defines information that you want to track in the form of records, which typically include properties such as company name, location, products, email, and phone.

Dynamics 365 applications 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 is specific to your organization – namely custom entities. Note, adding a field to existing standard entities does not make it a custom entity.

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

Application/Plan	Custom Entity Use Rights
Dynamics 365 Enterprise Applications and/or Plan Full Users	<ol style="list-style-type: none"> 1. Full access 2. No limit on number of custom entities 3. Full Create, Read, Update, and Delete (CRUD) on data records associated with custom entities
PowerApps Application	<ol style="list-style-type: none"> 1. CRUD on standard entities that are not restricted - (https://docs.microsoft.com/en-us/powerapps/maker/common-data-service/data-platform-restricted-entities) <ol style="list-style-type: none"> a. If the PowerApps application creates or updates a restricted entity, then the application user needs to be licensed with an Enterprise Application or Plan (Full user) 2. No limit on number of custom entities 3. Full CRUD on data records associated with custom entities
Dynamics 365 Team Members/Sales Professional/Customer Service Professional	<ol style="list-style-type: none"> 1. Create and modify up to 15 custom entities (per application) in addition to the included "out-of-the-box" entities <ol style="list-style-type: none"> a. There is no limit on read rights for custom entities 2. Custom entities should be within the context of the application module 3. Full CRUD on data records associated with custom entities

Figure 16: Team Members access to custom entities



Appendix E: 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 Full, Activity, or Team Members users. To make it faster and easier to deploy the solution and determine licensing requirements, these Menu Items are associated with certain Security Roles.

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

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

Note:

- Roles in 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.

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 (full user SL) 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 Unified Operations user SL level action), then they can customize the role to include the “Approve posting of service order” Menu Item. Because the required SL is determined by the highest-level action the user may perform, all users assigned to the Field Technician role would then require a full user SL.

Changing Menu Items Associated with an Individual

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

Creating Menu Items

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

Appendix F: Dynamics 365 Capacity Add-ons

Subscription add-ons apply across a single tenant; they are not tied to a specific user. Subscription add-ons can be purchased at any time and remain a part of the subscription for the remainder of the subscription term. We have broken this add-on section down into all Customer Engagement Plan 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 and Applications capacity add-ons

Customer Engagement Plan applications share the same tenant and infrastructure capacity. They have access to the Customer Engagement Plan application default subscription capacities, shared across the Customer Engagement Plan applications. If a customer purchases Dynamics 365 Plan they will obtain default access to both the Customer Engagement Plan applications and the Dynamics 365 Unified Operations Plan application. Refer to the Default Subscription Capacities [section](#) for more details.

Dynamics 365 for	Portal	Portal Page Views	Common Data Service Database Capacity	Common Data Service File Capacity	Common Data Service Log Capacity
Sales Enterprise	•	•	•	•	•
Sales Professional	•	•	•	•	•
Marketing	•	•	•	•	•
Customer Service Enterprise	•	•	•	•	•
Customer Service Professional	•	•	•	•	•
Field Service	•	•	•	•	•
Project Service Automation	•	•	•	•	•

Additional Common Data Service Capacity Add-ons

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

Note, subscription storage corresponding to a customer subscription is tracked against all the Dynamics 365 Customer Engagement Plan application instances associated with the tenant.

The following add-on capacity licenses are available:

- Additional Common Data Service Capacity Add-on: Effective April 1, 2019, organizations that transact on the new platform capacity license no longer need to pay for additional production or non-production environments. Organizations can create additional environments if they have 1 GB of database capacity available
- Additional Common Data Service File Capacity Add-on
- Additional Common Data Service Log Capacity Add-on

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

Portals and Page Views Add-on

The default Portal provided with Dynamics 365 Customer Engagement Plan 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/Portal	Included Capacity	Additional Increment
Page Views Access/utilization of the Dynamics 365 Portal	1 million/month	500K/month

Dynamics 365 Customer Service Insights Additional Cases Add-on

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

Subscription Capacity	Included Capacity	Additional Increment
Cases	100K Cases/tenant/month	500K Cases/tenant/month

Microsoft Social Engagement Additional Posts Add-on

Note: Effective January 16, 2019, Microsoft will no longer offer Microsoft Social Engagement service to new customers. Existing Dynamics 365 customers may continue to purchase additional Posts as required.

Resources:

- [Frequently asked questions about Microsoft Social Engagement service discontinuation](#)
- [Microsoft Social Engagement vs. Dynamics 365 Market Insights](#)

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

Subscription Capacity	Included Capacity	Additional Increment
Posts	10K/month	10K/month 100K/month 1M/month

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 Dynamics 365 for Marketing included 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.

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

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 customers to automatically create a schedule for the appropriate resource in SharePoint, while simultaneously optimizing appointment setting for travel time, mileage, and many other constraints.

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

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

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

Unified Operations Plan and Applications capacity add-ons

Dynamics 365 for Finance and Operations and Dynamics 365 for Retail share the same tenant and infrastructure capacity. They have access to the following additional capacities, shared across the Unified Operations Plan Applications.

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 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 a user SL or device SL is required.

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

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

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

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 or 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.

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

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

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

Sandbox Add-ons

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

Licensed users associated with a Dynamics 365 Unified Operations Plan or Retail subscription can access the instance included in the subscription, and every additional instance associated with the same customer.

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

*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.

Dynamics 365 Unified Operations - Additional Database Capacity Add-on

The Additional Database Capacity 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.

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

*4TB maximum may not be available in all regions

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

Dynamics 365 Unified Operations - Additional File Storage Capacity

The Additional File Storage Add-on allows Dynamics 365 Unified Operations or Dynamics 365 Retail customers to increase cloud storage capacity by 1GB per Additional File Storage add-on license.

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

Additional Common Data Service Capacity Add-ons

In addition to the additional Unified Operations capacities, Dynamics 365 Unified Operations plan and Retail application licenses may purchase Common Data Service capacity. Common Data Service platform capacity add-ons continue to provide flexibility to increase the storage capacity associated with your PowerApps subscription in increments of 1 GB per additional capacity add-on license.

The following add-on capacity licenses are available:

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

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

Customer Insights capacity add-ons

Dynamics 365 Customer Insights Additional Profiles Add-on

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

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

Appendix G: Licensing Channel & Segment Availability

Dynamics 365 Customer Engagement Applications

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

Dynamics 365 Customer Engagement Capacity

Dynamics 365	Channel						Segment						
	EA	EAS	EES	CSP	MPSA	MOSP	CORP	FAC	STU	EDU	GOV	GCC	NFP
CDS Database Capacity	•	•	•	•	•	•	•	•	•	•	•	•	•
CDS Log Capacity	•	•	•	•	•	•	•	•	•	•	•	•	•
CDS File Capacity	•	•	•	•	•	•	•	•	•	•	•	•	•
Additional Portal	•	•	•	•	•	•	•	•		•	•	•	•
Additional Portal Page Views	•	•	•	•	•	•	•	•		•	•	•	•
Additional Cases	•	•	•	•	•	•	•	•		•			•
Marketing Additional Contacts	•	•	•	•	•	•	•	•	•	•			•

Dynamics 365 Unified Operations Applications

Dynamics 365	Channel						Segment						
	EA	EAS	EES	CSP	MPSA	MOSP	CORP	FAC	STU	EDU	GOV	GCC	NFP
Dynamics 365 Plan	•	•	•	•	•		•	•	•	•	•		
Unified Operations Plan	•	•	•	•	•		•	•	•	•	•		
Finance and Operations (included in Unified Operations Plan)	•	•	•	•	•		•	•	•	•	•		
Retail	•	•	•	•	•		•	•	•	•	•		
Talent	•	•	•	•	•		•	•	•	•	•		
Operations - Activity	•	•	•	•	•		•	•	•	•	•		
Operations - Device	•	•	•	•	•		•	•	•	•	•		
Talent comprehensive hiring Add-on	•	•	•	•	•		•			•	•		•
Talent: Onboard						•	•						
Team Members	•	•	•	•	•	•	•	•	•	•	•	•	•

Dynamics 365 Unified Operations Capacity

Dynamics 365	Channel						Segment						
	EA	EAS	EES	CSP	MPSA	MOSP	CORP	FAC	STU	EDU	GOV	GCC	NFP
CDS Database Capacity	•	•	•	•	•		•	•		•	•		
CDS File Capacity	•	•	•	•	•		•	•		•	•		
Sandboxes	•	•	•	•	•		•	•	•	•	•		
Order Lines Add-on	•	•	•	•	•		•			•	•		•

Dynamics 365

Dynamics 365	Channel						Segment						
	EA	EAS	EES	CSP	MPSA	MOSP	CORP	FAC	STU	EDU	GOV	GCC	NFP
Customer Insights	•	•		•	•		•	•			•		•
Forms Pro Capacity	•	•	•	•	•		•	•			•		•

Appendix H: 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 I: Change Log

Page	Topic	Change	Action	Date
2	What's New	Updated	Updated with new releases	May 2019
19, 28, 51	Customer Service Insights	Added	New capability	May 2019
23	Talent: Attract	Removed	Talent: Attract is no longer available for new customers	May 2019
38	Marketing	Removed	Live Segment limitation	May 2019
49	Territories	Corrected	Use rights	May 2019
33	Price List	Removed	Removed price list links	April 2019
5 & 6	Order Lines	Clarified	Order Lines may be used for internal or external users	April 2019
22	Talent comprehensive hiring	Added	Capabilities table	April 2019
23 & 24	Customer Insights	Added	New release	April 2019
26	Default Capacities	Updated	Changes for capacity	April 2019
31	Service Support	Updated	Removed Enhanced Support (retired June 2019)	April 2019
34	Appendix A	Updated	Use rights	April 2019
36	Appendix B	Updated	Use rights	April 2019
50	Appendix F	Updated	Changes for capacity add-ons	April 2019
55	Appendix G	Updated	New SKUs	April 2019
various	Miscellaneous	Updated	Added scenarios, format updates, etc.	April 2019
7	External Users	Updated	Added Order Lines language	January 2019
16 & 17	Marketing	Added	Scenarios	January 2019
17	Marketing Additional Application	Relocated	To Dynamics 365 for Marketing chapter from Customer Engagement add-on section	January 2019
21	Talent comprehensive hiring Add-on	Relocated	To Unified Operations Chapter vs the Unified Operations add-on section	January 2019
23	PowerApps	Corrected	Added Activity user to PowerApps table	January 2019
24	Additional Services	Removed	Microsoft Social Engagement (MSE) discontinued effective January 16., 2019	January 2019
48	Additional MSE Posts	Updated	Added language to address the discontinuation of MSE and the availability of additional Post as required	January 2019

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