Microsoft Dynamics 365

Collapse All

Dynamics 365

Q: How is Dynamics 365 licensed?

Dynamics 365 simplifies the licensing of business applications. The primary licensing method is by named user subscription. The Dynamics 365 user subscriptions classify users into two types. One user type is a “full user” and the other is a "light user."

Full users are the users whose work requires use of the feature-rich business app’s functionality. Examples of full users are sales people, customer service representatives, finance employees, controllers, and supply chain managers. Such users have also been referred to in the past as “pro users” or “power users.” In the Dynamics 365 license model, full users are licensed with a Dynamics 365 application subscription.

Often, many users in an organization are considered light users. Light users may consume data or reports from line-of-business systems and complete light tasks like time/expense entry and human resources record updates. In the Dynamics 365 model, light users are licensed with the Dynamics 365 for Team Members subscription.

Q: What are Dynamics 365 application subscriptions?

Application subscriptions are named user subscriptions that license a user for core Business Applications (Sales, Customer Service, Field Service, Project Service Automation, Finance, Supply Chain Management, Retail, and Talent). Customers may purchase a single application as the Base license for a user. Users requiring multiple applications may purchase as many Attach licenses as needed at a reduced price. Each Attach license can only be assigned to a user with a qualifying prerequisite Base license.

Application subscriptions also include use rights to PowerApps for mobile app creation and use against Dynamics 365 data.

Q: How do the Dynamics 365 apps use AI?

AI capabilities in Dynamics 365 exclusively use Microsoft Azure services. We chose the Azure cloud because Azure services are built to Microsoft's Responsible AI standards and with the enterprise security, privacy, and compliance controls that our customers expect.

Dynamics 365 Customer Insights

Q: What is Dynamics 365 Customer Insights?

Dynamics 365 Customer Insights offering combines the standalone Dynamics 365 Customer Insights and Dynamics 365 Marketing apps into a single offering. While the name is unchanged, the new Customer Insights offering is expanded to include both the Customer Insights –

Journeys (formerly Dynamics 365 Marketing) and Customer Insights – Data (formerly the standalone Customer Insights) applications.

Q: Why are the Dynamics 365 Marketing and current Dynamics 365 Customer Insights apps being combined into one offering?

To provide the most value to users and empower them with the most personalized experiences, we're combining the power of a unified customer profile with the ability to orchestrate customer journeys in real-time, at every customer touchpoint, into one, simple, low-priced offering. The new, combined offering simplifies licensing to make it easier for customers to buy and use the applications as their business grows.

Q: What current certifications are in place for the new Customer Insights offering?

The current Exam MB-260: Microsoft Customer Data Platform Specialist and Exam MB-230: Microsoft Dynamics 365 Marketing Functional Consultant won't be combined at this time, but they're renamed to reflect the product changes.

Q: How many application installations can I have for either the Customer Insights - Journeys or Customer Insights - Data app?

Customer Insights includes rights to install both Customer Insights - Journeys (real-time journeys) and Customer Insights - Data applications in an unlimited number of production or sandbox Dataverse environments.

Q: Can you buy just the standalone Dynamics 365 Marketing product or Dynamics 365 Customer Insights product and not the other?

On September 1, 2023, only the new Customer Insights combined offering will be available for new customers.

Existing, standalone Dynamics 365 Marketing and/or Customers Insights customers have an opportunity to renew their existing licensing for one contractual cycle before transitioning to the new Customer Insights combined licensing. This renewal, however, must be contracted before September 1, 2025.

Q: What happens to customers who only have a Dynamics 365 Marketing or Dynamics 365 Customer Insights license or have licensed both applications?

After General Availability on September 1, 2023, existing customers can choose to remain and renew on the standalone licensing model for another contractual cycle. This renewal must be made during the transitional offer window that will run through September 1, 2025, with a final contract maturity date that can't extend beyond September 1, 2027. At the end of the renewed contractual period, customers will then need to transition to the new Customer Insights licensing.

Q: What is an interacted person?

An interacted person is any entity (such as a contact, lead, or Customer Insights - Data profile) engaged in an interaction. Entities that are stored, but not marketed to using Customer Insights - Journeys interactions don't count towards the interacted people quota. After an interaction (see below) is logged for a person. It doesn't matter how many interactions occur on that entity, it's counted once. After an interacted person hasn't received or engaged an interaction for 12 months, the entity becomes inactive and is no longer counted.

Q: What is an interaction?

An interaction is an outbound message orchestrated through Customer Insights - Journeys. Inbound interactions, such as form submissions, aren't counted. The interaction can be sent through out-of-box channels available in Customer Insights - Journeys (for example, email, SMS, or push notifications), other Microsoft channels (for example, ACS), or third-party systems integrated with Customer Insights - Journeys (for example, other text message (SMS) providers). Safe use limits allow 10x interactions per interacted person licensed. The exact system events counted against interactions in the interaction quota are EmailSent, EmailCcSent, SmsSent, PushNotificationSent, VoiceChannelSent, and CustomChannelSent.

Q: Which interacted people count against my quota?

Interacted people are licensed at the tenant level. Any entities across all Dataverse environments on a tenant where Customer Insights - Journeys orchestrates interactions count toward the total interacted people for the tenant. This applies to any environment, including production, sandbox, developer, or trial.

Q: Where can I see my quotas and quota usage?

You can calculate your paid quota based on your licenses, visible at admin.microsoft.com > Your Products. See the official pricing page for details about the quota granted with each offer. In Customer Insights - Journeys, see your usage by going to Settings > Overview > Quota limits. For Customer Insights - Data, your used quota is the total number of Customers across all instances on your tenant.

Q: What is my monthly interaction quota?

Your monthly interaction quota is 10 times the number of interacted people you buy, per month. For example, if you have 1 interacted person, you can interact with them 10 times per month. Or, if you have 10,000 interacted people, you can send 100,000 total interactions per month. We don't track interactions at the individual level, only total at the tenant level. If you need more than 10 interactions, increase the number of interacted people you buy to match your monthly volume. Plan for your peak month to make sure you have the right number of interacted people for your needs.

Q: How long is a person considered interacted?

When an entity (contact, lead, or Customer Insights - Data profile) is interacted with, it's counted as an interacted person and stays that way until it hasn't been interacted with for 12 months. Interacted person consumption is cumulative throughout the license period and even post license extension, subject to the 12-month rule mentioned above.

Q: Why can't I see my licenses in geos other than my home tenant geo?

To see your licenses in all geos, your tenant must be set up as a "multi-geo" tenant. Any employee in business applications or support can do this for you. To get help converting your tenant to multi-geo so licenses replicate across all geographies, contact your account manager. After June 14, 2024, this restriction is removed.

Q: Do I get the base quota for each application install?

No, the quota is at the tenant level. While each environment drives consumption, the total quota is counted and managed at the tenant level across all environments.

Q: One month of the year I send more than the 10x interactions per month allowed. What should I do?

Buy enough quota to cover the highest usage you expect in any month. The quota gives you the right scale and performance to support your highest volume.

Q: Why does usage on sandbox environments count against my entitlement?

The concept of sandbox and production environment types exists to support platform application lifecycle management features and doesn't intersect with any consumption usage metrics. Dynamics 365 Customer Insights, Dataverse add-ons, and other licenses are specified as tenant-level explicitly to capture usage across any and all environments of any and all types. Microsoft accrues the cost of database storage and transactions regardless of the environment type and therefore doesn't make any distinctions about usage by environment type with regard to entitlements. Entitlements are tenant-level, which is the sum of all usage at the tenant level, regardless of environment type.

Dynamics 365 Team Members

Q: What is the Dynamics 365 Team Members subscription license?

Team Members user licenses are intended for those who support multiple lines of business and are not tied to a specific business unit. Licensed users are granted read-only access to all Dynamics 365 data and basic Dynamics 365 capabilities for designated scenarios, such as expense entry or updating contacts.

Dynamics 365 Sales

Q: Can you step-up to D365 Sales Premium if you already have MRSS?

No. Customers with Microsoft Relationship Sales Solution (MRSS) subscription licenses cannot step-up to Dynamics 365 Sales Premium.

Microsoft Relationship Sales (MRS) is a distinct bundled offering that includes Dynamics 365 Sales Enterprise and LinkedIn Sales Navigator Advanced Plus. However, Dynamics 365 step-up licenses are only available for eligible software or online services editions within the same product family.

See the Dynamics 365 Licensing guidance and the Step Ups Licensing guidance for more information.

Dynamics 365 Business Central

Q: Is Dynamics 365 Business Central available in my country/region?

Business Central is available in a limited number of markets, but new countries/regions are added through Microsoft-led localization or through partner-led localization on a quarterly basis. Learn more at Country/Regional Availability and Supported Translations (available in English only).

Q: How do I get Business Central?

You can sign up for a free trial to explore Business Central. Visit Agentic CRM and ERP Solutions | Microsoft Dynamics 365 to start a free trial! If you want more time to explore, visit FAQ about using Business Central - Business Central | Microsoft Learn to learn how you can extend your trial period.

To help you get ready for doing business in Business Central, you can launch assisted setup guides, videos, or help articles for selected setup tasks. Learn more at Getting Ready for Doing Business.

When you're ready to buy Business Central, you can find a Business Central partner on the I'm looking for a solution provider page. Learn more at How do I find a reselling partner?

Q: Where do I go if I have questions?

If you have questions about Business Central that you can't find an answer for in this documentation, you can ask the Business Central community. Learn more at Dynamics 365 Business Central community forum.

From the community home page, you can also find links to our blogs where you can also find tips and tricks. Learn more at Microsoft Dynamics 365 Business Central on the Dynamics 365 blog and the older Dynamics 365 Business Central Blog.

Finally, you can contact your Business Central reselling partner. Learn more at the How do I get technical support? and How do I find a reselling partner? sections.

Q: Why can't I find that capability in my Business Central?

Did you read about a new capability in the release plan or on our blog recently? In that case, your Business Central might not have been upgraded to the latest version yet. You can check which version your Business Central is based on in the Help and Support page.

This applies to Business Central online and on-premises.

Also, if the capability is published as an extension in Marketplace, then there's a delay between the extension being announced and its availability in Marketplace. This applies to Business Central online only.

Q: Are there any differences between an on-premises deployment and Business Central online?

Yes. Business Central is optimized for online deployment, and some capabilities might run on premises only under certain circumstances, while others aren't supported at all. Learn more at Features not implemented in on-premises deployments of Dynamics 365 Business Central (available in English only).

Q: Can I get training in Business Central?

Yes, you can! You can find free eLearning content on the Microsoft training site. You can also ask your reselling partner for more training. If you don't know who that is, see the How do I find a reselling partner? section.

For more information about training across Dynamics 365 that is provided by Microsoft, see the Microsoft Dynamics 365 training page.

More content is provided by the Business Central community, such as the Microsoft Dynamics 365 Business Central Field Guide that is written by a partner.

Q: How do I get technical support for Business Central?

Business Central is sold through partners, and you should contact your reselling partner to get help with technical problems. If your Business Central partner then can't resolve the problem, they raise a support ticket with Microsoft.

Learn more at Help and Support and in the How do I find a reselling partner? section.

Q: Where is the save button?

There's no save button on pages like in other programs that you might be familiar with. In Business Central, changes that you make to a field are automatically saved as soon as you move to the next field or close the page, as long as there are no errors. When you make changes to a field and move to another field, you see the text Saving in the top-right corner of the page. It changes to Saved quickly if no errors occur. If an error occurs, the text changes to Not Saved.

Q: Where do I find that line number?

Documents such as sales order or purchase invoices consist of headers and lines. Each line has a number that Business Central uses to identify this particular line. As a result, you might see a warning or an error message that something is wrong in line number 1000, for example. In the default version of Business Central, line numbers are hidden. If you want to see the line numbers, you must personalize the current page and add the Line No. field. Learn more at Personalize Your Workspace.

Q: Why does Help describe functionality that I can't access?

If your Experience setting on the Company Information page is set to Essential, then UI elements for the Manufacturing and Service Management features aren't visible to you because they require the Premium experience. A text note is inserted in high-level help articles for these feature areas. Learn more at Change Which Features are Displayed.

Q: Why is new information not available in my language?

Microsoft Learn content about business functionality is published in several languages. The content is authored in English and published to URLs with en-us as the language code. When new information is published in English, it's then sent off for translation into the supported languages. This means that you'll not be able to read this new content in your own language for up to four weeks.

We understand the problems this can cause, and we encourage users to search for what they're looking for in English if they can't find it in their own language.

Q: What email address can I use with Business Central online?

Business Central online requires that you use a work, or school, email address to sign up. Business Central online doesn't support email addresses provided by consumer email services or telecommunication providers. This includes outlook.com, hotmail.com, gmail.com, and others.

If you try to sign up with a personal email address, you get a message indicating to use a work or school email address. Learn more at Troubleshooting Self-Service Sign-Up.

If you want to deploy Business Central on-premises, then you can use other authentication methods. Learn more at Deployment of Dynamics 365 Business Central.

Q: Do I have to buy Microsoft 365?

No. But if you want to experience Business Central as fully integrated with Microsoft 365, you can sign up for a 1-month free trial of Microsoft 365 by visiting https://products.office.com/try.

If you sign up with a non-Microsoft 365 work account (such as joe@mysolution.com), and you have a Microsoft 365 subscription, then you can associate your domain (mysolution.com) with the Microsoft 365 subscription. Learn more at What is a domain? in the Microsoft 365 content.

If you don't have a Microsoft 365 subscription, and you don't want to buy one, then we provision a new Microsoft Entra tenant for you when you sign up so that you have access to the advanced administration tools in the Azure portal.

Q: What is the integration with Microsoft 365 about?

Business Central online is fully integrated with Microsoft 365 so that you can navigate freely between Microsoft 365 apps and Business Central using the app launcher. In Business Central, you can open data in Excel, print reports using Word, and you can work with your Business Central data in Outlook, for example. Learn more at Use Business Central as your Business Inbox in Outlook.

Q: Can I extend my 30-day "New Company" trial period?

Yes. When the expiration date for your trial period is approaching, we display a notification to alert you when you sign in. The notification contains a link to the Extend Trial Period guide that you can use to extend your trial period. The extra 30 days start the moment you choose Extend Trial in the guide. You can extend the trial period one time yourself. After that, a Microsoft partner can extend it for another 30 days. Learn more at Extend Your Trial Version.

Note: It might take up to two business days to complete the trial extension process.

For more information about finding a partner, see How do I find a reselling partner?.

Q: What are the service level agreements for the cloud?

Business Central online is governed under the Modern Lifecycle Policy. The service level agreement terms are described in the document that you can download from the Service Level Agreements section on the Legal Information page.

Furthermore, as an administrator, you can monitor your tenant's health and specify upgrade windows in the Business Central Administration Center.

Databases are protected by automatic backups that are retained for 30 days. As an administrator, you cannot access or manage these backups because they are managed automatically by Microsoft. For more information about the underlying technology, see Automatic backups.

Q: How often does Business Central online get updated?

Business Central online is a service that consists of a Microsoft-maintained platform and business functionality. Many Microsoft partners provide extra business functionality, such as to address specific industry or localization needs. Both business functionality and service components are monitored continuously and updated as appropriate. You can always refer to the release plan for an overview of new and upcoming functionality. Learn more at Service Overview for Business Central Online (in English only) and New and Planned.

Q: Our administrator has moved me to another plan to give me another role, but I still see the same Home screen in Business Central?

It's a bit complicated, but it looks like your administrator didn't change your assigned role and assign user groups that match the new license. Essentially, your access to Business Central is determined by the type of plan (license) that you have - this sets permissions, your assigned role and your default Home screen. You can change your current role manually in My Settings.

But if you're moved to another plan, such as moving you from the Business plan to the Team Members plan, you might see the old Home screen because your permissions weren't changed.

Q: Can I cancel my subscription?

Yes, but depending on how you signed up to Business Central, your data can be deleted or preserved. Learn more at Canceling Business Central.

Q: Can I use multi-factor authentication?

Sure. If you do, you might need an app password in order to send email messages. App passwords give an app or a device access to your email account. The steps for getting an app password vary, depending on your email provider. Learn more at the help from your provider. For example, if you're using Outlook, see Multi-factor authentication for Microsoft 365.

Q: How do I find a reselling partner?

Business Central is sold and implemented through a global network of Dynamics 365 partners with industry expertise. Contact a partner for a detailed assessment, consulting services, and other services. Learn more at the Pricing section on the Dynamics 365 Business Central page on microsoft.com.

When you're ready to buy Business Central, you can find a Business Central partner on the I'm looking for a solution provider page. You can also find solutions and services from partners in Microsoft Marketplace.

If you want guidance from Microsoft, contact the Microsoft Sales team.

Your reselling partner will also handle technical support for you. Learn more at Resources for Help and Support.

Q: Is the Windows client supported?

The first releases of Business Central on premises included an installable client derived from Microsoft Dynamics NAV. Starting with 2019 release wave 2, this legacy component, referred to as "the Windows client," is no longer available for Business Central. Learn more at FAQ About the Windows Client and Business Central.