



Microsoft Dynamics 365 Licensing Guide

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Using This Guide

Use this guide to improve your understanding of how to license Microsoft Dynamics 365 (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.

For licensing information related to Dynamics 365 Business Central, Microsoft's comprehensive ERP and CRM solution designed for smaller businesses, refer to the Dynamics 365 Business Central Licensing [Guide](#). Licensing information for using mixed reality business tools and Dynamics 365 applications can be found in the Dynamics 365 Mixed Reality Licensing [Guide](#).

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 Dynamics 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 | 2) Use rights/dual use rights |
| 3) Channel Licensing (how to buy) | 4) Add-ons |
| 5) Licensing (how to license) | 6) Notes: Changes |
| 7) Minimum requirements | 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 August 2020.

Dynamics 365	Description	New offer or Change
Microsoft Forms Pro	Microsoft Forms Pro and additional capacity SKUs renamed to Dynamics 365 Customer Voice	Dynamics 365 Customer Voice is the new enterprise feedback management solution
Sales Premium	Sales Premium is a new combined offer consisting of Dynamics 365 Sales Enterprise and Dynamics 365 Sales Insights	New SKU, licensed per user

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. 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.

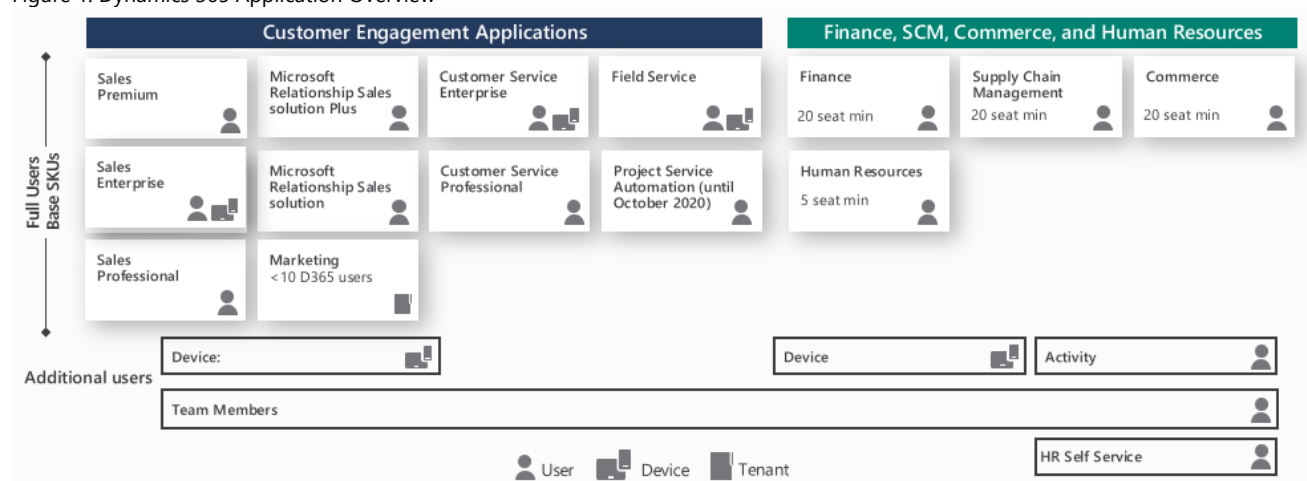
Dynamics 365 Applications:

Dynamics 365 Sales
Dynamics 365 Marketing
Dynamics 365 Customer Service
Dynamics 365 Field Service
Dynamics 365 Project Service Automation
Dynamics 365 Finance
Dynamics 365 Supply Chain Management
Dynamics 365 Commerce
Dynamics 365 Human Resources

Hereinafter written as:

Sales
Marketing
Customer Service
Field Service
Project Service Automation
Finance
Supply Chain Management
Commerce
Human Resources

Figure 1: Dynamics 365 Application 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 Finance, Supply Chain Management, Commerce, Human Resources, and Dynamics 365 Operations - Activity)
- Microsoft Products and Services Agreement (MPSA). More information on MPSA is available [here](#).
- Microsoft Online Subscription Program (Web Direct/MOSP) (except Finance, Supply Chain Management, Commerce, Human Resources, and Dynamics 365 Operations - Activity)

For more information on Dynamics 365 licensing channels and segment availability, refer to the [Product Terms and the Online Service Terms](#).

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](#).

How to License Dynamics 365

To license core Business Applications (Sales, Customer Service, Field Service, Project Service Automation, Finance, Supply Chain Management, Commerce, and Human Resources), customers may purchase as either a base or as an attach license(s).

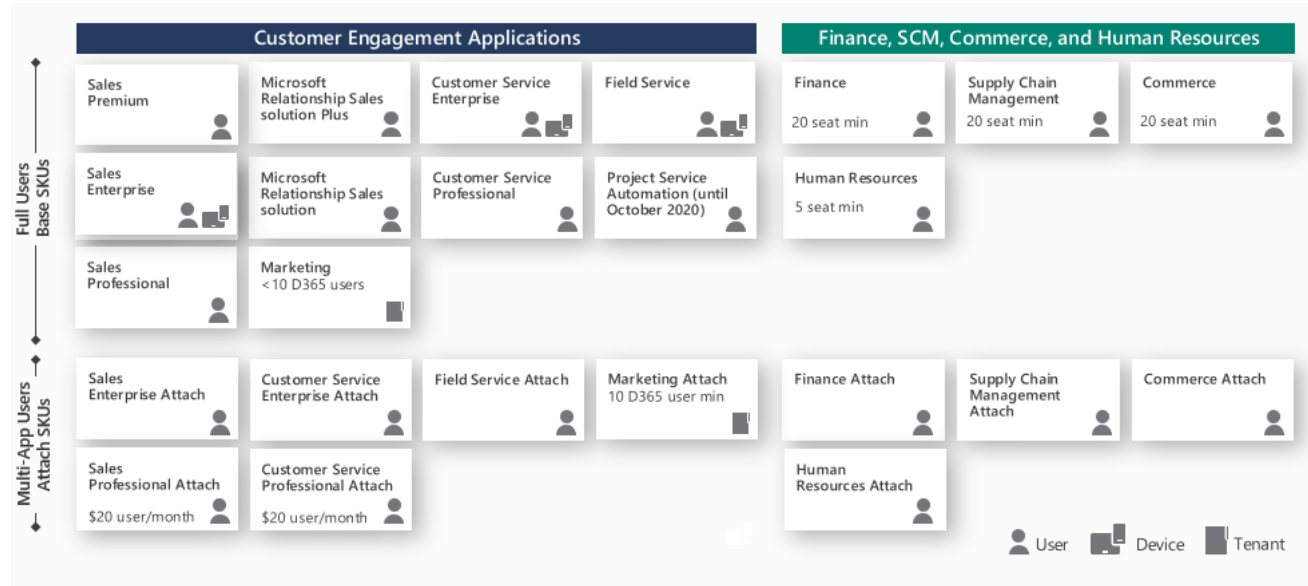
When purchasing multiple core Business Applications, the first or Base license must be the highest priced license for the user. Every full user must have a Base license.

Users requiring multiple core Business Applications may purchase as many Attach SKUs as needed at a reduced price. Each Attach license can only be assigned to a user with a qualifying prerequisite Base license. Admins do not need any license to configure and administer applications. The admin will not be able to assign the Attach license to a user who does not have the required Base license. Customers trying to assign an Attach license to a user that does not have the prerequisite Base license, will get an error during assignment. In EA if an Attach license is purchased when a Base license is required, customers may step-up the Attach license to the appropriate Base license. In CSP and MPSA, customers need to return the Attach license and purchase the appropriate Base license.

Note, this sales motion is user license (USL) based. Only the Business Applications that are USLs may be purchased as an Attach license.

1. Purchase the first or Base license at standard pricing
2. Purchase additional eligible Attach licenses at a reduced price

Figure 2: Dynamics 365 Base and Attach licenses



Note, Project Service Automation is available as Base license only. Project Service Automation customers seeking multiple Customer Engagement Application(s) may purchase Project Service Automation as the Base license and additional Customer Engagement Applications (Sales, Customer Service, Field Service) at the Attach price. If a user requires both a Project Service Automation license and a Finance, Supply Chain Management, Commerce, or Human Resources license, the customer must purchase both as a Base license at the standard price.

Additional applications, capacity, or non-core Business Applications do not qualify for the multi-application Base/Attach motion but may be purchased as individual licenses. Reference [Appendix G](#) for eligible Base and Attach license combinations.

Licensing Requirements for Internal Users

Dynamics 365 has two types of SLs (the only exception is Marketing application, which is licensed per tenant – 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 salespeople, customer service representatives, finance employees, controllers, human resources, 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 application subscription.

Full users can be further defined as Enterprise and Professional:

- Enterprise users: Sales Enterprise, Customer Service Enterprise, Field Service, Project Service Automation, Finance, Supply Chain Management, Commerce, and Human Resources
- Professional users: Sales Professional and Customer Service Professional

- **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 (hereinafter written as Team Members), Dynamics 365 Operations – Activity (hereinafter written as Operations – Activity), or Dynamics 365 Human Resources Self Service (hereinafter written as Human Resources Self Service) SL.

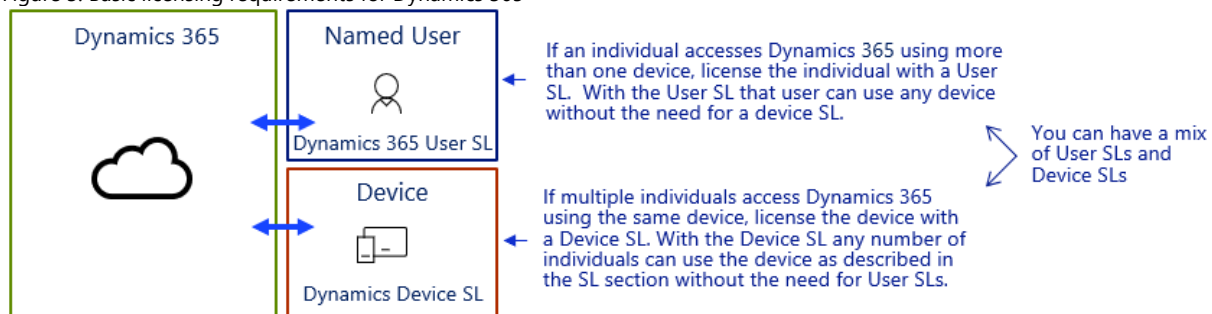
Device SL: With device SL any number of users can access a licensed device without the need for separate user SLs:

- Shared login: Customer Engagement Applications device SLs and Dynamics 365 Operations - Device SL (hereinafter written as Operations - Device), or
- Individual logins: Operations - Device SL without the need for separate user SLs

Note, if individual users share one login, their individual usage cannot be tracked.

Customer Engagement Applications 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 Finance, Supply Chain Management, and Commerce 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, Dynamics 365 Operations - Order Lines (hereinafter written as Operations - Order Lines) may also be used to license indirect access scenarios such that a user or device license is not required. Please see the Operations - 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](#).

Minimum License Purchase Requirements

To activate a subscription, customers enrolling in Dynamics 365 must purchase a minimum quantity of full user qualifying licenses where required. Only Base licenses count toward the minimum purchase requirements.

Application	Minimum Purchase Qualifying Licenses	Min Purchase of Qualifying Licenses
Academic licenses	Sales, Customer Service, Field Service, and/or Project Service Automation	20 base licenses
Marketing Attach	Sales, Customer Service, Field Service, Project Service Automation Finance, Commerce, and/or Supply Chain Management	10 base licenses
Marketing Additional Contacts	Marketing Additional Contacts Packs	Tier 3: 2 packs Tier 4: 5 packs Tier 5: 10 packs
Customer Insights Attach	20 Sales Enterprise, 20 Customer Service Enterprise, or 1 Marketing application	20 licenses
Microsoft Relationship Sales solution	Microsoft Relationship Sales Plus solution, and/or Microsoft Relationship Sales solution	10 licenses
Professional Direct Support	All Dynamics applications. Once maximum has been met all remaining users are covered at no charge	20 licenses 250 maximum

Customers may combine Finance, Supply Chain Management, Commerce base USLs and/or device (2.5 device SLs equal 1 base USL) Ls to satisfy the 20-user minimum purchase.

Application	Minimum Purchase Qualifying Licenses	Min Purchase of Qualifying Licenses	Exceptions for CSP
Commerce	Finance, Supply Chain Management, Commerce and/or Device (2.5=1)	20 base licenses	Combinations are not allowed in CSP. Each subscription of Finance, Supply Chain Management, or Commerce must meet the minimum purchase requirement
Finance		20 base licenses	
Supply Chain Management		20 base licenses	
Human Resources	Human Resources	5 base licenses	No

Licensing Requirements for External Users

External users are not employees, contractors, or 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.

Dynamics 365 customers have the option to license a Portal to provide access to business processes or internal data for external users.

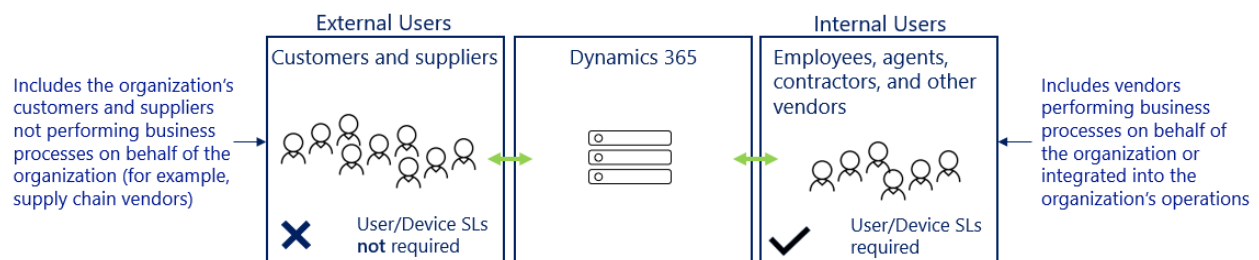
In addition, external users include off-site vendors not on an employee-like relationship with the organization or its affiliates (e.g. IT help desk support vendors serving multiple customer organizations).

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, human resources, 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, Operations - Order Lines 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 Operations - Order Lines [section](#) for more details.

Operations - Order Lines 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 Operations - 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.

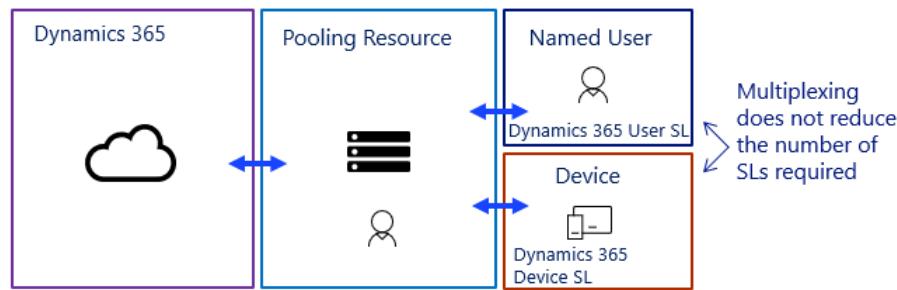


Multiplexing

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 accessing Dynamics 365 [restricted](#) data indirectly through a Power Apps 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 [Operations - 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, this document is intended to provide general multiplexing guidance that can be used for online as well as on-premises situations.

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

Dual Use Rights

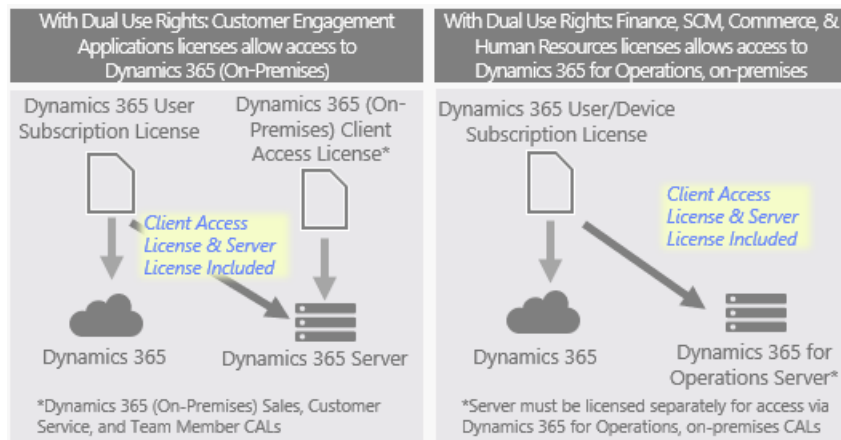
One of the advantages of Dynamics 365 is dual use rights. This allows customers the option to deploy the server software either in Microsoft's cloud or in a private on-premises or partner-hosted cloud. In some cases, customers may want to deploy both types of instances simultaneously. This might be done 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 the following SLs have use rights equivalent to a CAL and may access the on-premises Dynamics 365 server software provided via dual use rights.

	Dynamics 365 SKUs	Dynamics 365 on-premises SKUs	On-premises Server
Dynamics 365 Applications	Dynamics 365 Sales Enterprise	Dynamics 365 for Sales	Dynamics 365 (On-Premises)
	Dynamics Customer Service Enterprise	Dynamics 365 for Customer Service	
	Dynamics 365 Field Service	Dynamics 365 for Field Service functionality	
	Dynamics 365 Finance	Dynamics 365 for Operations ¹	Dynamics 365 for Operations, on-premises
	Dynamics 365 Supply Chain Management	Dynamics 365 for Operations ¹	
	Dynamics 365 Commerce	Dynamics 365 for Operations ¹	
Additional User/Device	Dynamics 365 Team Members	Dynamics 365 for Team Members	Dynamics 365 (On-Premises) or Dynamics 365 for Operations, on-premises
	Dynamics 365 Operations - Activity	Dynamics 365 for Operations Activity	Dynamics 365 for Operations, on-premises
	Dynamics 365 Operations - Device	Dynamics 365 for Operations Device	

¹On-premises dual use rights only apply for the specific Dynamics 365 for Operations applications for which the user has a cloud SL. For example, a user licensed for Finance may only use the Dynamics 365 on-premises security roles associated with the Finance USL.

Dynamics 365 (On-Premises) server licenses are included with the Client Access Licenses (CALs). Access to the Dynamics 365 for Operations, on-premises 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.



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
- Dynamics CRM 2016 for Dynamics 365 (On-Premises) Server

Note:

- 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
- Licenses for all supporting servers (e.g., Windows Server and CAL(s)) must be obtained separately

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 Business Center](#), 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 [here](#).

Dynamics 365 Subscriptions

The core Business Applications can be licensed as base or attach licenses, exceptions apply for Project Service Automation and Marketing. Reference [Appendix G](#) for appropriate license combinations.

Dynamics 365 Applications

Application subscriptions are named user subscriptions where a user is licensed with individual application(s). 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). Marketing is licensed at the tenant level.

- | | | |
|---------------------------------|------------------------------|---------------------------|
| • Sales Enterprise | • Marketing | • Supply Chain Management |
| • Sales Professional | • Field Service | • Commerce |
| • Customer Service Enterprise | • Project Service Automation | • Human Resources |
| • Customer Service Professional | • Finance | |

At a tenant level any combination of applications can be deployed. However, Enterprise and Professional applications of the same workload must be installed on separate instances (e.g. Sales Enterprise and Sales Professional).

A user with a Professional application is licensed only for that application and therefore may not directly or indirectly access another instance with an Enterprise application for the same workload. Conversely, as an Enterprise license includes the Professional capabilities for the same workload, an Enterprise user may access the Professional application instance. However, the functionality in the Professional application will still be limited to the Professional features of that workload.

Figure 4: Mix and Match Deployment

Customer Scenario – user level	Instances Restriction	Users may
Sales Enterprise + Sales Professional	Separate	Sales Enterprise users may access both instances, however the Sales Professional users many not access Sales Enterprise
Microsoft Relationship Sales solution +Sales Professional	Separate	Because Relationship Sales includes Sales Enterprise the same restrictions apply as stated above
Sales Enterprise + Customer Service Professional	None	Each user needs to be licensed with both application to access the two workloads
Customer Service Enterprise + Customer Service Professional	Separate	Customer Service Enterprise users may access both instances, however the Customer Service Professional users many not access Customer Service Enterprise
Customer Service Professional + Sales Professional	None	Each user needs to be licensed with both application to access the two workloads
Sales Professional + Team Members	None	Professional application users may access both; however, Team Members users have read and limited edit access to Professional applications (see Appendix C)
Customer Service Professional + Team Members	None	

Dynamics 365 Additional Users

Additional users are not subject to the Base/Attach motion and may access all applicable Dynamics 365 applications within the constraints described below.

Human Resources Self Service

The Human Resources Self Service user SL only applies to the Dynamics 365 Human Resources application. The Human Resources Self Service user SL does not include the use rights of a full Human Resources but enables access to employee and manager self-serve capabilities, such as:

- (i) Update personal employee information
- (ii) Manage human resources activities of direct employees or those reporting up through the users reporting chain
- (iii) Report sick leave
- (iv) Submit vacation request
- (v) View employee benefits
- (vi) Approve employee leave as a manager
- (vii) View employee information as a manager

Team Members

The Team Members user SL enables users to read Dynamics 365 data generated from Finance, Supply Chain Management, Commerce, Human Resources, and the Customer Engagement Applications. Full access to these applications is governed through Dynamics 365 application user, as described above.

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

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

For more information about Team Members application modules, please [check this link](#).

Team Members use rights for Customer Engagement Applications

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

- (i) Create, read, update, and delete contacts, activities and notes
- (ii) Update personal employee information
- (iii) Record time and expense for Project Service Automation, and apply for projects
- (iv) User reporting and dashboards
- (v) Participate as an end-consumer of Dynamics 365 services such as responding to surveys
- (vi) Team Members application module may be customized with maximum 15 additional entities (custom entities or standard Common Data Service entities) available to the Team Members license per pre-approved application scenarios in [Appendix A](#).

Reference [Appendix D](#) for more information on custom entities and [Appendix B](#) for a detailed list of the Customer Engagement Applications Team Members use rights.

Team Members use rights for Finance, Supply Chain Management, Commerce, and Human Resources Applications

The Team Members user SL grants a user the following Finance, Supply Chain, Commerce, and Human Resources 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 human resources activities of direct employees or those reporting up through the users reporting chain
- (v) Human Resources Self Service use rights when the Human Resources application is licensed
- (vi) Create requisitions
- (vii) Create or edit the items related to the following capabilities: quality control and departmental budgets
- (viii) Approval of time, expense, invoices
- (ix) Team Members application module may be customized with maximum 15 additional entities (custom entities or standard Common Data Service entities) available to the Team Members license per pre-approved application scenarios in [Appendix A](#).

Operations - Activity

The 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. Operations - Activity use rights include all Team Members user rights as well as the rights 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 Finance, Supply Chain Management, Commerce, and Human Resources Security Roles by user SL Level.

Device

Customer Engagement Applications Device SL

With the Customer Engagement Applications 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. For a detailed view of the use rights associated with Customer Engagement Applications device SL please refer to [Appendix B](#).

Customer Engagement Applications device SLs options:

- (i) Sales Enterprise
- (ii) Customer Service Enterprise
- (iii) Field Service

Finance, Supply Chain Management, and Commerce - Device SL

With the Operations - Device license, multiple users can use a device that is licensed with an 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)

Operations - Device SL use rights are also available to 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 of the Operations - Activity user and full user.

Product Licensing

Dynamics 365 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
More information	Reference Microsoft Dynamics 365 documentation here

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:** Sales Enterprise and LinkedIn Sales Navigator Enterprise
- **Microsoft Relationship Sales solution:** Sales Enterprise and LinkedIn Sales Navigator Team

MRSS qualifies as a base license as it includes a Sales Enterprise license, customers may purchase eligible attach licenses. Reference [Appendix G](#) for appropriate license combinations.

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 Enterprise

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

Users requiring both Sales Enterprise and Sales Insights applications may purchase Sales Premium (includes both Sales Enterprise and Sales Insights), licensed per user, at a reduced price.

Dynamics 365 Sales Professional

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

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. Sales Enterprise includes the Sales Insights features: assistant, email engagement, auto capture, and business card scanning (10/user/month: pooled at tenant level). Sales Insights has a capacity limit for business card scanning of 200/user/month. If additional Business card scanning capacity is required, Sales Enterprise customers may purchase additional Sales Insights licenses.

Customers are required to have a Sales Enterprise or Microsoft Relationship Sales solution (MRSs) license to enable all the Dynamics 365 Sales Insights features listed below.

- | | |
|---|--|
| (i) Predictive scoring (lead and opportunity) | (v) Pipeline intelligence |
| (ii) Predictive forecasting | (vi) Notes analysis |
| (iii) Business card scanning | (vii) Conversation intelligence |
| (iv) Relationship analytics | (viii) Connection insights (who knows whom and talking points) |

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

Dynamics 365 Marketing



General information:

Licensing	Per tenant
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 (Marketing standalone only)
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
More information	Reference Microsoft Dynamics 365 documentation here

The Marketing application is licensed per tenant and is based on contacts used in Marketing. The administrator will need to assign user licenses through the Microsoft 365 admin center to Marketing users that need access to the Marketing application. Since

Marketing is a tenant-based license, customers may install, use, and configure one Marketing application with only one Dynamics 365 instance.

The Marketing application is a tenant-based license, therefore the per user Attach sales motion does not apply to this application. Reference [Appendix G](#) for appropriate license combinations.

Dynamics 365 Marketing (standalone)

Customers who are new to Dynamics or have fewer than 10 full users of Sales, Customer Service, Field Service, Project Service Automation, Finance, Supply Chain Management, or Commerce may purchase the Marketing (standalone) application with an entitlement of 10K contacts. Customers receive Customer Engagement Applications entitlements once, providing these entitlements are not already on the customer's account, and only when purchasing Marketing standalone application:

- | | |
|---|---------------------------------------|
| (i) Common Data Service Database Capacity | (ii) Common Data Service Log Capacity |
| (iii) Common Data Service File Capacity | (iv) Dynamics 365 Customer Voice |

Dynamics 365 Marketing Attach

Customers with at least 10 full users of Sales, Customer Service, Field Service, Project Service Automation, Finance, Supply Chain Management, or Commerce may purchase Marketing Attach application with an entitlement of 10K contacts.

The base pack of 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 Applications entitlements are at the tenant level; therefore, they are not included with this application.

Scenario:

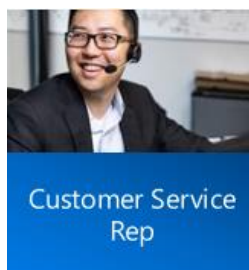
Dynamics 365 Sales on-premises customers would like to use Marketing.

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

For additional environments (production or non-production), reference [Appendix F: Dynamics 365 Capacity Add-ons](#).

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. 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 Marketing application OR capabilities delivered as part of the application. Visit this [help documentation](#) to learn more.

Dynamics 365 Customer Service



Manage cases



Dynamics 365
Customer Service

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	Customer Service Enterprise application add-ons: <ul style="list-style-type: none">• Chat for Customer Service• Digital Messaging
Capacity Add-on	For details, see Add-ons
Entitlements/Use Rights	For details of entitlements and use rights, see Use Rights
More information	Reference Microsoft Dynamics 365 documentation here

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

Dynamics 365 Customer Service Enterprise

Customer Service Enterprise for more complex, configurable, and intelligent capabilities, 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 Customer Service Professional

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

Dynamics 365 Customer Service Insights

Microsoft 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. Customer Service Enterprise users are entitled with Customer Service Insights capabilities.

Customers who wish to purchase Dynamics 365 Customer Service Insights, refer to the [Dynamics 365](#) section for information on entitlements and additional capacity.

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

Chat for Dynamics 365 Customer Service

Chat for Dynamics 365 Customer Service is an add-on capability for the Customer Service Enterprise application that helps agents engage in real-time with customers and resolve issues faster. Chat is licensed per user.

Third party computer-telephony channels can be integrated using Dynamics 365 Channel Integration Framework version 2.0.

Use of historical Supervisor reporting through Omnichannel Intraday Insights, Omnichannel Chat Insights and Omnichannel Sentiment Insights Dashboards requires Power BI Pro license or higher.

Dynamics 365 Digital Messaging

Dynamics 365 Digital Messaging is an add-on capability for Customer Service Enterprise that includes Chat for Dynamics 365 Customer Service, 3rd party SMS, and future social messaging channels. Digital Messaging is licensed per user.

Dynamics 365 Virtual Agent for Customer Service

Virtual Agent for Customer Service combines the power of Power Virtual Agents with Customer Service Insights. It empowers customer service teams using AI generated insights from Customer Service Insights to easily create powerful bots using a no-code graphical interface in Power Virtual Agents to drive toward automation, without the need for data scientist or developers.

Virtual Agent for Customer Service is licensed per tenant and everyone in the organization is entitled to use both Power Virtual Agents and Customer Service Insights. The administrator will need to assign licenses through the admin portal to users who need access to Power Virtual Agents and Customer Service Insights.

Reference the Power Platform Licensing [Guide](#) for more information on Power Virtual Agents.

Dynamics 365 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	Resource Schedule Optimization
Capacity Add-on	For details, see Add-ons
Entitlements/Use Rights	For details of entitlements and use rights, see Use Rights
More information	Reference Microsoft Dynamics 365 documentation here

Field Service is the recommended choice for your field-based service teams, leveraging tight integration between 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 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 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 Field Service - Resource Schedule Optimization

Resource Scheduling Optimization is an add-on capability for the Field Service application that enables customers to automatically create a schedule for the appropriate resource (a resource can be a person or a non-human asset), 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 Field Service license is required for managing the Resource Schedule Optimization.

Dynamics 365 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
More information	Reference Microsoft Dynamics 365 documentation here

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

Project Service Automation qualifies as a base license but may not be purchased as an attach license. Customers seeking multiple Customer Engagement Applications may purchase Project Service Automation as the Base license and additional Customer Engagement Applications (Sales, Customer Service, Field Service) at the Attach price. Reference [Appendix G](#) for appropriate license combinations.

Dynamics 365 Finance



General information:

Licensing	User subscription
Purchase requirements	For minimum requirements, 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
More information	Reference Microsoft Dynamics 365 documentation here

Finance enables medium and enterprise organizations to monitor the performance of global financial operations in real-time, predict future outcomes, and make data-driven decisions to drive growth. Finance provides deep data and process integrations across Dynamics 365, Office 365, and partner applications to offer a centralized source of information that saves time, facilitates collaboration across your organization, and enables faster, more informed decisions.

Reference [Appendix C](#): Finance, Supply Chain Management, Commerce, and Human Resources Security Roles by user SL Level for detailed information.

Dynamics 365 Supply Chain Management



General information:

Licensing	User subscription
Purchase requirements	For minimum requirements, 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	None
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
More information	Reference Microsoft Dynamics 365 documentation here

Supply Chain Management provides manufacturers, distributors, and retailers with the real-time visibility and intelligence they need to move from reactive to proactive operations. Supply Chain Management unifies data and uses predictive insights from AI and IoT—across order fulfillment, planning, procurement, production, inventory, warehousing, and transportation processes—to maximize operational efficiency, product quality, and profitability.

Asset Management is included in Supply Chain Management (out-of-the-box) for up to 100 assets. Customers who wish to purchase additional assets, refer to [Appendix F](#).

Dynamics 365 IoT Intelligence Scenario

IoT Intelligence helps shop floor workers to manage machines failures, shop floor managers to effectively manage operations across multiple production lines, and manufacturing executives to have a unified global view of operations.

An IoT Intelligence scenario is a set of capabilities to enable a specific business process. For example, scenario 'machine down' enables the manufacturing system to detect machine failures through IoT signals and generate an alert.

To enable IoT Intelligence, customers must purchase at least 1 IoT Scenario and be licensed to cover the number of IoT Intelligence scenarios that they are operationalizing and the total number of machines that are being monitored by scenarios. One IoT Intelligence Scenario SKU is required for every scenario that a customer requires. Each IoT Intelligence Scenario SKU includes 10 machines, additional machines are available for purchase, reference [Appendix E: Dynamics 365 Capacity Add-ons](#).


Customers may manage unlimited scenarios or machines with no additional purchase, after:

- 6 IoT Intelligence Scenarios Add-ons (6 scenarios and 60 machines) have been purchased
- 10 IoT Intelligence Machines Add-ons (100 Machines) have been purchased

A machine only needs to be licensed once, so if a machine is being monitored by two scenarios, only one machine license is required

Reference [Appendix C: Finance, Supply Chain Management, Commerce, and Human Resources Security Roles](#) by user SL Level for detailed information.

Dynamics 365 Commerce

General information:	
	Licensing
	User subscription
	Purchase requirements
	For minimum requirements, 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
	<ul style="list-style-type: none"> • eCommerce Tiers • Commerce Scale Unit - Cloud • Commerce Recommendations • Commerce Ratings and Reviews
	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
	More information
	Reference Microsoft Dynamics 365 documentation here

Dynamics 365 Commerce is designed to help retailers manage their operations, deliver a connected employee experience, and offer exceptional shopping experiences. The Commerce application simplifies the process of unifying customer shopping experience through an end-to-end commerce platform that brings together eCommerce, in-store, back office, and call center along with enabling easier integration to emerging channels through an API driven headless commerce engine. By leveraging intelligent forecasting and product recommendations, retailers may:

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

Commerce application full user licenses are intended for headquarters and central operations employees of retail organizations. Depending on the scenario, employees in retail stores will generally be licensed with either the [Dynamics 365 Operations - Device SL](#) or [Dynamics 365 Operations - Activity SL](#). Examples of these scenarios may include store employees, store managers and point of sale devices.

Dynamics 365 Commerce Scale Unit - Cloud

A Dynamics 365 Commerce Scale Unit - Cloud will be provisioned in the following scenarios:

1. A single Default Scale Unit - Cloud will be provisioned when an eCommerce tier is purchased (minimum Commerce user count must also be met). That unit may only be used to support eCommerce transactions.
2. A single Default Scale Unit - Cloud will be provisioned when one or more Commerce Devices are purchased (minimum Commerce user count must also be met). That unit may only be used to support Commerce Device transactions.
3. An additional Scale Unit - Cloud is purchased for customers who require additional cloud instance(s) of the commerce service for co-location, performance, additional redundancy, or customization purposes.

For more information, reference [Appendix F: Dynamics 365 Capacity Add-ons](#). Additional Scale Unit - Cloud may only be applied to support eCommerce transactions OR Commerce Devices, a single unit may not support both.

When a Default Commerce Scale Unit - Cloud is provisioned it will be sized appropriately for the number of purchased eCommerce transactions or the number of purchased POS devices. An additional Scale Unit - Cloud will be sized according to which tier was purchased.

Reference [Appendix C: Finance, Supply Chain Management, Commerce, and Human Resources Security Roles](#) by user SL Level for detailed information.

Commerce deployments may also utilize the Commerce Scale Unit - Self Hosted, 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 retail deployment, providing improved performance, business continuity and hybrid capabilities in store.

The Commerce Scale Unit - Self Hosted installation and use rights are included with a qualifying minimum purchase of Commerce Application SLs and may be downloaded and installed at no additional cost. All servers, users and devices accessing the Commerce Scale Unit - Self Hosted must be appropriately licensed. The Commerce Scale Unit - Self Hosted 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 eCommerce Tiers

The Dynamics 365 eCommerce application add-on enables eCommerce capabilities for Dynamics 365 Commerce. The eCommerce add-on requires a Dynamics 365 Commerce deployment with at least one Dynamics 365 commerce base or attach user and a sufficient minimum user purchase.

To enable eCommerce capabilities at least one eCommerce tier must be purchased, which will deploy a single cloud scale unit and include a specified allowance of eCommerce transactions, with a transaction counted as the final purchase of an eCommerce shopping cart (irrespective of the number of items in the cart).

Subscriptions have a minimum of a one-year commitment and transactions are sold as an annual allowance (i.e. Tier 1 includes 3K transactions per month which provide the customer with 36K transactions (3K x 12 months) which can be consumed at any point in the year).

Scenario:

Customer anticipates 144K transactions per year with 50% of those transaction occurring in November and December. Customer would purchase one unit of eCommerce Tier 2 and four units of eCommerce Overage Tier 2.

- $144K/12$ (12K/month) = Tier 2 (10K) + Overage Tier 2 (500) x 4.

Dynamics 365 Commerce Recommendations

Dynamics 365 Commerce Recommendations let customers easily and quickly find products that they want while they have an experience that serves them well. Commerce Recommendations is a tenant-based add-on license which requires a Commerce deployment with at least one Dynamics 365 commerce base or attach user and a sufficient minimum user purchase.

To enable Commerce Recommendations capability, at least one Recommendations unit must be purchased, which will cover 20K transactions per month, with a transaction counted as the final checkout of a shopping order (irrespective in-store or online purchase).

Subscription has a minimum of a one-year commitment and transactions are sold as an annual allowance i.e. one unit includes 20K transactions per month which provide the customer with 240K transactions (20K x 12 months) which can be consumed at any point in the year.

Dynamics 365 Commerce Ratings and Reviews

The Commerce Ratings and Reviews solution lets retailers capture product reviews and ratings from customers. Retailers can then show average ratings and review information across their e-Commerce website. Commerce Ratings and Reviews is a tenant-based add-on license which requires a Commerce deployment with at least one Dynamics 365 commerce base or attach user and a sufficient minimum user purchase.

To enable Commerce Ratings and Reviews capability, at least one Ratings and Reviews unit must be purchased, which will cover up to 250K ratings and reviews active in the commerce system.

Dynamics 365 Human Resources



Manage workforce
and employee self
service



Dynamics 365
Human Resources

General information:

Licensing	User subscription
Purchase requirements	For minimum requirements, 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	None
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
Capabilities	For a list of full capabilities, see (link)

Dynamics 365 Human Resources enables customers to optimize compensation, benefits, leave and absence, compliance, performance feedback, standardized training, and self-service programs. Enable HR to operate with the dexterity needed by the business using the Common Data Service and Power Platform to centralize people data and easily extend the solution.

Examples of full users who would be licensed with Human Resources application SLs would include human resource professionals.

Users who sit outside of HR, such as employees who need self-serve HR access need to be licensed with the Team Members, Human Resources Self Service, or Operations – Activity USL.

Reference [Appendix C](#): Finance, Supply Chain Management, Commerce, and Human Resources Security Roles by user SL Level for detailed information.

Dynamics 365

Dynamics 365 Customer Insights



General information:

Licensing	Per tenant
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 tenant 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.

Dynamics 365 Customer Service Insights



General information:

Licensing	User subscription
Purchase requirements	Reference Figure 15 below
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

Customer Service Enterprise users are entitled with Customer Service Insights capabilities. The following customers may purchase Customer Service Insights:

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

Figure 5: Customer Service Insights Availability

Dynamics 365	Customer Service Insights (standalone)	Customer Service Insights Additional Application
Availability	For purchase	For purchase
Purchase requirements	No Dynamics 365 purchase is required for standalone application	Customer Service Professional customer may purchase as an additional application add-on
Default Capacity (pooled at tenant level)	Customer Service Insights Cases: 100K cases/user/month (e.g., 1 user has 100K cases. If tenant has 100 users, the tenant has 10M cases)	
Capacity Add-on (per tenant/month)	Additional Customer Service Insights 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 Fraud Protection



Identify fraud patterns and reduce losses



Dynamics 365 Fraud Protection

General information:

Licensing	Per tenant
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	Additional capacity may be purchased. For details, see Add-ons

Dynamics 365 Fraud Protection is a cloud-based anti-fraud solution for medium to large-sized organizations worldwide, designed to help lower fraud-related costs, increase profits, and improve customer experience. Fraud Protection capabilities include account protection (AP), purchase protection (PP) and loss prevention (LP).

Account protection helps merchants to protect their online customer accounts by detecting and preventing fraudulent activities. Purchase protection helps merchants to protect their online transactions by detecting and preventing fraudulent activities. Loss prevention helps retailers to reduce shrinkage in their stores.

Transaction definitions:

Account protection transactions: Number of online account events (creation, login, activity) assessed for fraud or abuse by Dynamics 365 Fraud Protection account protection capability.

Purchase protection transactions: Number of online payment transactions assessed for fraud by Dynamics 365 Fraud Protection purchase protection capability.

Loss prevention transactions: Number of transactions (online/in-store) protected from shrinkage loss by Dynamics 365 Fraud Protection loss prevention capability.

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 is a high-productivity platform that includes the ability to integrate products.

- **Power Apps:** Extend and customize applications
 - Power Apps Portals add-on
 - AI Builder capacity add-on
 - Power Apps and Power Automate capacity add-on
- **Power Automate:** Automate business processes and workflow
- **Power BI:** Deliver business intelligence

Power Apps and Power Automate use rights are determined based on the Dynamics 365 application.

Power Apps/Power Automate Use Rights with Dynamics 365 license	Dynamics 365 Applications ¹	Dynamics 365 Enterprise Applications ²
Customization/extension of licensed Dynamics 365 application		
Customize licensed Dynamics 365 application	Yes (limited to 15 custom entities) ³	Yes (no limits on custom entities)
Run custom applications	-	Yes - unlimited (within the same environment as licensed Dynamics 365 application)
Access capacity-based portals (provisioning portals from the Common Data Service capacity)	-	Yes - unlimited (within the same environment as licensed Dynamics 365 application) ⁴
Connector use rights		
Standard connectors	•	•
Premium connectors	•	•
On-premises data gateway	•	•
Custom connectors	•	•
Common Data Service use rights		
Number of custom entities per licensed Dynamics 365 application	15	Unlimited
Restricted entities (within licensed Dynamics 365 application)	•	•
Power Automate use rights		
Run flows that extend licensed Dynamics 365 application	•	•
Run standalone flows that do not map to licensed Dynamics 365 application	-	-
Business process flows	•	•

¹Sales Professional, Customer Service Professional, Team Members, Operations - Activity, Human Resources Self Service

²Sales Enterprise, Customer Service Enterprise, Field Service, Project Service Automation, Finance, Supply Chain Management, Commerce, Human Resources

³Team Members application module may be customized with maximum 15 additional entities (custom entities or standard Common Data Service entities) available to the Team Members license per pre-approved application scenarios in [Appendix A](#).

⁴For Finance, Supply Chain Management and Commerce, the Dynamics 365 environment is defined as the environment that the dual write feature is configured against.

Note, Power Apps and Power Automate usage will count against daily API request limits associated with the Dynamics 365 license. More details at <http://aka.ms/platformlimits> - Power Apps and Power Automate capacity add-on can be purchased to increase daily service limits.

Microsoft Power BI in Dynamics 365 - Some Dynamics 365 applications may embed Power BI content within the service User Interfaces. This is simply a product feature; a Power BI license is not required to access or configure this content to the extent that those features are available in the application (e.g. ability to view or configure embedded tables and charts).

Dynamics 365 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.

Please visit <https://powerplatform.microsoft.com> for more details.

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. Note, USD is included for Customer Service Enterprise.

Dynamics 365 Customer Voice

Dynamics 365 Customer Voice is an enterprise feedback management solution that empowers everyone in the organization to develop enterprise-grade surveys to collect timely feedback from key customers across channels.

Customer Voice is licensed per tenant and is based on the number of responses received for distributed surveys. Admins will see this service under “Dynamics 365 Customer Voice capacity add-on”. Dynamics 365 Enterprise users (Sales Enterprise, Customer Service Enterprise, Field Service, Project Service Automation, Marketing, and Human Resources) are entitled to Dynamics 365 Customer Voice capabilities. Included with the entitled Dynamics 365 Customer Voice capability is 2K Survey Responses per tenant per month.

Additional Responses (2K Survey Responses/tenant/month) may be purchased as an upgrade to Office 365 Forms or as a standalone application for Sales Professional, Customer Service Professional customers. Customers who currently have the application and need additional capacity, may purchase as many of the Dynamics 365 Customer Voice Additional Responses 2K Survey Responses packs as needed.

Customer Voice survey respondents don’t need to be licensed providing the survey designer/editor has a license on the tenant.

- Designer/editor: need a license
- Respondents: don’t need a license

For use rights details, reference the Customer Voice [table](#).

For more details on options for turning his service on or off, please reference the [how to buy](#) page for Admins.

Dynamics 365 Mobile Offline capabilities enable offline entities, provides autoreply for offline actions, a strong security model and offline views and offline search for Customer Engagement Applications customers. Offline capabilities are not available for Team Members licenses.

Dynamics 365 - Gamification service allows Customer Engagement Applications 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		•

Dynamics 365 Default Subscription Capacities

Customer Engagement Applications default subscription capacities leverage the same tenant and infrastructure and will accrue across the one tenant. Finance, Supply Chain Management, Commerce and Human Resources applications leverage an entirely different tenant and have their own set of default capacities. The Customer Engagement Applications and Finance, Supply Chain Management, Commerce, and Human Resources applications capacities are not shared.

The first subscription (Base license) of a Dynamics 365 workload application includes the default capacity which is shared per tenant. Additional subscriptions do not include additional default capacity. Note, Attach licenses are licensed to access the platform entitlements included with the Base application.

For example, if a new customer purchases Sales, they will receive 10GB of default Common Data Services Database Capacity.

If an existing Sales customer purchases Field Services, they will not receive additional Common Data Services Database Capacity above the initial 10GB.

Figure 6: Common Data Service Default Capacity

Capacity	Purpose
Database	Stores and manages entity definitions and data
File	Store attachments to notes or emails in Customer Engagement Applications and Power Apps. These include documents, image files, videos, PDF files, and other crucial files needed in an organization.
Log	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.

Customer Engagement Applications

Professional 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 tenant; therefore, Marketing licenses don't include default capacities.

Additional database and file capacity are accrued and granted at no charge at a rate of 250MB and 2GB, respectively, per Enterprise Base licenses (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 Allocation	Default/tenant	Accrued/10 Enterprise USL
Common Data Service Database Capacity	10GB	10*250MB = 250MB
Common Data Service File Capacity	20GB	10*2GB = 20GB
Common Data Service Log Capacity	2GB	NA

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

Default Chat and Digital Messaging Capacity

Chatbot Session Capacity

Each Chat and Digital Messaging license receives an entitlement of 50 chatbot sessions for use with Microsoft Bot Framework bots. Sessions are pooled at the tenant level and expire at the end of each month. Additional chatbot sessions will require purchase of Chatbot Sessions Add-on. Microsoft Bot Framework bots are an additional service offered by Azure (requires separate purchase) and are not included in this capacity entitlement.

Default Capacity Allocation	Default/tenant
Chatbot Session	50 Chatbot sessions/user/month (pooled at the tenant level)

Entity Routing Requests Capacity

Each Chat and Digital Messaging license includes 600 entity routing requests (e.g., cases) per month (i.e., 600 for chat, 600 for Digital Messaging). Entity routing requests are pooled across the tenant and expire at the end of each month. Entity records like cases can be routed to omnichannel queues along with work items that originate from other channels such as Chat and SMS, allowing the organization to automate the assignment of the work items based on agent capacity, availability, and skill.

If additional entity routing requests are required, customers may purchase additional Chat or Digital Messaging licenses.

Refer to [Unified Routing for Entity Records](#) for more details on the capability.

Default Capacity Allocation	Default/tenant
Routing Request (e.g., cases)	600 Requests/user/month (pooled at the tenant level)

Default 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
Customer Service Insights Cases	100K Cases/user/month (pooled at the tenant level)

Default Virtual Agent for Customer Service Capacity

A session is an interaction between the customer and the bot and represents one unit of consumption. The session begins when a user topic is triggered. These sessions are referred to as 'billed sessions' in the product.

A session ends in one of the following scenarios:

1. When all the customer's questions are answered
2. When a customer intentionally ends or closes a chat session, or
3. When a bot is unable to answer adequately, and the interaction is escalated to a live agent

Default Capacity Allocation	Default/tenant
Customer Service Insights Cases	100K Cases/tenant/month
Chat session add-on for Virtual Agents	2K Chat sessions/tenant/month
Database Capacity	10GB
File Capacity	20GB
Log Capacity	2GB
Power Automate runs	Unlimited flow runs (only applicable for flows triggered from Power Virtual Agents)

Finance, Supply Chain Management, Commerce, and Human Resources Applications

Finance, Supply Chain Management, and Commerce user subscriptions receive default tenant allocations of all capacity types.

Each Finance, Supply Chain Management, and Commerce 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 24x7 for service health.

Additional production instances for Finance, Supply Chain Management, and Commerce are not available for purchase.

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 Capacity per Tenant shared across Finance, SCM, & Commerce - not cumulative			
Database Capacity	File Capacity	Production Instance	Non-production Instance
20GB ¹	40GB	1	1 Sandbox Tier 1 1 Sandbox Tier 2

¹For every 1GB of database capacity customers receive 1GB of Production Database, 1GB of Reporting Database, and 1GB of Entity Store Database.

Additional database and file capacity are accrued and granted at no charge at a rate of 500MB and 4GB, respectively for Finance, Supply Chain Management, Commerce, Operations – Activity (4 user SLs = 1 full user SL), and Operations – Device (2.5 device SLs = 1 user SL) subscriptions.

Default and Accrued Capacity Allocation	Finance, SCM, Commerce		4 Activity	2.5 Device
	Default/tenant	Accrued/Enterprise USL	Accrued/User SL	Accrued/Device SL
Database	20GB	500MB	500MB	500MB
File	40GB	4GB	4GB	4GB

Scenario:

Default and Accrued Capacity Allocation	Finance, SCM, Commerce	10 Finance, SCM, Commerce	12 Activity	5 Device
	Default/tenant	Accrued/ USL	Accrued/User SL	Accrued/Device SL
Database	20GB	10*500MB = 5000MB	3*500MB = 1500MB	2*500MB = 1000MB
File	40GB	10*4GB = 40GB	3*4GB = 12GB	2*4GB = 8GB

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

Human Resources full USLs are entitled to 2 Human Resources environments/instances per tenant (not per user). At any given time, only one of the instances may be in production but alternatively both instances may be in non-production (UAT, pre-production).

Default Capacity per Tenant shared for Human Resources – not cumulative				
	Common Data Service Instance (Prod/Non-Prod)	AOS Instance (Prod/Non-Prod)	Database capacity	File Capacity
Human Resources	2	2	20GB	40GB

Default Common Data Service Capacity for Finance, Supply Chain Management, Commerce, and Human Resources

In addition to the Finance, Supply Chain Management, Commerce, *and* Human Resources default entitlements, these application licenses also receive Microsoft Power Apps entitlements, which include Common Data Service capacity.

Default Capacity per Tenant shared across Finance, SCM, Commerce & Human Resources - not cumulative			
Dynamics 365	Common Data Service Database Capacity	Common Data Service File Capacity	Common Data Service Log Capacity
Commerce	10GB	20GB	2GB
Finance	10GB	20GB	2GB
Human Resources	10GB	20GB	2GB
Supply Chain Management	10GB	20GB	2GB

Default Asset Management Capacity

Supply Chain Management includes Asset Management, which helps manage and maintain physical assets throughout the lifecycle. IoT Intelligence helps shop floor workers to manage machines failures, shop floor

managers to effectively manage operations across multiple production lines, and manufacturing executives to have a unified global view of operations. If additional assets are required, Supply Chain Management customers may purchase Additional Asset Management.

Default Capacity Allocation	Default/tenant
Asset Management	100 Assets/tenant/month

Additional Asset Management is licensed per tenant, customers must purchase a sufficient number of Asset Management add-ons to meet or exceed the number of assets under management of the Asset Management application (e.g., 1500 assets = 15 additional asset licenses).

Note, after 50 Asset Management licenses have been purchased (5K assets), customers may manage unlimited assets with no additional purchase.

Assets that must be licensed:

- Assets under management of the Asset Management feature
- Parent level assets, where maintenance, costs, and/or location are tracked, are the only assets that need to be licensed

Role	Team Members	Activity/Device	Full User
Ticket creation	•	•	•
Maintenance worker		•	•
Maintenance clerk			•
Maintenance manager			•

Default Commerce Scale Unit - Cloud Capacity

A Dynamics 365 Commerce Scale Unit - Cloud will be provisioned in the following scenarios:

1. A single Default Scale Unit - Cloud will be provisioned when an eCommerce tier is purchased (minimum Commerce user count must also be met). That unit may only be used to support eCommerce transactions.
2. A single Default Scale Unit - Cloud will be provisioned when one or more Commerce Devices are purchased (minimum Commerce user count must also be met). That unit may only be used to support Commerce Device transactions.

The Commerce Scale Unit - Cloud received is sized appropriately for the number of purchased eCommerce transactions or the number of purchased POS devices.

Default Capacity Allocation	Default/tenant based on purchased transactions or devices
Commerce Scale Unit Basic - Cloud	3K eCommerce transactions/month or 65 device/tenant/month
Commerce Scale Unit Standard - Cloud	10K eCommerce transactions/month or 225 device/tenant/month
Commerce Scale Unit Premium - Cloud	25K eCommerce transactions/month or 500 device/tenant/month

Customer Insights, Fraud Protection, and Customer Voice

Dynamics 365 Customer Insights, Dynamics 365 Fraud Protection, and Dynamics 365 Customer Voice may be deployed in the same tenant but do not share the same instance as Customer Engagement Applications and Finance, Supply Chain Management, and Commerce applications.

Application/Capacity	Default Capacity per Tenant shared – not cumulative
Customer Insights <ul style="list-style-type: none"> • Profile Capacity • Segments/KPIs • Data Injection Refresh 	<ul style="list-style-type: none"> • 100K Profiles/month: Additional purchased profile capacity does not increase the number of segments/KPIs or allowed data injection refreshes • 20 Segments/KPIs: at a given time, additional segments may not be created • 4 Data Injection Refresh/day: Each refresh takes approximately 4 hours allowing 16 hours of data injection refreshes a day <p>Profile refers to a report for a uniquely identified individual customer that is created through a collection of defined data source sets from multiple systems.</p>
Fraud Protection <ul style="list-style-type: none"> • Transactions 	<ul style="list-style-type: none"> • Account protection: 100K AP transactions, plus complementary 2K PP transactions and 4K LP transactions • Purchase protection: 10K PP transactions, plus complementary 20K AP transactions and 4K LP transactions • Loss prevention: 20K LP transactions, plus complementary 20K AP transactions and 2K PP transactions
Customer Voice <ul style="list-style-type: none"> • Responses 	2K responses/tenant/month

Dynamics 365 Trial and Implementation

Dynamics 365 Trials

You can sign-up for a free trial:

- Sales: <https://dynamics.microsoft.com/get-started/?appname=sales>
- Customer Service: <https://dynamics.microsoft.com/get-started/?appname=customerservice>
- Field Service: <https://dynamics.microsoft.com/get-started/?appname=customerservice>
- Marketing: <https://dynamics.microsoft.com/get-started/?appname=marketing>
- Finance: <https://dynamics.microsoft.com/get-started/?appname=finance>
- Supply Chain Management: <https://dynamics.microsoft.com/get-started/?appname=SCM>
- Commerce: <https://dynamics.microsoft.com/get-started/?appname=commerce>
- Human Resources: <https://dynamics.microsoft.com/get-started/?appname=humanresources>

Note: At any time during your trial you can activate your subscription and keep your data and customizations. 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

Finance, Supply Chain Management, and Commerce 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 Finance, Supply Chain Management, Commerce, or Human Resources 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 Finance, Supply Chain Management, Commerce, and Human Resources application implementation by simplifying and standardizing the implementation process to realize business value faster. Once you sign up for one or more of these applications, 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

The benefits included in Subscription Support are applicable for customers who license Dynamics 365 via MOSP, EA, MPSA, EAS, and EES. Learn more about Dynamics 365 Support [options](#).

- Professional Direct Support
- Enterprise Solutions - Unified Support

Additional Resources

Resource	Link
Dynamics 365	https://dynamics.microsoft.com/
Dynamics 365 Licensing and Pricing	https://dynamics.microsoft.com/pricing/
Dynamics 365 Business Central Licensing Guide	https://go.microsoft.com/fwlink/?LinkId=871590&clcid=0x409
Microsoft Power Apps, Power Automate, and Power Virtual Agents Licensing Guide	https://go.microsoft.com/fwlink/?LinkId=2085130&clcid=0x409
Dynamics 365 Mixed Reality Licensing Guide	https://go.microsoft.com/fwlink/?LinkId=2090495&clcid=0x409
Dynamics AX (online) Licensing Guide	http://aka.ms/s201h6
AX 2012 Retail Licensing Scenarios	http://aka.ms/Sumqix
Dynamics CRM Online Licensing Guide	https://mbs.microsoft.com/Files/public/CRMONLINE/CRMOnlineLicensingGuide.pdf
Dynamics On-premises Licensing Guides	https://partner.microsoft.com/asset/collection/licensing-guide-assets#/
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/support/plans/
Partner Center	https://partnercenter.microsoft.com/pcv/dashboard/overview
Cloud Solution Provider Program (CSP)	https://mspartner.microsoft.com/Pages/solutions/cloud-reseller-overview.aspx

Appendix A: Team Members Overview

This table provides an overview of the Team Members use rights by Customer Engagement Applications and Finance, Supply Chain Management, Commerce, and Human Resources applications. Reference Appendix B for a detailed list of the Customer Engagement Applications Team Members and Appendix C for a detailed list of the Finance, Supply Chain Management, Commerce, and Human Resources Team Members use rights.

Use Rights	Description Service	Customer Engagement	Finance, SCM, Commerce, HR
Access			
	Access Anywhere: Web App, Mobile App, Tablet App, via Dynamics 365 App for Outlook and Dynamics 365 for Outlook	•	
Read			
	Dynamics 365 Applications: full read across	•	•
General System Use			
Common across Customer Engagement Applications	Activities: Create, update, and delete	•	
	Announcements: Create, update, and delete	•	
	Contacts: Create, update, and delete	•	
	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: Create, update, and delete	•	
	Yammer: collaboration (needs Yammer license)	•	
Customization - For more details, see Appendix D			
Customer Engagement Applications	Additional entities (custom entities or standard Common Data Service entities) ¹	15 per app	
Edit/Actions (pre-approved application scenarios for Team Members)			
Customer Service	Only employee self-serve: Create, update, and delete on own Case and read Knowledge Articles (Customer Service application module for Team Members, Portal ² or API access only)	•	
Sales	No additional entitlements beyond General System Use detailed in Appendix A	•	
Project Service Automation	Apply for Project, report Time & Expense for Projects, update Project Tasks, Update Own Resource Competencies for Project	•	

¹Actions can be performed only against records corresponding to entities included in the use rights

²When provisioning capacity-based portals, using Common Data Service capacity, portal licensing use rights apply

Use Rights	Description	Customer Engagement	Finance, SCM, Commerce, HR
Finance	Accounts Payable: view positive pay events		•
	Cost Objects: monitor monetary and non-monetary performance of assigned cost objects		•
	Department Budget: create and edit		•
	Employee self-serve: record and update personal information, record time and expense		•
	Expense: approve		•
	Invoice: approve		•
	Inventory: respond to inventory needs on production line		•
	Manager self-serve: manage direct reports, record and update employee information		•
	Purchase Orders: respond to vendors PO when listed as contact person		•
	Requisitions: create and edit		•
	Time: approve		•
Supply Chain Management	Cost Accounting		•
	Distribution		•
	Engineering		•
	Manufacturing		•
	Procurement		•
	Quality Control: create and edit		•
	Sales Order		•
	Transportation		•
Commerce	Employee self-serve: record and update personal information, record time and expense		•
	Expense: approve		•
	Invoice: approve		•
	Manager self-serve: 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		•
Human Resources	Absence and Leave: approve		•
	Employee self-service: record and update personal information, and request leave and absence		•
	Manager self-service: manage direct reports, record, and update employee information		•

Appendix B: Customer Engagement 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 Customer Engagement Applications.

Use Rights	Team Members	Sales		Customer Service		Field Service	PSA	Marketing
		Pro	Ent	Pro	Ent			
Access								
Dynamics 365 Mobile Client Application	●	●	●	●	●	●	●	●
Microsoft Dynamics 365 for iPad & Windows	●	●	●	●	●	●	●	●
Dynamics 365 for Outlook and Dynamics 365 App for Outlook ¹	●	●	●	●	●	●	●	●
Microsoft Dynamics 365 Web application	●	●	●	●	●	●	●	●
Read								
All Dynamics 365 application data	●	●	●	●	●	●	●	●
Custom Entity data	●	●	●	●	●	●	●	●
Approve								
Finance functionality: Time, Expense and Invoices	●	●	●			●	●	
Access via Customer Service app module for Team Members, Portal ² or API: Create, Read, Update, Delete								
Employee self-serve: Cases	●	●	●	●	●	●	●	
Non-Employees Only: Work Orders			●		●	●	●	
Non-Employees Only: Opportunities			●		●	●	●	
Entities: Create, Update, Delete								
Activities	●	●	●	●	●	●	●	●
Announcements	●	●	●	●	●	●	●	●
Calendar: share	●	●	●	●	●	●	●	●
Contacts	●	●	●	●	●	●	●	●
Custom Entities (see Appendix D)	15 max ³	15 max	●	15 max	●	●	●	●
Notes	●	●	●	●	●	●	●	●
Personal Views	●	●	●	●	●	●	●	●
Saved Views	●	●	●	●	●	●	●	●
Quality Control (applies to non-Customer Engagement Applications)	●							
Requisitions (applies to non-Customer Engagement Applications)	●							
Service Orders (applies to non-Customer Engagement Applications)	●							
Time and Expense (applies to non-Customer Engagement Applications)	●							

¹Dynamics 365 App for Outlook can be customized, however usage must comply with use rights for users' corresponding license and pre-approved application scenarios in [Appendix A](#).

²When provisioning capacity-based portals, using Common Data Service capacity, portal licensing use rights apply.

³Team Members application module may be customized with maximum 15 additional entities (custom entities or standard Common Data Service entities) available to the Team Members license per pre-approved application scenarios in [Appendix A](#).

Use Rights	Team Members	Sales		Customer Service		Field Service	PSA	Marketing
		Pro	Ent	Pro	Ent			
Accounts		•	•	•	•	•	•	•
Cases for Sales: Create cases with limited edit capability. No case business process flow, SLAs, entitlements, or case routing. Users only licensed with Sales license cannot act as customer service agents and resolve cases		•	•					
Competitors			•					
Embedded Intelligence			•		•			
Forecasting			•					
Invoices		•	•			•		
Lead Management		•	•					•
Marketing Campaigns		•	•					•
Marketing List		•	•					•
Opportunities		•	•					
Orders		•	•					
Price lists		•	•					
Product		•	•					
Product Bundles		•	•					
Product Families			•					
Product Hierarchies		•	•					
Product Relationships		•	•					
Product Taxonomy		•	•					
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						•		
Project Contracts							•	
Project Estimates							•	
Project Expenses							•	
Project Invoices							•	

Use Rights	Team Members	Sales		Customer Service		Field Service	PSA	Marketing
		Pro	Ent	Pro	Ent			
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 card scanning (10/user/month: pooled at tenant level)			•					
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								•
Dialog: start dialog	•	•	•	•	•	•	•	•
Field Service Mobile Application						•		
Field Service Mobile Application Offline Sync: use						•		
Knowledgebase: create, update, publish, configure, search (basic)			•	•	•	•	•	
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	•	•	•	•	•	•	•	•
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)						•		

Use Rights	Team Members	Sales		Customer Service		Field Service	PSA	Marketing
		Pro	Ent	Pro	Ent			
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	•						•	
Human Resources: manage direct reports and candidates	•							
Human Resources: manage personal info	•							
Finance 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)	•	•	•	•	•	•	•	•
General System Use: Actions								
Auditing: configure		•	•	•	•	•	•	•
Business Processes: customize		5 max	•	5 max	•	•	•	•
Dialogs: define and configure		•	•	•	•	•	•	•
Duplicate Detection: configure rules		•	•	•	•	•	•	•
Dynamics 365 Forms, Entities, and Fields: create		•	•	•	•	•	•	•
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	•	•	•	•	•	•	•	•

Use Rights	Team Members	Sales		Customer Service		Field Service	PSA	Marketing
		Pro	Ent	Pro	Ent			
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		5 max	•	5 max	•	•	•	•
System reports, charts, and dashboards: customize			•		•	•	•	
Word: create, update and delete templates	•	•	•	•	•	•	•	
Workflows: define and configure		•	•	•	•	•	•	•
Additional Services and Software								
Dynamics 365 - Gamification Fan & Spectator	•	•	•	•	•	•		
Dynamics 365 - Gamification Player & Admin			•		•	•		
Dynamics 365 Customer Voice***			•		•	•		• (standalone)
Microsoft PowerApps			•		•	•	•	
Project Desktop Client*							•	
Project Web App**							•	
Timesheet management via Project Web App**	•	•	•	•	•	•		
Unified Service Desk					•			

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

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

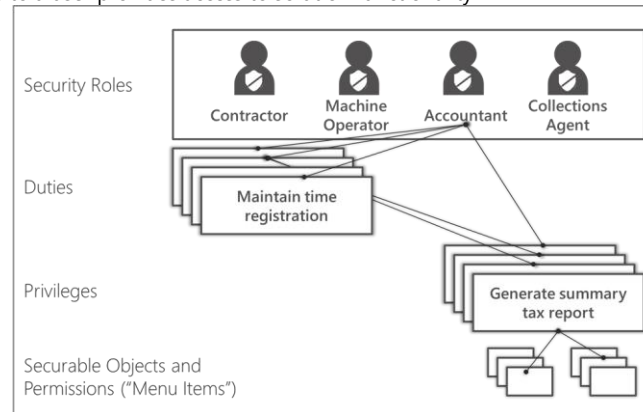
***Dynamics 365 Customer Voice is included in the Dynamics 365 Marketing standalone application, but not included in Marketing Attach.

Appendix C: Finance, Supply Chain Management, Commerce and Human Resources Security Roles

Overview of Security Roles

Providing users with access to the solution functionality is done by assigning each user one or more Security Roles. Finance, Supply Chain Management, Commerce, and Human Resources application Security Roles combine meaningful packages of solution functionality and access rights required to perform actions relevant to that role.

Figure 7: Assigning a Security Role to a user provides access to solution functionality



To make it easier to understand the licenses required, each Finance, Supply Chain Management, Commerce, and Human Resources application 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.
- Financial reporting functionality is included in select Dynamics 365 applications. To get the use rights, Financial reporting Designers require a Finance USL and Financial reporting Viewers require a Team Member USL.
- Admin rights apply across Finance, Supply Chain Management, and Commerce applications. For example, if you have a Finance license, you have the admin rights for Finance, as well as Supply Chain Management, and Commerce applications.
- Activity and Team Members use rights are included in the full user licenses and those rights are cross-application. A Finance user has Activity level access to Supply Chain Management and Commerce and Team Members level access to those workloads as well as Sales, Customer Service, Field Service, and Project Service Automation.

- Human Resources Self Service use rights are included in the Team Members and full user licenses. Those use rights are cross-application for customer engagement applications and Finance, Supply Chain Management, Commerce and Human Resources.

Finance, Supply Chain Management, and Commerce – Admin

Role	Security Role Description	Team Members	Activity	Finance, SCM, Commerce
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			•
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			•
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			•
System administrator	System Administrator role for Dynamics AX			•
System document branding administrator	Controls access to the Document Branding Management forms			•

Dynamics 365 Finance Security Roles

Role	Security Role Description	Team Members	Activity	Finance
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			•
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			•

Dynamics 365 Finance Security Roles - continued

Role	Security Role Description	Team Members	Activity	Finance
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			•
Human Resources				
Hcm Manager	The Manager role represents a direct line manager within HR. This role is responsible for managing employees based on reporting relationships defined by the position hierarchy and grants access to the My team page within Employee self-service			•

Dynamics 365 Supply Chain Management

Role	Security Role Description	Team Members	Activity	SCM
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			•
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			•
Engineering				
Process engineer	Defines processes to make new products			•
Process engineering manager	Reviews and authorizes new production processes			•
Product designer	Designs new and modifies existing BOM structures			•
Product design manager	Reviews and authorizes product BOM structures			•
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			•
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			•

Dynamics 365 Supply Chain Management - continued

Role	Security Role Description	Team Members	Activity	SCM
Marketing				
Marketing coordinator	Produces and distributes marketing materials			•
Marketing manager	Manages product marketing			•
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			•
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			•
Vendor admin (external)	This role is given to a user that represents the vendor and should have permission to do admin related activities on behalf of the vendor. Such as maintaining vendor information and vendors contact person information, raising new user request and view RFQ's.			•
Vendor prospect (external)	The role is given to a user that participates in the vendor onboarding process. This role gives the permission to run and enter data in the new vendor onboarding wizard.			•

Dynamics 365 Supply Chain Management - continued

Role	Security Role Description	Team Members	Activity	SCM
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			•
Sales				
Salesclerk	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			•
Human Resources				
Hcm Manager	The Manager role represents a direct line manager within HR. This role is responsible for managing employees based on reporting relationships defined by the position hierarchy and grants access to the My team page within Employee self-service			•
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			•

Dynamics 365 Commerce

Role	Security Role Description	Team Members	Activity	Commerce
Commerce				
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		•	•
DOM Administrator	Responsible to define & maintain the parameters, rules, fulfillment profile & frequency of DOM executions for the Distributed Order Management feature in Retail			•
Electronic reporting for retail developer	Electronic reporting for Retail developer			•
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			•
Human Resources				
Hcm Manager	The Manager role represents a direct line manager within HR. This role is responsible for managing employees based on reporting relationships defined by the position hierarchy and grants access to the My team page within Employee self-service			•

Dynamics 365 Human Resources

Role	Security Role Description	HR Self Service	Team Members	Activity	Human Resources
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	•	•	•	•
Absence manager	Reviews and manages leave and absence for a limited group of employees not in a direct reporting relationship	•	•	•	•
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				•
Hcm Manager	The Manager role represents a direct line manager within HR. This role is responsible for managing employees based on reporting relationships defined by the position hierarchy and grants access to the My team page within Employee self-service				•
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				•
Training manager	Documents training events, responds to training inquiries and records the financial consequences of training events				•

Dynamics 365 Human Resources - Admin

	Security Role Description	HR Self Service	Team Members	Activity	Human Resources
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				•
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				•
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				•
System administrator	System Administrator role for Dynamics AX				•
System document branding administrator	Controls access to the Document Branding Management forms				•

Appendix D: Custom Entities

Dynamics 365 application 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.

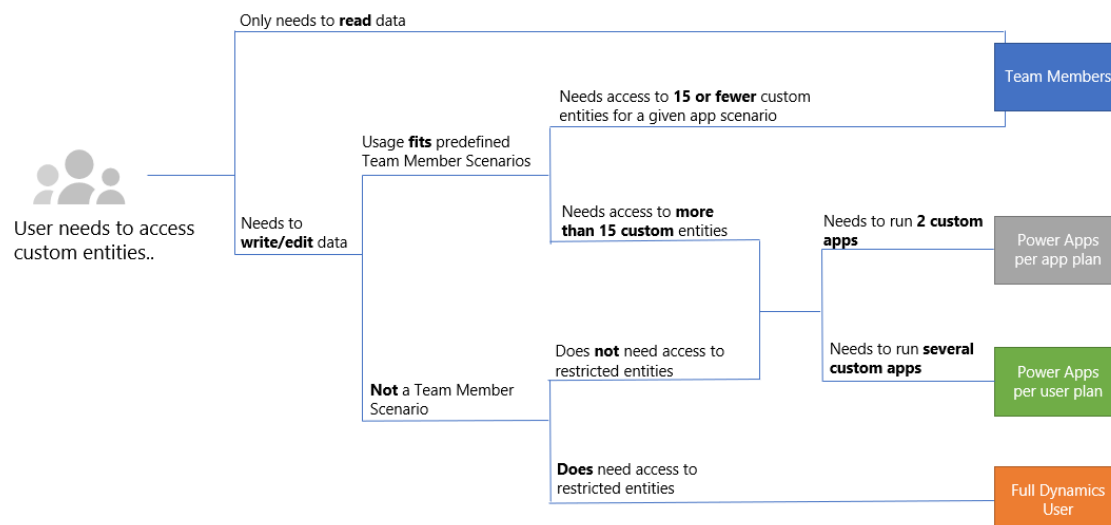
Dynamics 365 applications offer standard entities to cover typical scenarios. However, there may be times when customers and partners need to create entities to store data that is specific to your organization – namely custom entities. Note, adding a field to existing standard entities does not make 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.

Dynamics 365 Application	Custom Entity Use Rights
Enterprise Applications 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
Sales Professional, Customer Service Professional, Operations - Activity	<ol style="list-style-type: none"> 1. Create and modify up to 15 custom entities (per application) in addition to the included standard entities 2. There is no limit on read rights for Dynamics 365 custom entities 3. Customize/extend applications and workflows within the context of Dynamics 365 application use rights 4. Full CRUD on data records associated with custom entities
Team Members	<ol style="list-style-type: none"> 1. Create and modify up to 15 additional entities (custom entities or standard Common Data Service entities) per app module for Team Members. 2. All customization must be per pre-approved application scenarios in Appendix A. 3. There is no limit on read rights for Dynamics 365 custom entities 4. Full CRUD on data records associated with custom entities

Customers can add up to 15 entities (standard and/or custom) per Team Members application module. In case customers want to view (read only) more than 15 entities, they can do so by creating dashboards and sub-grids.

Figure 8: Team Members access to custom entities



Appendix E: Customization/Licensing Requirements

Finance, Supply Chain Management, Commerce, and Human Resources applications are fully customizable to provide customers with the right experience for every user and have over 10,000 Menu Items which are mapped to Full, Operations - Activity, Team Members, or Human Resources Self Service 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:

- Application roles 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 straightforward way to customize which actions a specific employee may perform in applications 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 Finance, Supply Chain Management, Commerce, or Human Resources 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 a Finance, Supply Chain Management, Commerce, or Human Resources 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 applications, which will leverage the same tenant and infrastructure will accrue across this one tenant. Finance, Supply Chain Management, Commerce, and Human Resources applications leverages an entirely different tenant and will have its own set of add-on capabilities. Note, add-ons may only be purchased by customers with a valid base offer (paid licenses).

Capacity add-ons are available for purchase with paid licenses. Unpaid licenses (e.g., demo/dev or Internal Use Rights (IUR)) don't qualify as a valid base offer.

Power Platform capacity add-ons

Reference the Power Platform Licensing [Guide](#) for Power Apps Portals, AI Builder, and Power Apps and Power Automate add-ons licensing details.

Customer Engagement Applications Capacity Add-ons

Customer Engagement Applications share the same tenant and infrastructure capacity. They have access to the Customer Engagement Application default subscription capacities, shared across the Customer Engagement Applications. Refer to the Default Subscription Capacities [section](#) for more details.

Additional Common Data Service Capacity

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

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

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

Customer Engagement Applications	Database	File	Log
Sales Enterprise/Sales Professional	•	•	•
Marketing	•	•	•
Customer Service Enterprise/Customer Service Professional	•	•	•
Field Service	•	•	•
Project Service Automation	•	•	•

Add-on Capacities

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
Sales Insights • Conversation Intelligence	3 Hours/user/month pooled at tenant level	Call Intelligence	1K Hours/tenant/month
Sales Insights • Business Card Scanning	10 Scans/user/month pooled at tenant level	<ul style="list-style-type: none"> Sales Enterprise user: purchase additional Sales Insights Sales Professional user: purchase AI Builder 	<ul style="list-style-type: none"> Sales Insights: 200/user/month (pooled at tenant level) AI Builder: 1M Service Credits
Marketing • Instance	1 marketing application	<ul style="list-style-type: none"> Marketing Additional Application (Production) Marketing Additional Non-Production Application 	Contacts not included – customers may continue to use their pool of contacts at tenant level
Marketing • Contacts	10K Contacts	<ul style="list-style-type: none"> Dyn 365 for Mktg Addl Contcts 5K Contcts Addon Dyn 365 for Mktg Addl Contcts T2 Dyn 365 for Mktg Addl Contcts T3 Dyn 365 for Mktg Addl Contcts T4 Dyn 365 for Mktg Addl Contcts T5 	<ul style="list-style-type: none"> 5K Contacts 50K Contacts for tiers 2-5 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
Chat & Digital Messaging • Chatbot Sessions	50 Chatbot Sessions/user/month pooled at tenant level	Chatbot Sessions	100 Chatbot Sessions/tenant/month Additional chatbot sessions expire at month end
Customer Service Insights • Cases	100K Cases/user/month pooled at tenant level	Customer Service Insights Additional Cases	500K Cases/tenant/month
Virtual Agent for Customer Service • Cases • Chat sessions for Virtual Agent	<ul style="list-style-type: none"> 100K Cases/user/month pooled at tenant level 2K Chat sessions/tenant/month 	<ul style="list-style-type: none"> Customer Service Insights Additional Cases Chat sessions 	<ul style="list-style-type: none"> 500K Cases/tenant/month 1K Chat sessions/tenant/month

Finance, Supply Chain Management, Commerce, and Human Resources capacity add-ons

Finance, Supply Chain Management, and Commerce share the same tenant and infrastructure capacity. They have access to the following additional capacities, shared across the Finance, Supply Chain Management, and Commerce Applications.

Additional Database and File Capacity

The Additional Database and File Capacity add-on provides flexibility to increase the SQL database storage capacity associated with your Finance, Supply Chain Management, or Commerce subscriptions in increments of 1GB per Additional add-on license. This Additional storage Add-on can be used to increase database storage across the production and/or non-production instances.

Add-on capacity cumulative across Finance, SCM, and Commerce			
Subscription Capacity	Included Capacity	Additional Increment	Max
Database Capacity	20GB	1GB	4TB - may not be available in all regions
File Capacity	40GB	1GB	NA

Additional Common Data Service Capacity

On top of the additional Finance, Supply Chain Management, Commerce, and Human Resources capacities, customers 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 Power Apps subscription in increments of 1GB per additional capacity add-on license.

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

Add-on Capacities

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
Supply Chain Management • Asset Management	100 Assets/tenant/month	Additional Asset Management	100 Assets/tenant/month
eCommerce Tier • Transactions	<ul style="list-style-type: none"> Tier 1: 3K Transactions/tenant/month Tier 2: 10K Transactions/tenant/month Tier 3: 25K Transactions/tenant/month 	eCommerce Tier Overage	Tier 1-Tier 3: 500 Transactions/tenant/month price decreases per tier level
Commerce Scale Unit - Cloud • eCommerce Transactions or Devices	<ul style="list-style-type: none"> Basic: 3K Transactions or 65 Device Standard: 10K Transactions or 225 Device Premium: 25K Transactions or 500 Device (per tenant month) 	Commerce Cloud Scale Unit	<ul style="list-style-type: none"> Basic: 3K Transactions or 65 Device Standard: 10K Transactions or 225 Device Premium: 25K Transactions or 500 Device (per tenant/month)

Dynamics 365 Operations - Order Lines

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

- 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
- Alleviates pricing and licensing friction in many common multiplexing scenarios
- Supports a broader set of external user scenarios
- Enables licensing of automated systems and devices that do not include users (e.g. IoT scenarios)
- Improves licensing cost transparency and predictability
- 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:

- 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 'Operations - Order Lines' licensing.
- Only update data in the tables designated as qualifying for Operations - Order Lines

Creation of new order lines and existing order lines updates in those tables is counted, deletions will not count against the customer's order line total. Order line SKU is not applicable for outbound integration. All other direct and indirect access requires a user or device subscription license. Operations - 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.

Operations – Order Lines is an opt-in and opt-out model. Customers opt-in by purchasing the Operations - 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 Operations - Order Lines will, by default, have opted out and all direct and indirect access must be appropriately licensed with user or device licenses.

The table below determines the entity even if the customer uses custom entities on these tables. 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 Commerce and Manufacturing: If a Commerce 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 Commerce 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 Finance, Supply Chain Management, and Commerce subscriptions can access the instance included in the subscription, and every additional instance associated with the same customer.

Available for Finance, Supply Chain Management, and Commerce Subscriptions				
Sandbox	Description	Purpose	Customer/ Load Size	Included Capacity
Tier 1 ¹	Developer: single box	Customize applications and unit testing	Any	NA
Tier 2 ¹	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 ²
Tier 5	Premium Performance Testing: multi box	Performance, load, and staging with user acceptance testing	Large/ heavy load	10GB/ Instance ²

¹Included for Finance, SCM, and Commerce users, additional instances may be purchased. Not included for Human Resources Users.

²Additional 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.

The Human Resources Sandbox is a non-production, test environment available for Human Resources users only.

Available for Human Resources Subscriptions			
Sandbox	Description	Purpose	Included Capacity
Human Resources Sandbox	Non-production (AOS) instance	Non-production/UAT use for HR users only	10GB/Instance

Customer Insights, Customer Voice, Fraud Protection capacity add-on

Dynamics 365 Customer Insights Additional Profiles

The Dynamics 365 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.

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
Customer Insights <ul style="list-style-type: none"> Customer Insights Additional Profiles 	100K Profiles/tenant/month Additional purchased capacity does not increase the number of segments/KPIs or allowed data injection refreshes	Customer Insights Additional Profiles	100K Profiles/tenant/ month
Customer Service Insights	Refer to the Product Licensing section for details.		
Customer Voice <ul style="list-style-type: none"> Customer Voice Additional Responses - see figure below for use rights 	2K responses/tenant/month	Customer Voice Additional Responses ¹	2K responses/tenant/ month - no limit to number of additional responses purchased
Fraud Protection account protection² <ul style="list-style-type: none"> Transactions 	100K AP transactions, 2K PP transactions, 4K LP transactions	<ul style="list-style-type: none"> Tier 1 add-on if overage < 2M Tier 2 add-on if overage >= 2M 	<ul style="list-style-type: none"> Tier 1 add-on if overage < 2M: 20K AP transactions/tenant/month Tier 2 add-on if overage >= 2M: 20K AP transactions/tenant/month
Fraud Protection purchase protection² <ul style="list-style-type: none"> Transactions 	10K PP transactions, 20K AP transactions, 4K LP transactions	<ul style="list-style-type: none"> Tier 1 add-on if overage < 500K Tier 2 add-on if overage >= 500K 	<ul style="list-style-type: none"> Tier 1 add-on, if overage < 500K: 2K PP transactions/tenant/month Tier 2 add-on, if overage >= 500K: 2K PP transactions/tenant/month
Fraud Protection loss prevention² <ul style="list-style-type: none"> Transactions 	20K LP transactions, 20K AP transactions, 2K PP transactions	<ul style="list-style-type: none"> Tier 1 add-on if overage < 250K/month Tier 2 add-on if overage >= 250K/month 	<ul style="list-style-type: none"> Tier 1 add-on, if overage < 250K/month: 4K LP transactions/tenant/month Tier 2 add-on, if overage >= 250K/month: 4K LP transactions/tenant/month

¹Customer Voice Additional Responses may be purchased as a standalone application for Sales Professional, Customer Service Professional, or Office 365 Forms customers and/or as additional capacity for customers who currently have the application and need more responses.

²If customer purchases any one of the Fraud Protection base offers, they are entitled to buy any of the Fraud Protection add-ons based on their transaction volume.

Figure 9:

Capabilities / Capacity	Microsoft Forms	Dynamics 365 Customer Voice
Survey authoring		
Multi-survey project management		•
Ready-to-use feedback project template		•
Drag-and-drop survey authoring experience	•	•
Multi-language support	•	•
Advanced branching logic		•
Survey personalization		•
Custom styling		•
Satisfaction metrics definition		•
Survey distribution		
Anonymous survey link	•	•
QR code	•	•
Send survey via email		•
Personalized email invitation		•
Non-anonymous external survey recipient		•
Unsubscribe support		•
Automate sending survey via Power Automate		•
Embed survey in web / app with context data		•
Insights and follow up		
Export results to Excel	•	•
Survey result summary	•	•
Satisfaction metrics score and trends		•
Link survey results to business application		•
Custom Power BI report dashboard support		•
Auto alert for low satisfaction metric score		•
Manage follow up for low satisfaction metric score		•

Appendix G: Base and Attach SKU Mapping

Dynamics 365 Business Applications	Base SKUs pupm	Attach SKUs pupm										
		Sales Ent	Sales Pro	MRSs	CS Ent	CS Pro	Field Service	PSA	Finance	Commerce	HR	SCM
Microsoft Relationship Sales solution Plus (MRSs) ¹	●	-	-	-	●	●	●	-	-	-	-	-
Microsoft Relationship Sales solution (MRSs) ¹	●	-	-	-	●	●	●	-	-	-	-	-
Sales Premium	●	-	-	-	●	●	●	-	-	-	-	-
Sales Enterprise	●	-	-	-	●	●	●	-	-	-	-	-
Sales Professional	●	-	-	-	-	●	-	-	-	-	-	-
Customer Service Enterprise (CS)	●	●	●	-	-	-	●	-	-	-	-	-
Customer Service Professional (CS)	●	-	●	-	-	-	-	-	-	-	-	-
Field Service ²	●	●	●	-	●	●	-	-	-	-	-	-
Project Service Automation (PSA)	●	●	●	-	●	●	●	-	-	-	-	-
Finance	●	●	●	-	●	●	●	-	-	●	●	●
Commerce	●	●	●	-	●	●	●	-	●	-	●	●
Human Resources (HR)	●	●	●	-	●	●	●	-	-	-	-	-
Supply Chain Management (SCM)	●	●	●	-	●	●	●	-	●	●	●	-
Business Central Essentials ³	●	-	●	-	-	●	-	-	-	-	-	-
Business Central Premium ³	●	-	●	-	-	●	-	-	-	-	-	-

¹To purchase a Customer Engagement Applications Attach license the Microsoft Relationship Sales solution Base license must be the higher priced SKU

²Dynamics 365 Remote Assist (Mixed Reality) is available as an Attach license only to Field Service

³Sales Pro and Customer Service Pro Attach licenses are available for Business Central full users

Appendix H: Change Log

Page	Topic	Change	Action	Date
Various	Forms Pro	Name Change	Microsoft Forms Pro and additional capacity SKUs renamed to Dynamics 365 Customer Voice	August 2020
Various pages, Appendix D	Team Members	Clarified	Wording "out-of-the-box" changed to "Standard" Common Data Service entities. Clarifying sentence added to Appendix D.	
13, Appendix G	Sales Premium	Added	New offer added (Sales Enterprise and Sales Insights)	
various	Format changes	Clarified	Minor clarifications, cosmetic and link updates	
10	Team Members	Clarified	Removed reference to admin rights	July 2020
23, 30, 57	Fraud Protection	Updated	Deprecating the existing Fraud Protection and introducing three new capabilities.	
30	Customer Insights	Clarified	Profile definition added	
Appendix B	Admin rights	Clarified	Sentence removed: "To configure and administer Dynamics 365 services a full enterprise user license is required (Sales, Customer Service, Field Service, Project Service Automation)." Table: "General System Use: Administer" row removed	
10	Team Members	Clarified	Team Members do not have admin rights.	June 2020
11	Team Members	Clarified	Human Resources Self Service use rights are included when the Human Resources application is licensed	
27	Virtual Agent for Customer Service	Clarified	"Authored topic" changed to "user topic", and "Topic ends" changed to "Session ends"	
various	Format changes	Clarified	Minor clarifications, cosmetic and link updates	

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