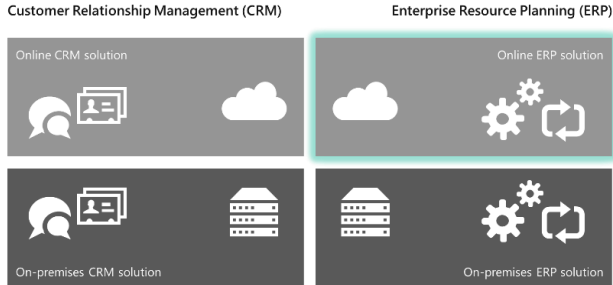


Licensing the Dynamics 365 ERP applications

Dynamics 365

Dynamics 365 offers both CRM and ERP functionality deployed as either online or on-premises solutions. This handout focuses on licensing the online ERP applications.



What is ERP?

ERP is business process management software that manages and integrates a company's financials, supply chain, operations, reporting, manufacturing, and human resource activities.



Licensing the Dynamics 365 ERP apps

A Team Members license should be assigned to users who need light access across the full range of apps. These are likely to be support staff rather than full time workers in these different professional capacities.

Note that all app licenses also include Team Members rights



User Subscription License

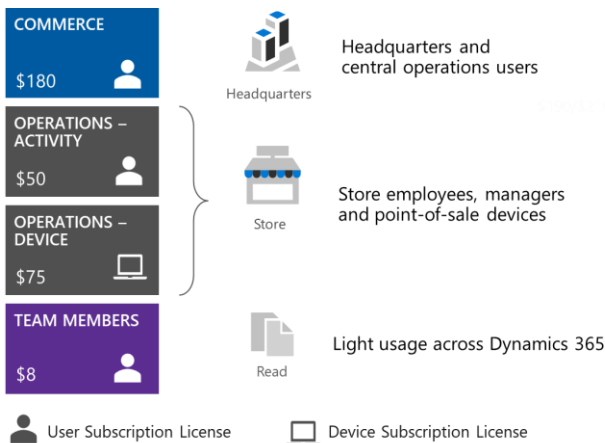


The blue boxes represent the ERP applications, and organizations assign licenses to users according to their role within the business:

- **Finance:** maximizing financial visibility and profitability
- **Supply Chain Management:** planning, production, inventory, warehouse and transportation management
- **Commerce:** managing shopping experiences across physical stores and digital channels
- **Human Resources:** managing employee benefits, leave and absence, compensation, and compliance programs
- **Project Operations:** connecting teams to accelerate project delivery and maximize profitability

Licensing for Commerce scenarios

Commerce scenarios are licensed through a combination of licenses, depending on a user's needs



For example

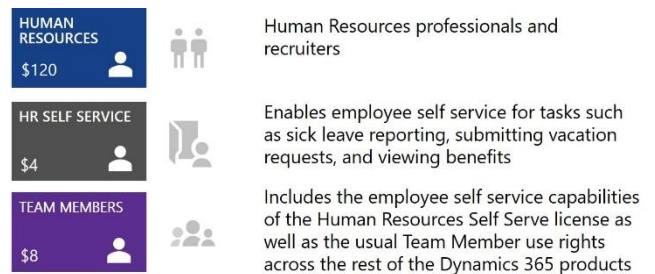
A clothing store with 10 users sharing a store computer

- User licensing: 10 x \$50 = \$500
- Device licensing: \$75



Licensing for Human Resources scenarios

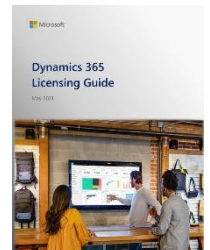
Human Resources scenarios are licensed through a combination of licenses, depending on a user's needs



The Dynamics 365 Licensing Guide

Great to refer to for:

- Information on the licenses for the different apps
- The types of people who will use each of the apps
- Examples of external users
- Licenses required for internal users by task
- Default Subscription capacities



Download the guide here: <http://bit.ly/D365LicensingGuide>

Meeting minimum purchase requirements

Base license minimums:

- 20 x Finance
- 20 x Supply Chain Management
- 20 x Commerce
- 20 x Project Operations
- 5 x Human Resources



EA

Licenses for Finance, Supply Chain Management, Commerce and Project Operations may be mixed to achieve the minimums
For example: 10 x Finance + 10 x Commerce

Operations – Device SLs can be used to satisfy the minimums with a ratio of 2.5 to 1

For example: 50 Operations – Device SLs = 20 SLs equivalent for Finance, Supply Chain Management, Commerce or Project Operations

CSP

No combinations are allowed, and thus each app must meet the minimum purchase requirements separately



Licensing a user for more than one app

Users who need to be licensed for more than one app are licensed with a Base license for the first app, and an Attach license for further apps.

| | | | | | |
|--------------------------|----------------------------------|----------------------|-------------------------|---------------------------------|------------------------|
| FINANCE \$180 | SUPPLY CHAIN MANAGEMENT \$180 | COMMERCE \$180 | FINANCE \$30 | SUPPLY CHAIN MANAGEMENT \$30 | COMMERCE \$30 |
| HUMAN RESOURCES \$120 | PROJECT OPERATIONS \$120 | Base licenses | HUMAN RESOURCES \$30 | PROJECT OPERATIONS \$30 | Attach licenses |

Base and Attach licenses provide access to same application functionality. The Base license must always be the higher priced app

Using the Team Members license

This is a named user subscription, designed for users who are not tied to a particular function, but who require basic Dynamics 365 functionality, priced at \$8 per user per month

Users can:

- Read Dynamics 365 data across all apps
- Participate in a specific set of scenarios for the ERP apps which are detailed in the Dynamics 365 Licensing Guide

A Team Members license does **not** provide access to custom applications, and a Power Apps license or a full Dynamics 365 license is then required, dependent on the scenario

Licensing external users

No licenses are required for external users



External users

- End customers of the organization
- Off-site vendors not in an employee-like relationship with the organization



NO LICENSE REQUIRED



NOT external users

Contractors, vendors or agents who:

- Provide business processes on the customer's behalf
- Use Microsoft Dynamics 365 to manage any portions of their business



LICENSE REQUIRED

Step-up licenses

Step-up licenses enable an EA customer to move from a lower license to a higher one at any time. They are **not required in CSP** since a new Subscription is started for the higher license, and the Subscription for the lower license is reduced or suspended

| Original license | Can step up to |
|--------------------------------------|-----------------------------------|
| Operations – Activity User SL | • Finance User SL |
| | • Supply Chain Management User SL |
| | • Commerce User SL |
| | • Project Operations User SL |
| | • Human Resources User SL |
| Team Members User SL | • Finance User SL |
| | • Supply Chain Management User SL |
| | • Commerce User SL |
| | • Project Operations User SL |
| | • Human Resources User SL |
| Human Resources Self Service User SL | • Operations – Activity User SL |
| | • Team Members User SL |

Availability of Dynamics 365 ERP licenses

| | Team Members User SLs | Operations Activity and Device SLs | Finance, Supply Chain Management, Commerce, Human Resources, Project Operations User SLs |
|------------|-----------------------|------------------------------------|--|
| EA | ✓ | ✓ | ✓ |
| MPSA | ✓ | ✓ | ✓ |
| Open/OV | | | |
| CSP | ✓ | ✓ | ✓ |
| Web Direct | ✓ | | |
| DPL | | | |
| SPLA | | | |