

Dynamics 365 Contact Center

Licensing guidance

Summary

Dynamics 365 Contact Center provides customer engagement across digital and/or voice channels. You can license Contact Center Digital and Contact Center Voice on a per-user subscription basis as standalone subscriptions, packaged together, or packaged along with other Dynamics 365 plans. This document provides guidance on how you can purchase, deploy, and use Contact Center.

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Applicable products

This licensing guidance applies to the following products:

- Microsoft Dynamics 365 Contact Center Digital
- Microsoft Dynamics 365 Contact Center Voice
- Microsoft Dynamics 365 Contact Center

Licensing model: User-based subscription

Note: This section describes the licensing model and standard provisions for the applicable products, including the core licensing requirements and benefits associated with that model. Review the subsequent sections for provisions that are unique to the applicable products.

User Subscription Licenses

You can license the applicable products on a user subscription basis. Assign a separate User Subscription License to each user account that accesses or benefits from the product. [View related Product Terms]

If the product license includes access to any cloud-based applications, the user may access the applications from any device using the login credentials for their licensed account.

Any device-based provisions included with the User Subscription License—such as protecting, managing, or installing desktop client apps on the user's devices—may be applied to the licensed user's personal devices or devices provided by your organization. Such provisions are typically limited to five devices. Refer to the *Product-specific provisions* for any applicable exceptions or clarifications.

Licensing requirements and technical enforcement

You must appropriately license the use of a product regardless of technical enforcement. Some products check for a license before granting access or allow you to restrict access to licensed users via your admin portal. Others may not enforce this yet but could in the future. Ensure you are properly licensed regardless of what technical enforcement is currently available. For products that are enabled for all users by default and lack the ability to restrict access, license every user you intend to benefit from the product.

Multiplexing

You must properly license any user or device that directly or indirectly accesses, uses, or otherwise benefits from a product. Using hardware or software to pool connections, reroute or indirectly access information, and/or reduce the number of devices or users that directly access or use a product reduce the number of users or devices accessing or being managed by the product (often referred to as "multiplexing") does not reduce the number of licenses you need. For additional information, refer to the <u>Microsoft Multiplexing Overview</u>. [View related Product Terms]

Reassigning licenses

You can reassign a User Subscription License, but not within 90 days of its last assignment unless the user is absent (for example has left your organization or is on leave). Likewise, you can reassign a Device Subscription License, but not within 90 days of its last assignment unless the device is unavailable (for example, it's been taken out of service or is under repair). If you reassign a Subscription License within 90 days of the last assignment for any other reason, that reassignment must be for the remaining duration of the subscription term. When reassigning, block access and remove related software from the previous device or user's device(s). *[View related Product Terms]*

Outsourcing software management

All licenses permit you to run the software on servers dedicated to your organization's use and provide access to your licensed users or from your licensed devices. This includes dedicated servers in your own datacenter or hosted by an Authorized Outsourcer. (An Authorized Outsourcer is any outsourcer that is not a <u>Listed Provider</u> or using a Listed Provider as a datacenter provider.) With the Flexible Virtualization Benefit provided by subscription licenses and licenses with active Software Assurance, you can also run and access the software hosted on an Authorized Outsourcer's shared servers. [View related Product Terms]

You'll find more information in the <u>Outsourcing Software Management</u> and <u>Flexible Virtualization</u> <u>Benefit</u> licensing guidance.

Product-specific provisions

All the typical provisions described in the *Licensing model* section above apply to Dynamics 365 Contact Center. The additional provisions below also apply.

Dataverse, routing, and voice allotments

Dataverse allotments

When you subscribe to Dynamics 365 Contact Center (Digital + Voice), Contact Center Digital, or Contact Center Voice, you receive the following Dataverse storage allotments pooled at the tenant level:

- Database: 10 GB plus 250 MB for every Contact Center User Subscription License
- **File**: 20 GB plus 35 GB for every Contact Center (Digital + Voice) or Contact Center Voice User Subscription License and 2 GB for every Contact Center Digital User Subscription License
- Log: 2 GB for every Contact Center User Subscription License

For example, if you have 100 Contact Center Digital User Subscription Licenses, you receive 10 GB of Database storage plus an additional 25 GB (250 MB x 100 USLs) for a total of 35 GB of storage. If you need additional storage, you can purchase additional capacity licenses.

Record routing allotments

When you subscribe to Dynamics 365 Contact Center (Digital + Voice) or Contact Center Digital, you receive 50 record routes per month (excluding chats, calls, and text messages) pooled at the tenant level for every User Subscription License.

For example, if you have 100 Contact Center Digital User Subscription Licenses, you receive 5000 record routes per month for your tenant. Record routing allotments do not carry over to the following month. If you require additional routing allotments, you can purchase additional capacity via the Unified Routing add-on, which includes 10,000 record routes per month, or Microsoft Copilot Studio, which includes 25,000 messages per month.

Voice allotments

When you subscribe to a Dynamics 365 Contact Center (Digital + Voice) or Contact Center Voice, you receive the following monthly allotments pooled at the tenant level:

• Intelligent Voicebot: 2000 minutes per month for every Contact Center (Digital + Voice) or Contact Center Voice User Subscription License

• **Call Intelligence**: 6000 minutes per month for every Contact Center (Digital + Voice) or Contact Center Voice User Subscription License/month

For example, if you have 100 Contact Center Voice User Subscription Licenses, you receive 200,000 pooled Intelligent Voicebot minutes per month and 600,000 pooled Call Intelligence minutes per month. Minutes do not carry over to the following month. If you require additional minutes, you can purchase additional capacity in 500-minute increments.

External users

External users do not need licenses to use Dynamics 365 applications. <u>External users</u> are defined as non-employees, non-affiliate contractors working less than 30 hours per week, and those not regularly onsite. Limited access for external users is included with internal user licenses, but graphical interfaces like Business Central, Sales, Customer Service, and Field Service are restricted. You can license Power Pages for external access to business processes or data. Internal users include employees, contractors, vendors, and agents providing services on your behalf. External Accountant licenses in Dynamics 365 Business Central are not considered external users. Dynamics 365 cannot be used for outsourced business services such as managing third-party sales orders or payroll. However, internal users can use it for tasks like preparing financial statements for clients.

Restricted Dataverse tables requiring Dynamics 365 licenses

App makers, who are building custom apps can use all of the Microsoft Dataverse tables available within <u>Common Data Model</u> to create apps and flows for users who have any version of Power Apps and Power Automate license.

However, a smaller set of tables tied to Dynamics 365 apps (Dynamics 365 Sales, Customer Service, Field Service, Marketing, or Project Service Automation) require canvas and model-driven app users to have a license for the corresponding Dynamics 365 app if they need to create, update, or delete rows within the tables. These are referred to as restricted tables.

Tables may be restricted to a Dynamics 365 app license for the following reasons:

- The table is used to store and maintain product-specific configuration data that should typically not be used outside of the application.
- The table is accompanied by advanced logic that creates and maintains data in a specific way when used within a Dynamics 365 product.

If an app or flow only reads information from a table, a Dynamics 365 app license is not required and an appropriate Power Apps or Power Automate license is all that's needed. For more details and a list of restricted tables, see <u>Restricted tables requiring Dynamics 365</u> <u>licenses</u>.

Dual use rights

One of the notable advantages of Dynamics 365 is the provision of dual use rights. These rights permit the deployment of Dynamics applications within Microsoft's cloud environment or alternatively in a private on-premises or partner-hosted cloud. There may be scenarios where deploying across multiple environments concurrently is desirable. For example, this approach could facilitate the migration of a Dynamics 365 on-premises installation to Dynamics 365 while simultaneously managing private development/test deployments within Microsoft Azure.

Dual use rights ensure that users who are appropriately licensed do not require additional client access licenses (CALs) to access applications hosted in on-premises settings. Holders of Dynamics 365 licenses enjoy equivalent rights to a CAL for accessing corresponding on-premises workloads. Moreover, device use rights mirror the rights for cloud devices. Dynamics 365 licenses encompassed any server licenses that an on-premises deployment typically necessitates.

Access to the on-premises server software through dual use rights is restricted to users with an eligible Dynamics 365 license and external users. For further information, please refer to the relevant on-premises licensing guides. Details regarding the mapping of online user/device licenses to on-premises user/device CALs can be found in the <u>Dynamics 365 Dual Use Rights</u> section of 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 (or later)
- Dynamics CRM 2016 for Dynamics 365 (On-Premises) Server (or later)
- Dynamics 365 Business Central, on-premises server (current released version with downgrade rights of minus 2 versions)

Please 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 subscription 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. (if you have transitioned to From SA, those support incidents are no longer available for onpremises).
 - 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.

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. <u>Find more details about dual write.</u>

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 <u>restricted table requiring Dynamics 365 licenses</u>, 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.

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 <u>Power Platform Licensing Guide</u>.

Power Bl

Some Dynamics 365 applications may embed Power BI content within the user interfaces, such as the ability to view 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 this content. Dynamics 365 users are not provided with any standalone or general-purpose Power BI license or use rights. A Power BI Pro or Power BI Premium per user license is required to customize the content. See <u>Microsoft Power</u> <u>BI</u> for more information.

Custom tables and security roles

For applicable products, Dynamics 365 licenses also include the right to use custom tables and create custom security roles, as described in Appendix D and E of the <u>Dynamics 365 Licensing</u> <u>Guide</u>.

Product comparison

Visit the <u>Microsoft Dynamics 365 Contact Center pricing page</u> for a comparison of what you get with each subscription plan.

Subscription plan options

You can subscribe to Dynamics 365 Contact Center Digital and Contact Center Voice as standalone subscriptions, packaged together, or packaged along with other Dynamics 365 plans. The following subscriptions include Contact Center Digital and/or Voice:

- Dynamics 365 Contact Center Digital
- Dynamics 365 Contact Center Voice
- Dynamics 365 Contact Center (Digital + Voice)
- Dynamics 365 Contact Center Digital Add-on to Customer Service Enterprise
- Dynamics 365 Contact Center Voice Add-on to Customer Service Enterprise
- Dynamics 365 Contact Center (Digital + Voice) Add-on to Customer Service Enterprise
- Dynamics 365 Contact Customer Service Premium [includes Contact Center (Digital + Voice) and Customer Service Enterprise]

Purchasing your subscriptions

Where to buy

You can buy Dynamics 365 subscription licenses from a Microsoft partner or Microsoft Sales.

To learn more about these options, refer to the How to Buy guide.

License	Prerequisite licenses	Minimum quantity	Maximum quantity	
Dynamics 365 Contact Center Digital	None	None	None	
Dynamics 365 Contact Center Voice	None	None	None	
Dynamics 365 Contact Center (Digital + Voice)	None	None	None	
Dynamics 365 Contact Center Digital Add-on	Dynamics 365 Customer Service Enterprise	None	May not exceed the number of Customer Service Enterprise User Subscription Licenses	
Dynamics 365 Contact Center Voice Add-on	Dynamics 365 Customer Service Enterprise	None	May not exceed the number of Customer Service Enterprise User Subscription Licenses	
Dynamics 365 Contact Center (Digital + Voice) Add-on	Dynamics 365 Customer Service Enterprise	None	May not exceed the number of Customer Service Enterprise User Subscription Licenses	
Dynamics 365 Contact Customer Service Premium	None	None	None	

Prerequisite licenses and minimum/maximum quantities

Example scenarios

Scenario 1: A company, Contoso Ltd., wants to implement Dynamics 365 Contact Center to enhance their customer service operations. They need a mix of digital and voice channels for their 10 contact center agents, who are all currently licensed with D635 Customer Service Enterprise. 3 agents will need access to digital channels and 7 agents will need access to voice channels. Additionally, the new Team Lead, who is not currently licensed with Customer Service Enterprise, will need access to both digital and voice channels.

Scenario	Contact Center	Contact Center	Customer Service
	Digital Add-on	Voice Add-on	Premium
Scenario 1	3	7	1

Contoso Ltd. decides to license the 10 agents with the following setup:

- **3 agents** with the Contact Center Digital Add-on at \$75 per user/month (as they already have Customer Service Enterprise licensed).
- **7 agents** with the Contact Center Voice Add-on at \$75 per user/month (as they already have Customer Service Enterprise licensed).

Additionally, they opt for the Customer Service Premium for their new Team Lead (who has no current Dynamics 365 licenses):

• **1 team lead** with Dynamics 365 Customer Service Premium at \$195 per user/month.

Integration with other products

Dynamics 365 Contact Center is designed to offer the same functionality regardless of the CRM solution it is connected to. Customers can select from two service rep UX configuration options, depending on their needs/preferences: a) embedded on top of their CRM (e.g. Salesforce or a custom CRM), or b) standalone app running outside of their CRM, but still connected to CRM data. Dynamics 365 Customer Service users who also purchase Dynamics 365 Contact Center can access all features of both products from a single unified interface, without a need for additional integration.

An Azure Communication Services resource is required to use Contact Center Voice. Azure Communication Services provides pay-as-you-go pricing for PSTN, SMS, VOIP (for Direct Routing) and call recording. See here for more details: <u>Visit the Azure Communication Services pricing page for more details</u>.

Frequently asked questions

1. Will customers with Omnichannel licenses be able to renew as part of their existing agreement?

Existing customers with Omnichannel add-on licenses will be able to remain on those licenses until the end of their current enrollment. Customers may renew their Omnichannel licenses for one additional enrollment term, however at the customers' next renewal, we should try to transition them to the equivalent Dynamics 365 Contact Center add-ons or Dynamics 365 Customer Service Premium.

2. Is Copilot Studio included with Dynamics 365 Contact Center? Are there any usage limits?

Copilot Studio is not included in Dynamics 365 Contact Center. It is a separate, but complementary, product that customers can use to build external and internal facing agents tailored to their needs. It serves as the editing canvas for customizing self-service agents that can be deployed through Dynamics 365 Contact Center, across voice (IVR) and digital channels.

3. Voice Channel for Customer Service Enterprise used to include 1K Power Virtual Agents (PVA) sessions, however PVA sessions are no longer included in Dynamics 365 Contact Center Voice. How will existing PVA customers be impacted?

Existing PVA customers have the option to either stay with PVA sessions and not have access to Generative AI features or purchase Copilot Studio messages to enable Generative AI features. A tenant can have both the old Power Virtual Agents (chat sessions) and the new Microsoft Copilot Studio (messages) at the same time, but a single environment cannot have both. Generative AI-enabled conversations will be blocked in environments that have PVA sessions.

Appendix

Glossary

CCaaS – Contact Center as a Service provides contact center functionality on a subscription basis, like how Microsoft Teams offers Unified Communications as a Service (UCaaS). Providers manage the underlying infrastructure, maintenance, and updates, allowing organizations to focus on delivering exceptional customer experiences.

Transition guidance for legacy products

Existing customers with Dynamics 365 Omnichannel add-on licenses will be able to remain on those licenses until the end of their current enrollment. Customers may renew their Omnichannel licenses for one additional enrollment term, however at the customer's next renewal, they will need to transition to the equivalent Dynamics 365 Contact Center add-on or Dynamics 365 Customer Service Premium.

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