Microsoft

Dynamics 365
Licensing Guide

October 2021

Using This Guide

Use this guide to understand how to license Microsoft Dynamics 365 intelligent business applications. You have a variety of options to suit your situation. Whether you need one Dynamics 365 application or many, they can be easily and independently deployed so you can start with what you need and easily adopt additional capabilities as your business demands.

To improve the readability of this document, we've shortened product names throughout to exclude "Dynamics 365." If you're ever uncertain, see the complete list of full and shortened Dynamics 365 names in Appendix A.

The Contents page shows how this document is structured, with an overview followed by details organized by product. The licensing section for each Dynamics 365 product includes information about:

- The specific application
- Related or add-in applications and capacity that may be licensed with it
- Use rights

To easily maneuver between sections, simply click the TOC symbol (TOC) at the end of each section to return to the Contents page.

Other resources you may need

This document is about Dynamics 365 licenses, but it is not a legally binding licensing rights document. It also does not supersede or replace any legal documentation covering use rights. To understand conditions on license acquisition, product-specific terms, and conditions governing how Microsoft products can be used in Microsoft volume licensing programs, review the complete Product Terms and Licensing Terms.

A complete list of product features and capabilities is available in technical documentation at Microsoft Dynamics 365 documentation | Microsoft Docs. You can also search for in-depth articles and find helpful information about licensing provisioning and licensing administration at Microsoft Docs.

For help determining the right technology solution for your organization, including the license requirements for a specific product or scenario, talk to your Microsoft account team or your Dynamics Certified Partner. Microsoft reserves the right to review or update this document at any time without notice.

This document does not apply to Microsoft Dynamics on-premises solutions; the Microsoft Dynamics CRM Online service; or the Microsoft Dynamics AX online service. Appendix H provides links to the applicable licensing guides for these other products, which include details on entitlements and use rights and the benefits derived from Dynamics 365 licenses.

Give your feedback: Please send us feedback and suggestions on how we can improve the Dynamics 365 Licensing Guide by submitting the Dynamics 365 Licensing Guide feedback form.

What's new in this licensing guide?

This licensing guide was updated to reflect licensing updates and new online service offerings as of October 2021. See Appendix I: Change Log for more details.

Dynamics 365	New Offer or Change
	• No new offers in October 2021

Contents

How to Buy Dynamics 365

If you're ready to conquer emerging business challenges with a next-generation ERP and CRM solution, you're in the right place. Depending on your situation and geographic location, there are several ways to buy Dynamics 365, including volume licensing agreements and through certified reseller partners. This guide defines standard licensing options, and the benefits they confer, generally and for specific Dynamics 365 products. To learn more about volume licensing or to find a reseller, visit the Microsoft Volume Licensing website. For details about volume licensing options, including Online Services terms, refer to Product Terms. Find Dynamics 365 country, language, and localization availability here.

Certain Dynamics 365 services may be available for purchase via pay-as-you-go meter. Azure subscription enables you to pay for what you use, and your account is billed monthly. For example, you can enable pay-as-you-go billing for Dynamics 365 Fraud Protection services. To learn more about Azure services, see the Azure Services section of Product Terms.

Note that for Dynamics 365, mixing licenses across different licensing programs—for instance, using a volume licensing agreement for one product and a license bought through a reseller partner for another—on a single tenant is not recommended and could lead to incompatible subscriptions. Microsoft Products and Services Agreement (MPSA) licenses may be mixed with Enterprise Agreement (EA) licenses, however, for short-term purposes.

Dynamics 365 Licensing Overview

Dynamics 365 applications are licensed by subscription in two broad categories:

- Assigned licenses, which include:
  - User licenses, which grant access for a named user, regardless of the device used. For products that offer licenses for both enterprise and professional levels of functionality (such as Sales), user licenses may be referred to as Enterprise licenses or Professional licenses. Note, however, that an organization may not install both versions in the same environment.
  - Device licenses, which grant access via certain devices, using either assigned or shared logins.
- Unassigned licenses that provide access to a feature or service at the tenant level, regardless of the user or device involved.
  - Options include full application access, cross-application access, and additional capacity for components, such as storage, that may be subject to capacity limits.

Assigned Licenses	
User access	**Device access**
The functionality of a single Dynamics 365 application. May be full access or additional user access, such as with the Team Members license.	Via shared or assigned logins
Unassigned Licenses		

Full product access	Cross-application access	Additional capacity

An organization may have both assigned and unassigned licenses. Details about each type are below.

Licenses grant users non-perpetual rights (with no buy-out rights) to the use of one or more specific Dynamics 365 products in the cloud (not on-premises). As long as your subscription payments are up to date and you adhere to the Product Terms, you will have access to the current licensed Dynamics 365 product.

Admins do not need any license to configure and administer Dynamics 365 applications.

Note: It's easiest to determine the licensing that's right for you if you understand a few related terms, such as user licensing and tenant licensing. If you're not already familiar with them, please see Appendix B.

Assigned licenses

Assigned licenses give a named user or dedicated shared device access to specific products. Full-access user licenses are the most common, but assigned licenses include several options for additional users, usually with limited functionality.

Full user access licenses

Full users are those whose work requires the full, feature-rich functionality of Dynamics 365, whether in a large organization with Enterprise licenses or a small company with a Professional license. Enterprise and Professional licenses may not be mixed.

Several products are also available with standard and enhanced levels of functionality, such as Sales Enterprise and Sales Premium. The licenses for these products indicate which functionality level has been purchased.

Note that Business Central (Essentials or Premium) stands alone. Reference the Business Central section for exceptions.

Base licenses and cost savings opportunities for "attach" licenses

Microsoft provides a cost-effective way for a single Dynamics 365 user to obtain full user licensing for multiple products. Licenses for products that provide core business functionality qualify as base licenses. (See the table below.) Each has one or more additional applications that are frequently used by people in the same roles and that qualify as "attach" licenses for that user. (These are sometimes referred to as subsequent qualifying applications.) To take advantage of the special attach license pricing:

1. Buy the first base user license at standard pricing.
2. Review which attach licenses are available for that base. (See the qualifying products for each base license below.)
3. Buy attach licenses for the same user at an attach license price. You may buy as many attach licenses as are available for that base license.

Every full user must have a base license, though the base licenses don't need to be for the same product. (For instance, an attach license for Customer Service Professional is available both for a user with a Finance base and another with a Commerce base.)

Base applications and their qualifying products for attach licensing

Dynamics 365 base licenses per user	Dynamics 365 attach licenses 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)		●	●	●		●	●				
Project Operations (Proj Oper.)		●	●	●		●			●	●	
Remote Assist (RA)											
Sales Enterprise		●	●	●							
Sales Premium		●	●	●		●	●				
Sales Professional			●								
Supply Chain Management (SCM)	●	●	●	●	●	●	●		●	●	

If you require multiple products on the base licenses list, you may buy as many qualifying attach licenses as you need at an attach license price.

Attach licensing details

Only assigned user licenses (not device licenses or unassigned licenses) may be bought as an attach license. Tenant-based licenses (for Fraud Protection, for instance), additional access licensing, and capacity licensing do not qualify for attach licensing pricing but may be licensed separately. Some specialized Dynamics 365 products (such as Guides) also are not eligible.

Base and attach licenses are identical in their core capabilities and are only differentiated in price.

Note: System administrator will not be able to assign an attach license to a user who does not have the required base license.

Customers who obtain licensing through an Enterprise Agreement and who accidentally buy an attach license—when a base license is required—may step-up to the appropriate base license as needed. Customers with licensing through the Cloud Solution Provider (CSP) or MPSA programs would need to return the attach license and buy the appropriate base license instead.

Additional user access licenses

Additional users often represent a large percentage of the total users in an organization. They may consume data or reports from line of business systems; complete light tasks like time or expense entry and HR record updates; or use the system more heavily without requiring full user capabilities. Additional users may access all the functionality of the respective Dynamics 365 product within the constraints described below.

Several different types of additional user license are available, all priced per month. The minimum duration requirement for each (such as a minimum 12-month commitment, for example) is determined by the licensing program. You must buy at least one full user license to buy additional user licenses.

- **Device license**: With a device license for a specific Dynamics 365 application, any number of unlicensed users can access the product through the licensed device. Device licenses may use shared logins (such as "Warehouse Computer" and a shared password) or individual logins (each user's personal credentials), depending on the application and license:

    o Shared logins are available for Sales Device, Customer Service Device, Field Service Device, Operations – Device, and Business Central Device licenses. Note that when individual users share a login, their individual usage cannot be tracked.
    o Individual logins are available for Operations – Device and Business Central Device licenses (with no separate user license required).

- **Human Resources Self Service license**: This license, assigned to a single named user, enables the user to manage their own basic HR activities (such as time entry or benefits look-up) without a full user license for Human Resources.

- **Operations – Activity license**: This named user license is intended for additional users who require more capabilities than the Team Members license, but do not require the use rights of a full user.

- **Team Members license**: This license, also assigned to a named user, is for users who are not tied to a particular function but require read-only access to all data and basic Dynamics 365 functionality for designated scenarios such as expense entry or updating contacts.

    Users with a Team Members license can read Dynamics 365 data generated from Finance, Supply Chain Management, Commerce, Human Resources, Project Operations, Sales, Customer Service, and Field Service. They may access a specific set of the functionalities of these products. The Team Members license does not provide access to custom applications. You have limited table (formerly known as 'entity') customization options for Team Members, read more about custom tables in Appendix D.

- **Business Central Team Members license**: This license, assigned to a named user, provides read-only access to certain data and functionality in Business Central deployments.

Unassigned Licenses

Unassigned licenses provide tenant level access to Dynamics 365 applications and resources. They are not assigned to specific users or devices.

Full application access licenses

These licenses are the primary licensing mechanism for certain products, such as Dynamics 365 Marketing, Fraud Protection, and Customer Insights, which are only licensed per tenant.

Cross-application access licenses

Cross-application licenses, such as the Operations – Order Lines license, may be used to provide access to some Dynamics 365 applications in some situations as a supplement or alternative to assigned user access.

Capacity licenses

The subscriptions for many Dynamics 365 products come with capacity entitlements or allowances, such as for data storage, transaction volume, case routing requests, or customer profiles, for instance. The exact entitlement depends on the specific product and licensing agreement. Capacity add-on licenses provide more flexibility for those components subject to capacity limits but needed to support a product.

- Default subscription capacities leverage the same tenant and infrastructure and accrue across the single tenant. Dataverse (formerly Common Data Service) capacities are shared between the following products: Sales, Customer Service, Field Service, Finance, Supply Chain Management, Commerce, Human Resources, Project Operations, Remote Assist, Guides, Business Central Essentials, and Business Central Premium. Database and file storage capacities (as distinct from the Dataverse capacities) are shared between only a few products: Finance, Supply Chain Management, Commerce, Human Resources, and Project Operations.

- Capacity add-on licenses, which apply across a single tenant, are not associated with a specific user. Additional capacity can be bought at any time and remains a part of the subscription for the remainder of the subscription term.

- Capacity licenses require a minimum of a one-year subscription commitment with annual allowances for the entitlements (such as the number of allowed transactions). The annual allowance applies even for capacities that are allotted per month. For instance, an annual subscription that provides a total of 36K transactions is licensed at 3,000 transactions per month for 12 months, but those transactions can be consumed at any point in the year, including all in one month. For instance, a seasonal business would be able to use its allowance in six months at a rate of 6,000 transactions per month.

  Note: As with other Microsoft products, add-on licenses are available only to customers with valid (paid) base licenses. Capacity add-ons may not be purchased for unpaid licenses such as demo/dev or Internal Use Rights (IUR) licenses.

Because assigned licenses are the primary licensing approach for most Dynamics 365 products, the remainder of this guide presents assigned licensing information for each application that uses it, followed by unassigned licensing options.

Assigned Application Licensing

Assigned licenses provide user or device access to Dynamics 365 products. Licenses for some products are available for different levels of functionality known as Professional, Enterprise, and Premium. Enterprise licenses are the standard; Professional licenses offer streamlined functionality for smaller businesses or less complex needs; and Premium licenses provide additional functionality.

While the Enterprise and Professional designations are primarily intended to distinguish between the complete functionality required by larger organizations and more cost-effective support for small or medium-sized businesses, these licensing options may also provide more flexibility for organizations deploying Dynamics 365 across multiple environments.

- **Enterprise licenses** are appropriate for users such as salespeople, customer service representatives, finance employees, controllers, human resources, and supply chain managers typically need the most extensive access and most advanced functionality. Enterprise licenses are available for these Dynamics 365 products: 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 licenses** suit users whose work scenarios are generally less complex and who need streamlined capabilities.

Note that enterprise and professional users may not be deployed in the same environment. That means most customers will want enterprise or professional licenses, but not both.

Dynamics 365 Business Central

Essentials	👤	Premium	👤

Business Central connects teams across your business with tools to help them work more efficiently, collaborate better, and respond more quickly to changes to meet your business goals. Business Central is a complete standalone solution that does not fully operate with all the Dynamics 365 products. Exceptions being you may purchase Customer Service Professional attach and/or Sales Professional attach user licenses. Marketing and Fraud Protection, tenant-based licenses, are also available for Business Central users.

Business Central, licensed by assigned user, is available with Essentials or Premium levels of capabilities. You may license users either with an Essentials license or a Premium license, but not both.

➢ Business Central Essentials

Business Central Essentials provides a wide range of operational and management capabilities, including:

- Financial Management
- AI-Supported Forecasting
- Customer Relationship Management
- E-Services
- Human Resources Management
- Project Management
- Supply Chain Management
- Warehouse Management and Inventory

Business Central Essentials capabilities

Financial Management			
Account Schedules	Basic XBRL	Deferrals	Responsibility Centers
Allocations	Budgets	Electronic Payment/Direct Debits[1]	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	Intercompany Postings		
Artificial Intelligence[2]			
Cash Flow Forecast	Late Payment Prediction	Image Recognition	Inventory Forecast
Sales Forecast			
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[3]	Opportunity Management	
E-Services			
Bank Feeds (US, CA)		Online Map	Tax. Reg. No. Validation Service (EU)[1]

Document Exchange Service	Document Management, 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[4]
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 Capabilities			
Analysis Reports	Intrastat[1]	Retention Policies	Workflow
Change Log	Job Queue	Unlimited Companies	Word Reporting/Document Reporting
Embedded Power BI	Notifications (On-Premises Only)	User Management	
Extended Text	Reason Codes	User Tasks	

[1]For feature availability in your region, consult https://docs.microsoft.com/en-us/dynamics365/business-central/about-localization
[2]Requires Intelligent Edge or Azure Machine Learning subscription
[3]Dynamics 365 Sales Integration requires a Dynamics 365 Sales license
[4]Support for sales tax or VAT depending on country of deployment

➢ **Business Central Premium**

Business Central Premium is licensed by assigned user and includes all Essentials license capabilities plus Service Order Management and Manufacturing.

Business Central Premium Additional Capabilities

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

Essentials and Premium user licenses include:

- Unrestricted Business Central Team Members access.

- 3 External Accountant licenses for organizations with third-party accountants who wish to connect to Business Central. External Accountant licenses provide all the same use rights as assigned Business Central licenses except access to user set up or administrative tasks.

- Unlimited companies.
- 1800 seconds (30 minutes) per tenant of access to Cortana Intelligence, which can compile data from a variety of sources to deliver more actionable insights and analytics.

Configuration components

Business Central licenses include the following configuration components. Customers choosing to exercise their dual use rights receive the full custom objects range numbered 50,000 – 99,999.

Configuration and Development					
Codeunits	Pages	Queries	Reports	Tables	XML Port

Dynamics 365 Commerce

Commerce, which is licensed per user, helps retailers manage their operations, connect employees with data, and offer exceptional shopping experiences. Dynamics 365 Commerce helps unify the customer shopping experience by bringing in-store, back office, and call center functionality together in one end-to-end platform. E-commerce may be added as an option. Commerce also eases integration to emerging channels (such as new social media platforms) through an API-driven, headless commerce engine. Intelligent forecasting and product recommendations enables retailers to:

- Improve in-store and e-commerce profitability.
- Drive intelligent business insights to optimize strategy and cost.
- Accelerate buying behavior through customer experiences that are unified and consistent across buying channels.
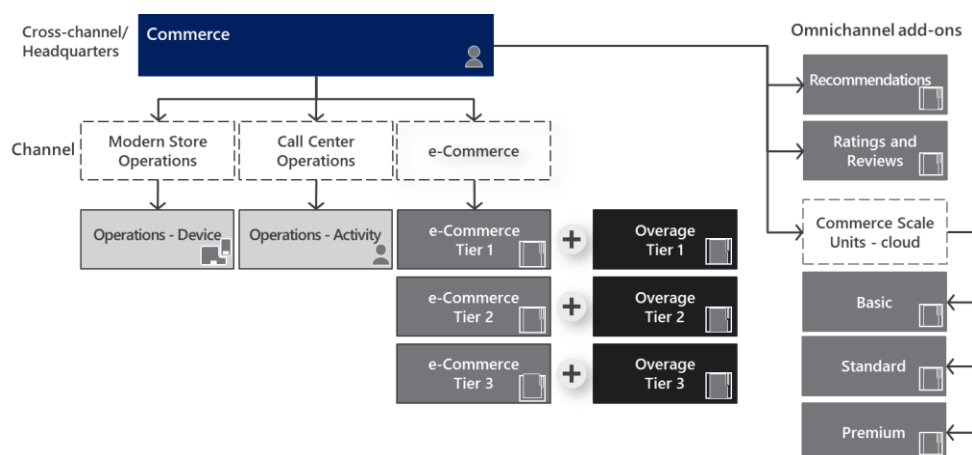
When you license Commerce, you automatically become entitled to the Fraud Protection capabilities and transaction capacities noted below. Once you have Commerce, you may also buy additional capacity licenses for Fraud Protection.

Application	Included Capacity	Add-On Capacity
Fraud Protection	• 20K account protection transactions/tenant/month • 2K purchase protection transactions/tenant/month • 8K loss prevention transactions/tenant/month	See the Fraud Protection section for add-on tiers and capacities

Commerce user roles

Full user licenses for Commerce are ideal for employees at the headquarters and central operations of a retail organization. Employees in retail stores will generally use either the Operations – Device license or the

[Operations – Activity](#) license instead, depending on the scenario and their precise roles or point-of-sale devices. A Team Members license may be sufficient for some employees, as suggested in the table below.

Find Commerce administer roles [here](#), and refer to the [Product Terms](#) for minimum purchase requirements.

Commerce security roles

Role	Security Role Description	Suggested License		
		Team Members	Operations - Activity	Commerce
Commerce				
Retail warehouse clerk	Performs picking, receiving, and stock counting in a store or warehouse	●	●	●
Retail store manager	Performs 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		●	●
Distributed order management (DOM) administrator	Defines and maintains the parameters, rules, fulfillment profile, and 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	Maintains and publishes retail catalogs, typically from headquarters			●
Retail merchandising manager	Maintains and replenishes retail products and assortments, typically from headquarters			●
Retail operations manager	Takes responsibility for all non-merchandising operations, such as configuring stores, registers, and staff, typically from headquarters			●
Retail service	Retail service account responsibilities			●
Retail store IT	Performs POS client configuration and installation at the store level			●
Human Resources				
HCM manager	Manages employees based on reporting relationships defined by the position hierarchy and grants access to the My team page within Employee self-service. Typically a direct line manager within HR			●

Additional Commerce applications and capacities

All optional Commerce licenses and capacities are tenant-based.

➤**Dynamics 365 e-Commerce tiers**

The Dynamics 365 e-Commerce application, which is licensed per tenant, enables Commerce to support e-commerce. Every e-Commerce Tier license comes with one Commerce Scale Unit – Cloud and includes a specified allowance of e-commerce transactions. A transaction is defined as the final purchase of an e-commerce shopping cart, regardless of the number of items in the cart.

E-Commerce Tiers are purchased based on the anticipated B2B and B2C transactions and average order value (AOV) expected for the year. AOV is the total annual e-commerce Gross Merchandise Value (GMV) divided by total transaction volume. GMV is the total value of all transactions processed through Dynamics 365 including returns, excluding shipping, handling, customs fees, tax or financial charges. If you need additional transactions, you can purchase the corresponding overage tier. If you expect a change in AOV, you need to re-assess the appropriate band.

If you need Commerce Scale Unit – Cloud to support your e-Commerce operations, you need to purchase the appropriate e-Commerce Tier license regardless of whether you need Dynamics 365 e-Commerce store front or not. If you need additional environments for e-commerce (more environments for Commerce Scale Unit - Cloud) you can purchase additional units of the e-Commerce Tier. E-Commerce Tier licenses are licensed per month, but transactions are enforced on an annual basis.

E-Commerce tiers and transaction capacities

Application/Capacity	Included Capacity	Add-On Capacity
e-Commerce Tier • Transactions • Commerce Scale Unit - Cloud	• 1 Commerce Scale Unit – Cloud • Transactions/tenant/month • See Tiers 1 – 3 capacity entitlements below in separate table	• Transactions/tenant/month • See Tiers 1 – 3 overage capacity entitlements below in a separate table

	# of monthly transactions per SKU					
	BAND 1 AOV<$50	**BAND 2** AOV $50-$150	**BAND 3** AOV $150-$500	**BAND 4** AOV $500-$2K	**BAND 5** AOV $2K-$5K	**BAND 6** AOV $5K+
Tier 1	4,700	2,400	1,100	480	275	200
Tier 1 overage	780	365	170	80	45	30
Tier 2	29,000	12,000	5,500	2,900	1,700	1,160
Tier 2 overage	1,250	540	230	125	75	50
Tier 3	86,000	38,750	15,500	8,600	5,065	3,400
Tier 3 overage	1,400	625	250	140	85	55

➢**Dynamics 365 Commerce Scale Unit**

Scale units are licensed per tenant to enable companies to execute mission-critical processes without interruption even during periods of peak demand. Scale units are offered in three different sizes: Basic, Standard or Premium, and they include Operations – Device entitlements. Scale units may be in the cloud or self-hosted. You may buy additional scale units if you need additional Commerce cloud environment(s) for co-location, performance, additional redundancy, or customization purposes.

Commerce Scale Unit – Cloud

After the minimum Commerce purchase requirements have been met, you are entitled with default Commerce Scale Unit - Cloud when buying licenses with device use rights. These scale units may only be used to support device transactions.

Default Commerce Scale Unit - Cloud entitlements are based on number of licenses with indicative device use rights. Contact your Microsoft representative for more details on the Commerce Scale Unit - Cloud mapping.

Commerce Scale Unit – Self-Hosted

Customers who license Dynamics 365 Commerce also have the option to use a self-hosted scale unit—a retail server, cloud point-of-sale (POS) website, and channel database deployed locally in a store. This type of scale unit maintains connectivity with and extends a retail Commerce deployment, improving performance, ensuring business continuity, and providing in-store hybrid capabilities.

A self-hosted Commerce scale unit and its use rights are included at no additional cost with a qualifying minimum purchase of Commerce licenses. (It is not available as a standalone license.) All servers, users, and devices accessing the self-hosted scale unit must be appropriately licensed, along with any required hardware and licenses for Windows Client or Windows Server and SQL Server, which must be acquired separately

Note: If dual use rights are being exercised and you use downgrade rights to downgrade to Dynamics AX 2012, the Retail Store Server is not an included use right and appropriate licensing must be obtained. Please see the 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 Capacity
Commerce Scale Unit – Cloud • Operations – Devices	• Basic: 65 devices/tenant/month • Standard: 225 devices/tenant/month • Premium: 500 devices/tenant/month	• N/A

➤Dynamics 365 Commerce Recommendations

The Commerce Recommendations application helps customers easily and quickly find products they want based on the purchase trends of their fellow customers. Recommendations is a tenant-based license.

One purchased Commerce Recommendations license confers an allotment of 20K transactions per month. For this purpose, a transaction is defined as the final checkout of a shopping order, whether in-store or online. As with other capacity licenses, a one-year subscription is required, and the total allotted transactions may be consumed at any point in the year.

➤Dynamics 365 Commerce Ratings and Reviews

The Commerce Ratings and Reviews application helps capture product reviews and ratings from customers. Retailers can then display average ratings and review information across their e-commerce website.

Commerce Ratings and Reviews is a tenant-based license. One license provides up to 250K active ratings and reviews.

Dynamics 365 Customer Service

Customer Service helps you manage customer relationships, empower your customer service agents, and provide a branded, personalized self-service experience through a searchable knowledge base that delivers consistent, up-to-date answers. Streamline customer support and help customers find the understanding they need to ensure product satisfaction and build customer loyalty.
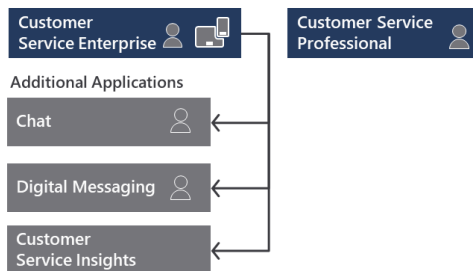
Customer Service is available as either an enterprise or professional user license and with several optional add-ins to deliver the capabilities needed for your situation. Choose user licenses for one or the other; you can only buy both licenses if you deploy them in separate environments. Customer Service Enterprise may also be licensed by device.

➤Dynamics 365 Customer Service Professional

Customer Service Professional provides basic resources for customer service agents. It also provides self-service customer portal and access to knowledge base for end customers. It's meant for less complex scenarios that need streamlined capabilities to support customers and customer service teams.

➤Dynamics 365 Customer Service Enterprise

Customer Service Enterprise licenses expand on the functionality of Customer Service Professional. In particular, the enterprise license grants use rights that give users the ability to schedule and dispatch service, create teams, and manage resources through integration with other Dynamics 365 applications such as Field Service and Project Operations, when the organization also licenses them.

When you license Customer Service Enterprise, you automatically become entitled to 2,000 Customer Voice responses per tenant per month, and you can buy additional response packs (in packs of 1,000 responses/tenant/month) as needed.

Unified routing provides intelligent and automated routing and assignment capabilities to customer service organizations. This allows organizations to use advanced capabilities such as multi-stage classification rules

and automated assignment based on agent availability, capacity, or specialization. Routing records, excluding Chat and Digital Messaging conversation records, are subject to a licensed capacity. Customer Service Enterprise includes unified routing with 50 record routes per user per month. See this documentation for more details.

Customer Service Insights provides integrated analytics and AI capabilities to help you better understand support engagements and emerging trends. It helps to identify opportunities for enhancing your automated support system and track the performance of support options and agents. Topic clustering groups related cases or those with commonalities to help customers or service agents to discover the information they need in the knowledge base. These insights capabilities are included in Customer Service enterprise license. Other service limits apply.

Customer Service Enterprise capacities

Application/Capacity	Included Capacity	Add-On Capacity
Customer Service Enterprise • Record routing	50 records/user/month, pooled at the tenant level	Unified routing add-on: • 10K records/tenant/month, pooled at tenant level (excluding Chat and Digital Messaging conversation records)

Customer Service use rights

Use Rights	Team Members	Customer Service Pro	Customer Service Ent
Access			
Dynamics 365 for Outlook and Dynamics 365 App for Outlook[1]	●	●	●
Dynamics 365 Mobile Client Application	●	●	●
Microsoft Dynamics 365 for iPad & Windows	●	●	●
Microsoft Dynamics 365 Web application	●	●	●
Read			
All Dynamics 365 application data	●	●	●
Custom table data	●	●	●
Approve			
Finance functionality: time, expense, and invoices	●	●	●
Tables: Create, Update, Delete			
Accounts		●	●
Activities	●	●	●
Announcements	●	●	●
Calendar: share	●	●	●
Case/Incident		●	●
Contacts	●	●	●
Custom tables (see Appendix D)	15 max[2]	15 max	●
Embedded Intelligence			●
Entitlements		●	●
Facilities/Equipment			●
Leads (create only)		●	●
Notes	●	●	●
Personal views	●	●	●
Product		●	●
Product families/hierarchies			●
Product relationships			●
Resources		●	●
Saved views	●	●	●
Service (service scheduling)			●
Work hours		●	●
Tables: Actions			
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			●

Use Rights	Team Members	Customer Service	
		Pro	Ent
Case management: reassign, add to queue, route, and resolve cases		●	●
Chat with support team (as chat client for self-service, requires third-party solution)	●	●	●
Dialog: start dialog	●	●	●
Knowledge base: create, update, publish, configure		●	●
Mail merge: perform mail merge	●	●	●
Marketing list: associate a marketing list with an account or contact	●	●	●
Open project position: apply for an open project position for Project Operations	●	●	●
Project tasks: update the 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 and dispatch capabilities: use scheduling assistant, drag & drop assignment, update resource bookings			●
Schedule board: configure and view			●
SLA: manage		●	●
Teams: define and configure			●
Work hours: manage			●
Yammer: use Yammer collaboration (requires the appropriate license, acquired separately)	●	●	●
General System Use: Actions			
Auditing: configure		●	●
Business processes: customize		5 max	●
Create and update custom reports, charts and dashboards		5 max	●
Customize and extend out of the box reports, charts and dashboards			●
Dialogs: define and configure		●	●
Duplicate detection: configure rules		●	●
Dynamics 365 forms, tables, and fields: create		●	●
Email: create, update, and delete templates	●	●	●
Forms and views: customize (see Appendix D)		2 max	●
Import data in bulk		●	●
Microsoft Excel: export data to Excel	●	●	●
Queue: define and configure (see Appendix D)		15 max	●
Records: use relationships and connections between records	●	●	●
Search and advanced find: use	●	●	●
Tables: define connections and relationships between tables		●	●
Word: create, update, and delete templates	●	●	●
Workflows: define and configure		●	●
Additional Services and Software			
Customer Service Hub		●	●
Dynamics 365 Customer Voice			●
Dynamics 365 Mobile offline capabilities			●
Timesheet management via Project Resource Hub	●	●	●
Unified Service Desk (USD) for Microsoft Dynamics 365			●

[1]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 C.

[2]Team Members application module may be customized with maximum 15 additional tables (custom tables or standard Dataverse tables) available to the Team Members license per pre-approved application scenarios in Appendix C.

Additional Customer Service applications

➢**Chat for Dynamics 365 Customer Service**

Chat for Dynamics 365 Customer Service is an add-in application for Customer Service enterprise licenses. It helps agents engage in real time with customers to resolve issues faster. Chat is licensed per user.

➢**Dynamics 365 Digital Messaging**

Dynamics 365 Digital Messaging is an add-in application for Customer Service enterprise licenses. It includes Chat for Dynamics 365 Customer Service and third-party SMS. Digital Messaging is licensed per user.

Record routing (previously entity routing) requests capacity

Incoming conversation records (chat, call, text message) can be routed within an organization without additional capacity requirements. However, organizations often need to route other records (support cases, activities etc.) to a work queue or a specific support agent using advanced capabilities such as multi-stage classification rules and automated assignment based on agent availability, capacity, or specialization. This is possible through unified routing. Routing records besides conversations through unified routing is subject to a licensed capacity. See Customer Service Enterprise for more details about record routing capacities.

Chat and Digital Messaging capacities

Application/Capacity	Included Capacity	Add-On Capacity
Chat and Digital Messaging • Record routing • Power Virtual Agents sessions	• Incoming conversation records (chat, call, text message) can be routed within an organization without additional capacity requirements • 1K Power Virtual Agents sessions/tenant/month (granted once per tenant regardless of the number of user licenses)	• Power Virtual Agents capacity add-on: See Power Apps, Power Automate, and Power Virtual Agent Licensing Guide licensing guide

Dynamics 365 Field Service

Field Service connects and empowers field-based service teams. It leverages tight integration between Customer Service case management capabilities and field service work orders to deliver business process-driven, best in class management of your field service operations. Field Service is licensed per user and/or device.

The Field Service user license also includes the latest version of Field Service Mobile, a Microsoft product specifically designed for Field Service and distinct from Dynamics 365 Mobile Client. When you license Field Service, you automatically become entitled to 2,000 Customer Voice responses per tenant per month, and you can buy additional response packs (in packs of 1,000 responses/tenant/month) as needed.

Field Service use rights

Use Rights	Team Members	Field Service
Access		
Dynamics 365 for Outlook and Dynamics 365 App for Outlook[1]	●	●
Dynamics 365 Mobile Client Application	●	●
Microsoft Dynamics 365 for iPad & Windows	●	●
Microsoft Dynamics 365 Web application	●	●
Read		
All Dynamics 365 application data	●	●
Custom table data	●	●
Approve		
Finance functionality: time, expense, and invoices	●	●
Tables: Create, Update, Delete		
Accounts		●
Activities	●	●
Announcements	●	●
Calendar: share	●	●
Cases for Field Service: Create cases with limited edit capability. No case SLAs, entitlements, or case routing. Users only licensed with Field Service license cannot act as customer service agents and resolve cases		●
Contacts	●	●
Custom tables (see Appendix D)	15 max[2]	●
Customer assets		●
Dispatch		●
Inventory management		●
Invoices		●
Leads (create only)		●
Notes	●	●

Use Rights	Team Members	Field Service
Opportunities		●
Orders		●
Personal views	●	●
Product		●
Product families/hierarchies		●
Product relationships		●
Purchase orders		●
Quotes		●
Repairs and returns management		●
Resources		●
Routing capabilities		●
Saved views	●	●
Schedule		●
Service agreements		●
Territories		●
Work hours		●
Work order management		●
Tables: Actions		
Activity feeds: post and 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 third party solution)	●	●
Dialog: start dialog	●	●
Entitlements: manage		●
Field Service Mobile application		●
Field Service Mobile application Offline sync: use		●
Knowledge base: create, update, publish, configure		●
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 and 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 and configure		●
SLA: manage		●
Teams: define and configure		●
Work hours: define and configure		●
Work hours: manage		●
Yammer: use Yammer collaboration (requires the appropriate license acquired separately)	●	●
General System Use: Actions		
Auditing: configure		●
Business processes: customize		●
Create and update custom reports, charts and dashboards		●
Customize and extend out of the box reports, charts and dashboards		●
Dialogs: define and configure		●
Duplicate detection: configure rules		●
Dynamics 365 forms, tables, and fields: create		●
Email: create, update, and delete templates	●	●
Forms and views: customize (see Appendix D)		●
Import data in bulk		●
Microsoft Excel: export data to Excel	●	●

Use Rights	Team Members	Field Service
Queue: define and configure (see Appendix D)		●
Records: use relationships and connections between records	●	●
Search and advanced find: use	●	●
Tables: define connections and relationships between tables		●
Word: create, update, and delete templates	●	●
Workflows: define and configure		●
Additional Services and Software		
Dynamics 365 Customer Voice		●
Dynamics 365 Mobile offline capabilities		●
Timesheet management via Project Resource Hub	●	●

[1]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 C.

[2]Team Members application module may be customized with maximum 15 additional tables (custom tables or standard Dataverse tables) available to the Team Members license per pre-approved application scenarios in Appendix C.

Additional Field Service capabilities

➢**Dynamics 365 Field Service Resource Schedule Optimization**

Resource Scheduling Optimization is an add-in capability for Field Service that enables you to automatically create a schedule for the appropriate resource—either a person or a non-human asset—while simultaneously optimizing appointments for travel time, mileage, and many other constraints.

Resource Schedule Optimization is licensed per resource. It will typically be used by a scheduler or dispatcher with a Field Service user license, who will designate any number of resources to be included.

The add-in license allows for unlimited use of schedule optimization, whether on a regular cadence (such as daily or weekly) or ad-hoc.

TOC

Dynamics 365 Finance

Finance 👤

Finance enables medium-sized organizations and enterprises to monitor the performance of global financial operations in real time and predict future outcomes. 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 data-driven decisions to drive growth. It is licensed per user with a minimum purchase requirement. Refer to the Product Terms. When you license Finance, you automatically become entitled to 100 electronic invoice transactions per tenant per month. See Electronic Invoicing section for more information about this entitlement.

Finance security roles

Role	Security Role Description	Team Members	Ops – Activity	Finance
C-Suite				
Chief executive officer	Reviews the financial and operational performance		●	●
Chief financial officer	Reviews the financial performance		●	●
Budgeting				
Budget contributor	Create, update, and approve departmental budget plans.	●	●	●
Budget clerk	Documents budget events and responds to budget inquiries		●	●
Budget manager	Reviews budget process performance and enables the budget process			●
Financials and Accounting				
Accounts payable positive payment 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			●

Role	Security Role Description	Team Members	Ops – Activity	Finance
Accounts payable centralized payments clerk	Documents accounts payable centralized payment events and responds to centralized payment inquiries			●
Accounts payable clerk	Documents vendor invoice events and responds to vendor inquiries			●
Accounts payable manager	Reviews vendor invoice process performance and enables the vendor invoice process			●
Accounts payable payments clerk	Documents accounts payable payment events and responds to payment inquiries			●
Accounts receivable centralized payments clerk	Documents accounts receivable centralized payment events and responds to centralized payment inquiries			●
Accounts receivable clerk	Documents customer invoice events and responds to customer inquiries			●
Accounts receivable manager	Reviews customer invoice process performance and enables the customer invoice process			●
Accounts receivable payments clerk	Documents accounts receivable payment events and responds to payment inquiries			●
Auditor	This role is designed for in-house or external auditors. It provides read-only access to a majority of the system. It is also used for audit policy management			●
Collections agent	Documents collections events and responds to collections inquiries			●
Collections manager	Reviews collections process performance and enables the collections process			●
Financial controller	Reviews all accounting process performance and enables those processes			●
Tax accountant	Documents fiscal events and responds to fiscal inquires			●
Tax engine developer	Create and manage taxable document model mappings.			●
Tax engine functional consultant	Create and manage generic tax engine components (taxable document and tax document)			●
Treasurer	Documents treasury events and responds to treasury inquiries			●
Human Resources				
HCM manager	This role represents a direct line manager within the HR organization who is responsible for managing employees based on reporting relationships defined by the position hierarchy. It grants access to the My team page within employee self-service.			●

Administrator security roles

Role	Security Role Description	Team Members	Ops – Activity	Finance, SCM, Commerce, Project Ops
System user	System role for all users	●	●	●
Data management operations 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			●

Role	Security Role Description	Team Members	Ops – Activity	Finance, SCM, Commerce, Project Ops
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 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, enables 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 and where, so workers can get the job done faster, with fewer errors and greater retention of learned skills. Guides is licensed per user and requires a Microsoft Windows PC and Microsoft HoloLens 2.

Role	Use Rights	Guides
Manager	Viewing Guides analytics using Microsoft Power BI dashboards. Viewing Power BI reports does not require Microsoft Power BI license but sharing does.	●
	Incorporate workflows using Microsoft Power Apps and Power Automate to view and save data	●
	Assign Guides to technicians using Dynamics 365 Field Service*	●
	Assign Guides to work orders within Dynamics 365 Supply Chain Management*	●
Author	Create guides and use 3D toolkit in the PC app or HoloLens app	●
	Import converted 3D models and import them into guides	●
Operator	Use the guides to perform tasks	●

*Dynamics 365 Field Service and Supply Chain Management licenses are not included with Dynamics 365 Guides.

Dynamics 365 Human Resources

Human Resources 　　Human Resources enables organizations to optimize compensation, benefits, leave and absence tracking, regulatory and policy compliance, performance feedback, standardized training, and self-service programs. Enable HR teams to operate with dexterity by using Dataverse and Power Platform to centralize people data and easily extend the solution. Human Resources is licensed per user. Refer to the **Product Terms** for minimum purchase requirements.

Human resource professionals are typically licensed as full users. Users outside of the HR organization, such as employees who need self-serve access, may be licensed through the Team Members license, the Human Resources Self Service license, or the Operations – Activity user license. When you license Human Resources, you automatically become entitled to 2,000 Customer Voice responses per tenant per month, and you can buy additional response packs (in packs of 1,000 responses/tenant/month) as needed.

Human Resource security roles

Role	Security Role Description	HR Self Service	Team Members	Operations – Activity	Human Resources
Contractor	Worker in contractor relationship with legal entities	●	●	●	●
Employee	Worker in employment relationship with legal entities	●	●	●	●
Pending worker	Worker in pending employment relationship with legal entities	●	●	●	●
Manager	Supervisor in reporting relationship with subordinates.	●	●	●	●
Absence manager	Reviews and manages leave and absence for a limited group of employees not in a direct reporting relationship	●	●	●	●
Compensation and benefits manager	Documents compensation and benefit events, responds to compensation and benefit inquiries, and records the financial consequences of compensation and benefit events				●

Role	Security Role Description	HR Self Service	Team Members	Operations – Activity	Human Resources
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 who is responsible for managing employees based on reporting relationships defined by the position hierarchy. It 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				●
Administrator					
System user	System role for all users	●	●	●	●
Data management operations 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 document branding administrator	Controls access to the Document Branding Management forms				●

Dynamics 365 Project Operations

Project Operations connects sales, resourcing, project management, and finance teams within a single product to help you win more deals, accelerate project delivery, and maximize profitability. It is licensed per user, with a minimum number of users required. Refer to the Product Terms.

Account managers, project managers, project assistants, and project accountants are typically licensed as full users. Users who create and approve time and expenses, such as a user with a Project Timesheet security role, only need a Team Member license. Project Operations licenses have no roles at the Operations – Activity level, but full users of Project Operations have rights to Operations – Activity roles for other Dynamics 365 products, such as Finance and Supply Chain Management.

Project Operations security roles

Role	Security Role Description	Team Members	Project Operations
Project Management			
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.		●
Project Accounting & Administration			
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		●
Project Sales			
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.		●
Practice Management			
Practice manager	Owns the practice in the project organization. Creates reports and dashboards for deals in the pipeline. Understands resource demand and utilization.		●
Resource Management			
Resource manager	Maintains project resource tasks. Staffs project demand and manages resource utilization to ensure resources are appropriately utilized.		●

Project Operations use rights

Use Rights	Team Members	Project Operations
Access		
Dynamics 365 for Outlook and Dynamics 365 App for Outlook[1]	●	●
Dynamics 365 Mobile Client Application	●	●
Microsoft Dynamics 365 for iPad & Windows	●	●
Microsoft Dynamics 365 Web application	●	●
Read		
All Dynamics 365 application data	●	●
Custom table data	●	●
Approve		
Finance functionality: time, expense and invoices	●	●
Access via Customer Service app for Team Members, Portal[2] or API: Create, Read, Update, Delete		
Employee self-serve: cases	●	●
Non-employees only: work orders		●
Non-employees only: opportunities		●
Tables: Create, Update, Delete		

Use Rights	Team Members	Project Operations
Accounts		●
Activities	●	●
Announcements	●	●
Calendar: share	●	●
Contacts	●	●
Custom tables (see Appendix D)	15 max[3]	●
Notes	●	●
Organizational units		●
Personal views	●	●
Price lists		●
Product		●
Product bundles		●
Product families/hierarchies		●
Product relationships		●
Project billing backlog views		●
Project contracts		●
Project estimates		●
Project invoice schedules		●
Project invoices		●
Project management		●
Project opportunity		●
Project price lists		●
Project pricing dimensions		●
Project quotes		●
Project resource requests		●
Project time and expense entries	●	●
Project transaction approval		●
Quick campaigns		●
Resource availability view		●
Resource schedule management		●
Saved views	●	●
Transaction and expense categories		●
Tables: Actions		
Activity feeds: post and 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 third-party solution)	●	●
Copying project quotes and project contracts		●
Create and confirm corrective invoices for projects		●
Create and confirm project invoices along a recurring schedule		●
Create custom and configurable project pricing		●
Dialog: start dialog	●	●
Knowledge base: create, update, publish, configure		●
Lead: qualify and convert to an opportunity		●
Mail merge: perform mail merge	●	●
Manage services, resources, work hours, and competencies		●
Marketing list: associate a marketing list with an account or contact	●	●
Project contract confirmation		●
Project tasks: update project task status for Project Operations	●	●
Project transactions: approve		●
Queue: use a queue item	●	●
Resource competencies: update own resource competencies for Project Operations	●	●
Resources (facilities, equipment, people): manage		●
Resources: define and configure		●
Schedule and dispatch capabilities: use scheduling assistant, drag and drop assignment, update resource bookings		●
Schedule board: configure and view		●
Services: define and configure		●

Use Rights	Team Members	Project Operations
Setup cost and bill rates for project resources from same division and resource transfer prices for resources from other divisions		●
Teams: define and configure		●
Territories: manage		●
Time and expense: submit time and expenses for Project Operations	●	●
Use resource availability view and resource schedule management		●
Winning a project quote		●
Work hours: manage		●
Yammer: use Yammer collaboration (requires the appropriate license, acquired separately)	●	●
General System Use: Actions		
Auditing: configure		●
Business processes: customize		●
Dialogs: define and configure		●
Duplicate detection: configure rules		●
Dynamics 365 forms, tables, and fields: create		●
Email: create, update, and delete templates	●	●
Forms and views: customize (see Appendix D)		●
Import data in bulk		●
Microsoft Excel: export data to Excel	●	●
Queue: define and configure (see Appendix D)		●
Records: use relationships and connections between records	●	●
Search and advanced find: use	●	●
System reports, charts, and dashboards: create and update		●
System reports, charts, and dashboards: customize		●
Tables: define connections and relationships between tables		●
Word: create, update, and delete templates	●	●
Workflows: define and configure		●
Additional Services and Software		
Project for the Web[4]		●

[1]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 C.

[2]When provisioning capacity-based portals using Dataverse capacity, portal licensing use rights apply.

[3]Team Members application module may be customized with maximum 15 additional tables (custom tables or standard Dataverse tables) available to the Team Members license per pre-approved application scenarios in Appendix C.

[4]Project for the Web is 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. It enables colleagues to collaborate during a video call using Microsoft Teams—a separate Microsoft product that provides videoconferencing, chat, calling, screensharing, and other team collaboration tools. With the combination of Teams and Remote Assist, the expert can see everything that the Dynamics 365 Remote Assist user sees, and they can holographically draw and annotate together.

Note that Remote Assist users, such as frontline workers, field workers, or technicians, do not need a separate license for Microsoft Teams. They can make or receive calls using Remote Assist on HoloLens without a separate Microsoft Teams license. The expert they contact for remote assistance—who is often an expert at headquarters—does require a Teams license. Remote Assist requires a Microsoft HoloLens 2 or an AR capable iOS or Android device (phone or tablet).

Role	Use Rights	Remote Assist
Technician, inspector or auditor	Access the application on the following device types: • HoloLens headset • iOS - Phone or tablet devices that are running iOS and ARKit • Android - Phone or tablet devices that are running ARCore	●
	Microsoft Teams: Initiate and receive calls, videoconferencing, instant messaging	●
	Draw annotation into 3D virtual space	●

Role	Use Rights	Remote Assist
	CRUD: Dynamics 365 Field Service work order	●
	Dataverse solution (tables) for call logging, asset capture, and one time calling. Does not require Dynamics 365 Field Service license.	●
Remote collaborator*	Use Microsoft Teams to join a Dynamics 365 Remote Assist call, see what a technician or inspector sees, and provide guidance in context	●

*Remote collaborators do not require a Dynamics 365 Remote Assist license but require a separate Microsoft Teams license to join Remote Assist calls.

You can access additional capabilities through Dynamics 365 Remote Assist, if you have additional software licenses such as OneDrive for Business, Exchange Online, Dynamics 365 Field Service, Power BI or Microsoft Stream. See this [help documentation](#) to learn more.

Dynamics 365 Sales

Choose the level of functionality appropriate for your business with Sales licensing options that include Professional or Enterprise capabilities—or even more features with the Premium or Microsoft Relationship Sales solution (MRSs) Plus licenses. Note that Professional and Enterprise licenses may not be combined within the same instance.

Each of the Sales options is licensed per user. Sales Enterprise may also be licensed per device.

➢ Sales Professional

A Sales Professional licenses provides essential sales force automation (SFA) for organizations without complex sales processes.

➢ Sales Enterprise

A Sales Enterprise license takes your organization beyond sales force automation to meet the needs of more complex sales processes. In addition to all the functionality available with a Sales Professional license, Sales Enterprise capabilities include customization, extensibility, embedded intelligence, and manual forecasting.

When you license Sales Enterprise, you automatically become entitled to 2,000 Customer Voice responses per tenant per month, and you can buy additional response packs (in packs of 1,000 responses/tenant/month) as needed.

➢ Sales Premium

If you need both Sales Enterprise and Sales Insights capabilities, you may buy Sales Premium, which is licensed per user.

➢Microsoft Relationship Sales solution Plus

Microsoft Relationship Sales solution (MRSs) Plus helps sales professionals build the relationships they need to harness the power of relationship selling. MRSs Plus includes Sales Enterprise and LinkedIn Sales Navigator Enterprise. It is licensed per user.

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

Learn more about [LinkedIn Sales Navigator](#) to understand the full power of the MRSs Plus license.

Sales use rights

Use Rights	Team Members	Sales	
		Pro	Ent
Access			

Use Rights	Team Members	Sales	
		Pro	Ent
Dynamics 365 for Outlook and Dynamics 365 App for Outlook[1]	●	●	●
Dynamics 365 Mobile Client Application	●	●	●
Microsoft Dynamics 365 for iPad & Windows	●	●	●
Microsoft Dynamics 365 Web application	●	●	●
Read			
All Dynamics 365 application data	●	●	●
Custom table data	●	●	●
Approve			
Finance functionality: time, expense, and invoices	●	●	●
Tables: Create, Update, Delete			
Accounts		●	●
Activities	●	●	●
Announcements	●	●	●
Calendar: share	●	●	●
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			●
Contacts	●	●	●
Custom tables (see Appendix D)	15 max[2]	15 max	●
Embedded intelligence			●
Forecasting			●
Invoices		●	●
Lead management		●	●
Marketing campaigns		●	●
Marketing list		●	●
Notes	●	●	●
Opportunities		●	●
Orders		●	●
Personal views	●	●	●
Price lists		●	●
Product		●	●
Product bundles		●	●
Product families/hierarchies			●
Product relationships			●
Quick campaigns		●	●
Quotes		●	●
Sales goals			●
Sales hub			●
Sales literature			●
Saved views	●	●	●
Territories			●
Tables: Actions			
Activity feeds: post and 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 third-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 task 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)	●	●	●

Use Rights	Team Members	Sales	
		Pro	Ent
General System Use: Actions			
Auditing: configure		●	●
Business processes: customize		5 max	●
Create and update custom reports, charts and dashboards		5 max	●
Customize and extend out of the box reports, charts and dashboards			●
Dialogs: define and configure		●	●
Duplicate detection: configure rules		●	●
Dynamics 365 forms, tables, and fields: create		●	●
Email: create, update, and delete templates	●	●	●
Forms and views: customize (see Appendix D)		2 max	●
Import data in bulk		●	●
Microsoft Excel: export data to Excel	●	●	●
Queue: define and configure (see Appendix D)		15 max	●
Records: use relationships and connections between records	●	●	●
Search and advanced find: use	●	●	●
Tables: define connections and relationships between tables		●	●
Word: create, update, and delete templates	●	●	●
Workflows: define and configure		●	●
Additional Services and Software			
Dynamics 365 Customer Voice			●
Dynamics 365 Mobile Offline capabilities			●
Timesheet management via Project Resource Hub	●	●	●

[1]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 C.

[2]Team Members application module may be customized with maximum 15 additional tables (custom tables or standard Dataverse tables) available to the Team Members license per pre-approved application scenarios in Appendix C.

Additional Sales application

➢ **Sales Insights**

Sales Insights, which is licensed per user, improves engagement and decision-making with prebuilt and embedded business insights that are easy to act upon. Sales Enterprise licenses automatically include select Sales Insights features, including assistant cards, email engagement, auto capture of Outlook activity, and business card scanning. (Business card scanning in this case has a capacity limit of 10/user/month, pooled at the tenant level).

Sales Premium includes the full capabilities of Sales Insights, which you can also buy as an additional application if you have a Sales Enterprise or MRSs Plus license (not available to Sales Professional users). A full Sales Insights license enables these additional features:

- 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)

Sales Insights has a capacity limit for business card scanning of 200/user/month and a Conversation Intelligence capacity of three hours/user/month. If additional business card scanning capacity is required, you may buy additional Sales Insights capacity licenses.

When Sales Insights is licensed via Sales Premium, additional Sales Insights capacity can be bought by purchasing additional Sales Premium licenses.

Sales Insights capacities

Application	Included Capacity	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)	Conversation Intelligence: 1K hours/tenant/month (pooled at tenant level)

Dynamics 365 Supply Chain Management
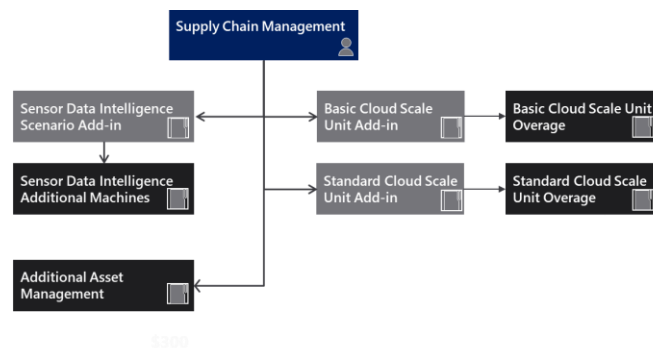
Supply Chain Management provides manufacturers, distributors, and retailers with the real-time visibility and intelligence they need for proactive operations. It unifies data and uses predictive insights from AI and IoT—across order fulfillment, planning, procurement, production, inventory, warehousing, and transportation processes—to maximize operational efficiency, product quality, and profitability. Supply Chain Management is licensed per user and has minimum purchase requirements detailed in the [Product Terms](.).

Supply Chain Management automatically includes enough Asset Management capacity for you to manage and maintain up to 100 physical assets throughout their lifecycles. If you need additional asset capacity, you may buy more.

Supply Chain Management security roles

Role	Security Role Description	Team Members	Ops – Activity	SCM
Asset Management				
Maintenance requester	Creates maintenance requests	●	●	●
Maintenance worker	Documents maintenance events and responds to maintenance inquiries		●	●
Maintenance clerk	Plans and authorizes maintenance events. Maintains maintenance planning master data and responds to maintenance related inquiries.			●
Maintenance manager	Enables and reviews the performance of the maintenance process. Maintains master data and responds to maintenance related inquiries.			●
Cost Accounting				
Cost object controller	Monitors monetary and non-monetary performance of assigned cost objects	●	●	●
Cost accountant	Implements dimensions, policies, and reporting structures according to the strategy set by the cost accounting manager			●
Cost accountant clerk	Performs repetitive tasks aligned with predefined policies and reporting structures			●
Cost accounting manager	Sets the overall strategy for how cost accounting is performed in the Enterprise			●
Inventory accountant	Documents costs, inventory valuations, and cost accounting events. Responds to costs, inventory valuations, and cost accounting events inquiries			●
Inventory accountant clerk	Authorizes and maintains costs, inventory valuations, and cost accounting calculations. Responds to costs, inventory valuations, and cost accounting inquiries			●
Customer Service				
Customer service representative	Documents customer service events and responds to customer service inquiries.		●	●

Role	Security Role Description	Team Members	Ops – Activity	SCM
Customer service manager	Reviews customer service process performance and enables the customer service process			●
Engineering				
Process engineer	Defines processes to make new products			●
Process engineering manager	Reviews and authorizes new production processes			●
Product designer	Designs new and modifies existing BOM structures			●
Product design manager	Reviews and authorizes product BOM structures			●
Distribution				
Receiving clerk	Documents receiving operation events and responds to warehouse receiving operation inquiries		●	●
Shipping clerk	Documents shipping operation events and responds to warehouse shipping operation inquiries		●	●
Warehouse worker	Documents warehouse operation events and responds to warehouse operation inquiries		●	●
Materials manager	Enables and reviews processes, maintains master data, and responds to inquiries within logistics and material management			●
Warehouse manager	Enables and reviews processes, authorizes recordings, maintains master data, and responds to inquiries within warehouse management			●
Warehouse planner	Plans and authorizes warehouse work. Maintains warehouse planning master information and responds to warehouse work planning inquiries			●
Field Service				
Field service technician	Visits customers in the field to perform service orders		●	●
Service dispatcher	Organizes the service technicians and prioritizes service orders		●	●
Service delivery manager	Reviews and enables the service order process			●
Marketing				
Marketing coordinator	Produces and distributes marketing materials			●
Marketing manager	Manages product marketing			●
Manufacturing				
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 and who is available and can respond to the main requests from machine operator			●
Procurement				
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			●
Quality Control				
Quality control clerk	Documents quality control events and responds to quality control inquiries	●	●	●
Quality control manager	Enables and reviews processes, maintains master data, and responds to inquiries within quality control			●

Role	Security Role Description	Team Members	Ops – Activity	SCM
Sales				
Sales clerk	Documents sales events and responds to sales inquiries		●	●
Sales representative	Documents sales events and responds to sales inquiries		●	●
Sales manager	Reviews sales process performance and enables the sales process			●
Human Resources				
HCM manager	The manager role represents a direct line manager within HR. This role is responsible for managing employees based on reporting relationships defined by the position hierarchy and grants access to the My team page within employee self-service			●
Transportation				
Transportation coordinator	Enables inbound, outbound, rating, routing, and handling of transportation process			●
Logistics manager	Set up, maintain, and configure the network planning that are used in transportation management processes			●

Find Supply Chain Management administrator roles here.

Additional Supply Chain Management applications and capacities

➢Asset Management capacities

Additional Asset Management capacities are licensed per tenant. If you use Asset Management, you must license sufficient Asset Management capacity to meet or exceed the number of assets you want to manage. For example, if you have 1,500 assets to manage in Asset Management, you'll need 14 additional asset capacity licenses. Once you've bought 50 Asset Management capacity licenses—enough for 5,000 assets—you may manage unlimited assets with no additional purchase.

The only assets that must be counted against these capacities are:
- Assets you want to manage with Asset Management
- Parent level assets for which you want to track maintenance, costs, and/or location

Application/Capacity	Included Capacity	Add-On Capacity
Supply Chain Management • Asset Management	• 100 assets/tenant/month	Additional Asset Management: • 100 assets/tenant/month

➢ Sensor Data Intelligence Add-in for Dynamics 365 Supply Chain Management (previously IoT Intelligence Scenario)

The Sensor Data Intelligence Add-in helps shop floor workers manage machine failures, enables shop floor managers to effectively manage operations across multiple production lines, and provides manufacturing executives with a unified global view of operations.

The Sensor Data Intelligence Scenario Add-in is a set of capabilities to enable a specific business process. For example, a "machine down" scenario enables the manufacturing system to detect machine failures through IoT signals and generate an alert.

To enable the Sensor Data Intelligence Add-in, buy at least one Sensor Data Intelligence Scenario Add-in license plus sufficient capacity for the number of machines being monitored. License capacities are pooled across the tenant. One Sensor Data Intelligence Scenario Add-in license is required for every scenario you need, and each includes 10 machines. You can buy additional machine capacity.

For instance, you may want a "machine down" scenario and a product quality monitoring scenario for 20 machines. You'd need two scenario licenses, each of which includes 10 machines per tenant per month. A machine only needs to be licensed once, so if the same machine is being monitored by two scenarios, only one machine license is required for it.

You may manage unlimited scenarios or machines with no additional purchase after licensing:
- Six Sensor Data Intelligence Scenario Add-ins (Six scenarios and 60 machines)
- 10 Sensor Data Intelligence Additional Machines Add-ins (100 machines)

Sensor Data Intelligence capacities

Application/Capacity	Included Capacity
Sensor Data Intelligence Scenario Add-in • Scenarios and machines	• 1 scenario and 10 machines/tenant/month
Sensor Data Intelligence Additional Machines • Machines	• 10 machines/tenant/month

➢ Cloud Scale Unit Add-in for Supply Chain Management

The Cloud Scale Unit for Supply Chain Management enables companies to execute mission-critical warehouse and manufacturing processes without interruptions. Cloud Scale Units for Dynamics 365 Supply Chain Management deliver on two key business objectives:

- When network latency is high and mission-critical processes must keep running.

- When throughput is high and heavy processes run in parallel, warehouse and manufacturing processes must still support high user productivity.

Cloud Scale Unit Add-in for Supply Chain Management is licensed per tenant, and you can purchase multiple Basic or Standard Cloud Scale Units for separate scenarios like managing outbound processes at different warehouse locations. If you need more transactions than are included in the Basic or Standard Cloud Scale Unit, you can purchase additional overage capacity for those respective units.

Cloud Scale Unit Add-in for Supply Chain Management capacity

Application/Capacity	Included Capacity	Add-On Capacity
Basic Cloud Scale Unit Add-in • Transactions	200K transactions/tenant/month	Basic Cloud Scale Unit Overage: 10K transactions/tenant/month
Standard Cloud Scale Unit Add-in • Transactions	1,500K transactions/tenant/month	Standard Cloud Scale Unit Overage: 100K transactions/tenant/month

TOC

Unassigned Application Licensing

Dynamics 365 Customer Insights

Customer Insights, not to be confused with Customer Service Insights, helps you unify and understand customer data to harness it for intelligent insights and actions. It eliminates data silos, enabling you to bring data from any source, unify customer data, and view it from within other Dynamics 365 products. Customer Insights is licensed per tenant and includes Customer Voice entitlements (2K responses).

Customer Insights capacities

Customer Insight capacities are based on profiles—a report for a uniquely identified customer that is created through collection of defined data source sets from multiple applications. Customer Insights license also grants capacities for data injection refreshes, Power Platform requests (formerly known as API calls), and environments. Buying add-on capacity does not increase the allotment of segments, KPIs, or allowed data injection refreshes. Find more details about capacity add-ons and Power Platform requests in the Capacity Licenses section.

Application	Included Capacity	Add-On Capacity
Customer Insights • Profile capacity • Data injection refresh • Power Platform requests • Environment	• 100K profiles/month. Note: Additional purchased profile capacity does not increase the number of segments, KPIs, or allowed data injection refreshes • 4 data injection refreshes/day. Each refresh takes approximately 4 hours, for 16 hours of data injection refreshes a day • 10K daily Power Platform requests per 100K profiles • 1 production and 1 sandbox environment	Customer Insights Additional Profiles: • 100K additional profiles • 10K daily Power Platform requests per 100K profiles

Dynamics 365 Customer Voice
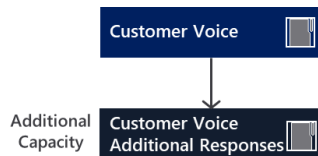
Customer Voice is a feedback management solution that empowers everyone in the organization to develop enterprise-grade surveys and collect timely feedback from key customers across channels. Customer Voice is licensed per tenant, with capacity allowances based on the number of responses that distributed surveys receive.

Customers of Dynamics 365 enterprise products (Sales Enterprise, Customer Service Enterprise, Customer Insights, Field Service, Marketing, and Human Resources) are automatically entitled to Customer Voice capabilities and 2,000 responses/tenant/month. Customers with Sales Professional or Customer Service Professional licenses may also buy Customer Voice. (See below.)

Survey respondents do not need to be licensed. Only the survey designer/editor must be licensed for the tenant.

Anyone who wants to enable Customer Voice, can purchase the license separately. The license comes with 2,000 responses/tenant/month. Any Customer Voice customer can buy additional response packs (in packs of 1,000 responses/tenant/month) as needed. For more details and options, visit How to Buy Customer Voice.

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 Capacity
Customer Voice • Responses	2K responses/tenant/month	Customer Voice Additional Responses: 1K responses/tenant/month with no purchase limit

Dynamics 365 Electronic Invoicing

Electronic invoicing is the process of creating, presenting, and exchanging structured, transactional invoice documents between businesses and governments for tax reporting purposes, or trading partners in an integrated electronic format.

Dynamics 365 Commerce, Finance, Project Operations, and Supply Chain Management applications include 100 electronic invoice transactions per tenant per month. This included capacity does not rollover and is 100 transactions per tenant regardless of the number of Dynamics 365 licensed applications.

| Electronic Invoicing Add-in	If you need additional transactions, you can buy the Electronic Invoicing additional capacity license for 1K electronic invoice transactions per tenant per month. The transaction capacity is use-it-or-lose-it on a monthly basis, and customers will need to purchase for peak capacity.

Electronic Invoicing capacity

Application/Capacity	Included Capacity	Add-On Capacity
Electronic Invoicing • Transactions	100 transactions/tenant/month	Electronic Invoicing Add-in: 1K transactions/tenant/month with no purchase limit

Dynamics 365 Fraud Protection

Fraud Protection is a cloud-based anti-fraud solution for medium to large organizations worldwide. It is designed to help lower fraud-related costs, increase profits, and improve the customer experience. Fraud Protection consists of Account Protection (AP), Purchase Protection (PP), and Loss Prevention (LP).

Note: Fraud Protection may be deployed in the same tenant as, but cannot share the same environment with, Sales, Customer Service, Field Service, or Marketing, or with Finance, Supply Chain Management, or Commerce.

There are two ways to purchase Dynamics 365 Fraud Protection: Pre-paid capacity model and Pay-as-you-go model.
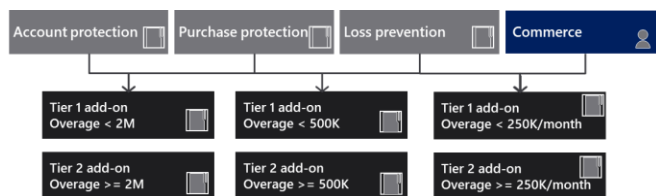
Pre-paid capacity model

Fraud Protection transaction capacities are included with the license and additional capacity is available. When you automatically receive Fraud Protection entitlements because you have licensed Commerce, you can also buy additional Fraud Protection capacity as needed.

➤ **Account Protection**

Fraud Protection account protection helps merchants protect online customer accounts by detecting and preventing fraudulent activities. Note that the initial capacity license includes capacities for purchase protection and lost prevention.

Account Protection capacities

Application/Capacity	Included Capacity	Add-On Capacity
Account Protection • Assessments	• 100K AP transactions/tenant/month • 2K PP transactions/tenant/month • 4K LP transactions/tenant/month	Tier 1 (< 2M transactions): • 20K AP transactions/tenant/month Tier 2 (>= 2M transactions): • 20K AP transactions/tenant/month

➤ **Purchase Protection**

Fraud Protection purchase protection helps merchants to protect online transactions by detecting and preventing fraudulent activities. Note that the initial capacity license includes capacities for account protection and loss prevention.

Purchase Protection capacities

Application/Capacity	Included Capacity	Add-On Capacity
Purchase Protection • Assessments	• 10K PP transactions/tenant/month • 20K AP transactions/tenant/month • 4K LP transactions/tenant/month	Tier 1 (< 500K transactions): • 2K PP transactions/tenant/month Tier 2 (>= 500K transactions): • 2K PP transactions/tenant/month

➤ **Loss Prevention**

Fraud Protection loss prevention helps retailers reduce shrinkage in their stores. Note that the initial capacity license includes capacities for account protection and purchase protection.

Loss Prevention capacities

Application/Capacity	Included Capacity	Add-On Capacity
Loss Prevention • Assessments	• 20K LP transactions/tenant/month • 20K AP transactions/tenant/month • 2K PP transactions/tenant/month	Tier 1 (< 250K transactions/month): • 4K LP transactions/tenant/month Tier 2 (>= 250 K transactions/month): • 4K LP transactions/tenant/month

Pay-as-you-go model

You can enable pay-as-you-go billing for Dynamics 365 Fraud Protection services via dynamics.microsoft.com. With pay-as-you-go model you will pay based on your actual monthly consumption for each Fraud Protection service. In order to enable Fraud Protection pay-as-you-go billing, you need to have Azure subscription and you need to purchase the Web Direct capacity license first. After that you can link your Azure subscription with the Fraud Protection meters. See this documentation to learn more.

Dynamics 365 Intelligent Order Management

Intelligent Order Management is an intelligent multitenant standalone service that allows customers to adapt quickly and fulfill orders efficiently at the fastest speed and lowest possible cost. It also provides intelligent fulfillment with event driven orchestration and AI & rules-based fulfillment, including anomaly detection and inventory reallocation. Intelligent Order Management is licensed per tenant, and it comes with 1K order lines. If you need additional capacity, you can buy multiple units of the same license. Intelligent Order Management license also includes limited Power Automate use rights, such as Power Platform requests per month, and use of connectors. See Power Platform Licensing Guide for more details.

Dynamics 365 Marketing

Build deeper relationships with coordinated marketing campaigns that deliver personalized messages and yield better data to guide ongoing efforts. Marketing tracks all your interactions with contacts and keeps a detailed record of the results of your marketing initiatives, including all the ways in which each contact interacts and responds so you can measure performance and build more effective campaigns.

Dynamics 365 Marketing is licensed per tenant. Because marketing contacts are its heart, the license entitles you to capacities based on the number of contacts used. To identify Marketing Contacts, Marketing monitors key interaction types. Any contact that performs one or more interactions will be flagged as a Marketing Contact and count against the allotment.

A Marketing Interaction is an outbound message sent to any Marketing Contact using Dynamics 365 Marketing. The message can be sent through out-of-box channels available in Dynamics 365 Marketing (e.g., email, push notifications), other Microsoft channels (e.g., ACS), or third-party systems integrated with Dynamics 365 Marketing (e.g., other SMS providers).

A Marketing Contact is any entity (such as a contact, lead, account, or Customer Insights profile) engaged in a Marketing Interaction. Contacts that are stored, but not marketed to using Dynamics 365 Marketing do not count towards their Marketing Contacts quota. After an Interaction is logged for a Contact, it does not matter how many Marketing Interactions that Contact performs, the Marketing Contact is still counted just once.

Note: Customers may install, use, and configure one Marketing license with only one Dynamics 365 environment.

➢ **Marketing (standalone)**

Customers who don't have any other Dynamics 365 product 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 license Marketing as a standalone application for a production environment, with a capacity allotment of 10K contacts and 100K interactions per

month. In this case, you'll receive capacity entitlements for the following (provided they're not already on your account):

- Dataverse Database Capacity
- Dataverse File Capacity
- Dataverse Log Capacity
- Dynamics 365 Customer Voice (2K responses)

➢ **Marketing (attached)**

If you have at least 10 full users of Sales Professional, Sales Enterprise, Customer Service Professional, Customer Service Enterprise, Field Service, Finance, Supply Chain Management, or Commerce, you may license Marketing with a "base pack" of one environment and a capacity allotment of 10K contacts and 100K interactions per month. You can only buy one base pack, but additional environments and additional contact and interaction packs are available. Dataverse capacity and Customer Voice entitlements are not included with this license, because those entitlements will already apply due to the prerequired eligibility criteria of 10 full licenses.

Additional Marketing options

➢ **Additional Marketing application (production)**

You can buy an additional Marketing application, licensed per tenant, to deploy for production use on a separate (second or subsequent) environment. Additional marketing contacts or interactions are not included, but you may continue to use your existing, tenant-level pool of marketing contacts.

➢ **Additional Marketing application (nonproduction)**

You can also buy an additional Marketing application, licensed per tenant, to deploy for nonproduction use on a separate environment. Additional marketing contacts or interactions are not included, but you may continue to use your existing, tenant-level pool of marketing contacts.

➢ **Additional Marketing contacts and interactions**

You can license additional marketing contacts and interactions beyond the initial capacity entitlement. All Marketing contacts and interactions used in a tenant are counted regardless of which environment (production and nonproduction) may be involved. See this [help](#) documentation to learn more.

Marketing capacities

Application	Included Capacity	Add-On Capacity
Marketing • Contacts • Interactions	• 10K contacts/month • 100K interactions/month	Additional Contacts/month: • Tier 1: 5K contacts and 50K interactions • Tier 2: 50K contacts and 500K interactions • Tier 3: 50K contacts and 500K interactions (min purchase 2 units) • Tier 4: 50K contacts and 500K interactions (min purchase 5 units) • Tier 5: 50K contacts and 500K interactions (min purchase 10 units) Additional Interactions/month: • Tier 1: 50K interactions • Tier 2: 500K interactions • Tier 3: 500K interactions (min purchase 2 units) • Tier 4: 500K interactions (min purchase 5 units) • Tier 5: 500K interactions (min purchase 10 units)

Cross-Application Licensing

Assigned licenses

Device licenses

- **Sales Device, Customer Service Device, and Field Service Device** licenses are full access licenses. They include the same rights as the equivalent Enterprise user license, except that access is limited to only the licensed device.

- The **Operations – Device** license provides limited access to a subset of Finance, Supply Chain Management, Commerce, and Project Operations capabilities. The **Business Central Device** license provides limited access to a subset of Business Central capabilities.

  These device licenses allow multiple users to operate a licensed point-of-sale device, shop floor device, warehouse device, or store manager device. If multiple users, who only require these limited use rights, work exclusively on shared devices, it will generally be more cost effective to license those devices than the users themselves.

  Operations – Device license use rights are also available to Operations – Activity users. However, an Operations – Device license does not include all the capabilities of the Operations – Activity user license. When a single user needs to work on one or more dedicated personal devices, it will be more cost effective to license that user with an Operations – Activity user license.

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

Device License	Operations – Device and Business Central Device capabilities
Point of Sale	One device located in the Commerce location or store, used by any individual, for completing customer facing sales of goods or services transactions. Note that a Commerce location or store is a physical location (static or mobile, such as a food truck) operated by you when closing goods or services transactions with customers.
Store Manager	One device located in the Commerce location, used by any individual, dedicated to performing the following tasks solely for that location. • Managing and replenishing inventory • Balancing cash registers and processing daily receipts • Configuring and maintaining menu options displayed by the ISV devices • Purchasing supplies and services required to run the Commerce location operations • Managing Commerce location staff • Processing reports required to analyze and manage Commerce location results • Managing master data related to Commerce location operations
Shop Floor	One device used for manufacturing shop-floor functions: • Clock-in and clock-out • Starting and finishing production jobs (including project activities carried out on the shop floor) • Reporting progress • Materials consumption and completion • Viewing documents and instructions related to production jobs • Viewing worker holiday balances
Warehouse Device	One device used for warehousing functions: • Receiving • Putting away • Doing internal stock transfers • Picking, packing • Capturing product attributes • Shipping goods plus performing inventory count checks in the context of a warehouse management system • Posting output and materials consumption against production orders when captured as transfers of raw materials and finished goods between a warehouse and a production line. (All other types of transactions are excluded.)

Human Resources Self Service license

The Human Resources Self Service user license enables access to employee and manager self-serve capabilities, such as:

- Update personal employee information
- Manage the human resources activities of direct employees or those reporting up through the user's reporting chain

- Report sick leave
- Submit vacation requests
- View employee benefits
- Approve employee leave as a manager
- View employee information as a manager

The HR Self Service license only grants access to Human Resources, not any other Dynamics 365 product. It does not include full user rights for Human Resources but does provide access to functionality employees often need to manage themselves.

Operations – Activity license

The Operations – Activity user license provides limited access to the Commerce, Finance, Human Resources, Project Operations, and Supply Chain Management applications. Operations – Activity use rights include all Team Members use rights as well as the right to:

- Approve all Operations – Activity related transactions (see Appendix F for details).
- Create or edit items related to warehousing, receiving, shipping, orders, vendor maintenance, and all budgets
- Operate a point-of-sale (POS) device, store manager device, shop floor device, or warehouse device.

Team Members licenses

The Dynamics 365 Team Members user license grants a named user the following rights for Customer Service Team Member, Sales Team Member and Project Resource Hub application modules. These rights are for their own use and not for activities for, or on behalf of, other people. (For instance, the license doesn't grant managers the right to perform the same actions for direct reports.)

- Create, read, update, and delete contacts, activities, and notes
- Update their own employee information
- Record time and expense for Project Operations, and apply for projects
- User reporting and dashboards
- Participate as a consumer of Dynamics 365 services, such as responding to surveys

The Dynamics 365 Team Members user license also grants a named user the following rights for Finance, Supply Chain, Commerce, Human Resources, and Project Operations. Again, these rights are for their own use, or for limited HR use by managers, and not for activities for, or on behalf of, others.

- Record any type of time or expense
- Approve time, expenses, and invoices
- Create requisitions
- Create or edit items related to quality control and departmental budgets
- Manage their own employee information
- Manage human resources activities for direct employees or those reporting up through the user's reporting chain
- Use Human Resources Self Service functionality (when Human Resources is licensed by the organization)

A Dynamics 365 Team Members license holder may customize a maximum of 15 additional tables (custom tables or standard Dataverse tables) that are available to licensed users per the pre-approved scenarios in Appendix C. For additional details, refer also to the use rights and security rights for each Dynamics 365 product provided previously in this guide.

The **Dynamics 365 Business Central Team Members license,** not to be confused with Dynamics 365 Team Members license, grants a named user the following rights for their own use only (not for, or on behalf of, others):

- Read data within Business Central
- Update existing data and entries in Business Central, such as previously created customer, vendor, or item records. Entries are defined as specific accounting information that, may be updated, such as a due date on customer ledger entries.
- Approve or reject tasks in all workflows assigned to that user, with the limit that approvals and rejections can only update data in records that Business Central Team Members can access.
- Create, edit, and delete a sales or purchase quote
- Create, edit, and delete personal information
- Edit job time sheets for approval
- Use the Dynamics 365 Power Apps/Power Automate use rights provided with a Dynamics 365 license
- Business Central Team Members application module may be customized with maximum 15 additional tables (custom tables or standard Dataverse tables) available to the Business Central Team Members license.

For additional details, refer to the [Essentials](#) and [Premium](#) capabilities.

Unassigned licenses

Operations – Order Lines license

Operations – Order Lines allows you to extend the use of the Commerce, Finance, Project Operations, or Supply Chain Management applications with an alternative to user and device-based licensing. The Operations – Order Lines license enables internal users, partners, customers, connected automated systems, IoT devices and bots to update specific tables with transactional licensing based on the number of order lines updated in those tables.

Operations – Order Lines licenses:

- Alleviate pricing and licensing friction in many common multiplexing scenarios.
- Support more scenarios that involve external users.
- Enable licensing of automated systems and devices that don't include users, such as in IoT scenarios.
- Improve licensing cost transparency and predictability.
- Tie licensing costs more directly with business outcomes.

To qualify for Operations – Order lines licensing, a transaction must:

- Be an indirect transaction that utilizes an OData or DIXF integration. Direct use of the Dynamics application or integrations outside of OData or DIXF do not qualify.
- Only update data in the tables designated as qualifying for Operations – Order Lines use. The table below determines the relevant entity even if you use custom entities on these operations tables. Access to any other tables or user actions requires a user license.

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

If a Commerce or Manufacturing transaction includes a qualifying order line type and utilizes OData or DIXF for integration, then use of Operations – Order Lines is permitted. Additional support for Commerce and Manufacturing scenarios beyond those limitations is not currently supported.

The following scenarios require a user or device license:

- Direct access to the Commerce, Finance, Project Operations, or Supply Chain Management applications
- Indirect access to these applications with a transaction type or action that is not covered by the qualifying order lines types

The Operations – Order Lines license does not apply for outbound integration.

While order line licensing is restricted to designated order line types, additional entity records that are required to support and are directly referenced by an order line, may be created or updated with the order line without a user or device license. Those additional entity records will not be counted as extra order lines unless they are a designated order line record type (see table above).

Operations – Order Lines capacity details

Operations – Order Lines is licensed by tenant per month, with an annual commitment, and includes an allowance of 100K order lines per month, enforced annually for a total of 1.2 million order lines. The creation of new order lines and updates to existing order lines count against the 100K order line allowance. Deletions do not count. If you reach the order line limit before the subscription year is complete, orders will not be blocked, but you'll receive warnings and can address the difference on your subscription anniversary by purchasing additional capacity.

You can opt in and opt out of an Operations – Order Lines license. Opt-in by buying the license. Dynamics 365 will then track all creation of designated order line types through OData and DIXF. If you don't buy an Operations – Order Lines license, you must have appropriate user or device licenses for all direct and indirect access.

Capacity licenses

Default subscription capacity

The first base license (subscription) for a Dynamics 365 product includes its default capacity, which is shared per tenant. Default capacity is not cumulative, so additional licenses do not increase your default capacity.

Attach licenses have the same capacity entitlements of the base license. For bundled offers such as Sales Premium and MRSs Plus, the capacity entitlements come with the core application (in this case, Sales Enterprise).

Sales Enterprise, Customer Service Enterprise and Field Service Enterprise accrue additional database and file capacities at no charge for each enterprise base license.

Capacity Included/Accrued	BC Essentials	BC Premium	BC Device	Customer Insights	Finance, SCM, Commerce, Project Oper	Guides	Human Resources	Intelligent Order Mgmt.	Marketing (standalone)	Remote Assist	Sales Ent, Cust Svc Ent, Field Svc Ent	Sales Pro, Cust Svc Pro	Operations – Activity	Operations – Device
Dataverse Database: Included/Tenant Max	-	-	-	15 GB[1]	10 GB	10 GB	10 GB	10 GB	10 GB	10 GB	10 GB	10 GB	-	-
Dataverse Database: Accrued/USL; Max 4TB/tenant	-	-	-	-		-		-	-	-	250 MB	-	-	-
Dataverse File: Included/Tenant	-	-	-	20 GB[1]	20 GB	20 GB	20 GB	20 GB	20 GB	20 GB	20 GB	20 GB	-	-
Dataverse File: Accrued/USL	-	-	-	-		-		-	-	-	2 GB	-	-	-
Dataverse Log: Included/Tenant	-	-	-	2 GB[1]	2 GB	2 GB	2 GB	2 GB	2 GB	2 GB	2 GB	2 GB	-	-
Dataverse Log: Accrued/USL	-	-	-	-		-	-	-	-	-	-	-	-	-
Operations Database Capacity: Included/Tenant	-	-	-	-	20 GB	-	20 GB	-	-	-	-	-	-	-

Capacity Included/Accrued	BC Essentials	BC Premium	BC Device	Customer Insights	Finance, SCM, Commerce, Project Oper	Guides	Human Resources	Intelligent Order Mgmt.	Marketing (standalone)	Remote Assist	Sales Ent, Cust Svc Ent, Field Svc Ent	Sales Pro, Cust Svc Pro	Operations – Activity	Operations – Device
Operations Database Capacity: Accrued/USL. Max 4 TB/Tenant	-	-		-	500 MB	-	-	-	-	-	-	-	500 MB/ 4 USLs	500 MB/2.5 devices
Operations File Capacity: Included/Tenant	-	-		-	40 GB	-	40 GB	-	-	-	-	-	-	-
Operations File Capacity: Accrued/USL	-	-		-	4 GB	-	-	-	-	-	-	-	4 GB/ 4 USLs	4 GB/ 2.5 devices
Business Central Database capacity: Included/AAD tenant	80 GB	80 GB	-	-	-	-	-	-	-	-	-	-	-	-
Business Central Database Capacity: Accrued/USL	2 GB	3 GB	1 GB/ device	-	-	-	-	-	-	-	-	-	-	-
Production: Environment/Tenant	1 BC	1 BC	-	-	1 AOS	-	2 Dataverse Database + 2 AOS²	-	-	-	-	-	-	-
Nonproduction: Environment/Tenant	3	3	-	-	1 Sandbox Tier 2	-	-	-	-	-	-	-	-	-

[1]Per 100K profiles
[2]At any given time, only one of the environments may be in production, but both environments may be in nonproduction.

Types of default capacity

- Dataverse database: Stores and manages table definitions and data. This relational database capacity is for any Dynamics 365 product that utilizes Dataverse. You can increase available capacity, shared tenant-wide, in 1 GB increments.

- Dataverse file: Stores attachments to notes or emails, which may include documents, image files, videos, PDF files, and other crucial files. This file capacity is for any Dynamics 365 product that utilizes Dataverse. You can increase available capacity, shared tenant-wide, in 1 GB increments.

- Dataverse log: Records table and attribute data changes over time for use in analysis and reporting. This log data (audit/tracing) capacity is for any Dynamics 365 product that utilizes Dataverse for Apps. You can increase available capacity, shared tenant-wide, in 1 GB increments.

- There are additional Microsoft subscriptions beyond Dynamics 365 that grant Dataverse capacity entitlement. Please see the Power Apps, Power Automate and Power Virtual Agents Licensing guide for other entitlements, as well as this page for details related to Project Online.

- Operations database capacity: Relational database capacity for all applicable products (specified in the table above) that have storage requirements outside of Dataverse for Apps.
    - For every 1 GB of database capacity, you receive 1 GB each of production, reporting, and table store databases.

- Operations file capacity: Stores attachments to notes or emails, which may include documents, image files, videos, PDF files, and other crucial files. This file capacity is for applicable products (specified in the table above) that have storage requirements outside of Dataverse for Apps.

- Business Central database storage: Structured database storage.

- Environments:

- o Production: a service that can be accessed by end users and is designed, built, and scaled to accommodate your applications to process live and/or real-time data in connection with your ongoing business operations and is deployed within a single geographic region

    - Dataverse environment: The foundation for Power Platform and Sales, Customer Service, Field Service, Marketing, Remote Assist, Guides, Human Resources, and Project Operations, which partially run on Dataverse environments

    - Application object server (AOS): For Human Resources, Finance, Supply Chain Management, Commerce, and Project Operations. Note that the production environment for Finance, Supply Chain Management, Commerce, and Project Operations comes with disaster recovery and high availability and is monitored 24x7 for service health. Additional production environments are not available. To ensure the environment is used for live operations, Microsoft will provision the production environment only after your Dynamics 365 implementation nears the operational phase, after completion of required activities in the Lifecycle Services (LCS) methodology.

    - Business Central environment: For Business Central Premium or Essentials

  - o Nonproduction: User acceptance testing (UAT), sandbox, and testing environments that cannot be accessed by end users and cannot be used to process live and/or real-time data in connection with your ongoing business operations.

- Power Platform requests (formerly known as API call requests): To ensure service levels, availability, and quality, Microsoft enforces limits on the number of requests users can make each day across their Dynamics 365 products. Power Apps and Power Automate usage counts against the Power Platform request entitlements provided by your license. If you exceed these limits, overage charges may apply. For more details, refer to the request limits and to the Power Apps, Power Automate, and Power Virtual Agent Licensing Guide.

- Power Apps portals: Deliver the ability to build standalone, external-facing portals over the Dataverse. Portals are licensed based on usage.

- Power Virtual Agents: Capacity is enforced monthly and unused sessions do not carry over month to month. You will get the seeded Power Virtual Agents capacity only one time per tenant, when you buy the first license that includes this capacity regardless of how many user licenses you have. Learn more in the Power Apps, Power Automate, and Power Virtual Agent Licensing Guide.

Capacity add-ons

Capacity Add-On/ Environment	BC Premium	BC Essentials	Customer Insights	Finance, SCM, Commerce, Project Oper.	Guides	Human Resources	Intelligent Order Mgmt.	Marketing	Remote Assist	Sales Ent, Cust Svc Ent, Field Svc Ent	Sales Pro, Cust Svc Pro
Dataverse Database	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB
Dataverse File	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB
Dataverse Log	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB	1 GB
Operations Add'l Database Capacity	-	-		1 GB	-	1 GB		-	-	-	-
Operations Add'l File Capacity	-	-		1 GB	-	1 GB		-	-	-	-
Operations Sandbox Tiers 2 - 5	-	-		10 GB	-	-		-	-	-	-
Human Resources Sandbox[1]	-	-		-	-	10 GB		-	-	-	-
Business Central Database Capacity	1 GB	1 GB		-	-	-		-	-	-	-
Business Central Database Capacity 100GB	100 GB	100 GB		-	-	-		-	-	-	-
Business Central Database Capacity Overage	1GB	1GB		-	-	-		-	-	-	-
Business Central Additional Environment[2]	4 GB	4 GB		-	-	-		-	-	-	-

[1]The Human Resources sandbox is a nonproduction, test environment available for Human Resources users only.
[2]Each additional production environment comes with 3 additional sandbox environments and 4 GB of database capacity

Power Platform capacity add-ons

- You may buy the Power Apps and Power Automate capacity add-on to increase the daily service limits for Power Platform requests.
- You may buy the Power Apps Portals add-on for additional portals.
- You may buy the Power Virtual Agents capacity add-on to increases the number of chat bot sessions and daily Power Platform request limit.

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

Additional Dataverse capacity

Dataverse capacity add-ons provide the flexibility for you to increase the storage capacity associated with your Power Apps subscription in increments of 1 GB per add-on license. The storage allotment corresponding to your subscription is tracked against all environments associated with the tenant.

Sandbox add-ons (for Finance, Commerce, Supply Chain Management and Project Operations only)

These nonproduction sandbox add-on environments may be configured for testing and training. Users licensed for Finance, Supply Chain Management, Commerce, and Project Operations can access associated licensed nonproduction environments. Note: For Tiers 4 and Tier 5, Finance, Commerce, Supply Chain Management and Project Operations accrue an additional 128 MB of Operations database and file capacity for each full user license.

Finance, Supply Chain Management, Commerce, and Project Operations User Licenses				
Sandbox	Description	Purpose	Customer/ Load Size	Included Database Capacity
Tier 2	Standard acceptance testing: multi box	User acceptance, integration testing, and training	Any	10 GB/ environment
Tier 3	Premium acceptance testing: multi box	Large scale user acceptance testing, integration testing, and training	Small/ light load	10 GB/ environment
Tier 4	Standard performance testing: multi box	Performance, load, and staging with user acceptance testing	Small to medium load	10 GB/ Environment + 128 MB/USL
Tier 5	Premium performance testing: multi box	Performance, load, and staging with user acceptance testing	Large/ heavy load	10 GB/ Environment + 128 MB/USL

Additional Licensing Requirements

Minimum license purchase requirements

To activate a Dynamics 365 subscription, you must buy a minimum quantity of qualifying licenses for some products. See the [Product Terms](#) for details about minimum purchase requirements.
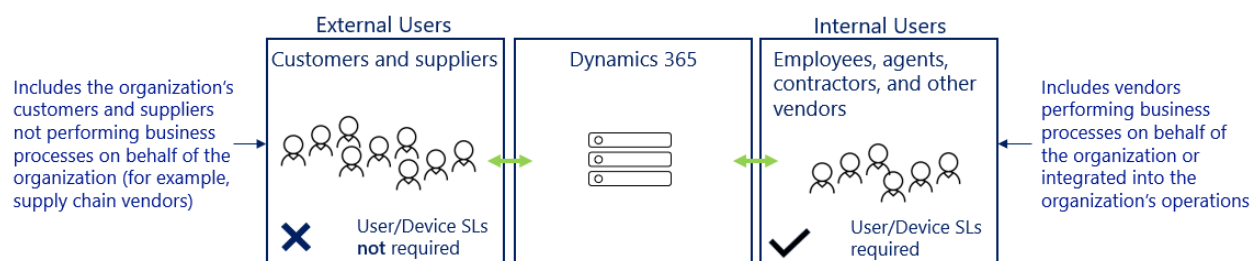
Licensing requirements for external users

External user access is available in limited situations to customers and third parties who interact with your organization or its affiliates (that is, separate companies or contractors). Off-site vendors who are not in employee-like relationships (such as IT help desk vendors who serve multiple organizations) also qualify as external users. These external users do not require user licenses to access Dynamics 365.

Limited external user access is included with your internal user licenses. However, the graphical interfaces for Business Central, Sales, Customer Service, and Field Service may not be accessed by external users. You also have the option to license Power Apps Portals to provide external access to your business processes or data.

External user access does not extend to your employees, onsite or independent contractors, vendors, agents, or those of your affiliates who are providing business processes on behalf of you or an affiliate. Those users are considered internal users. External user access also does not extend to contractors, vendors, or agents who are

using Dynamics 365 to manage any portions of their business (such as accounting, payroll, human resources, telemarketing, data recording, or social media marketing.). In this sense, you may not use Dynamics 365 to outsource business processes.

Additional licensing information and requirements for external users can be found on Product Terms and Commercial Licensing Terms. Note that for qualifying indirect transaction types, the Operations – Order Lines license may be used by internal or external users for indirect access scenarios where a user or device license is not required. Please see the Operations – Order Lines license section for more details.

Multiplexing

Multiplexing refers to your use of hardware or software to pool connections, reroute information, or reduce the number of devices or users that directly access Dynamics 365. Multiplexing does NOT reduce the required number of licenses of any type. Any user or device that accesses Dynamics 365—whether directly or indirectly—must be properly licensed or otherwise granted access (such as for external users) in one of the manners already discussed.

Dynamics 365 licenses are required for users or devices that directly input, query, or view data from Dynamics 365. Similarly, licenses are required for users or devices that input, query, or view data from Dynamics 365 through a pooling device. Pooled connections use a non-interactive Dynamics 365 user account (or application access in Business Central) that can access the system but only via the web service layer. Internal users and devices accessing Dynamics 365 data indirectly through a portal or via an API to a separate service (such Microsoft Outlook) must also be properly licensed, regardless of whether they are set up as a Dynamics 365 user for 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 license.
- The number of tiers of hardware or software between Dynamics 365 and the ultimate user or devices does not affect the number of licenses required.
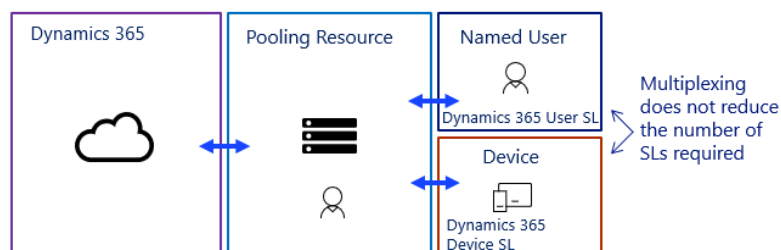
Dynamics 365 applications use Dataverse capacity and features to store and secure data. Power Apps users who have a Power Apps license may use custom applications to access (that is, create, read, update or delete) any Dynamics 365 non-restricted table in the Dataverse. However, Power Apps users and devices that need to create, update, or delete data in Dynamics 365 restricted tables must be properly licensed for Dynamics 365.

Note that if a licensed user receives data from an unlicensed user, the licensed user may manually enter this information into Dynamics 365. This scenario is not considered multiplexing because the manual action of

moving and entering the data is performed by a licensed user.

For qualifying indirect transaction types, the Operations – Order Lines license may also be used for indirect access without a user or device license. Please see the [Operations – Order Lines license](#) section for details.

For additional information about multiplexing, see the [Microsoft Multiplexing Overview](#).

Dual use rights

Dual use rights are one of the advantages of Dynamics 365. These rights allow you to deploy Dynamics applications either in Microsoft's cloud or in a private on-premises or partner-hosted cloud. In some cases, you may want to deploy in multiple environments simultaneously. For instance, you might do this to help migrate a Dynamics 365 on-premises deployment to Dynamics 365 while running private dev/test deployments in Microsoft Azure. Dual use rights mean that properly licensed users do not also need additional client access licenses (CALs) to access applications hosted in on-premises environments.

Users with Dynamics 365 licenses 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. Any server licenses that would be otherwise required for an on-premises deployment are included with the Dynamics 365 licenses.

Access to the on-premises server software provided via dual use rights is reserved for users assigned a qualifying Dynamics 365 license and external users. Reference the applicable on-premises licensing guides for more details. For an online user/device license to on-premises user/device CALs mapping, see the Dynamics 365 Dual Use Rights section in the [Product Terms.](#)

You may use downgrade rights to deploy an earlier version of a server, but 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 365 Business Central, on-premises server (current released version with downgrade rights of minus 3 versions)

Note:
- Dual use rights included with Dynamics 365 licenses are non-perpetual and expire when the cloud subscription expires.
- Dynamics CALs have no reciprocal rights to access functionality provided exclusively to Dynamics 365 licenses. Nor do dual use rights imply equivalent capabilities between Dynamics CALs and Dynamics 365 licenses.
- Licenses for all supporting servers (such as Windows Server and any CALs) must be obtained separately.
- If you choose to deploy with dual use rights, Microsoft technical support will assist with resulting issues, but support is not included for the on-premises deployment.
- If you choose to deploy on-premises, you have the following technical support options:
    - Seek support from your partner.
    - Buy [professional support incidents](#) to get support directly from Microsoft.
    - Use support incidents from an existing Software Assurance contract.
    - Buy Premier or Unified Support resources or use resources you've already paid for.
- Reference [Product activation and key information](#) for more information. Dynamics 365 on-premises licensing guides can be found [here](#).

Registration may be required. For more information regarding on-premises licensing see the Microsoft Dynamics 365 Business Central, on-premises, 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 the AOS applications Commerce, Finance, Supply Chain Management, and Project Operations into Dataverse. The dual write capability is configured at the table level, enabling you to designate the specific tables to synchronize with Dataverse. Find more details [here](#).

A specific license is not required to enable dual write, nor is additional licensing required if you want to configure dual write against unrestricted tables. When dual write is configured against a restricted table, however, users making updates in Dynamics 365 that result in updates to those restricted tables must be appropriately licensed. For example, if Finance users are leveraging dual write to integrate the Invoice Process (a Dataverse restricted table), these users need to be appropriately licensed.

For a list of restricted tables, please check [here](#).

Dynamics 365 extensibility

Power Platform: Dynamics 365 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 user interfaces, such as the ability to view or configure embedded tables and charts. This is simply a product feature, to the extent it is provided; a Power BI license is not required to access or configure this content. Dynamics 365 users are not provided with any standalone or general-purpose Power BI license or use rights. If you require Power BI Pro, you will need to license and pay for it separately.

Other extensibility: For applicable products, Dynamics 365 licenses also include the ability use custom tables, as described in [Appendix D,](#) and create custom security roles, as described in [Appendix E](#).

Appendix A: Dynamics 365 Licenses

Dynamics 365 Licenses	Short Names
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 Electronic Invoicing	Electronic Invoicing
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

Appendix B: Definitions

- **Attach license:** A lower-cost license for a product, sometimes referred to as the subsequent qualifying application, for a user already licensed for another base product. For instance, a user licensed for Commerce might have an attach license for Customer Service Professional. Not every Dynamics 365 product qualifies for attach licensing.

- **Base product or base license:** The first product licensed for a given user, such as Commerce. Sometimes referred to as the first license. Only user licenses qualify for base license treatment.

- **Device license**: Device licensing, an alternative to user licensing, enables any number of users to access a product through a single licensed device, without the need for separate user licenses. Only the user or the device requires a license, not both. You may mix user and device licenses. Device licenses may be referenced in some documents or diagrams as device subscription license (SL) and indicated on diagrams with ▆.

- **Environment:** An environment is a space to store, manage, and share your organization's business data, apps, and flows. It also serves as a container to separate apps that may have different roles, security requirements, or target audiences. Power Apps automatically creates a single default environment for each tenant, which is shared by all users in that tenant.

- **Tenant:** A tenant contains uniquely identified domains, users, security groups, and licenses. Your organization may have multiple tenants (for example, for different geographical regions), and a single tenant can contain multiple Dynamics 365 (online) environments. For example, an organization may have a European tenant with environments for sales, operations, and service, plus a North American tenant with only a sales environment. Each environment is always associated with only one tenant.

  In a multi-tenant scenario like the example, a licensed Dynamics 365 user associated with one tenant can only access environments mapped to the same tenant. To access another tenant, the user would need a separate license and a unique set of sign-in credentials. That means a sales manager with appropriate licenses as a user for the European tenant in the example could access both the sales and operations environments in Europe but would need separate licensing to access the North American environment.

  Any combination of products may be deployed at the tenant level, except that if you buy both Enterprise and Professional licenses for the same product (such as Customer Service), you must install them on separate environments. In addition, a user with a Professional license is entitled only to the functionality granted by that license and may not directly or indirectly access another environment with an Enterprise license for the same workload. Conversely, since an Enterprise license includes the Professional capabilities for the same workload, an Enterprise user may access the Professional license environment—but the features available to them will still be limited to the Professional features for that workload.

  Tenants may be indicated on diagrams with ▊ . Find more information on [the differences between tenants and instances](#).

- **Tenant license**: Some Dynamics 365 products (such as Fraud Protection) are available through a tenant license instead of a user or device license. Tenant licenses confer access to the default Dynamics 365 environment(s) included in the subscription account, and every additional Dynamics 365 environment (production or nonproduction) is associated with the same online services tenant.

  In theory, anyone in the organization may access the functionality of tenant licenses. In some cases, license administrators may need to assign a (no-cost) user license to those individuals who need access to products licensed at the tenant level. Find more information on how to assign the tenant license see [the Dynamics 365 Licensing Brief](#).

  Tenant licenses also may be indicated on diagrams with ▊ .

- **User license**: Access to Dynamics 365 products is primarily accomplished by licenses assigned to a named user for a specific product. Each user requires their own license, with a few exceptions (such as a device license, below). User licenses cannot be shared, but an individual with a user license may access the product through any number of devices. User licenses may be referenced in some documents or diagrams as user subscription licenses (SLs) and indicated on diagrams with 👤.

- **Workload**: A workload is a defined set of business functionality (such as Sales, Customer Service, Finance, or Business Central Essentials) applied to a specific application.

Appendix C: Dynamics 365 Team Members Use Rights Overview

This table provides an overview of the use rights granted through a Dynamics 365 Team Members license (not applicable for Dynamics 365 Business Central Team Members) for Sales, Customer Service, and Field Service, as well as for Finance, Supply Chain Management, Commerce, Human Resources, and Project Operations.

Use Rights	Description	Sales, Customer Service, Field Service	Finance, SCM, Commerce, HR, Project Ops
Access			
	Access Anywhere: Web App, Mobile App, Tablet App, via Dynamics 365 App for Outlook and Dynamics 365 for Outlook	●	
Read			
	Dynamics 365 Applications: full read across	●	●
General System Use			
Common	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	●	
	Microsoft Excel: export data and access user reports, charts, and dashboard	●	
	Notes: create, update, and delete	●	
	Yammer: collaboration (needs Yammer license)	●	
Customization			
Apps on Dataverse platform	Additional tables (custom tables or standard Dataverse tables)[1]	15 per app	
Edit/Actions (pre-approved application scenarios for Team Members)			
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 for Team Members, Portal[1] or API access only)	●	
Customer Service	Only employee self-serve: create, update, and delete on own case; read knowledgebase articles (Customer Service for Team Members, Portal[1] 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 vendor's 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	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 a project, report time and expense for projects, update project tasks, update own resource competencies	•	

[1]When provisioning capacity-based portals using Dataverse capacity, portal licensing use rights apply.

Appendix D: Custom Tables (formerly known as 'Entities')

Dynamics 365 licenses provide the right to use custom tables.

Custom table overview:

A table 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 products offer standard tables to cover typical scenarios. However, there may be times when you or your business partners need to create tables to store data that is specific to your organization—namely, custom tables. Note that adding a field to existing standard tables does not make it a custom table.

Custom tables may be created by you or a partner. They can either map to existing Dynamics 365 tables (that is, you can directly change Dynamics 365 tables), or they can be brand new tables.

| Dynamics 365 Licenses	Custom Table Use Rights
Enterprise Applications – Full Users	1. Full access 2. No limit on number of custom tables 3. Full create, read, update, and delete (CRUD) capability on data records associated with custom tables
Sales Professional, Customer Service Professional, Operations – Activity	1. Create and modify up to 15 custom tables (per application) in addition to the included standard tables 2. No limit on read rights for Dynamics 365 custom tables 3. Customize/extend applications and workflows within the context of Dynamics 365 application use rights 4. Full CRUD on data records associated with custom tables
Team Members	1. Create and modify up to 15 additional tables (custom tables or standard Dataverse tables) per Team Members application module. 2. All customization must be per pre-approved scenarios in Appendix C. 3. No limit on read rights for Dynamics 365 custom tables 4. Full CRUD on data records associated with custom tables

You can add up to 15 tables (standard and/or custom) per Team Members application module. If you want to view (read only) more than 15 tables, you can do so by creating dashboards and sub-grids. See more information on Team Members license documentation.

Appendix E: Security Role Assignment, Implementation Concerns, and Customization Licensing

Security role assignment

Provide users with access to Dynamics 365 functionality by assigning each user one or more security roles. Commerce, Finance, Human Resources, Project Operations, and Supply Chain Management security roles combine meaningful packages of functionality and access rights required to perform actions relevant to each role.

Assigning a security role to a user provides access to functionality.
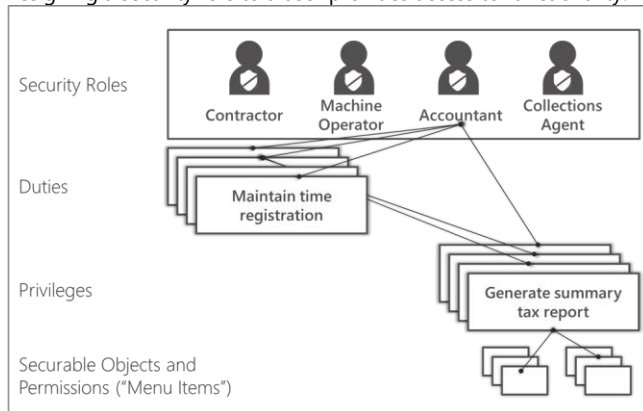
To make it easier to understand the licenses required, each Commerce, Finance, Human Resources, Project Operations, and Supply Chain Management security role has a predetermined user type. By assigning security roles to users, you can identify what user license those users require.

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, you can ensure they get the functionality they need and determine the user license type that is required.

Notes:
- You can assign multiple security roles to one user. In that case, the highest user license type required will cover all the user's needed rights. Full user licensing is the highest type.

- You can also configure or customize security roles. This may impact the license required for the new or modified roles. Please refer to <u>Customization/Licensing Requirements</u> for more information about how such customization can impact licensing requirements.

- Financial reporting functionality is included in select Dynamics 365 products. To get use rights for this functionality, financial report designers need a Finance user license, and financial report viewers need a Team Members license.

- Admin rights apply across Commerce, Finance, and Supply Chain Management. For example, if you have a Finance license, you have admin rights not only for Finance but also Supply Chain Management and Commerce.

- Operations – Activity and Team Members use rights are included in full user licenses, and those rights apply across products. For instance, a Finance user has Operations – Activity level access to Commerce and Supply Chain Management, as well as Team Members access to those workloads and to 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 apply across Commerce, Customer Service, Field Service, Finance, Human Resources, Supply Chain Management, and Sales.

Implementation concerns

Development and testing with Visual Studio subscriptions

Commerce, Finance, and Supply Chain Management development requires a Visual Studio Professional license 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 licenses and must be acquired separately.

Lifecycle Services

Lifecycle Services (LCS) provides a cloud-based collaborative workspace shared between Microsoft customers and partners that helps you improve the predictability and quality of your Commerce, Finance, Human Resources, Project Operations, and Supply Chain Management implementations by simplifying and standardizing the implementation process to realize business value faster. Once you sign up for one or more of these products, you are provided with a project workspace that includes methodologies and services to help you manage the service lifecycle. LCS provides a variety of services to help you navigate the various phases of the project including:

- Defining your business processes and any customization needed.
- Developing additional functionality using best practices.
- Operating your environment to reduce the time it takes to resolve issues and realize greater return on investment while reducing the total cost of ownership.

Customization licensing requirements

This section applies only to Commerce, Finance, Human Resources, Project Operations, and Supply Chain Management. These five applications are fully customizable to provide you with the right experience for every user. The products have over 10,000 menu items, which are mapped to full user, Operations – Activity or Team Members license users, or Human Resources Self Service users. (A "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 solution or a separate device.)

To make it faster and easier to deploy and determine licensing requirements, these menu items are associated with certain security roles. Note that roles are not the same as job titles.

Each menu item is classified at one of the user license types (from full user access to Human Resources Self Service). Users with a given license have access to each menu Item classified at, or below, that license type. That means that the required license for a given user is determined by the highest classification of the menu items the user will need access to.

For example, if you assign an accountant to a role that includes access to a menu item classified as "Operations App," then that person needs a full user license. Full user licensing includes Team Member access. That means menu items classified at the Team Members level are available to all users who have a Team Members license or any higher license.

For an even better fit, you 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 that individual has access to.

Assigning multiple roles to a single user
The straightforward way to customize which actions a specific user may perform is by assigning multiple roles to that employee. For example, an employee could be assigned both the customer service representative and the field technician roles. That user can then perform actions associated with both roles and still only need a single user license. Since the customer service rep role is classified at a higher user type (namely, full user

license) than the field technician role (which has a Team Members classification), the employee would only need a full user license for Commerce, Finance, Human Resources, or Supply Chain Management to perform actions associated with both roles.

Changing menu items associated with a role

Another way to customize which actions users may perform is by changing which menu items are associated with a role. For example, if you want everyone who is assigned the field technician role to be able to also approve posting of service orders (which is classified as a Commerce, Finance, Human Resources, or Supply Chain Management user license level menu item), you can customize the role to include the "Approve posting of service order" menu item. Because the required license 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 license.

Changing menu items associated with an individual

Further, you may assign specific actions to specific users. Following the example above, if you have 20 employees assigned to the field technician role and you want to allow only five of them to approve posting of service orders, you can assign the "posting of service order" menu item to those five individuals. Those five individuals would then need a full user license, while the remaining 15 employees assigned to the field technician role would only need the Team Members user license.

Creating menu items

You and your business partners may also create menu items to fit specific business scenarios. Any new menu items must be mapped to the user license type that best matches the type of use, based on the user license definitions in this guide.

Appendix F: Operations – Activity Approval Privileges

Enterprise product licenses include Operations – Activity use rights, and those rights cross applications. The license required for specific actions—whether an enterprise or Operations – Activity license—is indicated in the table below.

For instance, if a user needs to review and approve bank reconciliation (line 4 in the table), this user must have an Operations – Activity license. If the same user needs to approve fixed assets journal (line 9), this user will need an enterprise license, which will provide use rights for both tasks.

Duty name	Privilege name	License[1]
Approve advanced ledger entry transactions	Approve the advanced ledger entry	Enterprise
Approve and activate product changes	Approve and activate product changes	Enterprise
Approve bill of exchange transactions	Approve customer bills of exchange journal	Enterprise
Approve BOMs	Approve BOM versions	Enterprise
	Approve BOMs	Enterprise
Approve budget register entries	Approve budget account entry through workflow	Activity
Approve closing transactions	Approve ledger elimination journal	Enterprise
Approve credit limit adjustments workflow	Approve credit limit adjustments workflow	Enterprise
Approve credit management holds workflow	Approve credit management holds workflow	Enterprise
Approve customer invoices	Approve free text invoices	Enterprise
	Approve recurring invoice through workflow	Enterprise
Approve customer payment transactions	Approve customer payment journal	Enterprise
Approve fixed assets budget entries	Approve fixed asset budget entry through workflow	Enterprise
Approve fixed assets transactions	Approve fixed assets journal	Enterprise
Approve ledger allocation transactions	Approve ledger allocation journal	Enterprise
Approve ledger transactions	Approve ledger allocation journal	Enterprise
	Approve ledger journal	Enterprise
Approve netting transactions	Approve netting journal	Enterprise
Approve nonconformances	Approve nonconformance	Enterprise
Approve promissory note transactions	Approve vendor promissory note journal	Enterprise
Approve purchase agreement	Approve the purchase agreement through workflow	Activity
Approve routes	Approve route versions	Enterprise
	Approve routes	Enterprise
Approve vendor payment transactions	Approve vendor disbursement journal	Enterprise
Approve vendor user requests	Approve vendor user requests	Enterprise
Approves generated customer rebates	Maintain rebate approvals	Enterprise
Enable bank management process	Approve bank account reconciliation	Enterprise
Enable purchasing process	Maintain approved vendor list	Enterprise
Enable recruitment process	Approve applications	Enterprise
Maintain approved vendors	Maintain approved vendor list	Enterprise
Maintain budget register entries	Approve budget account entry through workflow	Activity
Maintain catalogs	Review and approve vendor catalogs	Activity
Maintain commitment documents	Approve commitment documents through workflow	Activity
Maintain compensation transactions	Change compensation event status to Approved	Enterprise
Maintain credit card payments	Maintain refund approvals	Activity
Maintain overdue vendor debt CIT and PIT journals	Approve overdue vendor debt CIT and PIT journals	Enterprise
Maintain payment schedule journal processing	Approve payment schedule journal through workflow	Activity

Duty name	Privilege name	License[1]
Maintain planned orders	Approve planned orders	Enterprise
Maintain purchase rebates	Maintain vendor rebate approvals	Enterprise
Maintain refund check processing	Maintain refund approvals	Enterprise
Maintain royalty information	Maintain royalty approvals	Enterprise
Maintain vendor invoices	Maintain vendor invoice matching approval	Enterprise
	Post invoice approval journal transactions	Enterprise
Manage fixed asset impairment	Approve fixed assets journal	Enterprise
Retail catalog approval workflow duty	Retail catalog approval workflow privilege	Activity
Review bank management process performance	Review and approve bank reconciliation	Activity

[1]When configuration key is on

Appendix G: Trials and Service Support

Trials

You can learn about Dynamics 365 trial criteria and agreement period, and sign up for trials at these links:
- Sales
- Customer Service
- Field Service
- Marketing
- Finance
- Supply Chain Management
- Commerce
- Human Resources
- Remote Assist
- Guides
- Business Central

At any time during your trial, you can activate a subscription and keep your data and customizations. Trial support is the same as what customers receive when purchasing Dynamics 365. Premium level support options are not available during the trial period, however.

Service support

The support benefits included in subscription licenses are applicable if you license Dynamics 365 or Power Platform via an Enterprise Agreement (EA), Enterprise Subscription Agreement (ESA), Enrollment for Education Solutions (EES), Microsoft Online Subscription Agreement (MOSA), or Microsoft Products and Services Agreement (MPSA). Learn more about support options, which include:

- Professional Direct Support
- Unified Support (for enterprise solutions)

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

Appendix H: Additional Resources

Resource	Link
Dynamics 365	https://dynamics.microsoft.com/
Dynamics 365 Licensing and Pricing	https://dynamics.microsoft.com/pricing/
Microsoft Power Platform	https://powerplatform.microsoft.com/en-us/
Microsoft Power Automate	https://flow.microsoft.com/en-us/pricing/
Microsoft Power Virtual Agents	https://powervirtualagents.microsoft.com/en-us/pricing/
Power Apps Pricing	https://powerapps.microsoft.com/en-us/pricing/
Power BI Pricing	https://powerbi.microsoft.com/en-us/pricing/
Microsoft Power Apps, Power Automate, and Power Virtual Agents Licensing Guide	https://go.microsoft.com/fwlink/?LinkId=2085130&clcid=0x409
Dynamics AX (Online) Licensing Guide	http://aka.ms/s201h6
AX 2012 Retail Licensing Scenarios	http://aka.ms/Sumqjx
Dynamics CRM Online Licensing Guide	https://mk0licensingschvvvb2.kinstacdn.com/wp-content/uploads/2016/04/Microsoft-Dynamics-CRM-Online-Licensing-Guide-Dec-2016.pdf
Dynamics On-Premises Licensing Guides	https://partner.microsoft.com/asset/collection/licensing-guide-assets#/
Dynamics Blog	https://community.dynamics.com/b/msftdynamicsblog
Microsoft Volume Licensing	www.microsoft.com/licensing
Software Assurance	https://www.microsoft.com/en-us/Licensing/licensing-programs/software-assurance-default?rtc=1
Dynamics 365 Support	https://dynamics.microsoft.com/support/plans/
Partner Center	https://partnercenter.microsoft.com/pcv/dashboard/overview
Cloud Solution Provider Program (CSP)	https://mspartner.microsoft.com/Pages/solutions/cloud-reseller-overview.aspx

Appendix I: Change Log

Page	Topic	Change	Action	Date
13	Customer Service	Clarified	Customer Service Insights is included in Customer Service enterprise license.	October
14, 17, 26, 49	Gamification	Removed	Dynamics 365 Sales Gamification to be deprecated on October 1, 2021	
33	Intelligent Order Management	Clarified	Intelligent Order Management license also includes limited Power Automate use rights, such as 100K Power Platform requests per month.	
33	Marketing	Clarified	Marketing Contacts and Interactions definitions clarified.	
43	Dual use rights	Updated	VLSC and Microsoft Activation Center link removed and added Product activation and key information link.	
57	Trials	Updated	Human Resources and Guides trial links updated	
5	Attach licenses	Clarified	Base and attach licenses are identical in their core capabilities and are only differentiated in price.	September
15	Chat and Digital Messaging	Clarified	Power Virtual Agents sessions are granted once per tenant regardless of the number of user licenses.	
19	Guides	Added	Product feature list replaced with use rights table.	
24	Remote Assist	Added	Product feature list replaced with use rights table.	
34	Marketing	Removed	Marketing use rights table removed, as Marketing is licensed per tenant.	
37	Business Central	Clarified	Business Central Team Members application module, removed reference to per pre-approved application scenarios.	
40	Types of default capacity	Added	Power Virtual Agents clarification added	
40	Capacity Add-ons	Added	Dataverse add-on capacity added to Customer Insights, Intelligent Order Management, and Marketing	
10	e-Commerce and Commerce Scale Unit	Clarified	If you need Commerce Scale Unit – Cloud to support e-Commerce operations, you need to purchase the appropriate e-Commerce Tier license regardless of whether you need Dynamics 365 e-Commerce store front or not.	August
33	Intelligent Order Management	Added	New offer: Dynamics 365 Intelligent Order Management: 1K order lines/tenant/month	
34	Marketing	Added	• Dynamics 365 Marketing and Marketing Attach: Adding 100K Interactions and 1K SMS messages to default entitlements • New offers: Additional Interaction packs (Tiers 1-5) • Additional Contact packs: Interaction entitlements added	
41	Dataverse capacity	Clarified	Link added to additional Microsoft subscriptions beyond Dynamics 365 (such as Project Online) that grant Dataverse capacity entitlement	
59	Appendix H	Updated	Link to Dynamics CRM Online Licensing Guide	