



# Dynamics 365 Licensing Guide

December 2020



## What's new in this licensing guide?

This licensing guide was updated to reflect licensing updates and new online service offerings as of December 2020.

Dynamics 365	Description	New offer or Change
		<ul style="list-style-type: none"><li>• No new offers</li><li>• See Appendix H: Change Log for more details</li></ul>

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## Using this Guide

Use this guide to improve your understanding of how to license Microsoft Dynamics 365 (Dynamics 365). Dynamics 365 brings your customers and business together with the next generation of Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) applications. Dynamics 365 applications are designed so they can be easily and independently deployed. A customer can start with what they need, yet the applications work together so, as the business demands, the customer can adopt additional capabilities with ease.

This document applies for users with Dynamics 365 licenses and does not supersede or replace any of the legal documentation covering use rights. For brevity and ease of reading, the Dynamics 365 application names are shortened, to exclude "Dynamics 365". For a complete list of the Dynamics 365 applications by branded name refer to [Appendix F](#).


This document is not a binding document to licensing rights. For licensing terms, reference the [Product Terms and the Online Services Terms](#), which describe conditions on license acquisition in addition to product-specific terms, and conditions governing how Microsoft products can be used in the Commercial Licensing Programs.

This guide is not intended to influence the choice of Microsoft Dynamics products and services. Microsoft reserves the right to review or update this document at any time without notice. For help determining the right technology solution for any given organization, including the license requirements for a specific product or scenario, consult with your Microsoft account team or your Dynamics Certified Partner.

This document **does not** apply to Microsoft Dynamics on-premises solutions. This guide also **does not** apply to the Microsoft Dynamics CRM Online or Microsoft Dynamics AX online services. Legacy online customers should refer to the applicable licensing guide ([Appendix G](#)) for details on their entitlements and use rights, including benefits derived from Dynamics 365 licenses.

To facilitate a good understanding of Dynamics 365 licensing, this guide is structured as shown in Table of Contents. Included within each Application Subscription section:

- (i) Dynamics 365 applications
- (ii) Additional applications and capacity
- (iii) Application use rights

To enable easy maneuvering between application subscriptions, simply click on the TOC symbol  at the end of each application section to return to the Table of Contents.

## How to buy Dynamics 365

For information on licensing programs, channels and segment availability, refer to the [Product Terms and the Online Services Terms](#). Dynamics 365 country, language, and localization availability is available [here](#).

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.

Visit the [Microsoft Volume Licensing website](#) to learn more about how to buy through Volume Licensing, find a reseller partner, and more helpful information.

## How to License Dynamics 365

### Licensing Overview

Dynamics applications are licensed under a variety of models consisting of assigned licenses that are dedicated to a named user or device and unassigned licenses that provide access to a feature or service at tenant level.

## Assigned Licenses

Assigned licenses provide a named user or dedicated shared device with access to applications.

### Full User Access Licenses

Full users are the users whose work requires use of the feature rich business applications functionality.

- Enterprise users or principal users, such as salespeople, customer service representatives, finance employees, controllers, human resources, and supply chain managers are licensed with: Sales Enterprise, Customer Service Enterprise, Field Service, Human Resources, Finance, Supply Chain Management, Commerce, Project Operations, Remote Assist, Guides, Business Central Premium, and Business Central Essentials.
- Professional users whose work scenarios are generally less complex with streamlined capabilities to provide core support functionality are licensed with: Sales Professional and Customer Service Professional.

Note, Enterprise and Professional users may not be deployed in the same tenant. See more details in the Tenant section below.

Most Dynamics 365 full user licensing follows the base plus attach model which provides a cost-effective way for a single user to be licensed for multiple applications. To license a core business Dynamics 365 application, customers may purchase either a base or, in many cases, an attach license(s). Every full user must have a base license. This sales motion is [user license](#) (USL) based. Only the Business Applications that are USLs may be purchased as an attach license.

- Purchase the first or base license at standard pricing
- Purchase additional eligible attach licenses at a reduced price

Marketing ([tenant](#) based), 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.

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.

Dynamics 365 Base licenses per user	Dynamics 365 Attach License per user										
	Commerce	CS Ent	CS Pro	Field Svc	Finance	HR	Proj Oper.	RA	Sales Ent	Sales Pro	SCM
Business Central Essentials			•							•	
Business Central Premium			•							•	
Commerce		•	•	•	•	•	•		•	•	•
Customer Service Enterprise (CS)				•					•	•	
Customer Service Professional (CS)										•	
Field Service		•	•					•	•	•	
Finance	•	•	•	•		•	•		•	•	•
Guides											
Human Resources (HR)		•	•	•			•		•	•	
Microsoft Relationship Sales solution Plus (MRSs Plus) <sup>1</sup>		•	•	•		•	•				
Project Operations (Proj Oper.)		•	•	•		•			•	•	
Remote Assist (RA)											
Sales Enterprise		•	•	•							



Dynamics 365 Base licenses per user	Dynamics 365 Attach License per user									
	Commerce	CS Ent	CS Pro	Field Svc	Finance	HR	Proj Oper.	RA	Sales Ent	Sales Pro
Sales Premium <sup>1</sup>		•	•	•		•	•			
Sales Professional			•							
Supply Chain Management (SCM)	•	•	•	•	•	•	•		•	•

<sup>1</sup>Eligible base license as Sales Enterprise is included.

## Additional User Access Licenses

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. Additional users are not subject to the base/attach motion and may access all applicable Dynamics 365 applications within the described constraints. 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 Services Terms](#), you will have access to the most up-to-date version of Dynamics 365.

- **Device:** Dynamics 365 may be licensed with user or device SL, only the user or the device requires a license, but not both. If the user of a device has a user SL, then the device does not need to be licensed. Likewise, if the device is licensed with a device SL, the user does not need a license. Customers may mix both user and device SLs.

With device license any number of users can access a licensed device without the need for separate user SL.

- Shared login: Sales Device, Customer Service Device, Field Service Device, Dynamics 365 Operations - Device, and Business Central Device, or
- Individual logins: Operations - Device or Business Central Device without the need for separate user license

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

- **Human Resources Self Service:** named user subscription that enables users to manage their own basic HR activities without the need of a full user.
- **Operations – Activity:** 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
- **Team Members:** 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. Full access to applications is governed through Dynamics 365 application user.

The Team Members user SL enables users to read Dynamics 365 data generated from Finance, Supply Chain Management, Commerce, Human Resources, Project Operations and the Sales, Customer Service, and Field Service applications. The Team Members user SL grants a user access to participate in a limited specific set of functionalities, as defined below, from the applications. The Team Members subscription does not provide access to custom applications and is not intended for scenarios beyond those listed in the applicable use rights sections. Reference [Appendix B](#) for more information on custom entities.

Subscription duration requirements are determined by the Licensing Program.

## Unassigned Licenses

Unassigned licenses provide tenant level access to applications and resources and are not assigned to specific users or devices.

### Full Application Access Licenses

Full application licenses are the primary licensing mechanism for a given application such as Dynamics 365 Marketing.

### Additional Application Access Licenses

Additional application licenses may be used to license access to application but are not the primary licensing vehicle for those applications such as Operations – Order Lines.

### Capacity Licenses

Capacity entitlements and add-ons cover capacity components such as storage and additional environments needed to support an application.

- Default subscription capacities leverage the same tenant and infrastructure and accrue across the one tenant. Dataverse (formerly Common Data Service) capacities are shared between Sales, Customer Service, Field Service, Finance, Supply Chain Management, Commerce, Human Resources, Project Operations, Remote Assist, Guides, Business Central Essentials, Business Central Premium applications. Database and file storage capacities (not the Dataverse capacities) are given and shared only between Finance, Supply Chain Management, Commerce, Human Resources, and Project Operations. The Marketing application is licensed per tenant; therefore, Marketing licenses don't include default capacities.
- Capacity add-on subscriptions 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.

Note, add-ons may only be purchased by customers with a valid base offer (paid licenses). Unpaid licenses (e.g., demo/dev or Internal Use Rights (IUR)) don't qualify as a valid base offer.

## Application Licensing - Assigned

### Dynamics 365 Business Central

Essentials



Premium



#### ➤ Business Central Essentials

Business Central Essentials is licensed by user and is fast to implement, easy to configure, and simplicity guides innovations in product design, development, implementation, and usability.

- |                                        |                                 |
|----------------------------------------|---------------------------------|
| (i) Financial Management               | (iv) Human Resources Management |
| (ii) Supply Chain Management           | (v) Project Management          |
| (iii) Customer Relationship Management | (vi) Warehouse Management       |

#### Business Central Essentials Functionality

Financial Management			
Account Schedules	Basic XBRL	Deferrals	Responsibility Centers
Allocations	Budgets	Electronic Payment/Direct Debits <sup>1</sup>	Unlimited Dimensions
Bank Account Management	Cash Flow Forecast	Fixed Assets	
Bank Reconciliation	Check Writing	Multiple Currencies	
Basic General Ledger	Consolidation	Payment Handling	

Advanced Financial Management			
Cost Accounting	Inter-company Postings		
Artificial Intelligence <sup>2</sup>			
Cash Flow Forecast	Inventory Forecast	Sales Forecast	
Image Recognition	Late Payment Prediction		
Customer Relationship Management			
Business Inbox for Outlook	Contact Classification	Email Logging	Relationship Management
Campaign Management	Contact Management	Interaction/Document Management	Task Management
Campaign Pricing	Dynamics 365 Sales Integration <sup>3</sup>	Opportunity Management	
E-Services			
Bank Feeds (US, CA)	Document Management,	Online Map	Tax. Reg. No. Validation Service (EU) <sup>1</sup>
Document Exchange Service	Document Capture	PayPal	
Human Resources Management			
Basic Human Resources			
Project Management			
Basic Resources	Job Quotes	Project Management Jobs	
Capacity Management	Multiple Costs	Time Sheet	
Supply Chain Management			
Alternative Order Addresses	Item Attributes	Purchase Invoicing	Sales Line Pricing
Alternative Ship-To Addresses	Item Budgets	Purchase Line Discounting	Sales Order Management
Alternative Vendors	Item Categories	Purchase Line Pricing	Sales Return Order Management
Assembly Management	Item Charges	Purchase Order Management	Sales Tax/VAT <sup>4</sup>
Basic Inventory	Item Cross References	Purchase Return Order Management	Shipping Agents
Basic Payables	Item Substitutions	Requisition Management	Standard Cost Worksheet
Basic Receivables	Item Tracking	Demand Forecasting	Stock keeping Units
Calendars	Location Transfers	Sales Invoice Discounts	Vendor Catalogue Items
Cycle Counting	Multiple Locations	Sales Invoicing	
Drop Shipments	Order Promising	Sales Line Discounting	
Warehouse Management and Inventory			
Automated Data Capture System	Internal Picks and Put Aways	Warehouse Shipment	Warehouse Receipt
Bin Set-Up	Pick	Warehouse Management Systems	
Other			
Analysis Reports	Intrastat <sup>1</sup>	Reason Codes	Workflow
Change Log	Job Queue	Unlimited Companies	Word reporting/Document reporting
Embedded Power BI	Notifications (on-premises only)	User Management	
Extended Text	Retention Policies	User Tasks	

<sup>1</sup>For feature availability in your region, consult <https://docs.microsoft.com/en-us/dynamics365/business-central/about-localization>

<sup>2</sup>Requires Intelligent Edge or Azure Machine Learning subscription

<sup>3</sup>Requires Dynamics 365 license

<sup>4</sup>Support for Sales Tax or VAT depending on country deployment

## ➤ Business Central Premium

Business Central Premium is licensed by user and includes all the Essentials license functionality plus:

- (i) Everything in Essentials
- (ii) Manufacturing
- (iii) Service Management

## Business Central Premium Functionality

Service Order Management		
Service Order Management	Service Item Management	Planning and Dispatching
Service Price Management	Service Contract Management	
Manufacturing		
Production Orders	Machine Centers	Finite Loading
Production Bill of Materials	Basic Supply Planning	Sales and Inventory Forecasting
Version Management	Basic Capacity Planning	Agile Manufacturing

Customers may not mix Essentials and Premium users but must license at least one of Essentials or Premium users. Customers must license either Essentials or Premium users, not both. These licenses provide users with unrestricted access to the functionality included in Team Members and Business Central.



Essentials and Premium licenses include:

- 3 external accountant licenses for customers who have external accountants who wish to connect to their Business Central application. External Accountant Licenses contain all the same use rights as Business Central license except for the following: Access to user set up or admin tasks and any other Business Central application
- Unlimited companies
- 1800 seconds/tenant of Cortona Intelligence

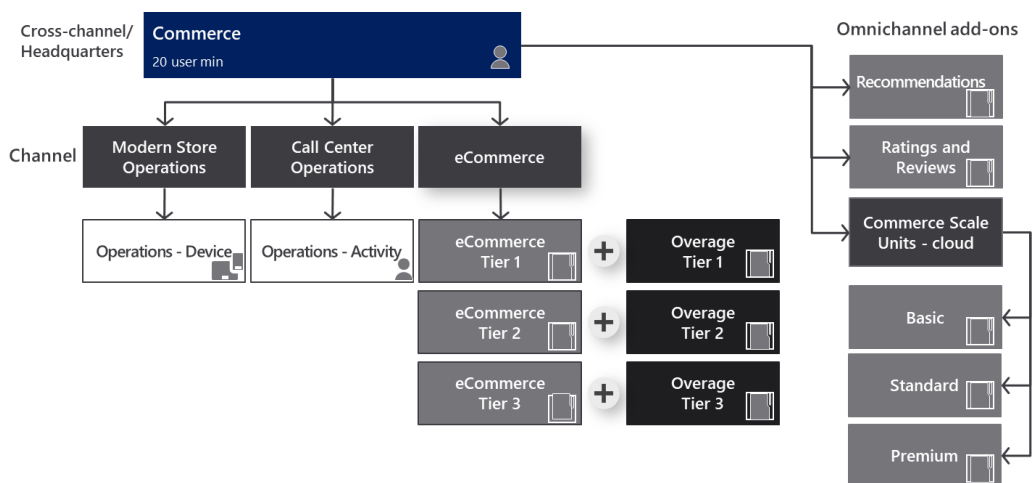
## Configuration Components

Configuration components are available for purchase for both Essentials and Premium users. Dynamics 365 Business Central license keys include, via dual use rights, the full custom objects range 50,000 – 99,999 for the above configuration components.



Configuration and Development					
Codeunits	Pages	Reports	Table	Queries	XML Port

## Dynamics 365 Commerce



The Commerce application is licensed per user and 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 customers receive Fraud Protection entitlements and may purchase the Fraud Protection additional capacity SKUs (based on volume) without buying the Fraud Protection base license.

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
Fraud Protection	<ul style="list-style-type: none"> <li>• 20K PP transactions/tenant/month</li> <li>• 2K AP transactions/tenant/month</li> <li>• 8K LP transactions/tenant/month</li> </ul>	See Fraud Protection capacity add-on <a href="#">section</a>	

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 [Operations – Device SL](#) or [Operations - Activity SL](#). Examples of these scenarios may include store

employees, store managers, and point of sale devices. Refer to the [Product Terms](#) for minimum purchase requirements.

## Additional Commerce Applications

### ➤ 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 environment(s) of the commerce service for co-location, performance, additional redundancy, or customization purposes.

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.

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.

### Commerce Scale Unit - Cloud Capacity

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
Commerce Scale Unit - Cloud <ul style="list-style-type: none"><li>• eCommerce Transactions or Devices</li></ul>	<ul style="list-style-type: none"><li>• Basic: 3K Transactions or 65 Device/tenant/month</li><li>• Standard: 10K Transactions or 225 Device/tenant/month</li><li>• Premium: 25K Transactions or 500 Device/tenant/month</li></ul>	Commerce Scale Unit - Cloud	<ul style="list-style-type: none"><li>• Basic: 3K Transactions or 65 Device/tenant/month</li><li>• Standard: 10K Transactions or 225 Device/tenant/month</li><li>• Premium: 25K Transactions or 500 Device/tenant/month</li></ul>

### ➤ 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).

### eCommerce Capacity

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
eCommerce Tier • Transactions	<ul style="list-style-type: none"> <li>• Tier 1: 3K Transactions/tenant/month</li> <li>• Tier 2: 10K Transactions/tenant/month</li> <li>• Tier 3: 25K Transactions/tenant/month</li> </ul>	<ul style="list-style-type: none"> <li>• Transactions for eCommerce Tier 1</li> <li>• Transactions for eCommerce Tier 2</li> <li>• Transactions for eCommerce Tier 3</li> </ul>	<ul style="list-style-type: none"> <li>• 500 Transactions/tenant/month</li> <li>• 500 Transactions/tenant/month</li> <li>• 500 Transactions/tenant/month</li> </ul>

### ➤ 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.

### Commerce Roles Overview

Role	Security Role Description	Team Members	Activity	Commerce
<b>Commerce</b>				
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			•



Role	Security Role Description	Team Members	Activity	Commerce
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			•
<b>Human Resources</b>				
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			•

Find Commerce administer roles [here](#).

## Dynamics 365 Customer Service



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. The Customer Service applications are licensed per user and/or Customer Service Enterprise device.

### ➤ 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.

Customer Service Enterprise users are entitled with Customer Service Insights capabilities. Customer Service Insights provides integrated analytics and AI capabilities, helping customer service organizations to better understand support engagements and emerging trends. Customers who wish to purchase Dynamics 365 Customer Service Insights, refer [here](#).

For more information on service limits for other capabilities, see <https://aka.ms/AA9qlq6>

### Customer Service Insights Case Capacity

**Topic Clustering:** 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.

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
Customer Service Insights included with Customer Service Enterprise			
Cases for Topic clustering	100K cases/user/month pooled at tenant level	Customer Service Insights Additional Cases	500K Cases/tenant/month

## ➤Dynamics 365 Customer Service Professional

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

## Additional Customer Service Applications

### ➤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.

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, 3<sup>rd</sup> party SMS, and future social messaging channels. Digital Messaging is licensed per user.

## Chat and Digital Messaging Capacity

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
Chat and Digital Messaging			
Azure bot sessions (only for Azure bots built on Azure Bot Service)	50 Azure Bot sessions/tenant/month pooled at tenant level	Chatbot Sessions	100 Chatbot Sessions/tenant/month Additional chatbot sessions expire at month end
Routing Requests (e.g., Cases, Knowledge base suggestions)	600 Routing requests /user/month pooled at tenant level	N/A	N/A

### Azure bot Session Capacity

Each Chat and Digital Messaging license receives an entitlement of 50 Azure bot sessions for use with Azure Bot Service. 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. Azure bots are an additional service offered by Azure (requires separate purchase) and are not included in this capacity entitlement.

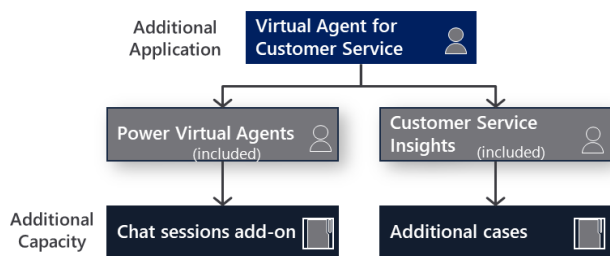
### Entity Routing Requests Capacity

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 only refers to entity records, and do not count interactions such as incoming chats, which are unlimited. Entity records are usually created by another process or system before being routed in omnichannel. 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.

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



## ➤ 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 Apps, Power Automate, and Power Virtual Agent Licensing [Guide](#) for more information.

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

### Virtual Agent for Customer Service Capacity

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
<b>Virtual Agent for Customer Service</b> <ul style="list-style-type: none"> <li>Cases</li> <li>Billed sessions for Virtual Agent</li> </ul>	<ul style="list-style-type: none"> <li>100K Cases/user/month pooled at tenant level</li> <li>2K Billed sessions/tenant/month</li> </ul>	<ul style="list-style-type: none"> <li>Customer Service Insights Additional Cases</li> <li>Billed session add-on for Virtual Agent</li> </ul>	<ul style="list-style-type: none"> <li>500K Cases/tenant/month</li> <li>1K Billed sessions/tenant/month</li> </ul>

### Customer Service Use Rights Overview

Use Rights	Team Members	Customer Service	
		Pro	Ent
<b>Access</b>			
Dynamics 365 Mobile Client Application	•	•	•
Microsoft Dynamics 365 for iPad & Windows	•	•	•
Dynamics 365 for Outlook and Dynamics 365 App for Outlook <sup>1</sup>	•	•	•
Microsoft Dynamics 365 Web application	•	•	•
<b>Read</b>			
All Dynamics 365 application data	•	•	•
Custom Entity data	•	•	•
<b>Approve</b>			
Finance functionality: Time, Expense, and Invoices	•		
<b>Entities: Create, Update, Delete</b>			
Activities	•	•	•
Announcements	•	•	•
Calendar: share	•	•	•
Contacts	•	•	•
Custom Entities (see <a href="#">Appendix B</a> )	15 max <sup>2</sup>	15 max	•
Notes	•	•	•
Personal Views	•	•	•
Saved Views	•	•	•
Accounts		•	•
Embedded Intelligence			•
Entitlements		•	•
Facilities/Equipment			•

Use Rights	Team Members	Customer Service	
		Pro	Ent
Leads (create only)		•	•
Resources		•	•
Service (Service Scheduling)			•
Work Hours		•	•
<b>Entities: Actions</b>			
Activity Feeds: post & follow activity feeds	•	•	•
Activity: convert to a case		•	•
Add or remove a Connection (stakeholder, sales team) for an Account or Contact	•	•	•
Business Units: define and configure			•
Case Management: reassign, add to queue, route & resolve cases		•	•
Chat with support team (as chat client for self-service, requires 3rd party solution)	•	•	•
Dialog: start dialog	•	•	•
Knowledgebase: create, update, publish, configure, search (basic)		•	•
Mail merge: perform mail merge	•	•	•
Marketing List: associate a Marketing List with an Account or Contact	•	•	•
Open Project Position: apply for Open Project Position for Project Operations	•	•	•
Project Tasks: update Project Tasks status for Project Operations	•	•	•
Queue: use a queue item	•	•	•
Resource Competencies: update own Resource Competencies for Project Operations	•	•	•
Resources (facilities, equipment, people): manage			•
Schedule & Dispatch Capabilities: use scheduling assistant, drag & drop assignment, update resource bookings			•
Schedule Board: configure and View			•
SLA Policies: configure		•	•
Teams: define and configure			•
Work Hours: manage			•
Yammer: use Yammer collaboration requires the appropriate license (acquired separately)	•	•	•
<b>General System Use: Actions</b>			
Auditing: configure		•	•
Business Processes: customize		5 max	•
Dialogs: define and configure		•	•
Duplicate Detection: configure rules		•	•
Dynamics 365 Forms, Entities, and Fields: create		•	•
Dynamics 365: administer		•	•
Email: create, update, and delete templates	•	•	•
Entities: define connections and relationships between entities		•	•
Forms and Views: customize (see Appendix B)		2 max	•
Import data in bulk		•	•
Microsoft Excel: export data to Excel	•	•	•
Queue: define and configure (see Appendix B)		15 max	•
Records: use relationships & connections between records	•	•	•
Search and advanced find: use	•	•	•
System reports, charts, and dashboards: create and update		5 max	•
System reports, charts, and dashboards: customize			•
Word: create, update, and delete templates	•	•	•
Workflows: define and configure		•	•
<b>Additional Services and Software</b>			
Customer Service Hub		•	•
Dynamics 365 Customer Voice			•
Dynamics 365 - Gamification Fan & Spectator	•	•	•
Dynamics 365 - Gamification Player & Admin			•
Dynamics 365 Mobile Offline capabilities			•
Timesheet management via Project Resource Hub	•	•	•
Unified Service Desk for Microsoft Dynamics 365 (USD)			•

<sup>1</sup>Dynamics 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](#).

<sup>2</sup>Team Members application module may be customized with maximum 15 additional entities (custom entities or standard Dataverse entities) available to the Team Members license per pre-approved application scenarios in [Appendix A](#).

## Dynamics 365 Customer Service Insights



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)

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 Customer Voice



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, Marketing, and Human Resources) are entitled to Customer Voice capabilities. Customer Voice may be deployed in the same tenant but doesn’t share the same environment as Sales, Customer Service, Field Service, or Marketing and Finance, Supply Chain Management, or Commerce applications.

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 Customer Voice Additional Responses 2K Survey Responses packs as needed.

Customer Voice survey respondents do not 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 more details on options for turning his service on or off, please reference the [how to buy](#) page for Admins.

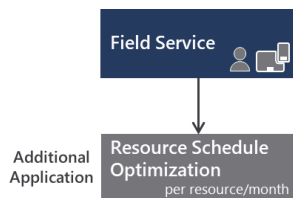
Dynamics 365 Customer Voice Capabilities		
Survey authoring	Survey distribution	Insights and follow up
Multi-survey project management	Anonymous survey link	Export results to Excel
Ready-to-use feedback project template	QR code	Survey result summary
Drag-and-drop survey authoring experience	Send survey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

## Customer Voice Capacity



Application/Capacity	Included Capacity	Add-on	Add-on Capacity
Customer Voice <ul style="list-style-type: none"> <li>Responses</li> </ul>	2K Responses/tenant/month	Customer Voice Additional Responses	2K responses/tenant/month No purchase limit of additional responses

## Dynamics 365 Field Service



The Field Service application is licensed per user and/or device and 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.

## Additional Field Service Application

### ➤ 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.

## Field Services Use Rights Overview

Use Rights	Team Members	Field Service
<b>Access</b>		
Dynamics 365 Mobile Client Application	•	•
Microsoft Dynamics 365 for iPad & Windows	•	•
Dynamics 365 for Outlook and Dynamics 365 App for Outlook <sup>1</sup>	•	•
Microsoft Dynamics 365 Web application	•	•
<b>Read</b>		
All Dynamics 365 application data	•	•
Custom Entity data	•	•
<b>Approve</b>		
Finance functionality: Time, Expense, and Invoices	•	•
<b>Entities: Create, Update, Delete</b>		
Activities	•	•
Announcements	•	•
Calendar: share	•	•
Contacts	•	•
Custom Entities (see <a href="#">Appendix B</a> )	15 max <sup>2</sup>	•
Notes	•	•

Use Rights	Team Members	Field Service
Personal Views	•	•
Saved Views	•	•
Accounts		•
Invoices		•
Territories		•
Resources		•
Work Hours		•
Customer Assets		•
Dispatch		•
Inventory Management		•
Purchase Orders		•
Repairs and Returns Management		•
Routing Capabilities		•
Schedule		•
Service Agreements		•
Work Order Management		•
<b>Entities: Actions</b>		
Activity Feeds: post & follow activity feeds	•	•
Add or remove a Connection (stakeholder, sales team) for an Account or Contact	•	•
Business Units: define and configure		•
Chat with support team (as chat client for self-service, requires 3rd party solution)	•	•
Dialog: start dialog	•	•
Field Service Mobile Application		•
Field Service Mobile Application Offline Sync: use		•
Knowledgebase: create, update, publish, configure, search (basic)		•
Mail merge: perform mail merge	•	•
Marketing List: associate a Marketing List with an Account or Contact	•	•
Open Project Position: apply for Open Project Position for Project Operations	•	•
Project Tasks: update Project Tasks status for Project Operations	•	•
Queue: use a queue item	•	•
Repairs: create and manage (RMA)		•
Resource Competencies: update own Resource Competencies for Project Operations	•	•
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		•
Teams: define and configure		•
Work Hours: define & configure		•
Work Hours: manage		•
Yammer: use Yammer collaboration requires the appropriate license (acquired separately)	•	•
<b>General System Use: Actions</b>		
Auditing: configure		•
Business Processes: customize		•
Dialogs: define and configure		•
Duplicate Detection: configure rules		•
Dynamics 365 Forms, Entities, and Fields: create		•
Dynamics 365: administer		•
Email: create, update, and delete templates	•	•
Entities: define connections and relationships between entities		•
Forms and Views: customize (see Appendix D)		•
Import data in bulk		•
Microsoft Excel: export data to Excel	•	•
Queue: define and configure (see Appendix B)		•
Records: use relationships & connections between records	•	•





Use Rights	Team Members	Field Service
Search and advanced find: use	•	•
System reports, charts, and dashboards: create and update		•
System reports, charts, and dashboards: customize		•
Word: create, update, and delete templates	•	•
Workflows: define and configure		•
<b>Additional Services and Software</b>		
Dynamics 365 Customer Voice		•
Dynamics 365 - Gamification Fan & Spectator	•	•
Dynamics 365 - Gamification Player & Admin		•
Dynamics 365 Mobile Offline capabilities		•
Timesheet management via Project Resource Hub	•	•

<sup>1</sup>Dynamics 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](#).

<sup>2</sup>Team Members application module may be customized with maximum 15 additional entities (custom entities or standard Dataverse entities) available to the Team Members license per pre-approved application scenarios in [Appendix A](#).

## Dynamics 365 Finance



The Finance application is licensed per user and 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. Refer to the [Product Terms](#) for minimum purchase requirements.

### Finance Security Roles Overview

Role	Security Role Description	Team Members	Activity	Finance
<b>C-Suite</b>				
Chief executive officer	Reviews the financial and operational performance		•	•
Chief financial officer	Reviews the financial performance		•	•
<b>Budgeting</b>				
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			•
<b>Financials and Accounting</b>				
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			•

Role	Security Role Description	Team Members	Activity	Finance
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			•
<b>Human Resources</b>				
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			•

## Administrator Security Roles Overview

Role	Security Role Description	Team Members	Activity	Finance, SCM, Commerce, Project Ops
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 Guides



Guides



Dynamics 365 Guides, a mixed-reality application for Microsoft HoloLens, licensed per user enabling employees to learn in the flow of work by providing holographic instructions when and where they need them. A series of step-by-step instruction cards with image and video support are visually tethered to the place where the work needs to be done. Additional guidance in the form of holographic models shows what needs to be done where, so workers can get the job done faster, with fewer errors and greater retention of learned skills.

## Hardware requirements:

- Microsoft HoloLens 1 or HoloLens 2
- Microsoft Windows PC

## Product features:

- Pre-loaded with 3D models
- Enterprise-level and security: Enterprise AAD authentication
- Supported content formats:
  - 3D models: glTF, GLB, FBX
  - Images: PNG, JPG, JPEG, GIF, TIFF, BMP
  - Videos: MP4, MOV, WMV, MKV, AVI, ASF, M2TS
- No code authoring allows employees without specialized 3D or programming skills to author guides
- Tethered instruction cards provide a simple step by step structure with each card linked to where the work gets done to ensure nothing is missed.
- Hands free gaze control allows workers to use gaze for controlling the interface if they need to be hands free
- Use images, video, or 3D holograms in addition to the instruction cards to show what needs to be done where
- Automatic media optimization of images and video automatically convert and optimize for HoloLens 1 or HoloLens 2
- Pre-loaded library of 3D assets like arrows, rings, and hands help you build guides without custom models
- Custom 3D models in FBX and GLTF format are automatically transcoded to GLB for import
- Use data to enhance employee performance. Pull performance data into Power BI dashboards, making it easier to identify where instruction is needed; and improve processes
- Powered by Dynamics 365 and Dataverse (formerly Common Data Service) allows partner and customer access and integration

## Microsoft Visio Add-ins

Microsoft Visio provides options for automatically changing the layout of the diagram with the Re-Layout Page command, commonly used layouts.

## Dynamics 365 Human Resources



The Human Resources application is licensed per user and 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 Dataverse (formerly Common Data Service) and Power Platform to centralize people data and easily extend the solution. Refer to the [Product Terms](#) for minimum purchase requirements.

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.

## Human Resource Security Roles Overview

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	●	●	●	●

Role	Security Role Description	HR Self Service	Team Members	Activity	Human Resources
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				•
<b>Administrator</b>					
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 Project Operations



The Project Operations application is licensed per user and connects sales, resourcing, project management, and finance teams within a single application to win more deals, accelerate project delivery, and maximize profitability.

Examples of full users who would be licensed with Project Operations application SLs include Account Managers, Project Managers, Project Assistants, and Project Accountants.

Users who create and approve time and expenses like a Project Timesheet user need a Team Member license. Project Operations has no roles at the Operations - Activity level, but Project Operations full users have rights to Activity level roles for other applications like Finance and Supply Chain Management.

### Project Operations Security Roles Overview

Role	Security Role Description	Team Members	Project Operations
<b>Project Management</b>			
Project Resource	Works on the project as a team member usually fulfilling a specialized role. Records time and expense entries as they make progress on the project.	•	•
Project Timesheet delegate	Enables creation and approval of project timesheets	•	•
Project Timesheet user	Enables creation and approval of project timesheets	•	•
Project Approver	Approves time, expenses, and materials within a project		•
Project Manager	Creates and plans projects and tasks. Plan resources and estimates the cost and revenue for the project. Reviews and approves all consultant activity on the project and tracks the progress and spend. Reviews draft invoices.		•
<b>Project Accounting &amp; Administration</b>			
Project Billing Administrator	Creates project invoices. Manages and maintains invoice layouts. Reviews invoices for accuracy of sales tax codes and exchange rates. Sends invoices to customers and posts invoices to general ledger.		•
Expense Administrator	Configures expense management solution		•
Project Assistant	Documents project accounting process events and responds to project accounting process inquiries		•
Project Accountant	Maintains project accounting policies		•
Project Supervisor	Enables and reviews the project accounting process		•
<b>Project Sales</b>			
Account Manager	Manages sales and relationship for customer-facing projects. Creates and manages new project opportunities, builds proposals, and wins quotes to create project contracts.		•
<b>Practice Management</b>			
Practice Manager	Owns the practice in the project organization. Creates reports and dashboards for deals in the pipeline. Understands resource demand and utilization.		•
<b>Resource Management</b>			
Resource Manager	Maintains project resource tasks. Staffs project demand and manages resource utilization to ensure resources are appropriately utilized.		•



## Project Operations Use Rights Overview

Use Rights	Team Members	Project Operations
<b>Access</b>		
Dynamics 365 Mobile Client Application	•	•
Microsoft Dynamics 365 for iPad & Windows	•	•
Dynamics 365 for Outlook and Dynamics 365 App for Outlook <sup>1</sup>	•	•
Microsoft Dynamics 365 Web application	•	•
<b>Read</b>		
All Dynamics 365 application data	•	•
Custom Entity data	•	•
<b>Approve</b>		
Finance functionality: Time, Expense and Invoices	•	•
<b>Access via Customer Service app module for Team Members, Portal<sup>2</sup> or API: Create, Read, Update, Delete</b>		
Employee self-serve: Cases	•	•
Non-Employees Only: Work Orders		•
Non-Employees Only: Opportunities		•
<b>Entities: Create, Update, Delete</b>		
Activities	•	•
Announcements	•	•
Calendar: share	•	•
Contacts	•	•
Custom Entities (see <a href="#">Appendix D</a> )	15 max <sup>3</sup>	•
Notes	•	•
Personal Views	•	•
Saved Views	•	•
Accounts		•
Price lists		•
Product		•
Product Bundles		•
Product Families/Hierarchies		•
Product Relationships		•
Quick Campaigns		•
Organizational Units		•
Project invoice schedules		•
Transaction and Expense categories		•
Project pricing dimensions		•
Project billing backlog views		•
Project Opportunity		•
Project Quotes		•
Project Contracts		•
Project Estimates		•
Project Time and Expense Entries	•	•
Project Invoices		•
Project Management		•
Project Price Lists		•
Project Transaction Approval		•
Resource Availability View		•
Project resource requests		•
Resource Schedule Management		•
<b>Entities: Actions</b>		
Activity Feeds: post & follow activity feeds	•	•
Add or remove a Connection (stakeholder, sales team) for an Account or Contact	•	•
Business Units: define and configure		•
Chat with support team (as chat client for self-service, requires 3rd party solution)	•	•
Dialog: start dialog	•	•
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		•

Use Rights	Team Members	Project Operations
Marketing List: associate a Marketing List with an Account or Contact	●	●
Winning a project quote		●
Project Contract confirmation		●
Copying project quotes and project contracts		●
Create custom and configurable project pricing		●
Setup cost and bill rates for project resources from same division and resource transfer prices for resources from other divisions		●
Project Tasks: update Project Tasks status for Project Operations	●	●
Project Transactions: approve		●
Create and confirm project invoices along a recurring schedule		●
Create and confirm corrective invoices for projects		●
Queue: use a queue item	●	●
Resource Competencies: update own Resource Competencies for Project Operations	●	●
Resources (facilities, equipment, people): manage		●
Resources: define & configure		●
Schedule & Dispatch Capabilities: use scheduling assistant, drag & drop assignment, update resource bookings		●
Schedule Board: configure and View		●
Services: define & configure		●
Teams: define and configure		●
Territories: manage		●
Time & Expense: submit Time & Expense for Project Operations	●	●
Use Resource Availability View and Resource Schedule Management		●
Work Hours: manage		●
Yammer: use Yammer collaboration requires the appropriate license (acquired separately)	●	●
<b>General System Use: Actions</b>		
Auditing: configure		●
Business Processes: customize		●
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 <a href="#">Appendix D</a> )		●
Import data in bulk		●
Microsoft Excel: export data to Excel	●	●
Queue: define and configure (see <a href="#">Appendix D</a> )		●
Records: use relationships & connections between records	●	●
Search and advanced find: use	●	●
System reports, charts, and dashboards: create and update		●
System reports, charts, and dashboards: customize		●
Word: create, update, and delete templates	●	●
Workflows: define and configure		●
<b>Additional Services and Software</b>		
Project for the Web <sup>4</sup>		●

<sup>1</sup>Dynamics 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](#).

<sup>2</sup>When provisioning capacity-based portals, using Dataverse capacity, portal licensing use rights apply.

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

<sup>4</sup>Project for the Web is the Microsoft's most recent offering for cloud-based work and project management that is built on the Power Platform.



## Dynamics 365 Remote Assist

### Remote Assist



Dynamics 365 Remote Assist, a mixed reality application for Microsoft HoloLens, is licensed per user allowing colleagues to collaborate during a video call using Microsoft Teams. The expert can see everything that the Dynamics 365 Remote Assist user sees, and they can holographically draw and annotate together.

## Hardware requirements:

- Microsoft HoloLens 1 or HoloLens 2
- AR capable iOS or Android device (phones and tablets)

Apart from the Dynamics 365 Remote Assist user license, the Dynamics 365 Remote Assist user (i.e., front line worker, field worker, technician, etc.) will not need to purchase a separate license for Teams to make or receive calls on Dynamics 365 Remote Assist on HoloLens. The HQ-based Expert assisting the Dynamics 365 Remote Assist user will require a Teams license.

## Product features:

- Mixed reality annotations: 2-way inking and arrow insertion anchored to real world
- OneDrive integration, file sharing, and display
- Enterprise-level and security: Enterprise AAD authentication and single sign-on
- Integration with Dynamics 365 Field Service
- Initiate and receive calls using Microsoft Teams
- Insert documents (PDF) and images (JPG, PNG, TIFF, and BMP) into their shared view
- Share their view of another application by running Remote Assist in the background
- Capture mixed reality photos during calls
- In-call text chat: Instant messaging
- Group calling: Connect with more than 1 expert simultaneously
- View and update Dynamics 365 Field Service work orders



## Dynamics 365 Sales



Customers may choose what level of functionality is appropriate for their business with two solution options for licensing Sales: Enterprise or Professional licenses. Note, these two services are not meant to be combined within an organization. The Sales applications are licensed per user and/or Sales Enterprise device.

### ➤ 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.

### ➤ Sales Premium

Users requiring both Sales Enterprise and Sales Insights applications may purchase Sales Premium (Sales Enterprise and Sales Insights), licensed per user.

### ➤ Microsoft Relationship Sales solution Plus

Microsoft Relationship Sales solution (MRSs) Plus, 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 includes Sales Enterprise and LinkedIn Sales Navigator Enterprise.

MRSs Plus qualifies as a base license as it includes a Sales Enterprise license, customers may purchase eligible attach licenses. Refer to the [Product Terms](#) for minimum purchase requirements, programs, and conditions.

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>.

## ➤ Sales Professional

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

## Additional Sales Application

### ➤ Sales Insights

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 select Sales Insights features: assistant cards, 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 purchase Sales Insights and enable all the features listed below. Note: Sales Premium includes Sales Insights.

- Predictive scoring (lead and opportunity)
- Predictive forecasting
- Business card scanning
- Relationship analytics
- Assistant studio
- Pipeline intelligence
- Notes analysis
- Conversation intelligence
- Connection insights (who knows whom and talking points)

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

### Sales Insights Capacity

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
Sales Insights included with Sales Enterprise			
Business Card Scanning	10 scans/user/month (pooled at tenant level)	Sales Insights	200/user/month (pooled at tenant level)
Conversation Intelligence	-	Sales Insights	3 hours/user/month (pooled at tenant level)
Sales Insights			
Business Card Scanning	200 scans/user/month (pooled at tenant level)	Sales Insights	200/user/month (pooled at tenant level)
Conversation Intelligence	3 hours/user/month (pooled at tenant level)	Call Intelligence	1K hours/tenant/month (pooled at tenant level)

## Sales Use Rights Overview

Use Rights	Team Members	Sales	
		Pro	Ent
Access			
Dynamics 365 Mobile Client Application	●	●	●
Microsoft Dynamics 365 for iPad & Windows	●	●	●
Dynamics 365 for Outlook and Dynamics 365 App for Outlook <sup>1</sup>	●	●	●
Microsoft Dynamics 365 Web application	●	●	●
Read			
All Dynamics 365 application data	●	●	●
Custom Entity data	●	●	●
Approve			
Finance functionality: Time, Expense, and Invoices	●	●	●
Entities: Create, Update, Delete			
Activities	●	●	●
Announcements	●	●	●
Calendar: share	●	●	●
Contacts	●	●	●
Custom Entities (see <a href="#">Appendix B</a> )	15 max <sup>2</sup>	15 max	●

Use Rights	Team Members	Sales	
		Pro	Ent
Notes	•	•	•
Personal Views	•	•	•
Saved Views	•	•	•
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/Hierarchies			•
Product Relationships			•
Quick Campaigns		•	•
Quotes		•	•
Sales Goals			•
Sales Hub			•
Sales Literature			•
Territories			•
<b>Entities: Actions</b>			
Activity Feeds: post & follow activity feeds	•	•	•
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			•
Chat with support team (as chat client for self-service, requires 3rd party solution)	•	•	•
Dialog: start dialog	•	•	•
Knowledgebase: create, update, publish, configure, search (basic)			•
Lead: qualify and convert to an opportunity		•	•
Mail merge: perform mail merge	•	•	•
Marketing List: associate a Marketing List with an Account or Contact	•	•	•
Open Project Position: apply for Open Project Position for Project Operations	•	•	•
Project Tasks: update Project Tasks status for Project Operations	•	•	•
Queue: use a queue item	•	•	•
Resource Competencies: update own Resource Competencies for Project Operations	•	•	•
Teams: define and configure			•
Yammer: use Yammer collaboration requires the appropriate license (acquired separately)	•	•	•
<b>General System Use: Actions</b>			
Auditing: configure		•	•
Business Processes: customize		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 <a href="#">Appendix B</a> )		2 max	•
Import data in bulk		•	•
Microsoft Excel: export data to Excel	•	•	•
Queue: define and configure (see <a href="#">Appendix B</a> )		15 max	•
Records: use relationships & connections between records	•	•	•
Search and advanced find: use	•	•	•
System reports, charts, and dashboards: create and update		5 max	•

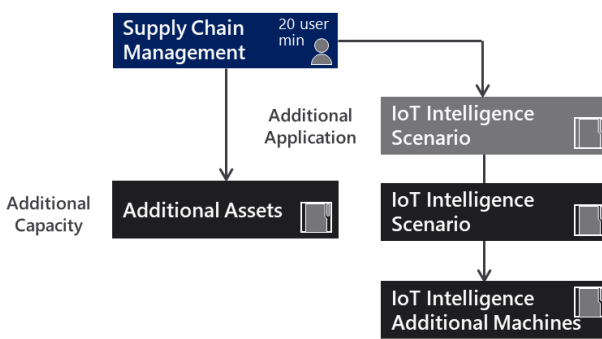


Use Rights	Team Members	Sales	
		Pro	Ent
System reports, charts, and dashboards: customize			•
Word: create, update, and delete templates	•	•	•
Workflows: define and configure		•	•
<b>Additional Services and Software</b>			
Dynamics 365 Customer Voice			•
Dynamics 365 - Gamification Fan & Spectator	•	•	•
Dynamics 365 - Gamification Player & Admin			•
Dynamics 365 Mobile Offline capabilities			•
Timesheet management via Project Resource Hub	•	•	•

<sup>1</sup>Dynamics 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](#).

<sup>2</sup>Team Members application module may be customized with maximum 15 additional entities (custom entities or standard Dataverse entities) available to the Team Members license per pre-approved application scenarios in [Appendix A](#).

## Dynamics 365 Supply Chain Management



Supply Chain Management application is license per user and 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. Refer to the [Product Terms](#) for minimum purchase requirements.

Asset Management is included in Supply Chain Management (out-of-the-box) for up to 100 assets. Asset Management helps manage and maintain physical assets throughout the lifecycle. If additional assets are required, Supply Chain Management customers may purchase Additional Asset Management.

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 or manager			•
Maintenance manager			•

## Additional Supply Chain Management Applications

### ➤ 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.

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.

### Supply Chain Management Capacity

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
<b>Supply Chain Management</b> <ul style="list-style-type: none"> <li>• Asset Management</li> <li>• IoT Intelligence Scenarios</li> <li>• IoT Intelligence Machines</li> </ul>	<ul style="list-style-type: none"> <li>• 100 Assets/tenant/month</li> <li>• 1 Scenario and 10 Machines/tenant/month</li> <li>• 10 Machines/tenant/month</li> </ul>	<ul style="list-style-type: none"> <li>• Additional Assets</li> <li>• IoT Intelligence Scenario</li> <li>• IoT Intelligence Additional Machines</li> </ul>	<ul style="list-style-type: none"> <li>• 1 Scenario and 10 Machines/tenant/month</li> <li>• 10 Additional Machines/tenant/month</li> </ul>

### Supply Chain Management Security Roles Overview

Role	Security Role Description	Team Members	Activity	SCM
<b>Cost Accounting</b>				
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			•
<b>Customer Service</b>				
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			•
<b>Engineering</b>				
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			•
<b>Distribution</b>				
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		•	•

Role	Security Role Description	Team Members	Activity	SCM
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			•
<b>Field Service</b>				
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			•
<b>Marketing</b>				
Marketing coordinator	Produces and distributes marketing materials			•
Marketing manager	Manages product marketing			•
<b>Manufacturing</b>				
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			•
<b>Procurement</b>				
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.			•
<b>Quality Control</b>				
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			•
<b>Sales</b>				
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			•
<b>Human Resources</b>				
Hcm Manager	The Manager role represents a direct line manager within HR. This role is responsible for managing employees based on reporting			•

Role	Security Role Description	Team Members	Activity	SCM
	relationships defined by the position hierarchy and grants access to the My team page within Employee self-service			
<b>Transportation</b>				
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			•

Find Supply Chain Management administer roles [here](#).

## Application Licensing - Unassigned

### Dynamics 365 Customer Insights



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. Customer Insights includes Customer Voice entitlements.

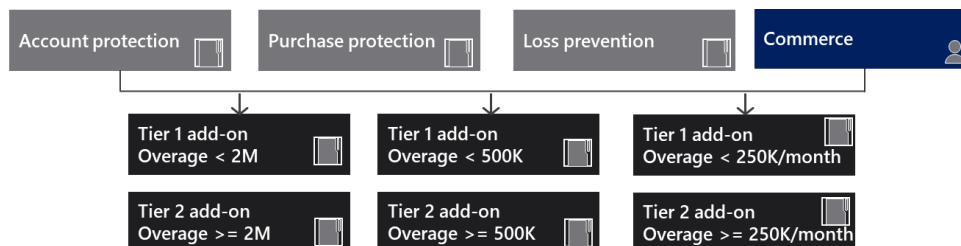
Customer Insights may be deployed in the same tenant but does not share the same environment as Sales, Customer Service, Field Service, or Marketing and Finance, Supply Chain Management, or Commerce applications.

#### Customer Insights Capacity

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. For additional environments customer can purchase multiple units of Customer Insights applications. For more information see: <https://aka.ms/dynamics365cidocs>

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
<b>Customer Insights</b> <ul style="list-style-type: none"> <li>Profile Capacity</li> <li>Data Injection Refresh</li> <li>API calls</li> <li>Environment</li> </ul>	<ul style="list-style-type: none"> <li>100K Profiles/month: Additional purchased profile capacity does not increase the number of segments/KPIs or allowed data injection refreshes</li> <li>4 Data Injection Refresh/day: Each refresh takes approximately 4 hours allowing 16 hours of data injection refreshes a day</li> <li>10K daily API calls per 100K profiles</li> <li>1 production and 1 sandbox environment</li> </ul>	Customer Insights Additional Profiles	<ul style="list-style-type: none"> <li>Additional Profiles (100K)</li> <li>10K daily API calls per 100K profiles</li> </ul>

### Dynamics 365 Fraud Protection



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 consists of Account Protection, Purchase Protection, and Loss Prevention. Fraud Protection may be deployed in the same tenant but doesn't share the same environment as Sales, Customer Service, Field Service, or Marketing and Finance, Supply Chain Management, or Commerce applications. Note, Commerce customers who receive Fraud Protection entitlements may purchase additional Fraud Protection capacity without needing any additional licenses.

## ➤ Dynamics 365 Account Protection

Fraud Protection account protection helps merchants to protect their online customer accounts by detecting and preventing fraudulent activities.

### Account Protection Capacity

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
Account Protection • Assessments	<ul style="list-style-type: none"> <li>• 100K AP transactions/tenant/month</li> <li>• 2K PP transactions/tenant/month</li> <li>• 4K LP transactions/tenant/month</li> </ul>	<ul style="list-style-type: none"> <li>• Account Protection Tier 1 add-on</li> <li>• Account Protection Tier 2 add-on</li> </ul>	<ul style="list-style-type: none"> <li>• 20K AP transactions/tenant/month</li> <li>• 20K AP transactions/tenant/month</li> </ul>

## ➤ Dynamics 365 Purchase Protection

Fraud Protection purchase protection helps merchants to protect their online transactions by detecting and preventing fraudulent activities.

### Purchase Protection Capacity

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
Purchase Protection • Assessments	<ul style="list-style-type: none"> <li>• 10K PP transactions/tenant/month</li> <li>• 20K AP transactions/tenant/month</li> <li>• 4K LP transactions/tenant/month</li> </ul>	<ul style="list-style-type: none"> <li>• Purchase Protection Tier 1 add-on</li> <li>• Purchase Protection Tier 2 add-on</li> </ul>	<ul style="list-style-type: none"> <li>• 2K PP transactions/tenant/month</li> <li>• 2K PP transactions/tenant/month</li> </ul>

## ➤ Dynamics 365 Loss Prevention

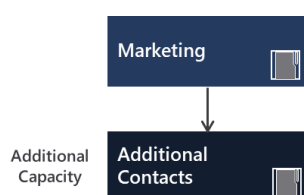
Fraud Protection loss prevention helps retailers to reduce shrinkage in their stores.

### Loss Prevention Capacity

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
Loss Prevention • Assessments	<ul style="list-style-type: none"> <li>• 20K LP transactions/tenant/month</li> <li>• 20K AP transactions/tenant/month</li> <li>• 2K PP transactions/tenant/month</li> </ul>	<ul style="list-style-type: none"> <li>• Loss Prevention Tier 1 add-on</li> <li>• Loss Prevention Tier 2 add-on</li> </ul>	<ul style="list-style-type: none"> <li>• 4K LP transactions/tenant/month</li> <li>• 4K LP transactions/tenant/month</li> </ul>



## Dynamics 365 Marketing



The Marketing application is licensed per tenant and is based on contacts used in Marketing. Due to commerce system requirements, Dynamics 365 tenant licenses cannot be assigned to individual users. A zero-dollar Dynamics 365 SKU is available in the Microsoft 365 admin center (not commerce) which enables license administrators to assign a Marketing license to an individual user. Since Marketing is a tenant-based license, customers may install, use, and configure one Marketing application with only one Dynamics 365 environment.

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

### ➤ Marketing (standalone)

Customers who are new to Dynamics (don't have any other Dynamics 365 applications) or have fewer than 10 full users of Sales Professional, Sales Enterprise, Customer Service Professional, Customer Service Enterprise, Field Service, Finance, Supply Chain Management, Commerce, or Project Operations may purchase the Marketing (standalone) production application with an entitlement of 10K contacts. Customers receive capacity and Customer Voice entitlements once, providing these entitlements are not already on the customer's account, and only when purchasing Marketing standalone application:

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

## ➤ Marketing Attach

Dynamics 365 customers with at least 10 full users of Sales Professional, Sales Enterprise, Customer Service Professional, Customer Service Enterprise, Field Service, Finance, Supply Chain Management, or Commerce may purchase Marketing Attach application with an entitlement of 10K contacts.

The base pack of Marketing includes one Marketing Application environment and an entitlement of 10K contacts. Only one of the “base packs” with 10K contacts may be purchased. Dataverse capacity and Customer Voice entitlements are at the tenant level; therefore, they are not included with this application.

## Additional Marketing environments

### ➤ Marketing Additional Application (production)

Marketing Additional application, licensed per tenant, enables Marketing customers to deploy an additional Marketing application for production use on a separate environment. Customers get one environment of the Marketing application; additional marketing contacts are not included. Customers may continue to use their pool of marketing contacts from the tenant level.

### ➤ Marketing Additional Non-Production Application

Marketing Additional Non-Production application, licensed per tenant, provides Marketing customers an additional Marketing application for non-production use on a separate environment. Additional marketing contacts are not included, customers may continue to use their pool of marketing contacts from the tenant level.

**Marketing contacts** are any contacts used as part of a marketing activity in Dynamics 365 Marketing. Contacts not marketed to using Dynamics 365 Marketing features don't count towards their marketing-contacts quota. Marketing keeps a detailed record of all the ways in which each contact interacts with marketing initiatives but monitors just a few key interaction types when it comes to identifying marketing contacts. Any contact that performs one or more of these key interactions will become flagged as a marketing contact, and count against the marketing-contact quota. There are many other types of interactions (such as email opens, survey responses, and website visits) which represent follow-up activities to the core set of key interactions. After a key interaction is logged for a contact, it doesn't matter how many of the same or follow-up interactions that contact performs, the contact is still counted just once.

The key interaction types are:

- Contact used in customer journey
- Marketing email sent
- Event check-in
- Event registration
- Marketing form submitted
- LinkedIn form submission

All marketable contacts used in a tenant are counted irrespective of environment (production and non-production). Visit this [help](#) documentation to learn more.

## Marketing Capacity

Application/Capacity	Included Capacity	Add-on	Add-on Capacity
Marketing <ul style="list-style-type: none"><li>• Contacts</li></ul>	10K Contacts	<ul style="list-style-type: none"><li>• Dyn 365 for Mktg Addl Contcts 5K Contcts Addon</li><li>• Dyn 365 for Mktg Addl Contcts T2</li><li>• Dyn 365 for Mktg Addl Contcts T3</li><li>• Dyn 365 for Mktg Addl Contcts T4</li><li>• Dyn 365 for Mktg Addl Contcts T5</li></ul>	<ul style="list-style-type: none"><li>• 5K Contacts</li><li>• 50K Contacts for tiers 2-5</li></ul> 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

## Marketing Use Rights Overview

Use Rights	Team Members	Marketing
<b>Access</b>		
Dynamics 365 Mobile Client Application	•	•
Microsoft Dynamics 365 for iPad & Windows	•	•
Dynamics 365 for Outlook and Dynamics 365 App for Outlook <sup>1</sup>	•	•
Microsoft Dynamics 365 Web application	•	•
<b>Read</b>		
All Dynamics 365 application data	•	•
Custom Entity data	•	•
<b>Entities: Create, Update, Delete</b>		
Activities	•	•
Announcements	•	•
Calendar: share	•	•
Contacts	•	•
Custom Entities (see <a href="#">Appendix B</a> )	15 max <sup>2</sup>	•
Notes	•	•
Personal Views	•	•
Saved Views	•	•
Accounts		•
Lead Management		•
Marketing Campaigns		•
Marketing List		•
Quick Campaigns		•
Sales Literature		•
Campaign Management (customer journeys, marketing pages, etc.): multi-channel		•
Email Marketing		Max 10x contacts
Event Management		•
Lead Scoring		•
<b>Entities: Actions</b>		
Activity Feeds: post & follow activity feeds	•	•
Connector for LinkedIn Lead Gen Forms		•
Dialog: start dialog	•	•
Mail merge: perform mail merge	•	•
Marketing List: associate a Marketing List with an Account or Contact	•	•
Queue: use a queue item	•	•
Teams: define and configure		•
Yammer: use Yammer collaboration requires the appropriate license (acquired separately)	•	•
<b>General System Use: Actions</b>		
Auditing: configure		•
Business Processes: customize		•
Dialogs: define and configure		•
Duplicate Detection: configure rules		•
Dynamics 365 Forms, Entities, and Fields: create		•
Dynamics 365: administer		•
Entities: define connections and relationships between entities		•
Forms and Views: customize (see <a href="#">Appendix B</a> )		•
Import data in bulk		•
Microsoft Excel: export data to Excel	•	•
Queue: define and configure (see <a href="#">Appendix B</a> )		•
Records: use relationships & connections between records	•	•
Search and advanced find: use	•	•
System reports, charts, and dashboards: create and update		•
Workflows: define and configure		•
<b>Additional Services and Software</b>		
Dynamics 365 Customer Voice <sup>3</sup>		• standalone
Dynamics 365 Mobile Offline capabilities		•

<sup>1</sup>Dynamics 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](#).

<sup>2</sup>Team Members application module may be customized with maximum 15 additional entities (custom entities or standard Dataverse entities) available to the Team Members license per pre-approved application scenarios in [Appendix A](#).

<sup>3</sup>Customer Voice is included in the Marketing standalone application, but not included in Marketing Attach. See [Marketing](#).



# Cross Application Licensing

## Assigned Licenses

### Device Licenses

- **Sales Device, Customer Service Device, Field Service Device** licenses are full devices – they include the same rights as the equivalent user license, except that access is limited to only the licensed device.
- The **Operations - Device** and **Business Central Device** license are a limited license with a subset of Finance, Supply Chain Management, Commerce, Project Operations (Operations – Device only) or Business Central capabilities. These device licenses allow multiple users to use a licensed device to operate a point of sale device, shop floor device, warehouse device or store manager device. If 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.

Operations - Device SL use rights are also available to Operations - Activity users. However, an Operations - Device SLs does not include all the capabilities of the Operations - Activity user. 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.

A single device can provide any of the following functionality in any combination. Operations – Device or Business Central Device SLs do not include all the capabilities of the full user.

Device SL	Operations – Device and Business Central Device 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"><li>• Managing and replenishing inventory</li><li>• Balancing cash registers and processing daily receipts</li><li>• Configuring and maintaining menu options displayed by the ISV Devices</li><li>• Purchasing supplies and services required to run the Commerce Location operations</li><li>• Managing Commerce Location staff</li><li>• Processing reports required to analyze and manage Commerce Location results</li><li>• Managing master data related to Commerce Location operations</li></ul>
Shop Floor	One device used for manufacturing shop-floor functions. Shop Floor Functions: <ul style="list-style-type: none"><li>• Clock-in and clock-out</li><li>• Starting and finishing production jobs (including project activities carried out on the shop floor)</li><li>• Reporting progress</li><li>• Materials consumption and completion</li><li>• Viewing documents and instructions related to production jobs</li><li>• Viewing worker holiday balances</li></ul>
Warehouse Device	One device used for Warehousing functions: <ul style="list-style-type: none"><li>• Receiving</li><li>• Putting-away</li><li>• Doing internal stock transfers</li><li>• Picking, packing</li><li>• Capturing product attributes</li><li>• Shipping goods plus performing inventory count checks in the context of a warehouse management system</li><li>• 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)</li></ul>

## Human Resources Self Service License

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

- Update personal employee information
- Manage human resources activities of direct employees or those reporting up through the users reporting chain
- Report sick leave
- Submit vacation request
- View employee benefits
- Approve employee leave as a manager
- View employee information as a manager

## Operations – Activity License

The Operations - Activity user SL only applies to the Finance, Supply Chain Management, Commerce, Human Resources, and Project Operations applications. Operations - Activity use rights include all Team Members use rights as well as the rights to:

- (i) Approve all Activity related transactions: reference [Appendix D](#) for approval privileges
- (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.

## Team Members Licenses

The Team Members user SL grants a user the following **Sales, Customer Service, or Field Service** 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 Operations, 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 Dataverse (formerly Common Data Service) entities) available to the Team Members license per pre-approved application scenarios in [Appendix A](#).

For additional details reference the applicable Dynamics 365 application use rights sections.

The Team Members user SL grants a user the following **Finance, Supply Chain, Commerce, Human Resources, and Project Operations** 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 user 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 Dataverse (formerly Common Data Service) entities) available to the Team Members license per pre-approved application scenarios in [Appendix A](#).

For additional details reference the applicable Dynamics 365 security rights overview sections.

The **Business Central** Team Members user SL grants a user the following rights for their own use and not for, or on behalf of, other individuals:

- (i) Read anything within Business Central
- (ii) Update existing data and entries in Business Central - existing data are records like customer, vendor or item records which are already created. Entries means entries on which it is specifically allowed from an accounting perspective to update specific information. (e.g. due date on customer ledger entries)
- (iii) Approve or reject tasks in all workflows assigned to a user. Approvals and rejections can only update data in records that Business Central Team Members can access
- (iv) Create, edit, delete a sales and purchase quote
- (v) Create, edit, delete personal information
- (vi) Edit job time sheets for approval
- (vii) Use Power Apps/Power Automate Use Rights with Dynamics 365 license
- (viii) Team Members application module\* may be customized with maximum 15 additional entities (custom entities or standard Dataverse (formerly Common Data Service) entities) available to the Team Members license per pre-approved application scenarios

\*For Team Members application module is defined as the Business Central application capabilities available to Business Central Team Members users as described in Team Members use rights i – vii

For additional details reference the [Essentials](#) and [Premium](#) functionality sections.

## Unassigned Licenses

### Operations - Order Lines License

For qualifying indirect transaction types in Finance, Supply Chain Management, Commerce, Human Resources, or Project Operations, Operations - Order Lines may be used to license indirect access scenarios such that a user or device license is not required.

The Operations - Order Lines is licensed by tenant per month, includes 100K order lines/month, and is available for Finance, Supply Chain, Commerce, and Project Operations. Order Lines 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:

- (i) For qualifying transaction types, customers will be able to license indirect access on a transactional 'order line' basis rather than on a per user basis
- (ii) Alleviates pricing and licensing friction in many common multiplexing scenarios
- (iii) Supports a broader set of external user scenarios
- (iv) Enables licensing of automated systems and devices that do not include users (e.g. IoT scenarios)
- (v) Improves licensing cost transparency and predictability
- (vi) Ties licensing cost more directly with business outcomes

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

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

- (i) Be an indirect transaction that utilizes an OData or DIXF integration. Direct usage of the Dynamics application or integrations outside of OData or DIXF may not utilize 'Operations - Order Lines' licensing.
- (ii) 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	VENDINVOICEINFLINE
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.

## Capacity Licenses

### Default Subscription Capacity

The first subscription (base license) of a Dynamics 365 application includes the default capacity which is shared per tenant. Default capacity is not cumulative, therefore additional subscriptions do not increase the customer's default capacity. Attach licenses access the platform entitlements included with the base application. Note: For bundled offers such as Sales Premium and MRSs Plus, the capacity entitlements come with the core application.

Additional database and file capacity are accrued and granted at no charge per each Enterprise base license.

Capacity Included /Accrued	BC Essentials	BC Premium	Finance, SCM, Commerce, Project Oper	Guides	Human Resources	Marketing	Remote Assist	Sales Ent, Cust Svc Ent, Field Svc Ent	Sales Pro, Cust Svc Pro	Operations - Activity	Operations - Device
Dataverse (formerly Common Data Service) Database: Included/tenant max	-	-	10GB	10GB	10GB	-	10GB	10GB	10GB	-	-
Dataverse Database: Accrued/USL max 4TB/tenant	-	-	-	-	-	-	-	250MB	-	-	-
Dataverse File: Included/tenant	-	-	20GB	20GB	20GB	-	20GB	20GB	20GB	-	-
Dataverse File: Accrued/USL	-	-	-	-	-	-	-	2GB	-	-	-
Dataverse Log: Included/tenant	-	-	2GB	2GB	2GB	-	2GB	2GB	2GB	-	-
Dataverse Log: Accrued/USL	-	-	-	-	-	-	-	-	-	-	-
Operations Database Capacity: Included/tenant	-	-	20GB	-	20GB	-	-	-	-	-	-
Operations Database Capacity: Accrued/USL max 4TB/tenant	-	-	500MB/SL	-	-	-	-	-	-	500MB/4 SL	500MB/2.5 SL
Operations File Capacity: Included/tenant	-	-	40GB	-	40GB	-	-	-	-	-	-
Operations File Capacity: Accrued/USL	-	-	4GB/SL	-	-	-	-	-	-	4GB/4 SL	4GB/2.5 SL
Business Central Database Storage: Included/tenant	80GB		-	-	-	-	-	-	-	-	-
Production: environment/tenant	1 BC	1 BC	1 AOS	-	2 Dataverse Database + 2 AOS <sup>1</sup>	-	-	-	-	-	-
Non-Production: environment/tenant	3	3	1 Sandbox Tier 2	-	-	-	-	-	-	-	-

<sup>1</sup>At any given time, only one of the environments may be in production but alternatively both environments may be in non-production.

### Types of default capacity

- Dataverse (formerly Common Data Service) Database: stores and manages entity definitions and data. Relational database capacity for any Dynamics 365 application that utilizes Dataverse for Apps. Each unit increases available tenant wide shared capacity by 1 GB.
- Dataverse File: store attachments to notes or emails to include documents, image files, videos, PDF files and other crucial files. File capacity for and Dynamics 365 application that utilizes Dataverse for Apps. Each unit increases available tenant wide shared capacity by 1 GB.
- Dataverse Log: records entity and attribute data changes over time for use in analysis and reporting purposes. Log data (audit/tracing) capacity for any Dynamics 365 application that utilizes Dataverse for Apps. Each unit increases available tenant wide shared capacity by 1 GB.
- Operations Database Capacity: relational database capacity for all applicable applications (specified in table) that have storage requirements outside of Dataverse for Apps.
- Operations File Capacity: store attachments to notes or emails to include documents, image files, videos, PDF files and other crucial files. File capacity for applicable applications (specified in table) that have storage requirements outside of Dataverse for Apps.
- Database Storage: structured database storage. For every 1GB of database capacity customers receive 1GB of each Production, Reporting, and Entity Store databases.
- File Storage: unstructured file storage.
- Environment: each additional production or non-production (Sandbox) Dynamics 365 (online) environment added creates a separate and isolated Dynamics 365 organization on the same tenant.

- Production:
  - Dataverse Environment: Foundation for Power Platform and Sales, Customer Service, Field Service, Marketing, Remote Assist, Guides, and Human Resources and Project Operations which partially run on Dataverse environments
  - Application Object Server (AOS): Human Resources, Finance, Supply Chain Management, Commerce, and Project Operations

Note, the Finance, Supply Chain Management, Commerce, and Project Operations production environment comes with disaster recovery and high availability and is monitored 24x7 for service health. Additional production environments are not available for purchase. To ensure the environment is used for live operations, we will provision the production environment only after the implementation nears the 'operate' phase after completion of the required activities in the Lifecycle Services (LCS) methodology.

  - Business Central environment: Business Central Premium, Business Central Essentials
- Non-Production: UAT, sandbox, and testing environments.
- API Call Requests: To ensure service levels, availability and quality, there are entitlement limits to the number of requests users can make each day across their applications. Power Apps and Power Automate usage will count against the API call request limits provided by the Dynamics 365 license. If you exceed these limits overage charges may be applied. Service limits can be found here <http://aka.ms/platformlimits>. For more details reference the Power Apps, Power Automate, and Power Virtual Agent Licensing [Guide](#).
- Power Apps Portals: deliver the capability to build standalone, external-facing portals over the Dataverse. Portals are licensed based on [usage](#).

## Capacity Add-ons

Capacity Add-on/ Environment	BC Premium	BC Essentials	Finance, SCM, Commerce, Project Oper.	Guides	Human Resources	Marketing	Remote Assist	Sales Ent, Cust Svc Ent, Field Svc Ent	Sales Pro, Cust Svc Pro
Dataverse Database	1GB	1GB	1GB	1GB	1GB	-	1GB	1GB	1GB
Dataverse File	1GB	1GB	1GB	1GB	1GB	-	1GB	1GB	1GB
Dataverse Log	1GB	1GB	1GB	1GB	1GB	-	1GB	1GB	1GB
Operations Add'l Database Capacity	-	-	1GB	-	1GB	-	-	-	-
Operations Add'l File Capacity	-	-	1GB	-	1GB	-	-	-	-
Operations Sandbox Tiers 2 - 5	-	-	10GB	-	-	-	-	-	-
Human Resources Sandbox <sup>1</sup>	-	-	-	-	10GB	-	-	-	-
Business Central Database Capacity	1GB	1GB	-	-	-	-	-	-	-
Business Central Additional Environment <sup>2</sup>	4GB	4GB	-	-	-	-	-	-	-

<sup>1</sup>The Human Resources Sandbox is a non-production, test environment available for Human Resources users only.

<sup>2</sup>Each additional production environment comes with 3 additional sandbox environments and 4GB of database capacity

## Power Platform capacity add-ons

- Power Apps and Power Automate capacity add-on may be purchased to increase API call requests daily service limits
- Power Apps Portals add-on can be used to purchase additional portals

For more information reference the Power Apps, Power Automate, and Power Virtual Agent Licensing [Guide](#).

## Additional Dataverse (formerly Common Data Service) Capacity

Dataverse 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 storage corresponding to a customer subscription is tracked against all the applications environments associated with the tenant.

### Sandbox add-ons

The non-production environment 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, Commerce, Project Operations subscriptions can access the environments included in the subscription, and every additional purchased environment associated with the same customer.

Finance, Supply Chain Management, Commerce, and Project Operations USL				
Sandbox	Description	Purpose	Customer/ Load Size	Included Capacity
Tier 2	Standard Acceptance Testing: multi box	User acceptance, integration testing and training	Any	10GB/ environment
Tier 3	Premium Acceptance Testing: multi box	Large scale user acceptance testing, integration testing and training	Small/ light load	10GB/ environment
Tier 4	Standard Performance Testing: multi box	Performance, load, and staging with user acceptance testing	Small to medium/ medium load	10GB/ environment <sup>1</sup>
Tier 5	Premium Performance Testing: multi box	Performance, load, and staging with user acceptance testing	Large/ heavy load	10GB/ environment <sup>1</sup>

## Additional Licensing Requirements

### 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. Refer to the [Product Terms](#) for minimum purchase requirements.

### 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. Sales, Customer Service, and Field Service graphical user interfaces may not be accessed by external users.

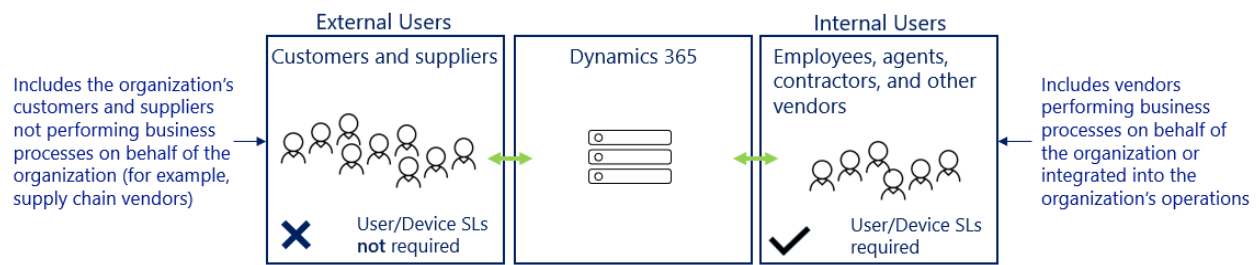
Dynamics 365 customers have the option to license a Portal to provide access to business processes or internal data for external users.

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.

Additional licensing requirements for external users can be found on [Product Terms](#).





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.

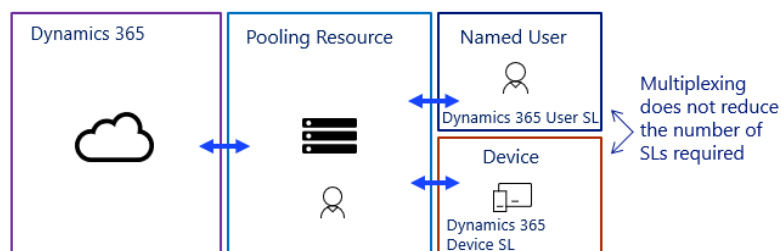
Operations - Order Lines is an opt-in model, and once you opt-in, any transaction that comes in via OData or DIXF and creates or updates a qualifying order line type will be counted and charged for, independent of whether it came from an internal or external user. If that would adversely affect them,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

## 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:

- 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.



Dynamics 365 use the Dataverse to store and secure data used by the applications. Power Apps users who have a Power Apps license may use custom apps that access (Create, Read, Update or Delete) any Dynamics 365 non-restricted entity in the Dataverse. However, Power Apps users and devices creating, updating or deleting data in Dynamics 365 restricted entities through Power Apps must be properly licensed for Dynamics 365.

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 Multiplexing - Overview](#). Note, if a licensed user receives data from an unlicensed user, the licensed user may manually enter this new information into the Dynamics 365 service. This scenario is not considered multiplexing because the manual action of moving and entering the data is performed by the licensed user.

## Dual Use Rights

One of the advantages of Dynamics 365 is dual use rights. These rights allow 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 environments 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 environments.

Users licensed with Dynamics 365 SLs have use rights equivalent to a CAL for the purpose of accessing equivalent on-premises workloads. Device use rights are equivalent to the cloud device use rights. With Dynamics 365 the server license is included with the SLs.

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. For the full list of user/device SLs to on-premises user/device CALs license mapping reference the Dynamics 365 Dual Use Rights section in the [Product Terms](#).

Customers may use downgrade rights to deploy an earlier version of a server, however, downgrade rights are limited to:

- Dynamics AX 2012 R3 for Dynamics 365 for Operations on-premises Server
- Dynamics CRM 2016 for Dynamics 365 (On-Premises) Server
- Dynamics NAV 2018 for Dynamics 365 Business Central, 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
- If a customer chooses to deploy with dual use rights, Microsoft Technical support will assist with support issues resulting with the deployment, however, support is not included for the on-premises deployment.
- Customers who choose to deploy on-premises have the following technical support options:
  - Seek support from their partner
  - Purchase [professional support incidents](#) to get support directly from Microsoft
  - Use support incidents from existing Software Assurance contract
  - Purchase, or use existing, Premier or Unified Support

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: Contact your partner
- 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](#).

## Dual Write

Dual write enables customers to synchronize data from Commerce, Finance, and Supply Chain Management applications into Dataverse (formerly Common Data Service). Dual write is configured at the entity level, enabling customers to designate the specific entities that it will synchronize with Dataverse. For more details, please visit [here](#).

A specific license is not required to enable dual write and when configuring dual write against unrestricted entities no additional licensing is required. However, when dual write is configured against a restricted entity, users making updates in the application that result in updates to those restricted entities must be appropriately licensed.

For example, if Finance users are leveraging dual write to integrate Invoice Process (Dataverse restricted entity), these users need to be appropriately licensed. For a list of restricted entities, please check [here](#).

## Dynamics 365 Application extensibility

**Power Platform** - Dynamics 365 application extensibility is provided through Power Platform. The Power Platform functionality available to Dynamics users is detailed in the Power Apps, Power Automate, and Power Virtual Agent Licensing [Guide](#).

**Power BI** - 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.

**Other extensibility** - For applicable applications, Dynamics 365 subscriptions also include the ability use custom entities as described in [Appendix B](#) and create custom security roles as described in [Appendix C](#).

## Appendix A: Team Members Use Rights Overview

This table provides an overview of the Team Members use rights by Sales, Customer Service, Field Services and Finance, Supply Chain Management, Commerce, Human Resources, and Project Operations applications.

Use Rights	Description Service	Sales, Customer Service, Field Service	Finance, SCM, Commerce, HR, Project Ops
<b>Access</b>			
	Access Anywhere: Web App, Mobile App, Tablet App, via Dynamics 365 App for Outlook and Dynamics 365 for Outlook	•	
<b>Read</b>			
	Dynamics 365 Applications: full read across	•	•
<b>General System Use</b>			
Common	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)	•	
<b>Customization</b>			
Apps on Dataverse platform	Additional entities (custom entities or standard Dataverse entities) <sup>1</sup>	15 per app	
<b>Edit/Actions (pre-approved application scenarios for Team Members)</b>			
Sales	Only employee self-serve: Customer management - work with contacts or read accounts, lead and opportunity management - read leads and opportunities linked with accounts (Sales application module for Team Members, Portal <sup>1</sup> or API access only)	•	
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 <sup>1</sup> or API access only)	•	
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		•

Use Rights	Description Service	Sales, Customer Service, Field Service	Finance, SCM, Commerce, HR, Project Ops
	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		•
Project Operations	Record time and expense entries as progress is made on a project		•
	Create and approve project timesheets		•
	Project Resource Hub: Apply for Project, report Time & Expense for Projects, update Project Tasks, update Own Resource Competencies for Project	•	

<sup>1</sup>When provisioning capacity-based portals, using Dataverse capacity, portal licensing use rights apply

## Appendix B: 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.

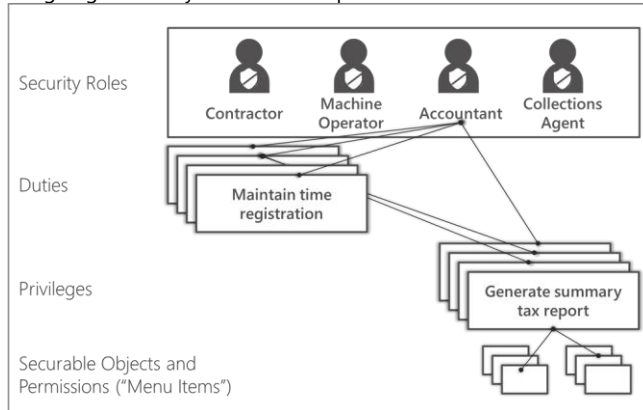
Dynamics 365 Application	Custom Entity Use Rights
Enterprise Applications Full Users	<ol style="list-style-type: none"><li>1. Full access</li><li>2. No limit on number of custom entities</li><li>3. Full Create, Read, Update, and Delete (CRUD) on data records associated with custom entities</li></ol>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

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.

## Appendix C: Security Role Assignment, Implementation, Testing, LCS, & Customization Licensing

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

Assigning a Security Role to a user provides access to solution functionality



To make it easier to understand the licenses required, each Commerce, Finance, Human Resources, Project Operations, and Supply Chain Management 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 [Customization/Licensing Requirements](#) 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 Commerce, Finance, and Supply Chain Management 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 Commerce and Supply Chain Management and Team Members level access to those workloads as well as Customer Service, Field Service, Project Operations, and Sales.
- Human Resources Self Service use rights are included in the Team Members and full user licenses. Those use rights are cross-application for Commerce, Customer Service, Field Service, Finance, Human Resources, Supply Chain Management, and Sales.



# Implementation

## Development and Testing with Visual Studio subscriptions

Commerce, Finance, and Supply Chain Management 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 Commerce, Finance, Human Resources, or Supply Chain Management 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 Commerce, Finance, Human Resources, Project Operations, and Supply Chain Management 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

## Customization/Licensing Requirements

Commerce, Finance, Human Resources, Project Operations, and Supply Chain Management 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 Commerce, Finance, Human Resources, or Supply Chain Management 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 Commerce, Finance, Human Resources, or Supply Chain Management 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 D: Operations - Activity Approval Privileges

The table below specifies the license required for each action item. Activity use rights are included in the Enterprise license and those rights are cross-application. For instance, if a user needs to review and approved bank reconciliation, this user must be licensed with Activity. In case the same user needs to approve fixed assets journal, this user will need an Enterprise license.

Duty name	Privilege name	License <sup>1</sup>
Enable bank management process	Approve bank account reconciliation	Enterprise
Maintain overdue vendor debt CIT and PIT journals	Approve overdue vendor debt CIT and PIT journals	Enterprise
Manage fixed asset impairment	Approve fixed assets journal	Enterprise
Review bank management process performance	Review and approve bank reconciliation	Activity
Approve advanced ledger entry transactions	Approve the advanced ledger entry	Enterprise
Approve closing transactions	Approve ledger elimination journal	Enterprise
Approve customer invoices	Approve free text invoices	Enterprise
Approve customer invoices	Approve recurring invoice through workflow	Enterprise
Approve fixed assets transactions	Approve fixed assets journal	Enterprise
Approve ledger allocation transactions	Approve ledger allocation journal	Enterprise
Approve ledger transactions	Approval ledger journals	Enterprise
Approve ledger transactions	Approve ledger allocation journal	Enterprise
Approve ledger transactions	Approve ledger journal	Enterprise
Manage fixed asset impairment	Approve fixed assets journal	Enterprise
Review bank management process performance	Review and approve bank reconciliation	Activity
Approve closing transactions	Approve ledger elimination journal	Enterprise
Approve fixed assets transactions	Approve fixed assets journal	Enterprise
Approve ledger allocation transactions	Approve ledger allocation journal	Enterprise
Approve ledger transactions	Approval ledger journals	Enterprise
Approve ledger transactions	Approve ledger allocation journal	Enterprise
Approve ledger transactions	Approve ledger journal	Enterprise
Manage fixed asset impairment	Approve fixed assets journal	Enterprise
Review bank management process performance	Review and approve bank reconciliation	Activity
Maintain overdue vendor debt CIT and PIT journals	Approve overdue vendor debt CIT and PIT journals	Enterprise
Maintain vendor invoices	Maintain vendor invoice matching approval	Enterprise
Maintain vendor invoices	Post invoice approval journal transactions	Enterprise
Approve netting transactions	Approve netting journal	Enterprise
Approve promissory note transactions	Approve vendor promissory note journal	Enterprise
Approve vendor payment transactions	Approve vendor disbursement journal	Enterprise
Enable purchasing process	Maintain approved vendor list	Enterprise
Maintain purchase rebates	Maintain vendor rebate approvals	Enterprise
Maintain vendor invoices	Maintain vendor invoice matching approval	Enterprise
Maintain vendor invoices	Post invoice approval journal transactions	Enterprise
Review bank management process performance	Review and approve bank reconciliation	Activity
Approve bill of exchange transactions	Approve customer bills of exchange journal	Enterprise
Approve customer invoices	Approve free text invoices	Enterprise
Approve customer invoices	Approve recurring invoice through workflow	Enterprise
Approve customer payment transactions	Approve customer payment journal	Enterprise
Approve netting transactions	Approve netting journal	Enterprise
Approves generated customer rebates	Maintain rebate approvals	Enterprise
Review bank management process performance	Review and approve bank reconciliation	Activity
Review bank management process performance	Review and approve bank reconciliation	Activity
Approve budget register entries	Approve budget account entry through workflow	Activity

Duty name	Privilege name	License <sup>1</sup>
Approve budget register entries	Approve budget register entry through workflow	Activity
Maintain budget register entries	Approve budget account entry through workflow	Activity
Approve budget register entries	Approve budget account entry through workflow	Activity
Approve budget register entries	Approve budget register entry through workflow	Activity
Approve fixed assets budget entries	Approve fixed asset budget entry through workflow	Enterprise
Maintain budget register entries	Approve budget account entry through workflow	Activity
Maintain commitment documents	Approve commitment documents through workflow	Activity
Maintain payment schedule journal processing	Approve payment schedule journal through workflow	Activity
Review bank management process performance	Review and approve bank reconciliation	Activity
Maintain commitment documents	Approve commitment documents through workflow	Activity
Maintain payment schedule journal processing	Approve payment schedule journal through workflow	Activity
Review bank management process performance	Review and approve bank reconciliation	Activity
Maintain compensation transactions	Change compensation event status to Approved	Enterprise
Approve credit limit adjustments workflow	Approve credit limit adjustments workflow	Enterprise
Approve credit management holds workflow	Approve credit management holds workflow	Enterprise
Review bank management process performance	Review and approve bank reconciliation	Activity
Approve and activate product changes	Approve and activate product changes	Enterprise
Approve BOMs	Approve BOM versions	Enterprise
Approve BOMs	Approve BOMs	Enterprise
Approve routes	Approve route versions	Enterprise
Approve routes	Approve routes	Enterprise
Approve and activate product changes	Approve and activate product changes	Enterprise
Approve routes	Approve route versions	Enterprise
Approve routes	Approve routes	Enterprise
Approve and activate product changes	Approve and activate product changes	Enterprise
Approve BOMs	Approve BOM versions	Enterprise
Approve BOMs	Approve BOMs	Enterprise
Approve and activate product changes	Approve and activate product changes	Enterprise
Maintain planned orders	Approve planned orders	Enterprise
Maintain approved vendors	Maintain approved vendor list	Enterprise
Maintain catalogs	Review and approve vendor catalogs	Activity
Approve purchase agreement	Approve the purchase agreement through workflow	Activity
Maintain catalogs	Review and approve vendor catalogs	Activity
Approve purchase agreement	Approve the purchase agreement through workflow	Activity
Approve vendor user requests	Approve vendor user requests	Enterprise
Enable purchasing process	Maintain approved vendor list	Enterprise
Approve nonconformances	Approve nonconformance	Enterprise
Enable recruitment process	Approve applications	Enterprise
Retail catalog approval workflow duty	Retail catalog approval workflow privilege	Activity
Maintain credit card payments	Maintain refund approvals	Activity
Maintain refund check processing	Maintain refund approvals	Enterprise
Maintain royalty information	Maintain royalty approvals	Enterprise
Enable bank management process	Approve bank account reconciliation	Enterprise
Maintain payment schedule journal processing	Approve payment schedule journal through workflow	Activity
Review bank management process performance	Review and approve bank reconciliation	Activity

<sup>1</sup>When configuration key is on

## Appendix E: Trials and Service Support

### 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>
- Remote Assist: <https://dynamics.microsoft.com/en-us/get-started/?appname=mixedrealityremoteassist>
- Guides: <https://dynamics.microsoft.com/en-us/get-started/?appname=mixedrealityguides>
- Business Central: <https://docs.microsoft.com/en-us/learn/modules/trial-dynamics-365-business-central/>

**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.

### Service Support

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



- Professional Direct Support
- Enterprise Solutions - Unified Support

The Microsoft Cloud Solution Provider program (CSP) enables partners to manage their customer's success. Support for Business Central is solely through the Microsoft Cloud Solution Provider partners.

## Appendix F: Dynamics 365 License List and Definitions

Dynamics 365 Licenses:	Written as:
Dynamics 365 Account Protection	Account Protection
Dynamics 365 Business Central Device	Business Central Device
Dynamics 365 Business Central Essentials	Business Central Essentials
Dynamics 365 Business Central Premium	Business Central Premium
Dynamics 365 Business Central Team Members	Business Central Team Members
Dynamics 365 Commerce	Commerce
Dynamics 365 Customer Insights	Customer Insights
Dynamics 365 Customer Service	Customer Service
Dynamics 365 Customer Service Insights	Customer Service Insights
Dynamics 365 Customer Voice	Customer Voice
Dynamics 365 Field Service	Field Service
Dynamics 365 Finance	Finance
Dynamics 365 Fraud Protection	Fraud Protection
Dynamics 365 Guides	Guides
Dynamics 365 Human Resources	Human Resources
Dynamics 365 Human Resources Self Service	Human Resources Self Service
Dynamics 365 Loss Prevention	Loss Prevention
Dynamics 365 Marketing	Marketing
Dynamics 365 Operations – Activity	Operations - Activity
Dynamics 365 Operations – Device	Operations - Device
Dynamics 365 Project Operations	Project Operations
Dynamics 365 Purchase Protection	Purchase Protection
Dynamics 365 Remote Assist	Remote Assist
Dynamics 365 Sales	Sales
Dynamics 365 Sales Insights	Sales Insights
Dynamics 365 Sales Premium	Sales Premium
Dynamics 365 Supply Chain Management	Supply Chain Management
Dynamics 365 Team Members	Team Members
Microsoft Dataverse (formerly Common Data Service)	Dataverse
Microsoft Relationship Sales solution Plus	MRSs Plus

### Definitions:

- **Device SL** (key ): With device license any number of users can access a licensed device without the need for separate user SL.
- **Tenant** (key ): A tenant contains uniquely identified domains, users, security groups, and subscriptions and can contain multiple Dynamics 365 (online) environments.


In some cases after purchasing the tenant license, license administrators may need to assign no charge user license through the admin portal to users that need access to tenant level applications.

In a multi-tenant scenario, a licensed Dynamics 365 user associated with a tenant can only access one or more Dynamics 365 environments 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.

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 environments.

A user with a Professional application is licensed only for that application and therefore may not directly or indirectly access another environment 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 environment. However, the functionality in the Professional application will still be limited to the Professional features of that workload.

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

- **User SL** (key 

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## Appendix G: Additional Resources

Resource	Link
Dynamics 365	<a href="https://dynamics.microsoft.com/">https://dynamics.microsoft.com/</a>
Dynamics 365 Licensing and Pricing	<a href="https://dynamics.microsoft.com/pricing/">https://dynamics.microsoft.com/pricing/</a>
Microsoft Power Platform	<a href="https://powerplatform.microsoft.com/en-us/">https://powerplatform.microsoft.com/en-us/</a>
Microsoft Power Automate	<a href="https://flow.microsoft.com/en-us/pricing/">https://flow.microsoft.com/en-us/pricing/</a>
Microsoft Power Virtual Agents	<a href="https://powervirtualagents.microsoft.com/en-us/pricing/">https://powervirtualagents.microsoft.com/en-us/pricing/</a>
Power Apps Pricing	<a href="https://powerapps.microsoft.com/en-us/pricing/">https://powerapps.microsoft.com/en-us/pricing/</a>
Power BI Pricing	<a href="https://powerbi.microsoft.com/en-us/pricing/">https://powerbi.microsoft.com/en-us/pricing/</a>
Microsoft Power Apps, Power Automate, and Power Virtual Agents Licensing Guide	<a href="https://go.microsoft.com/fwlink/?LinkId=2085130&amp;clid=0x409">https://go.microsoft.com/fwlink/?LinkId=2085130&amp;clid=0x409</a>
Dynamics AX (online) Licensing Guide	<a href="http://aka.ms/s201h6">http://aka.ms/s201h6</a>
AX 2012 Retail Licensing Scenarios	<a href="http://aka.ms/Sumqjx">http://aka.ms/Sumqjx</a>
Dynamics CRM Online Licensing Guide	<a href="https://mbs.microsoft.com/Files/public/CRMONLINE/CRMOnlineLicensingGuide.pdf">https://mbs.microsoft.com/Files/public/CRMONLINE/CRMOnlineLicensingGuide.pdf</a>
Dynamics On-premises Licensing Guides	<a href="https://partner.microsoft.com/asset/collection/licensing-guide-assets#/">https://partner.microsoft.com/asset/collection/licensing-guide-assets#/</a>
Dynamics Blog	<a href="https://community.dynamics.com/b/msftdynamicsblog">https://community.dynamics.com/b/msftdynamicsblog</a>
Microsoft Volume Licensing	<a href="http://www.microsoft.com/licensing">www.microsoft.com/licensing</a>
Software Assurance	<a href="http://www.microsoft.com/licensing/software-assurance/default.aspx">http://www.microsoft.com/licensing/software-assurance/default.aspx</a>
Microsoft License Advisor	<a href="http://www.microsoft.com/licensing/mla/default.aspx">http://www.microsoft.com/licensing/mla/default.aspx</a>
Dynamics 365 Support	<a href="https://dynamics.microsoft.com/support/plans/">https://dynamics.microsoft.com/support/plans/</a>
Partner Center	<a href="https://partnercenter.microsoft.com/pcv/dashboard/overview">https://partnercenter.microsoft.com/pcv/dashboard/overview</a>
Cloud Solution Provider Program (CSP)	<a href="https://mspartner.microsoft.com/Pages/solutions/cloud-reseller-overview.aspx">https://mspartner.microsoft.com/Pages/solutions/cloud-reseller-overview.aspx</a>

## Appendix H: Change Log

Page	Topic	Change	Action	Date
various	Common Data Service	Name change	Rebranded as Microsoft Dataverse	December 2020
4, 25	MRSs	Retired	Microsoft Relationship Sales solution retired. Microsoft Relationship Sales solution Plus is still available.	
31	Customer Insights	Relocated	Customer Insights relocated to “Unassigned” section	
31	Customer Insights	Added	Customer Voice entitlements	
32	Fraud Protection	Relocated	Fraud Protection relocated to “Unassigned” section	
44	Dual use rights	Updated	Updated on-premises technical support options	
5	Team Members	Removed	At least one full user must be assigned to the tenant to administer and configure the individual Team Members applications. Because you do not need a license to perform Admin tasks.	November 2020
7	Business Central	Added/removed	Business Central Essentials Functionality <ul style="list-style-type: none"> <li>Bank Feeds: UK removed</li> <li>Retention Policies added</li> </ul>	
15, 18, 26, 29, 43	Project Web App	Replaced	PWA replaced with Project Resource Hub in use right tables, and removed reference from External User section	
24	Project Operations use rights	Added/Clarified	Project Operations use rights table aligned with Team Members use rights, and added Project Opportunity and Project for the Web	
38	Operations – Order Lines	Added	Capacity includes 100K order lines/month	
39 – 41	Sandbox Tier 1	Removed	Sandbox Tier 1 is removed from CSP in November and EA in December, 2020	
39 – 41	Operations Database and Operations File Capacity	Name change	Unified Operations Database and Unified Operations File Capacity name changed to Operations Database and Operations File Capacity	
43	Multiplexing	Clarification	Removed bullet: Internal users and devices accessing Dynamics 365 restricted data indirectly through a Power Apps must still be properly licensed for Dynamics 365. Added a paragraph: Power Apps users and devices creating, updating or deleting data in Dynamics 365 restricted entities through Power Apps must be properly licensed for Dynamics 365	
45	Dual Write	New	Dual write section added	November 2020
Appendix B	Custom Entities	Removed	Team Members decision tree removed	

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