Microsoft

# Microsoft Dynamics 365, Enterprise edition

# Licensing Guide

May 2017

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# Using This Guide

Use this guide to improve your understanding of how to license Microsoft Dynamics 365. Microsoft Dynamics 365 evolves Microsoft's current CRM and ERP cloud solutions into one cloud service with new purpose-built applications to help manage specific business functions. Dynamics 365 applications are designed so they can be easily and independently deployed. A customer can start with what they need, yet the applications work together so, as the business demands, the customer can adopt additional capabilities with ease.

This document does not apply to Microsoft Dynamics NAV, Microsoft Dynamics GP, Microsoft Dynamics SL, Microsoft Dynamics AX 2012, or Microsoft Dynamics CRM 2016 or prior versions. This guide also does not apply to the Microsoft Dynamic CRM Online or Microsoft Dynamics AX online services. This guide is not intended to influence the choice of Microsoft Dynamics products and services. The examples presented in this guide are illustrative. Microsoft reserves the right to review or update this document at any time without notice.

Current online customers should refer to the applicable licensing guide for details on their entitlements and use rights, including benefits derived from Dynamics 365 licenses.

- Microsoft Dynamics CRM Online Licensing Guide
- Microsoft Dynamics AX Licensing Guide

This document applies for users licensed with Dynamics 365 licenses.

For help determining the right technology solution for any given organization, including the license requirements for a specific product or scenario, consult with your Microsoft account team or your Microsoft Dynamics Certified Partner.

This guide does not supersede or replace any of the legal documentation covering use rights.

# Introduction to Microsoft Dynamics 365

Microsoft Dynamics 365 is the next generation of intelligent business applications in the cloud. Dynamics 365 unifies CRM and ERP capabilities by delivering new purpose-built applications to help manage specific business functions, including Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, Dynamics 365 for Project Service Automation and Dynamics 365 for Operations. Designed to be personalized, enable greater productivity, deliver deeper insights and adapt to business needs, Dynamics 365 applications help businesses accelerate digital transformation to meet the changing needs of customers and capture the new business opportunities of tomorrow. Note that Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, and Dynamics 365 for Project Service Automation may also be referred to as Plan 1 Business Applications.

Dynamics 365 has two editions, Enterprise and Business editions. The Enterprise edition is optimized for 250+ employees and includes the capabilities of Dynamics CRM Online and Dynamics AX products that existed in market pre Q4CY16. The Business edition is optimized for 10-250 employees and includes Dynamics 365 for Financials at launch with future expected sales and marketing applications. This licensing guide will focus on the Enterprise edition. Please see here for the Business edition licensing guide.

# Subscription Licensing Requirements

## Internal and External Users

With Microsoft Dynamics 365, you must license each internal user who will access the service. However, access by external (third party) users is included with the subscription and does not require subscription licenses (SLs) External users are users that are not an employee, contractor, or agent of the customer or its affiliates.

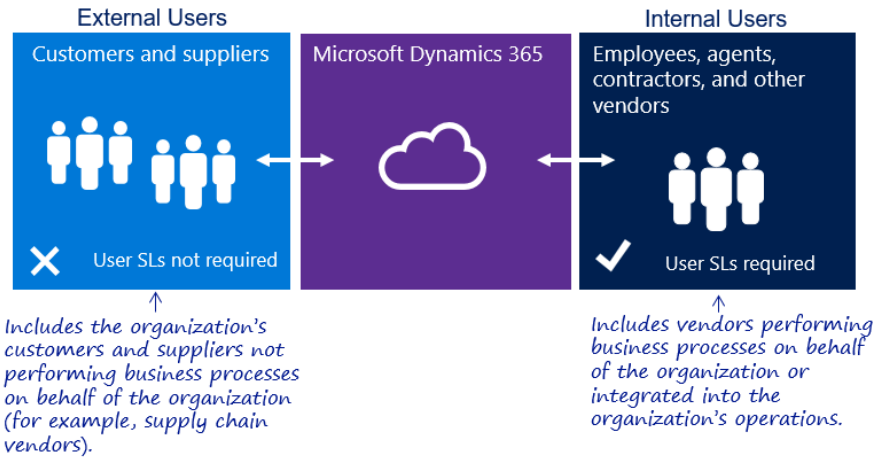
In other words, end customers (customers of the Microsoft Dynamics 365 customer) do not require a SL to access Microsoft Dynamics 365 unless these users are accessing Microsoft Dynamics 365 client applications and graphical user interface (GUI). However, end customers may not use Microsoft Dynamics 365 to manage any portions of their business. In this sense, the definition of external users does not extend to the customer or the customer's affiliate's contractors, vendors, or agents providing business processes on the customer's behalf.

Please note you may not use Microsoft Dynamics 365 to provide business process outsourcing services to your clients or customers.

Microsoft Social Engagement, a service included as part of select Dynamics 365 licenses, does not distinguish internal and external users. You must license external users as well as internal users who will accesses services with a Dynamics 365 license.

**Note:** Offsite vendors are considered external users only when their time is shared in between multiple customer organizations (for example, IT support service vendors serving multiple customer organizations) and they are not in an employee-like relationship.

Figure 1: Internal vs. external users




## Licensing Requirements for Internal Users

You may license access to Microsoft Dynamics 365 by purchasing a Subscription License (SL) for every internal user who directly or indirectly accesses the service.

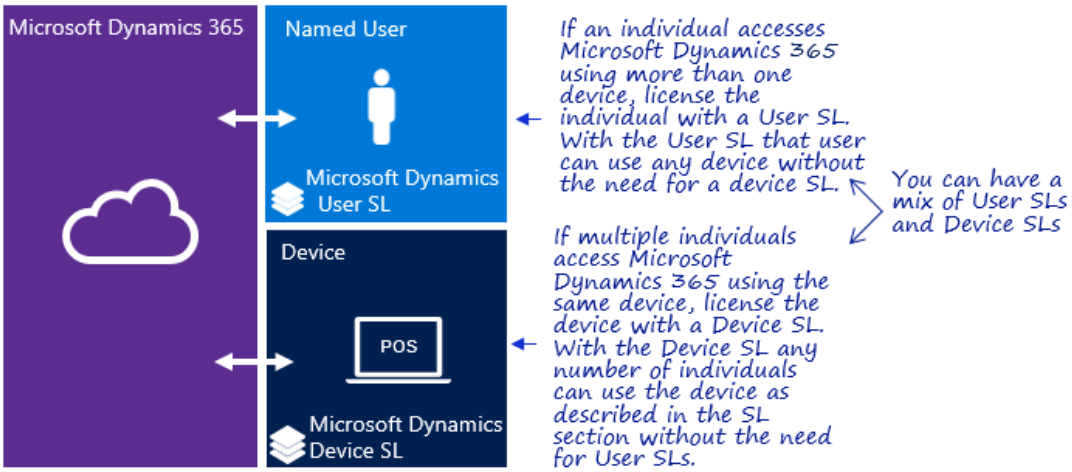
Dynamics 365, Enterprise edition has two types of SLs:

- User SLs are assigned on a "named user" basis, meaning each user requires a separate User SL; User SLs cannot be shared but an individual with a User SL may access the service through multiple devices.
- Device SLs are assigned to license a device. With the Plan 1 Business Application Device SL any number of users can use the licensed device with a shared login, such as 'truck1@contoso.com' without the need for separate User SLs. Individual users cannot be tracked as they all share one login. Plan 1 device licenses are full devices – they include the same rights as the equivalent user license. With the Dynamics 365 Operations Device SL any number of users can access a licensed device with individual logins without the need for separate User SLs. The Operations device is a limited license with a subset of Operations capabilities.

Only the user or the device requires a SL, not both. If the user of a device is licensed with a User SL, then the device does not need a Device SL. Likewise, if the device is licensed with a Device SL, then the user does not need a User SL.

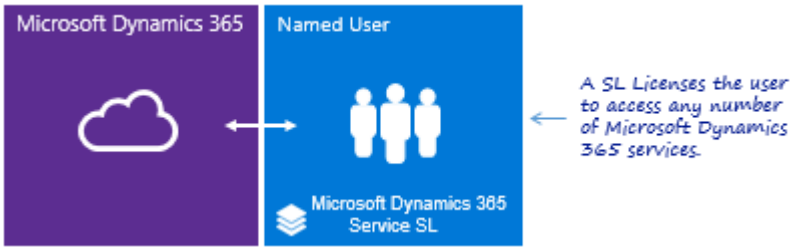
The User and Device SL grants users non-perpetual rights (with no buy-out rights) to the use of the Dynamics 365 service. As long as you are current on your subscription payments and adhere to the Product Terms and the Online Service Terms, you will have access to the most up-to-date version of Microsoft Dynamics 365.

Figure 2: Basic licensing requirements for Microsoft Dynamics 365




The subscription licenses include access rights to the default Microsoft Dynamics 365 instances included in the subscription account, and every additional Microsoft Dynamics 365 instance (production or non-production) associated with the same Azure AD tenant. For more information on Azure AD tenants, please see here.

Figure 3: Accessing multiple instances




## Multiplexing

Multiplexing refers to the use of hardware or software that a customer uses to pool connections, reroute information, or reduce the number of devices or users that directly access or use Microsoft Dynamics 365. Multiplexing does not reduce the number of SLs of any type required to access the Microsoft Dynamics 365 service. Any user or device that accesses Microsoft Dynamics 365 —whether directly or indirectly— must be properly licensed.

Microsoft Dynamics 365 SLs are required for users or devices that directly input, query, or view data from the Microsoft Dynamics 365 service. Similarity, Microsoft Dynamics 365 SLs are required for users or devices that input data into, query, or view data from Microsoft Dynamics 365 through a pooling device. Pooled connections use a non-interactive user account in Dynamics 365 that can access the system but only via the web service layer. Internal users and devices accessing Microsoft 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 if they are set up as a Dynamics 365 user in the service, for example:

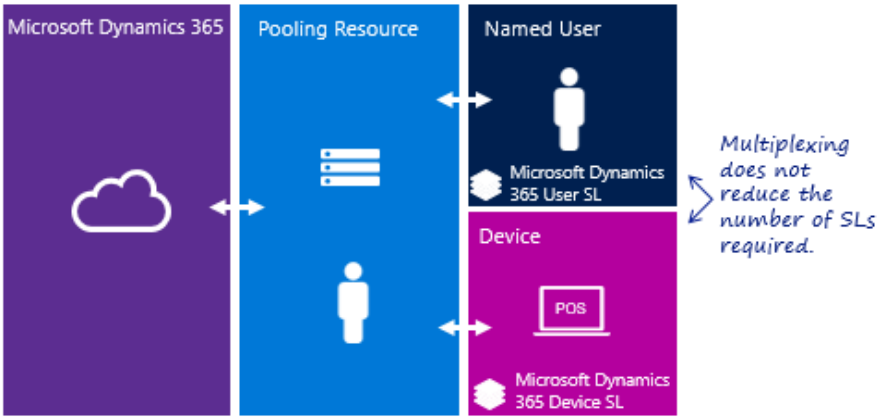
- Internal users and devices access Microsoft Dynamics 365 data indirectly through a PowerApp must still be properly licensed for Dynamics 365.
- Any user or device that accesses the service, files, data, or content provided by the service that is made available through an automated process requires a Microsoft Dynamics 365 SL.

- The number of tiers of hardware or software between the Microsoft Dynamics 365 and the user or devices that ultimately use its data, services, or functionality does not affect the number of SLs required.

For additional information about multiplexing refer to the Microsoft Volume Licensing Brief Multiplexing—Client Access License (CAL) Requirements.

**Note**: Licensed users may manually rekey information (when coming from non-licensed users) into the Dynamics 365 service. This scenario is not considered multiplexing.

Figure 4: Multiplexing



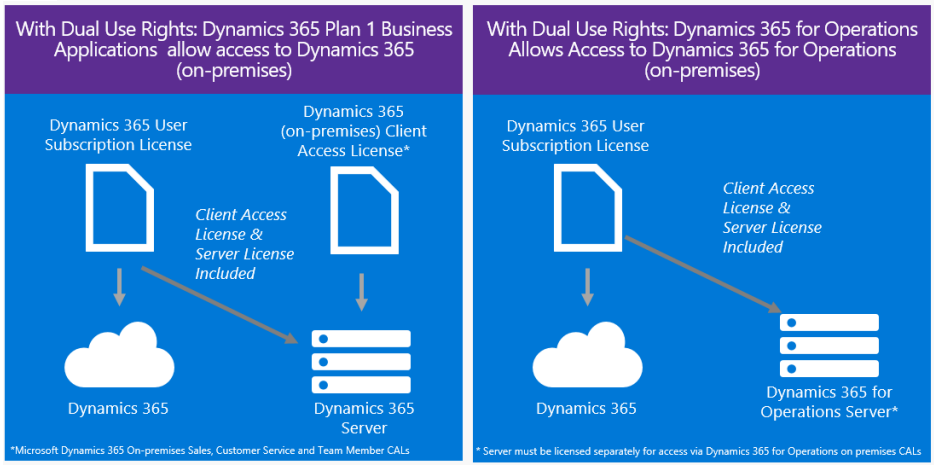

## Dual Use Rights

One of the advantages of Microsoft Dynamics 365 is dual use rights. This allows customers the option to deploy either in Microsoft's cloud or in a private on-premises or partner-hosted cloud. In some cases, customers may want to deploy both types of instances simultaneously. This might be done to help with migrating a Microsoft Dynamics 365 on-premises deployment to Microsoft Dynamics 365, running private Dev/Test deployments in Microsoft Azure. With Dual Use Rights, Microsoft Dynamics 365 users licensed with the required User SL do not need to acquire CALs to access Server instances.

Users or devices licensed with Dynamics 365 SLs have use rights equivalent to a CAL for the purpose of accessing equivalent on-premise workloads. With Microsoft Dynamics 365 the server license is included with the SLs. For Operations, this is the Dynamics 365 for Operations Server and for the Plan 1 Business Applications this is the Dynamics 365 Server. Customers may use downgrade rights to deploy an earlier version of a server, however, for Dynamics 365 for Operations Server, downgrade rights are limited to Dynamics AX 2012 R3 Server. Licenses for all supporting servers (e.g., Windows Server and CAL(s)) must be obtained separately.

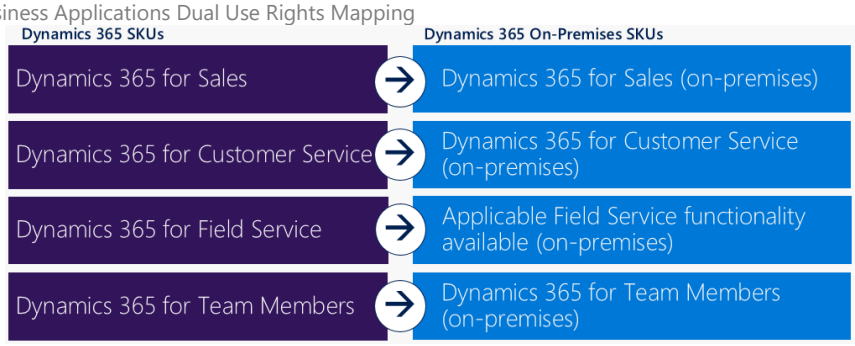
Users or devices licensed with Microsoft Dynamics 365 Plan 1 Business Application subscriptions, Microsoft Dynamics 365 On-premises Sales, Customer Service and Team Member CALs, and Microsoft Dynamics CRM CALs may access the Dynamics 365 Server software provided via dual use rights. Users or devices without Software Assurance on CALs may not access new versions of Microsoft Dynamics 365 On-premises Server. Access to the Dynamics 365 for Operations (on-premises) Server software provided via dual use rights is exclusive to those users assigned a qualifying Dynamics 365 SL and External Users.

Figure 5: Dual Use Rights



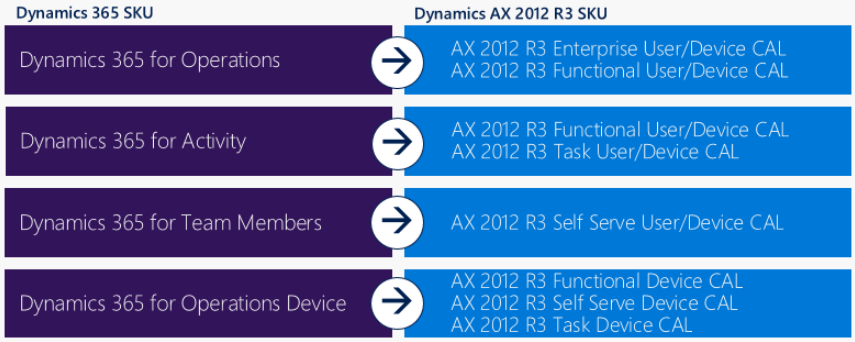

Plan 1 includes Dynamics 365 for Sales, Dynamics 365 for Customer Service and Dynamics 365 for Field Service** and the applicable dual use rights. Plan 2 includes all Plan 1 applications and the applicable dual use rights as well as Dynamics 365 for Operations and the applicable dual use rights.

Figure 6: Plan 1 Business Applications Dual Use Rights Mapping




+Field Service (On-Premises) is available for Dynamics 365 Plan 1 and Field Service customers through dual use rights

Figure 7: Operations Dual Use Rights Mapping




Dual Use Rights included with Dynamics 365 SLs are non-perpetual and will expire when the cloud subscription expires.

Microsoft Dynamics CALs have no reciprocal rights to access functionality provided exclusively to Microsoft Dynamics 365 User SLs, nor do Dual Use Rights imply equivalent capabilities between Microsoft Dynamics CALs and Microsoft Dynamics 365 SLs.

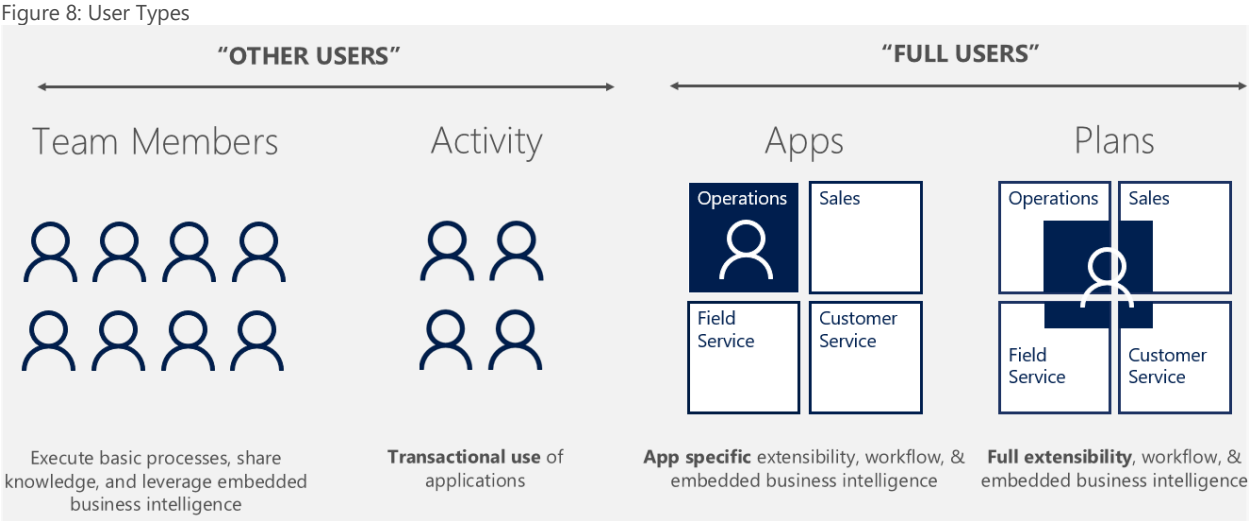
Customers who have purchased Dynamics 365 and are entitled to On-Premises software can obtain their software as follows. Volume Licensing: Volume Licensing Service Center (VLSC), Cloud Solution Provider

Program: PartnerSource, Microsoft Online Subscription Program: CustomerSource. Registration may be required.

# Microsoft Dynamics 365 Subscription License Types

Dynamics 365 simplifies licensing of business applications. The primary licensing is by named user subscription. The Dynamics 365 user subscriptions classify users into two types, "full users" and "other users".

Figure 8: User Types




**Full users** are the users whose work requires use of the feature rich business applications functionality. Examples of full users are sales people, customer service representatives, finance employees, controllers, supply chain managers, etc. These users have also been referred to in the past as Pro users or Power Users. These full users are licensed with a Dynamics 365 Plan, or Dynamics 365 application subscription.

**Other users** often represent a large percentage of users in an organization and may consume data or reports from line of business systems, complete light tasks like time/expense entry and HR record updates or be heavier users of the system, but not require full user capabilities. These other users are licensed with either Dynamics 365 for Team Members or Dynamics 365 for Operations Activity subscriptions.

There is also device licensing available for the Enterprise edition for shared device scenarios. See the Device Subscription License section for more information.

# Dynamics 365 for Team Members

The Dynamics 365 for Team Members subscription is a named user subscription designed for users who are not tied to a particular function, but who require basic Dynamics 365 functionality. This license includes read access as well as some write access for select light tasks across all Dynamics 365 applications for a given tenant. As a result, as more Dynamics 365 applications are adopted across an organization, any user previously licensed with Team Members subscription would be licensed already to access those additional applications.

The Team Members SL user may access Dynamics 365 data from Dynamics 365 for Operations and Dynamics 365 Plan 1 Applications. Note, at least one Dynamics 365 Plan 1 or Dynamics 365 for Operations user must be assigned to the tenant to administer and configure the service.

The Team Members SL grants a user full read access across all the Dynamics 365 Enterprise edition applications for a given tenant. In addition, the Team Members SL includes some limited use write access across Operations and Plan 1 Business Applications as defined below.

Dynamics 365 for Team Members, Enterprise edition also includes the "PowerApps for Dynamics 365 Applications" license. Team Members users can use PowerApps to access Dynamics 365 within the bounds of their Team Members license.

**Team Member use rights for Dynamics 365 for Operations**

The Team Members SL grants a user the following Dynamics 365 for Operations rights for their own use and not for, or on behalf of, other individuals:

(i) To record any type of time
(ii) To record any type of expenses
(iii) Manage personal information
(iv) Manage direct employee activities in Human Resources
(v) Create requisitions
(vi) Create or edit the items related to the following capabilities: quality control, service orders and departmental budgets
(vii) Approval of time, expense, invoices

**Team Member use rights for Dynamics 365 Plan 1 Applications**

The Team Members SL grants a user the following Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, or Dynamics 365 for Project Service Automation rights for their own use and not for, or on behalf of, other individuals:

(i) Write access to Accounts, Contacts, Activities, Tasks and notes
(ii) Record time and expense for Dynamics 365 for Project Service Automation, and apply for projects
(iii) Set up and manage the knowledgebase and Interactive Service Hub
(iv) Update personal information
(v) User Reporting and dashboards
(vi) Edit Custom Entities*
(vii) Participate as an end-consumer of Dynamics 365 services such as responding to surveys, or applying for projects

[4]Custom entities (either based on entities included in Dynamics 365 or created by a customer or partner) may require a higher CAL or USL, depending on the required access. Customizations can only be performed against entities included in the use rights.

Please review Appendix A for a more detailed list of the Team Members use rights.

# Dynamics 365 Enterprise Edition Applications

Application subscriptions are named user subscriptions where a user is licensed only for one individual application. This is largely how business applications have traditionally been licensed. Application subscriptions also include use rights to PowerApps for mobile app creation and use against Dynamics 365 data. Dynamics 365 will have the following Applications as part of the Enterprise edition: PowerApps, Dynamics 365 for Sales, Dynamics 365 for Field Service, Dynamics 365 for Customer Service, Dynamics 365 for Project Service Automation and Dynamics 365 for Operations.

## Microsoft PowerApps

PowerApps and Microsoft Flow capabilities are included in all the Dynamics 365 applications and Dynamics 365 for Team Members subscriptions so that users can create, modify and use mobile apps based on Dynamics 365 data. Dynamics 365 Business and Enterprise edition Plans include PowerApps P2, which provides users full create and run capabilities across data sources including the ability to model business data in the Common Data Model (CDM).

| | Dynamics 365 Team Members/Activity | Dynamics 365 Apps | Dynamics 365 Plans |
|---|---|---|---|
| Included PowerApps Plan | PowerApps for Dynamics 365 Team members and Activity | PowerApps for Dynamics 365 Apps | PowerApps Plan 2 |
| Service included | PowerApps & Flow | PowerApps & Flow | PowerApps & Flow |
| Service features | Create & run within the context of the Team Members and Activity use rights<br><br>Be monitored | Create & run within the context of the Dynamics 365 App use rights<br><br>Be monitored | Run any App or flow & build against any existing data source<br><br>Model business data and create customer entities using the Common Data Model (CDM)<br><br>Set policy and view usage |
| Include capacity | 2,000 flow runs/month | 2,000 flow runs/month | 15,000 flow runs/month<br>200 MB Data storage<br><br>20 GB File storage |

## Microsoft Dynamics 365 for Sales

For your sales team, Microsoft Dynamics 365 for Sales provides licensed users with access to core sales capabilities for a significantly lower price than comparable offerings from other vendors, including lead and opportunity management, product, price list, and order management, as well as sales group management functionality. Each Dynamics 365 for Sales User SL also includes rights to Unified Service Desk for Microsoft Dynamics 365, Microsoft Social Engagement, Voice of the Customer for Microsoft Dynamics 365, Dynamics 365 Mobile Offline, Dynamics 365 - Gamification, and Microsoft PowerApps capabilities. Additionally, this license includes rights to configure and administer the Dynamics 365 for Sales application.

For a detailed view of the use rights associated with Dynamics 365 for Sales please refer to Appendix B.

## Microsoft Dynamics 365 for Customer Service

Microsoft Dynamics 365 for Customer Service is the recommended choice for your customer support teams. It provides licensed users with access to core customer service capabilities for a significantly lower price than comparable offerings from other vendors, including Enterprise case management, Interactive Service Hub, Unified Service Desk for Microsoft Dynamics 365, SLAs and Entitlements, and other Service group management functionality. Each Dynamics 365 for Customer Service User SL also includes rights to Microsoft Social Engagement, Voice of the Customer for Microsoft Dynamics 365, Dynamics 365 Mobile Offline, Microsoft Dynamics 365 - Dynamics 365 - Gamification, and Microsoft PowerApps capabilities. Additionally, this license includes rights to configure and administer the Dynamics 365 for Customer Service application.

For a detailed view of the use rights associated with Dynamics 365 for Customer Service please refer to Appendix B.

## Microsoft Dynamics 365 for Field Service

Microsoft Dynamics 365 for Field Service is the recommended choice for your field-based service teams, leveraging tight integration between Dynamics 365 for Customer Service case management capabilities and field service work orders to deliver business process driven, best in class field service management. It provides licensed users with access to field service capabilities including work order management, schedule, dispatch, and routing capabilities, repairs and returns management, and inventory management. Each Dynamics 365 for Field Service User SL also includes rights to Microsoft Social Engagement, Voice of the Customer for Microsoft Dynamics 365, Dynamics 365 Mobile Offline, Dynamics 365 - Gamification, and Microsoft PowerApps capabilities. Additionally, this license includes rights to configure and administer the Dynamics 365 for Field Service application.

This User SL also includes the Field Service Mobile Application, a Microsoft application that is specifically designed for Dynamics 365 for Field Service, distinct from the Dynamics CRM Mobile Client Application. This application is technically limited to only Field Service entities and a maximum of 10 custom entities.

For a detailed view of the use rights associated with Dynamics 365 for Field Service please refer to Appendix B.

## Microsoft Dynamics 365 for Project Service Automation

Microsoft Dynamics 365 for Project Service Automation is designed for professionals who manage projects and the associated customer engagement process end-to-end. This provides licensed users with capabilities required for setting up a project organization, engaging with customers, project scheduling and costing, managing and approving time and expense, and closing projects. Each Dynamics 365 for Project Service Automation Service User SL also includes rights to Microsoft Social Engagement, Voice of the Customer, Dynamics 365 Mobile Offline, Dynamics 365 - Gamification, and Microsoft PowerApps capabilities. Additionally, this license includes rights to configure and administer the Dynamics 365 for Project Service Automation application.

This User SL also includes the Microsoft Project Online Premium license. The details for this license can be found on the Microsoft Project Online website.

For a detailed view of the use rights associated with Dynamics 365 for Project Service Automation please refer to Appendix B.

**Note:** The SharePoint that comes with Project Online plans is a use rights restricted version that only allows SharePoint usage within the scope of Project Online. Please see the Service Description for additional details.

# User SL Comparison Dynamics 365 for Sales, Customer Service, Field Service, and Project Service Automation

The following provides a high-level summary of the use rights associated with each of the five User SL levels. For a detailed comparison, refer to Appendix B.

| | Team Members | Sales | Customer Service | Field Service | Project Service Automation | Plan 1 |
|---|---|---|---|---|---|---|
| All Dynamics 365 Enterprise edition Data | ○ | ○ | ○ | ○ | ○ | ○ |
| Dynamics 365 for Operations functionality: Record Time & Expense; create requisitions; manage budgets; approval of Operations time, expense & invoices; edit & respond to inquiries for: quality control, service orders | ● | ● | ● | ● | ● | ● |
| Accounts and Contacts, Activities & Notes | ● | ● | ● | ● | ● | ● |
| Knowledge Management, Interactive Service Hub | ● | ● | ● | ● | ● | ● |
| Record Time & Expense, Manage personal information, Apply for projects | ● | ● | ● | ● | ● | ● |
| Custom entities | ●[1] | ●[1] | ●[1] | ●[1] | ●[1] | ●[1] |
| Dual Use Rights for equivalent Dynamics 365 CAL (if exists) | ● | ● | ● | ● | ● | ● |
| Run workflows & On-demand processes | ●[2] | ●[2] | ●[2] | ●[2] | ●[2] | ● |
| Microsoft Project Online Essentials, Gamification Fan & Spectator rights | ● | ● | ● | ● | ● | ● |
| Portal Only: Self-Serve Case Submission & Chat initiation as supportee (not agent) | ●[3] | ●[3] | ●[3] | ●[3] | ●[3] | ●[3] |
| Portal Only, Non-Employee Only: Update Work Orders, Create & Update Opportunities | ●[3] | ●[3] | ●[3] | ●[3] | ●[3] | ●[3] |
| User reports, dashboards, and charts | ● | ● | ● | ● | ● | ● |
| Configure System reports, system charts, system dashboards | × | ○ | ○ | ○ | ○ | ● |
| Leads, Opportunities, goals, contracts, quotes, orders, invoices, competitors | ○ | ● | ○ | ○ | ○ | ● |
| Sales Campaigns, quick campaigns, marketing lists, prices lists, product lists | ○ | ● | ○ | ○ | ○ | ● |
| Unified Service Desk | ○ | ● | ● | ○ | ○ | ● |
| Full Case Management, Services, resources, work hours, facility, equipment, articles | ○ | ○ | ● | ○ | ○ | ● |
| Work Orders, Schedule & Dispatch with Schedule Board, Service Agreements, Field Service Invoices & Purchase Orders, Customer Assets, Inventory, Repairs & Returns | ○ | ○ | ○ | ● | ○ | ● |
| Projects, Project Expenses & Estimates, Resource Availability View & Schedule Management, Project Price Lists/Contracts/Invoices, Approve Project Transactions, Microsoft Project Online Premium | ○ | ○ | ○ | ○ | ● | ● |
| PowerApps | ○[4] | ○[4] | ○[4] | ○[4] | ○[4] | ● |
| Microsoft Social Engagement, Voice of Customer, Mobile Offline, Gamification Player & Admin | × | ● | ● | ● | ● | ● |
| Create workflows, bulk data import, and customizations across entities included in Application | × | ○ | ○ | ○ | ○ | ● |

● Full Access Rights ○ READ only/Limited access rights ✖ No access rights

[1]Custom entities (either based on entities included in CRM or created by a customer or partner) may require a higher CAL or USL, depending on the required access. Customizations can only be performed against entities included in the use rights.
[2]Creating, updating and deleting via workflows can only be performed against entities included in the use rights (i.e. update an opportunity requires Sales or Plan 1).
[3]No Access to Dynamics 365 User Interface. Case Management and Chat can only be submitted on users' own behalf, as a supportee, not on behalf of a customer or other individual.
[4]Creation of PowerApps can only leverage data included within the individual application.

## Microsoft Dynamics 365 for Operations

The Microsoft Dynamics 365 for Operations applications includes full read, edit and approval access across the entire ERP solution (formerly known as Microsoft Dynamics AX) plus Microsoft PowerApps capabilities.

Please note there is a minimum of 20 Microsoft Dynamics 365 for Operations or Plan 2 User SLs and/or equivalent Microsoft Dynamics 365 for Operations Device SLs per tenant. It takes 2.5 Device SLs to equal 1 Dynamics 365 for Operations User SL. For example, a customer could meet the minimum requirement with 10 Dynamics 365 for Operations User SLs and 25 Dynamics 365 for Operations Device SLs. The Microsoft Cloud Solution Provider (CSP) program does not allow for the device equivalent. The CSP minimum is 20 Dynamics 365 for Operations User SLs.

Please review Appendix C for a list of the out of the box Dynamics 365 for Operations roles and their associated user types. For a description of how to create custom roles for Dynamics 365 for Operations and how to license them please refer to Appendix D.

# Dynamics 365 for Operations Activity

The Dynamics 365 for Operations Activity subscription is a named user subscription intended for users who may be heavy users of the application, but do not require the use rights of a full user. Dynamics 365 for Operations Activity use rights include all Team Member user rights as well as the right to:

(i) To approve all Activity related transactions
(ii) Create or edit the items related to warehousing, receiving, shipping, orders, vendor maintenance, and all budgets
(iii) Operate a POS device, store manager device, shop floor device, or warehouse device.

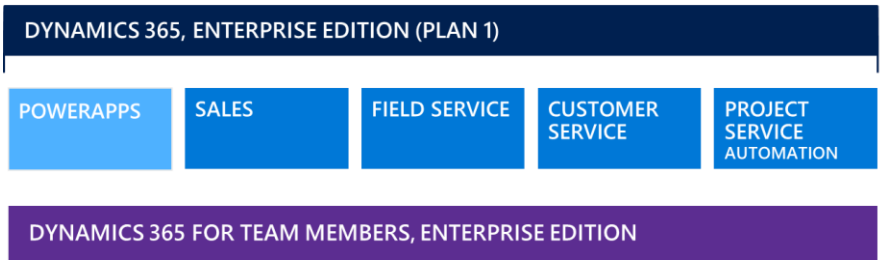
Please review Appendix C for a list of the out of the box Dynamics 365 for Operations roles and their associated user types.

# Dynamics 365 Plans

Plan subscriptions are new with Dynamics 365. With one single user subscription, a Plan subscription is the most cost-effective option to provide ultimate flexibility for a user to have access to any Dynamics 365 functionality to get their job done. Plan subscriptions provide users rights to use functionality across any of the respective Plan applications as well as use of Microsoft PowerApps, the mobile application platform service.

## Enterprise Edition Plan 1

Plan 1 gives you the flexibility to work with any application functionality. Plan 1 includes flexibility to use Dynamics 365 for Sales, Dynamics 365 for Field Service, Dynamics 365 for Customer Service, Dynamics 365 for Project Service Automation, and full PowerApps P2. Licensing becomes simpler because all Plan 1 business application rights are included.




### Enterprise Edition Plan 2

Plan 2 includes access to Plan 1 functionality plus Dynamics 365 for Operations.

# Custom Entities

Microsoft Dynamics 365 for Team Members and higher provide the right to use custom entities. Custom entities may only be created or replicated by a partner or user licensed for full Application or Enterprise Plan use. Rights to create or replicate new custom entities are not included with Team Members and Operations Activity licenses. Custom entities may be based on entities included in Dynamics 365, or created by a customer or partner. If the custom entity is based on or replicates the functionality of entities included in Microsoft Dynamics 365, or if the entity links to entities included in Microsoft Dynamics 365, then users accessing the custom entity must also be licensed to access the included or replicated entity. For example, users creating an entity that replicates the cases entity for a ticketing system would still require the user to be licensed for cases. In other words, customizations may only be performed against entities users are licensed to access.

# Additional Services and Software

Microsoft offers additional services and software that work in tandem with Microsoft Dynamics 365, including Microsoft Social Engagement, Voice of the Customer for Microsoft Dynamics 365, Microsoft Dynamics 365 - Gamification, Interactive Service Hub, Dynamics 365 Mobile Offline, and Unified Service Desk for Microsoft Dynamics 365.

## Microsoft Social Engagement

**Microsoft Social Engagement** provides volume and sentiment analysis of social networking data and is recommended for sales, marketing and customer service workers interested in social media discussion of their products, competitors and industry.

All Microsoft Social Engagement functionality is included with Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, and Dynamics 365 for Project Service Automation applications.

| Functionality Included with Select Dynamics 365 Applications | |
|---|---|
| Social listening | Social insights |
| Social analytics | Social Center: unlimited streams |
| Activity map | Social Center: sharing streams |
| Trends & posts alerts | Social Center: assign posts to users |
| Private messages | Link2CRM |
| Export widgets to Excel | Automation rules |
| Azure Event Hub integration* | Intention analysis |

*Note: Azure Event Hub functionality requires Azure subscription

## Unified Service Desk for Microsoft Dynamics 365

**Unified Service Desk for Microsoft Dynamics 365** (USD) consolidates numerous communication channels (such as phone, chat, email, and social media) and relevant services into a single interface to enable greater efficiency and productivity.

USD installation rights are included with Dynamics 365 for Sales and Dynamics 365 for Customer Service SLs. USD is not available as a standalone license.

USD software is installed and run locally on the user's device. The use rights expire upon expiration of the qualifying User SL subscription term or Software Assurance subscription. Only licensed users may use the software.

## Interactive Service Hub

**Interactive Service Hub** provides a modern and intuitive end user experience for Customer Service and knowledge management roles through an online user experience (UX) design. It unifies customer interactions and pulls together all related information, enabling customers to be productive and view what's most relevant at all times. The interactive service hub includes a multi-stream dashboard where users can view and act on their workload across multiple data streams as well as a single-stream dashboard where users are provided an aggregate view of the workloads.

Interactive Service Hub is licensed with Microsoft Dynamics 365 for Team Members and higher User SLs and Microsoft Dynamics CRM Server 2016 or later for Team Members CALs.

## Voice of the Customer for Microsoft Dynamics 365

**Voice of the Customer** for Microsoft Dynamics 365 provides general sentiment, contextual feedback, and transactional understanding based on insight captured through feedback and surveys. Customer feedback is captured and leveraged to shape engagements with easy to use, mobile and touch-enabled tools. Feedback is analyzed as part of a single customer record, enabling a direct response to a specific customer concern, or as a whole, so that organizations can better understand their market and programmatically respond to customer needs.

Full Voice of the Customer capabilities are licensed with Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service and Dynamics 365 for Project Service Automation, or Enterprise Plan license.

Voice of Customer capabilities are limited to a maximum of 200 concurrent surveys. Additional limitations can be found here.

## Dynamics 365 Mobile Offline

**Dynamics 365 Mobile Offline capabilities** enable offline entities, provides auto-reply for offline actions, a strong security model and offline views and offline search.

Dynamics 365 Mobile offline sync is licensed with Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service and Dynamics 365 for Project Service Automation, or Enterprise Plan license.

## Dynamics 365 - Gamification

The Dynamics 365 - Gamification service allows customers to incent their workers by turning work into play via individual and team contests, as well as engaging the broader organization by enabling them to build fantasy team competitions.

Microsoft Dynamics 365 - Gamification Commissioner, Game Manager and Player rights are licensed with Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service and Dynamics 365 for Project Service Automation, or Enterprise Plan license. Fan and Spectator rights are licensed with Dynamics 365 for Team Members.

| Role | Use Rights | Included in Team Members | Included in Select Apps |
|---|---|---|---|
| Spectator | View Results on Leaderboards (web, mobile, and TV screens) & chat with participants | ✓ | ✓ |
| Fan | Draft personal Fantasy Teams & Earn points, badges & trophies on team results | ✓ | ✓ |
| Player | Play/Compete in Game (earn points, badges, and trophies) & participate in Chat | | ✓ |
| Game Manager | Setup Games: Define game model, metrics, positions, & prizes | | ✓ |
| Commissioner | Oversee Games: Admin, role management | | ✓ |

# Device Subscription License

## Microsoft Dynamics 365 for Sales Device SL

With the Dynamics 365 for Sales device license, multiple users can access the Dynamics 365 for Sales application through a shared device login. The use rights are equal to the that of the Dynamics 365 for Sales User SL, except that access is limited to only the licensed device. Please note there is no Dynamics 365 Enterprise Plan 1 device license. For a detailed view of the use rights associated with Dynamics 365 for Sales device please refer to Appendix B.

## Microsoft Dynamics 365 for Customer Service Device SL

With the Dynamics 365 for Customer Service device license, multiple users can access the Dynamics 365 for Customer Service application through a shared device login. The use rights are equal to the that of the Dynamics 365 for Customer Service User SL, except that access is limited to only the licensed device. Please note there is no Dynamics 365 Enterprise Plan 1 device license. For a detailed view of the use rights associated with Dynamics 365 for Customer Service device please refer to Appendix B.

## Microsoft Dynamics 365 for Field Service Device SL

With the Dynamics 365 for Field Service device license, multiple users can access the Dynamics 365 for Field Service application through a shared device login. The use rights are equal to the that of the Dynamics 365 for Field Service User SL, except that access is limited to only the licensed device. Please note there is no Dynamics 365 Enterprise Plan 1 device license. For a detailed view of the use rights associated with Dynamics 365 for Field Service device please refer to Appendix B.

## Microsoft Dynamics 365 for Operations Device SL

With the Dynamics 365 for Operations device license multiple users can access through a device to operate a point of sale device, shop floor device, warehouse device or store manager device.

- "Point of Sale Device" means one device located in the Commerce location, used by any individual, for completing customer facing sales of goods or services transactions.
- "Warehouse Device" means one device dedicated to Performing Warehousing Functions, and that may not be used for any other purposes.
- "Shop Floor Device" means one device dedicated to performing manufacturing shop-floor functions and that device may not be used for other purposes.
- "Shop floor functions" means 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, and viewing worker holiday balances.
- "Performing warehousing functions" means receiving, putting-away, doing internal stock transfers, picking, packing, capturing product attributes, and shipping goods plus performing inventory count checks in the context of a warehouse management system and 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).
- "Commerce Location" or "Store" means a physical location (static or itinerant) operated by you when closing goods or services transactions with customers.
- "Store Manager Device" means one device located in the Commerce Location, used by any individual, dedicated to performing the following tasks solely for that Commerce Location (i) managing and replenishing inventory, (ii) balancing cash registers and processing daily receipts, (iii) configuring and maintaining menu options displayed by the ISV Devices, (iv) purchasing supplies and services required to run the Commerce Location operations, (v) managing Commerce Location staff, (vi) processing reports required to analyze and manage Commerce Location results, and (vii) managing master data related to Commerce Location operations.

Note: Dynamics 365 for Operations Device SL use rights are also available to Dynamics 365 for Operations Activity users. When multiple users who only require these use rights work exclusively on shared devices, it will generally be more cost effective to license those devices with the device SL. When a single user utilizes one or more dedicated personal devices, it will be more cost effective to license that user with an Activity USL.

## Default Subscription Capacities

Dynamics 365 will come with many great default features. We want to start by giving you a run through of what will come standard when you start a subscription for either the Plan 1 Business Apps, or the Dynamics 365 for Operations App. We have broken this default section down into all Plan 1 Business

Apps, Dynamics 365 for Sales, Dynamics 365 for Field Service, Dynamics 365 for Customer Service, and Dynamics 365 for Project Service Automation, which will leverage the same tenant and infrastructure will accrue across this one tenant. Dynamics 365 for Operations leverages an entirely different tenant and will have its own set of default capabilities.

## Plan 1 Business Applications

The following Plan 1 Business application subscriptions share the same tenant and share infrastructure capacity: Dynamics 365 for Sales, Dynamics 365 for Field Service, Dynamics 365 for Customer Service, and Dynamics 365 for Project Service Automation. They will have access to the following shared Plan 1 Business Application default subscription capacities. If a customer purchases Plan 2 they will obtain default access to both the Plan 1 Business Applications and the Dynamics 365 for Operations App.

### Default Production Instance

The Plan 1 Business Application subscriptions offer one production instance per tenant, shared across all Plan 1 Business Applications.

### Default Non-Production Instance Capacity

The Plan 1 Business Application subscriptions offer one non-production instance per tenant, shared across all Plan 1 Business Applications.

### Default Microsoft Dynamics 365 Portal

**The Dynamics 365 Portal** provides you the capability to extend your Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, or Dynamics 365 for Project Service Automation scenarios into cloud hosted web portals, each of which is easily configurable for your employees, partners and customers.

One portal is included with any Dynamics 365 Plan 1 Business Application subscription, per tenant, shared across all Plan 1 Business Applications. A Plan 1 Business Application subscription is required to administer and configure the portal. Each Portal may only be associated with one instance.

Internal users indirectly accessing Microsoft Dynamics 365 application data via a portal are required to have the appropriate Microsoft Dynamics 365 license.

The Microsoft Dynamics 365 Portal includes the following capacity for each portal, with additional capacity available for purchase as a subscription add-on to Microsoft Dynamics 365 Plan 1 Business Application subscriptions. Unused capacity expires at the end of the month and does not roll over to the next month.

| Subscription Capacity – Per Portal | Included Capacity | Additional Increment |
|---|---|---|
| **Page views:**<br>Access/utilization of the Dynamics 365 Portal | 1 million/month | 500,000/month |

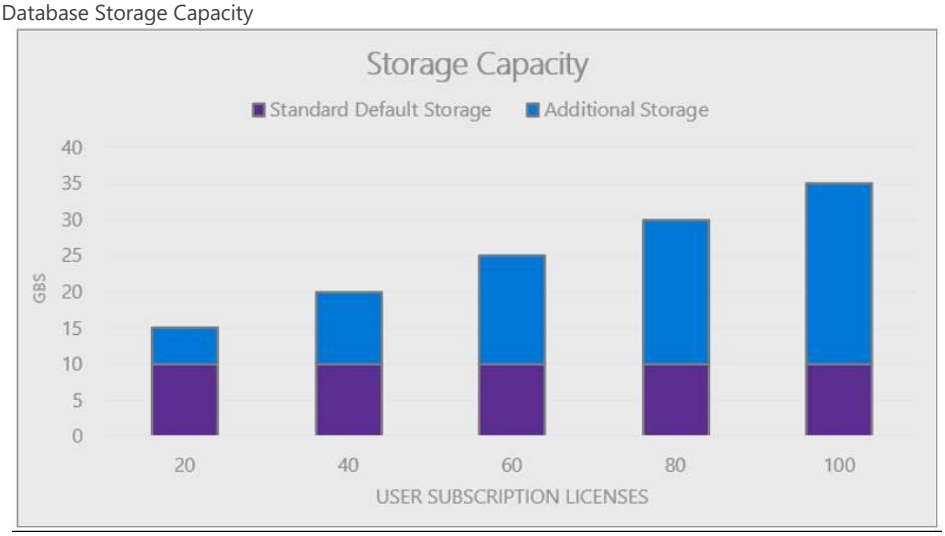
### Default Database Storage

The tenant for Plan 1 Business Application subscriptions includes by default 10 GB database storage as long at least one instance of the tenant is on v8.2. Additional storage capacity is granted at no charge as an organization increases the number of full users and is accrued at the rate of 5GB for every 20 full users. Full users have a Dynamics 365 for Sales, Dynamics 365 for

Customer Service, Dynamics 365 for Field Service, Dynamics 365 for Project Service Automation, or Enterprise Plan license. For example, for every increment of 20 Dynamics 365 for Sales SLs, the included storage capacity increases by 5 GB. So, a customer with 20 Dynamics 365 for Sales SLs receives a default storage of 15 GB. The cap on the amount of free storage that may be earned is subject to the technical limit of 30 TB.

The Plan 1 applications storage and the Dynamics 365 for Operations storage are not shared.

Figure 9: Database Storage Capacity




## Microsoft Social Engagement Capacity in Dynamics 365 Enterprise Plan 1

The Microsoft Social Engagement service included with Plan 1 Business Application subscriptions includes 10,000 social posts per month, per tenant. Unused posts expire at the end of the month and do not roll over to the next month. Additional capacity is available for purchase as a subscription add-on to the Microsoft Plan 1 Business Application subscriptions in increments of 10,000, 100,000 and 1 million additional posts per month.

## Dynamics 365 for Operations Application

The Dynamics 365 for Operations app will have access to the following default subscription capacities that are only associated the Operations tenant. If a customer purchases Plan 2 they will obtain default access to both the Plan 1 Business Applications and the Dynamics 365 for Operations App.

## Default Production Instance

Each Dynamics 365 for Operations subscription offers one production instance per tenant. The production instance comes with disaster recovery and high availability. As a reminder, there is a minimum of 20 Dynamics 365 for Operations User SLs and/or equivalent Device SL per tenant. It takes 2.5 Device SLs to equal 1 Dynamics 365 for Operations User SL. Also, the production instance is monitored 24 X 7 for service health. To ensure the environment is used for live operations, we will provision the production instance only after the implementation nears the 'operate' phase after

completion of the required activities in the Microsoft Dynamics Lifecycle Services (LCS) methodology.

## Default Non-Production Instance Capacity

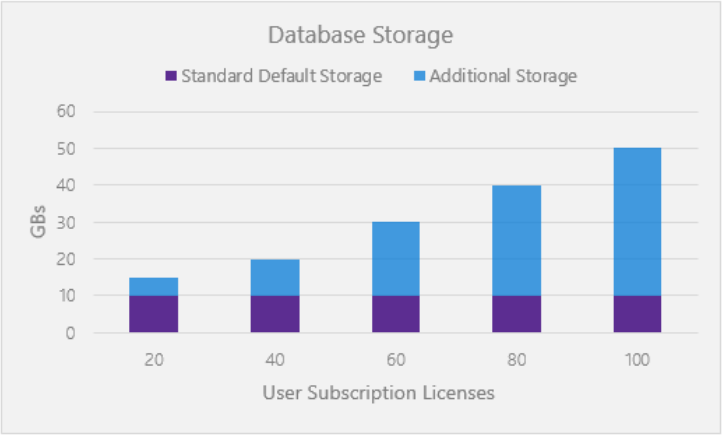
The Dynamics 365 for Operations application will come with one Sandbox Tier 1 and one Sandbox Tier 2 environment per customer. Additional non-production instances can be purchased. See

- Sandbox Tier 1: Developer Instance is provided for the life of the tenant. Additional Developer Instances can be purchased separately as an optional add-on. This is a non-production single box instance that customers can use to customize Dynamics 365 for Operations and unit test their changes. The Non-Production Developer Instance add-on license does not include any incremental default storage capacity.
- Sandbox Tier 2: Standard Acceptance Testing Instance is provided for the life of the tenant. Additional Standard Acceptance Testing Instances can be purchased separately as an optional add-on. This is a non-production multi-box instance that customers can use for User Acceptance Testing, integration testing, and training. The Non-Production Standard Acceptance Testing Instance includes 10 GB of default storage at no additional charge.

## Default Database Storage

The tenant for the Dynamics 365 for Operations application subscription includes by default 10 GB database storage. Additional storage capacity is granted at no charge as an organization increases the number of full users and is accrued at the rate of 5GB for every 20 Dynamics 365 for Operations or Plan 2 users. The Plan 1 application storage and the Dynamics 365 for Operations storage are not shared between them.

Figure 10: Database Storage Capacity




## Default File Storage Capacity

Each Dynamics 365 for Operations customer will receive 100 GB of file/Azure Binary Large Objects (BLOBs) cloud storage for files and binary data. Additional file storage if required can be purchased separately.

# Microsoft Power BI in Microsoft Dynamics 365

Dynamics 365 for Operations and Plan 2 users are not provided with any standalone or general-purpose Power BI license or use rights. Customers who require Power BI Pro will need to license and pay for it separately.

Dynamics 365 for Operations may embed Power BI content within the service User Interface. This is simply a product feature, and no Power BI licensing is required to access this content. Please consult the Dynamics 365 roadmap for more information on this feature.

Dynamics 365 Enterprise Plan 1 and Plan 1 Business Application subscriptions include an option to embed Power BI content as a product feature, but require users to subscribe to Power BI (free user or Power BI Pro depending on content) separately to configure access to this content. More details are available in this article.

# Microsoft Dynamics 365 Add-ons

If you require additional subscription capacity (such as additional instances or storage), you can include these optional add-on licenses with your subscription. Subscription add-ons apply across tenant; they are not tied to a specific user. Subscription add-ons can be purchased at any time and remain a part of the subscription for the remainder of the subscription term. We have broken this add-on section down into all Plan 1 Business Apps, Dynamics 365 for Sales, Dynamics 365 for Field Service, Dynamics 365 for Customer Service, and Dynamics 365 for Project Service Automation, which will leverage the same tenant and infrastructure will accrue across this one tenant. Dynamics 365 for Operations leverages an entirely different tenant and will have its own set of add-on capabilities.

## Plan 1 Business Applications

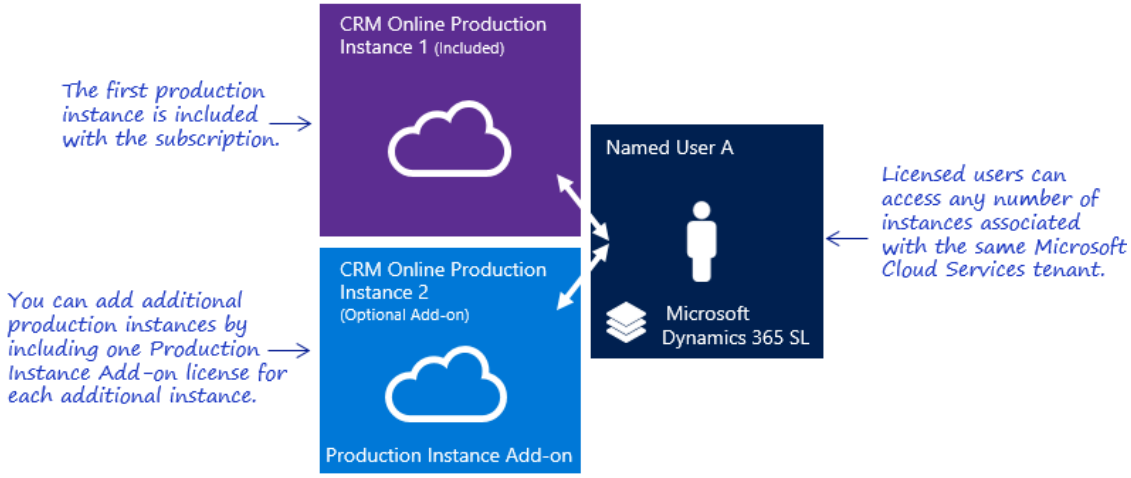
The following Plan 1 Business Application subscriptions share the same tenant and share infrastructure capacity: Dynamics 365 for Sales, Dynamics 365 for Field Service, Dynamics 365 for Customer Service, and Dynamics 365 for Project Service Automation. They will have access to the following Plan 1 Business Application default subscription capacities, shared across the Plan 1 Business Applications. If a customer purchases Plan 2 they will obtain default access to both the Plan 1 Business Applications and the Dynamics 365 for Operations Application.

### Production Instance Add-on

The Production Instance Add-On is well suited for multi-instance deployments such as departmental applications configured within an organization. Licensed users associated with a Dynamics 365 Plan 1 Business Application subscription can access the default Dynamics 365 Plan 1 Business Applications instance included in the subscription, and every Dynamics 365 Plan 1 Business Application additional instance associated with the same tenant, shared across the Plan 1 Business Applications.

The Production Instance Add-On license does not include any default storage capacity.

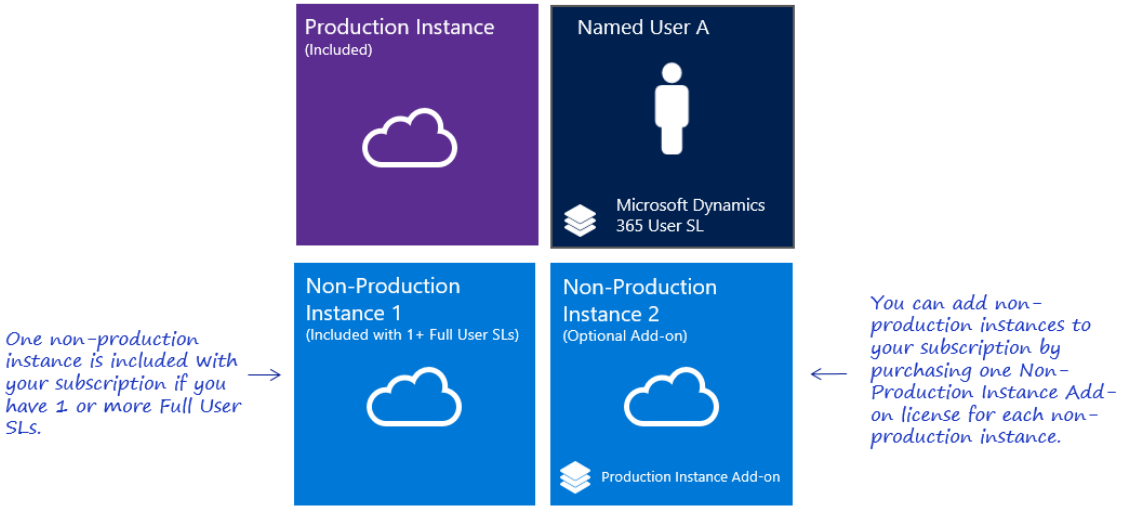
Figure 11: Plan 1 Business Applications Production Instance Add-on




## Non-Production Instance Add-on

The Non-Production Instance Add-On is well suited for deployments such as test environments, training applications, and sandbox environments configured within an organization. Licensed users associated with a Dynamics 365 Plan 1 Business Application subscription can access the default Dynamics 365 Plan 1 Business Application Non-Production instance included in the subscription, and every additional Non-Production instance associated with the same tenant. The additional Non-Production Instance Add-On license does not include any default storage capacity.

Figure 12: Non-Production Instance Add-On




## Microsoft Dynamics 365 Additional Portals and Page Views

The default Portal provided with Dynamics 365 Plan 1 business application subscriptions may be extended by purchasing licenses for additional portals, for use as a non-production portal, or additional production portals.

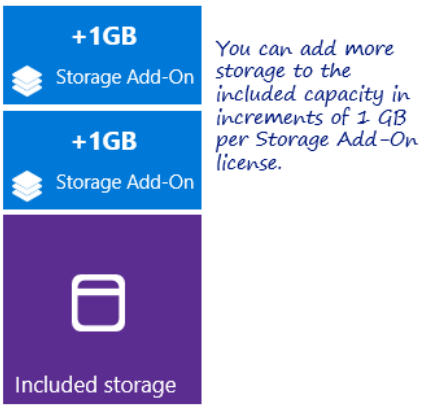
Customers may also extend the default 1 Million monthly page views capacity of the Portal by purchasing additional page views in increments of 500,000.

## Dynamics 365 Plan 1 Business Application Additional Storage Add-on

The Additional Storage Add-On provides flexibility to increase the storage capacity associated with your Microsoft Dynamics Online subscription in increments of 1 GB per Additional Storage Add-On license, up to 5,000 GB (5 TB) of storage.

**Note:** The subscription storage corresponding to a customer subscription is tracked against all the Microsoft Dynamics 365 Plan 1 Business Application instances associated with the tenant.

Figure 13: Storage Add-On




## Social Engagement Additional Posts Add-on

The Additional Posts Add-On provides additional capacity to a Microsoft Social Engagement subscription in increments of 10,000 posts per month. On the first day of the month, the number of purchased additional posts is added to the included capacity of 10,000 posts. All unused posts expire at the end of each month.

Figure 14: Social Engagement Additional Posts Add-on

## Dynamics 365 for Field Service - Resource Schedule Optimization Add-on

Resource Scheduling Optimization is an Add-on capability for the Dynamics 365 for Field Service application that enables the customer to automatically schedule work orders to the most appropriate resources, while simultaneously optimizing appointment setting for travel time, mileage, and many other constraints.

Resource Schedule Optimization is licensed per Resource included in the optimization process and will typically be accessed by a scheduler or dispatcher user who will designate any number of resources to be included. Resources may be individuals, such as field technicians or other human resources, equipment, or even designated groups of resources.

The add-on license allows for unlimited use of schedule optimization, which may be on a regular cadence such as daily or weekly, or ad-hoc.

A Dynamics 365 for Field Service license is required for managing the Resource Schedule Optimization.

## Dynamics 365 for Operations Application

The Dynamics 365 for Operations application will have access to the following add-ons that are only associated with the Dynamics 365 for Operations tenant. If a customer purchases Plan 2 they will obtain default access to both the Plan 1 Business applications and the Dynamics 365 for Operations application.

### Sandbox Tier 1 Add-on (one included with subscription)

This is a non-production single box Developer Instance that customers can use to customize Dynamics 365 for Operations and unit test their changes. Licensed users associated with a Dynamics 365 for Operations subscription can access the default Dynamics 365 for Operations Developer instance included in the subscription, and every Dynamics 365 for Operations additional instance associated with the same customer. The additional Non-Production Developer Instance Add-On license does not include any incremental default storage capacity.

### Sandbox Tier 2 Add-on (one included with subscription)

This is a non-production multi-box Standard Acceptance Testing instance that customers can use for User Acceptance Testing, integration testing and training licensed users associated with a Dynamics 365 for Operations subscription can access the default Dynamics 365 for Operations Standard Acceptance Testing instance included in the subscription and every Dynamics 365 for Operations additional instance associated with the same customer. The additional Non-Production Standard Acceptance Testing Instance Add-On license includes 10 GB of default storage at no additional charge per instance.

### Sandbox Tier 3 Add-on

This is a non-production multi-box Premium Acceptance Testing instance that customers can use for larger scale user acceptance testing, integration testing and training. This sandbox environment can also be used for performance testing for smaller customers or customers with lighter loads. Licensed users associated with a Dynamics 365 for Operations subscription can access every Dynamics 365 for Operations additional instance associated with the same customer. The additional Non-Production Premium Acceptance Testing Instance Add-On license includes 10 GB of default storage at no additional charge per instance.

### Sandbox Tier 4 Add-on

This is a non-production multi-box Standard Performance Testing instance that customers can use for performance testing, load testing and staging along with user acceptance testing. This sandbox environment will be a representative of production environment for smaller to medium sized customers or customers with medium load. Licensed users associated with a Dynamics 365 for Operations subscription can access every Dynamics 365 for Operations additional instance associated with the same customer. The additional Non-Production Premium Acceptance Testing Instance Add-On license includes 10 GB of default storage at no additional charge per instance. Additional storage capacity is also granted at no charge per instance as an organization increases the number of Full User and Device SLs. For every increment of 20 Full User SLs (excludes Team

Members and Activity Users), the included storage capacity increases by 2.5 GB. Again, the total SQL storage of Dynamics 365 for Operations is capped at 1 TB.

## Sandbox Tier 5 Add-on

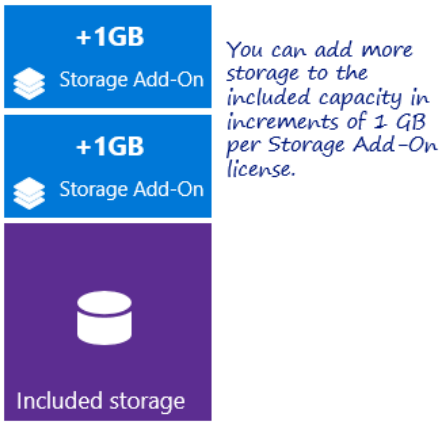
This is a non-production multi-box Premium Performance Testing instance that customers can use for performance testing, load testing and staging along with user acceptance testing. This sandbox environment will be a representative of production environment for larger sized customers or customers with heavier load. Licensed users associated with a Dynamics 365 for Operations subscription can access every Dynamics 365 for Operations additional instance associated with the same customer. The additional Non-Production Premium Acceptance Testing Instance Add-On license includes 10 GB of default storage at no additional charge per instance. Additional storage capacity is also granted at no charge per instance as an organization increases the number of Full User and Device SLs. For every increment of 20 Full User SLs, the included storage capacity increases by 2.5 GB. Again, the total SQL storage of Dynamics 365 for Operations is capped at 1 TB.

## Additional Storage Add-On

The Additional Storage Add-On provides flexibility to increase the SQL database storage capacity associated with your Dynamics 365 for Operations subscription in increments of 1 GB per Additional Storage Add-On license, for a max of 1 TB. This Additional Storage Add-on can be used to increase database storage across the production and/or non-production instances.

**Note:** The subscription storage corresponding to a customer subscription is calculated as cumulative across Dynamics 365 for Operations instances associated with the tenant.

Figure 15: Storage Add-On




## Visual Studio

Dynamics 365 for Operations development requires Visual Studio Professional 2015 for standard development, customization and extension activities. However, if you want to run performance and load tests, you will need Visual Studio Enterprise 2015. Please note that Visual Studio licenses are not included as part of the Dynamics 365 for Operations Subscription Licenses and must be acquired separately.

# Tiered Pricing Policies

For larger Dynamics 365 deployments, customers may qualify for a lower price per user. Tiered pricing applies to Enterprise Edition Plan 1 subscriptions, where Plan 1 and Plan 2 seats both count toward Plan 1 tier qualification.

Other considerations:

- Tiered pricing policies apply per customer tenant, and do not accumulate across tenants.
- Tiered pricing does not apply to Team Members, Operation Activity or any Dynamics 365 Application (e.g. Customer Service) subscriptions.
- Tiered pricing is not available in the Microsoft Online Subscription Program (MOSP), nor for Academic or Charity pricing in any program.

# Dynamics 365 Support Policies

## Subscription Support Plan

The benefits included in the Subscription Support Plan are applicable for customers who license Microsoft Dynamics 365.

The benefits included in the Subscription are:

Unlimited Break/Fix Support: Unlimited online and phone incident submission where support engineers identify and resolve technical issues with next business day responses.

Microsoft guarantees support in International English and provides local language support in select markets around the world, wherever possible.

CustomerSource: A wealth of quality personalized information, unlimited access to training courses, self-help options, downloads, tips, and more. Take advantage of this online customer portal during the term of your subscription to find answers to the most common Microsoft product questions, including troubleshooting steps, easy access to Knowledge Base to find solutions to common issues, and how-to articles. CustomerSource is available in multiple languages and local country sites.

Microsoft Dynamics Community: A central place to get ideas, ask questions, and discuss solutions with your peers and other Microsoft Dynamics Online Service experts around the world. Take advantage of the Microsoft Dynamics Community to help answer your questions.

"Getting Started Catalog" and Self-Help Resources: Self-directed support with online learning tools, easy access to knowledge base, and troubleshooting steps to help solve issues quickly.

## Enhanced Support Plan

Enhanced Support includes all of the Support Subscription Plan benefits, plus:

Unlimited Access to Online Training:

- E-learning: Benefit from online, self-paced courses dedicated to Microsoft Dynamics solutions on specific topic areas, comparable to classroom training.
- Training Materials: Download courseware content for use as a study tool or as a desktop reference.
- Learning Plans: Use these plans as a training roadmap for users, including detailed training and certification options available for each module or specific functionality.

Support Incident Response Time: Response time for Severity A cases less than two hours for Severity A, four hours for Severity B, and 8 hours for Severity C. Case Severity definitions are included in Appendix E.

## Professional Direct Services

Professional Direct Services includes all of the Support Subscription Plan benefits, plus:

Support Incident Response Time: Response time for Severity A cases less than one hour, two hours for Severity B, and 4 hours for Severity C. Case Severity definitions are included in Appendix E.

24x7 Support: Available for Severity A cases only.

Technical Call Routing: Direct access to tier 2 escalation engineers.

Service Delivery Management: Receive access to a dedicated, pooled team of Professional Direct Service Delivery Managers (PDM) to manage your support experience, and provide services such as: light advisory services, onboarding assistance, upgrade & release readiness.

The Service Delivery Management benefit provides the following services:

- Escalation Specialists: If your submitted support case becomes a critical issue your Escalation Specialist can assist by escalating your incident for faster resolution and will manage the case until closure.
- Red Carpet Welcome: A formal welcome meeting is scheduled to establish relationships and to ensure you have a deep awareness of the key benefits that are included in your offering, including a walk-though of how to use your benefits.
- Light Advisory Services: Advisory Services helps you get to the right resources for your needs and facilitates information transfer. When you request additional guidance that goes beyond your billing and technical break/fix needs, Advisory Services acts as your liaison with groups at Microsoft providing high level guidance on resolution of how-to questions. The Service Delivery Manager proactively works with you to understand your large pain-points, directs you to suggested self-service content, and acts as your voice to drive your insight upward in Microsoft.
    - Professional Direct does not provide detailed advisory assistance specific to an individual customer such as code or architecture reviews, design reviews, detailed instructions for application or configuration tuning (e.g., performance tuning), or the verification of specifications. Also, Service Delivery Manager does not engage in implementation activities such as, but not limited to, coding or configuration for customer development or deployment.
- Release Upgrade Readiness: The Professional Direct Service Delivery Manager will prepare and manage the customer's experiences for new product/version releases and upgrades by working directly with customer through the upgrade process to help ensure test/dev environments are upgraded and customer's concerns and conflicts are resolved prior to production upgrade.
- Monthly Review: The monthly review is designed to develop a rapport between the customer and its Service Delivery Manager. During this meeting, the Service Delivery Manager gets to know customer's organization, reviews open service requests, seeks feedback, and, if needed creates a go-forward strategy to get the customer's service back on track. Additional topics covered during discussions are product feature requests, service incidents or outage related experiences, and future product adoption plans.
- Service Interruption Handling: At first notification of a Service Interruption Event (SIE) the Professional Direct Service Delivery Manager will consider the effects it may have on a customer's organization and will proactively contact impacted customers. The Service Delivery Manager will monitor service requests as needed until resolution and will also work with the customer if a credit for downtime is required by working with Microsoft billing teams.
- Case Wellness: The Service Delivery Manager *proactively* reviews a customer's high priority support requests (SRs), and collaborates with Microsoft's Service Engineering teams to ensure faster resolution. Severity A and Severity B cases (if requested) are monitored daily.
- Product Onboarding Assistance: With rapid product releases, customers may feel inundated with the new features and services. The Service Delivery Manager reviews the customer's product setup and subscription purchase to ensure understanding and provide guidance. An introductory session on new features and services is conducted with follow-up to help you configure the product.

- Ask the Expert Webinars: A monthly online webinar where Microsoft experts share their knowledge and expertise on specific topics. Webinars are offered twice a month to accommodate global time zones, with varying topics driven by customer feedback.

## Support Policies

Microsoft guarantees support in International English and provides local language support in select markets around the world wherever possible.

Response times for technical support incidents vary by case severity. Definitions are included in Appendix E. More information about Microsoft Dynamics 365 Support options can be viewed here.

Premium Support offerings will be available for purchase only for customers enrolled in MOSP, EA, MPSA, EAS, and EES licensing programs

Customers can only choose one Premium Support offering. Mixing and matching support offerings is not allowed.

Enhanced or Professional Direct Support rights require each user licensed with Microsoft Dynamics 365 to also be licensed for that support option. Professional Direct purchase requirement is $450USD per month (equivalent to 50 seats) for Dynamics 365 Enterprise edition, Plan 1 and Applications, and $750USD per month (equivalent to 50 seats) for Dynamics 365 Enterprise edition, Plan 2. When purchasing through Volume Licensing, ensure the minimum threshold is entered when placing the order.

# International Availability

Country, language, and localization availability for Dynamics 365 is available here.

# Microsoft Dynamics Lifecycle Services

Microsoft Dynamics Lifecycle Services (LCS) provides a cloud-based collaborative workspace shared between customers and partners that helps organizations improve the predictability and quality of their Microsoft Dynamics 365 for Operations implementations by simplifying and standardizing the implementation process to realize business value faster. Once you sign up for Microsoft Dynamics 365 for Operations, you are provided with a project workspace including methodologies and services that help you manage your Microsoft Dynamics 365 for Operations lifecycle. LCS provides a variety of services to assist and help navigate you through the various phases of the project including defining your business processes and any customization needed, develop that additional functionality using best practices, and help operate your environment to reduce the time it takes to resolve issues and realize greater return on investment while reducing the total cost of ownership.

# Licensing Programs

Microsoft Dynamics 365 is licensed through the Microsoft Volume Licensing and the Cloud Solution Provider program (CSP). In Volume Licensing, Microsoft Dynamics 365 is available through:

- Enterprise Agreement
- Enterprise Agreement Subscription
- Enrollment for Education Solutions (under the Campus and School Agreement)

- Microsoft Dynamics Online Government (except Dynamics 365 for Operations, Operations Activity and Plan 2)
- Microsoft Products and Services Agreement (MPSA)

Microsoft Online Subscription Program (MOSP) (except Dynamics 365 for Operations, Dynamics 365 for Operations Activity and Dynamics 365 Plan 2) participating in a Volume Licensing program typically involves signing an agreement and/or enrollment, meeting a minimum purchase requirement, and ordering licenses through a Microsoft Reseller. Visit the Microsoft Volume Licensing website to learn more about how to buy through Volume Licensing, find a reseller partner, and more.

### Minimum License Purchase Requirements

To activate the paid subscription, new customers enrolling in Microsoft Dynamics 365 for Plan 1 Business Applications on the Academic price list must purchase a minimum of 20 full user licenses (Enterprise Plan 2, Enterprise Plan 1, Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, or Project Service Automation).

The 20-license minimum license requirement does not apply to existing Academic customers who have previously enrolled on or before October 31, 2016, but these customers are required to maintain at least a 5-seat minimum in accordance with the prior program requirements.

# Free Trial

## Plan 1 Business Application Trial

You can sign-up for a free 30-day trial of Microsoft Dynamics 365 Plan 1 Business Applications for up to 25 users through Microsoft Online Services. At any time during your trial you can activate your subscription and keep your data and customizations. Get details at http://www.microsoft.com/en-us/dynamics/crm-free-trial-overview.aspx.

## Dynamics 365 for Operations Trial

A 7-day trial of Dynamics 365 for Operations will be made available through a simple email signup. The trial version of Dynamics 365 for Operations includes a Getting started guide that provides a step-by-step task guide, which allows you to view specific scenarios in action. The product is available to explore and exercise scenarios. Demo data is included to ease the use of the product and to make the experience more meaningful. A reminder email will be sent 3 days prior to the trial expiration. A buy experience can be initiated at that time to complete the purchase. Get details at www.microsoft.com/en-us/dynamics365/operations.

**Note:** Support included for Trial is the same as what customers receive when purchasing Microsoft Dynamics CRM Online services. Premium level support options are not available for purchase during the trial period.

# Links for Additional Information

| | |
|---|---|
| Microsoft Dynamics 365 | https://www.microsoft.com/en-us/dynamics/erp-ax-overview.aspx |
| Online Licensing Guides: | |
| Microsoft Dynamics AX | http://aka.ms/s201h6 |
| Microsoft Dynamics CRM | http://aka.ms/gtn5wt |
| On-Premises Licensing Guides: | |

| | |
|---|---|
| AX 2013 R3 | http://aka.ms/Jswgcc |
| CRM 2016 | http://aka.ms/kn26ux |
| Dynamics 365 On-Premises | https://www.microsoft.com/en-us/dynamics365/pricing |
| Microsoft Dynamics Blog | https://community.dynamics.com/b/msftdynamicsblog |
| Microsoft Volume Licensing | www.microsoft.com/licensing |
| Software Assurance | http://www.microsoft.com/licensing/software-assurance/default.aspx |
| Activate Software Assurance Benefits | https://www.microsoft.com/en-us/Licensing/existing-customer/product-activation.aspx |
| Microsoft License Advisor | http://www.microsoft.com/licensing/mla/default.aspx |
| Contact a Licensing Specialist | www.microsoft.com/licensing/contact/default.mspx |
| Microsoft Dynamics Online Support | http://www.microsoft.com/en-us/dynamics/dynamics-online-support.aspx |
| CustomerSource | https://mbs.microsoft.com/customersource/ |
| Microsoft Downloads Center | http://www.microsoft.com/downloads |
| Cloud Solution Provider Program (MPN) | https://mspartner.microsoft.com/en/us/Pages/solutions/cloud-reseller-overview.aspx |

# Appendix A: Key Team Members Features

Below are the details around the Team Members license. Note that there is only one Dynamics 365 for Team Members, Enterprise edition license which provides access to both Dynamics 365 Enterprise Plan 1 Business Application and Dynamics 365 for Operations, Enterprise edition features. The table calls out which Application to which a given feature applies. Additional details on Plan 1 Business Application functionality for Team Members is also shown in Appendix B.

| Access Rights | Description | Plan 1 Business Apps | Operations App |
|---|---|---|---|
| Access | Access Anywhere: Web App, Mobile App, Tablet App, via Outlook | ● | |
| General System Use | Use Relationship and Connections between records | ● | |
| | Run as an On-demand process*, Run an Automated Workflow* | ● | |
| | Saved views, personal views | ● | |
| | Search, Advanced Find Search | ● | |
| | Export data to Microsoft Excel, Perform Mail Merge | ● | |
| Read | Full Read across all Dynamics 365 Applications | ● | ● |
| Edit/Actions | Accounts & Contacts, Activities & Notes, Shared Calendar, Announcements | ● | |
| | Knowledge Management, Interactive Service Hub for KM, User Dashboards/Reports | ● | |
| | Time & Expense, Apply for Project | ● | |
| | Collaboration experience: Activity Feeds & Yammer Integration | ● | |
| | Use a Queue Item, start dialog* | ● | |
| | Custom Entities* | ● | |
| | Record time and Expenses (including for projects) | ● | ● |
| | Manage personal info | ● | ● |
| | Create requisitions | | ● |
| | Create and edit quality control | | ● |
| | Create and edit service orders | | ● |
| Approval | Time, Expense and Invoices | | ● |
| Special Portal Only Items | Employee Self Service: Via Web Only: Start Personal Support Chat & Cases | ● | |
| | Respond to Voice of the Customer Surveys | ● | |
| | Non-Employee, Non-Outsourced users: Create & Update Opportunities, update work orders | ● | |
| Platform | PowerApps for Team Members | ● | ● |

*Actions can be performed only against records corresponding to entities included in the use rights

# Appendix B: Plan 1 Applications

The following tables lists the use rights corresponding to the User Subscription Licenses (User SLs) and applicable Device Subscription Licenses available in Microsoft Dynamics 365 Plan 1 Business Applications.

Please note a full user license (Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, Dynamics 365 for Project Service Automation) is required to enable much of the functionality of Team Members due to the need to configure and administer the services.

Bullets indicate full create, read, update, delete access unless otherwise indicated.

| Use Right | Team Members | Sales | Customer Service | Field Service | Project Service Automation |
|---|---|---|---|---|---|
| *Dynamics 365 for Operations functionality: Record Time & Expense; create requisitions; manage budgets; approval of Operations time, expense & invoices; edit & respond to inquiries for: quality control, service orders* | ● | ● | ● | ● | ● |
| Accounts and Contacts | ● | ● | ● | ● | ● |
| Associate a Marketing List with an Account or Contact | ● | ● | ● | ● | ● |
| Activities and Notes | ● | ● | ● | ● | ● |
| Post & follow activity feeds | ● | ● | ● | ● | ● |
| Yammer collaboration* | ● | ● | ● | ● | ● |
| Use a queue item | ●** | ●** | ●** | ●** | ●** |
| Start dialog | ●** | ●** | ●** | ●** | ●** |
| Shared Calendar | ● | ● | ● | ● | ● |
| View Announcements | ● | ● | ● | ● | ● |
| Run as an on-demand process | ●** | ●** | ●** | ●** | ●** |
| Run an automated workflow | ●** | ●** | ●** | ●** | ●** |
| Use relationships and connections between records | ●** | ●** | ●** | ●** | ●** |
| Write custom entity records | ●*** | ●*** | ●*** | ●*** | ●*** |
| Read custom entity data | ● | ● | ● | ● | ● |
| Personal views; Saved Views | ● | ● | ● | ●** | ● |
| Search & Advanced find search | ● | ● | ● | ●** | ● |
| Export data to Microsoft Excel | ● | ● | ● | ● | ● |
| Perform mail merge | ● | ● | ● | ● | ● |
| Dynamics 365 Mobile Client Application | ● | ● | ● | ● | ● |
| Microsoft Dynamics 365 for iPad & Windows | ● | ● | ● | ● | ● |
| Microsoft Dynamics 365 for Outlook | ● | ● | ● | ● | ● |
| Microsoft Dynamics 365 Web application | ● | ● | ● | ● | ● |
| Read All Dynamics 365 application data | ● | ● | ● | ● | ● |
| Portal or API access Only: Employee Self Service: Submit cases and update Cases user has submitted (as a support client/customer) | ● | ● | ● | ● | ● |
| Chat with support team (as chat client for self-service, requires 3rd party solution) | ● | ● | ● | ● | ● |
| Portal or API access Only/Non-Employees Only: Update Work Orders | ● | ● | ● | ● | ● |
| Portal or API access Only/ Non-Employees Only: Create & Update Opportunities | ● | ● | ● | ● | ● |
| Add or remove a Connection (stakeholder, sales team) for an Account or Contact | ● | ● | ● | ● | ● |
| Create and update announcements | ● | ● | ● | ● | ● |

| Use Right | Team Members | Sales | Customer Service | Field Service | Project Service Automation |
|---|---|---|---|---|---|
| Submit Time & Expense for Project Service Automation | ● | ● | ● | ● | ● |
| Update Project Tasks for Project Service Automation | ● | ● | ● | ● | ● |
| Update Own Resource Competencies for Project Service Automation | ● | ● | ● | ● | ● |
| Apply for Open Project Position for Project Service | ● | ● | ● | ● | ● |
| Project Finder Mobile Application | ● | ● | ● | ● | ● |
| User reports, charts, and dashboards | ● | ● | ● | ● | ● |
| Create, update, customize, and run Reports | ● | ● | ● | ● | ● |
| Microsoft Project Online Essentials**** | ● | ● | ● | ● | ● |
| Interactive Service Hub | ● | ● | ● | ● | ● |
| Create, Publish, Configure Knowledgebase | ● | ● | ● | ● | ● |
| Dynamics 365 - Gamification Fan & Spectator | ● | ● | ● | ● | ● |
| Embedded PowerApps (Includes Flow) | ● | ● | ● | ● | ● |
| User Interface integration for Microsoft Dynamics 365 | ● | ● | ● | ● | ● |
| Import data in bulk | | For App | For App | For App | For App |
| Configure auditing | | For App | For App | For App | For App |
| Configure duplicate-detection rules | | For App | For App | For App | For App |
| Define connections and relationships between entities | | For App | For App | For App | For App |
| Define and configure queues | | For App | For App | For App | For App |
| Define and configure dialogs | | For App | For App | For App | For App |
| Define and configure workflows | | For App | For App | For App | For App |
| System reports, charts, and dashboards | | For App | For App | For App | For App |
| Customize forms and views | | For App | For App | For App | For App |
| Create Dynamics 365 forms, entities, and fields | | For App | For App | For App | For App |
| Administer Dynamics 365 | | For App | For App | For App | For App |
| Dynamics 365 - Gamification Player & Admin | | ● | ● | ● | ● |
| Microsoft Social Engagement | | ● | ● | ● | ● |
| Voice of Customer | | ● | ● | ● | ● |
| Full Mobile Offline sync | | ● | ● | ● | ● |
| Email and Word Templates | | ● | ● | ● | ● |
| Lead Management | | ● | | | |
| Opportunities | | ● | | | |
| Qualify and convert a Lead to an Opportunity | | ● | | | |
| Convert an activity to an Opportunity | | ● | | | |
| Competitors | | ● | | | |
| Products | | ● | | | |
| Price Lists | | ● | | | |
| Quotes | | ● | | | |
| Orders | | ● | | | |
| Invoices | | ● | | | |
| Goals | | ● | | | |
| Territories | | ● | | | |
| Sales literature | | ● | | | |
| Marketing Lists | | ● | | | |

| Use Right | Team Members | Sales | Customer Service | Field Service | Project Service Automation |
|---|---|---|---|---|---|
| Quick campaigns | | ● | | | |
| Marketing campaigns | | ● | | | |
| Define and configure business units | | ● | | | |
| Define and configure teams | | ● | | | |
| Unified Service Desk for Microsoft Dynamics 365 | | ● | ● | | |
| Case management | | | ● | | |
| Convert an Activity to a Case | | | ● | | |
| Contract templates | | | ● | | |
| Contracts | | | ● | | |
| Configure SLA policies | | | ● | | |
| Entitlements | | | ● | | |
| Facilities/Equipment | | | ● | | |
| Define and configure services, resources, and work hours | | | ● | | |
| Work Orders | | | | ● | |
| Schedule & Dispatch capabilities: use Scheduling Assistant, Drag & Drop Assignment, update resource bookings | | | | ● | |
| Configure and View Schedule Board | | | | ● | |
| Service Agreements | | | | ● | |
| Purchase Orders | | | | ● | |
| Invoices | | | | ● | |
| Customer Assets | | | | ● | |
| Inventory Management | | | | ● | |
| Create and manage Repairs and Returns (RMA/RTV) | | | | ● | |
| Manage Resource Schedule Optimization | | | | ● | |
| Manage Resources (facilities, equipment, people), territories and work hours | | | | ● | |
| Field Service Mobile Application | | | | ● | |
| Projects | | | | | ● |
| Project Expenses and Project Estimates | | | | | ● |
| Resource Availability View and Resource Schedule Management | | | | | ● |
| Project Price Lists | | | | | ● |
| Project Contracts | | | | | ● |
| Project Invoices | | | | | ● |
| Approve Project Transactions | | | | | ● |
| Manage Services, Resources, Work Hours, and Competencies | | | | | ● |
| Microsoft Project Online Premium**** | | | | | ● |

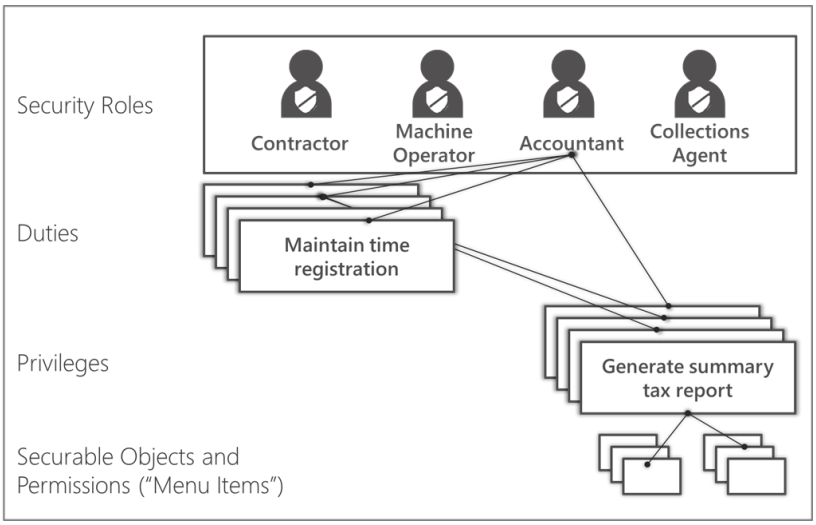
*Use of Yammer within the Microsoft Dynamics 365 requires a Yammer Enterprise license (acquired separately).
**Actions can be performed only against records corresponding to entities included in the use rights.
*** Custom entities (either based on entities included in Microsoft Dynamics 365 or created by a customer or partner) may require a higher CAL or User SL, depending on the required access. Customizations can only be performed against entities included in the use rights.
****Microsoft Project Online use rights governed by Microsoft Project Online licensing. https://products.office.com/en-us/project/compare-microsoft-project-management-software
'For App' means that the use right in question is applicable only for the licensed application and not other applications.

# Appendix C: Dynamics 365 for Operations Security Roles by User SL Level

## Overview of Security Roles

Providing users with access to the solution functionality is done by assigning each user one or more Security Roles. Microsoft Dynamics 365 for Operations Security Roles combine meaningful packages of solution functionality and access rights required to perform actions relevant to that role.

Figure 5: Assigning a Security Role to a user provides access to solution functionality




To make it easier to understand the licenses required, each Microsoft Dynamics 365 for Operations Security Role has a pre-determined user type. When you assign Security Roles to users, you then know what User SL those users require.

For example, in a manufacturing organization, the Accountants and Field Service Technicians require different use rights. By assigning those user groups to the appropriate Security Role, they get the functionality they need, and you know the User SL type that is required.

**Notes:**

- Customers can assign multiple Security Roles to one user, in which case the highest User SL type required covers all the user rights.
- Customers have the flexibility to configure or customize Security Roles. This may impact the license required for the new/modified Security Roles. Please refer to the Appendix D for more information about how such customization can impact licensing requirements.

## Out of the box security roles for Dynamics 365 for Operations

| Role | Description | User SL | | |
|---|---|---|---|---|
| Human Resources | | Team Members | Activity | Operations |
| 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 | • | • | • |
| Compensation and benefits manager | Documents compensation and benefit events, responds to compensation and benefit inquiries and records the financial consequences of compensation and benefit events | | | • |
| FMLA administrator | Information and functionality around managing employees who are out an FMLA leave | | | • |
| 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 | | | • |
| Recruiter | Documents recruiting events, responds to recruiting inquiries and records the financial consequences of recruiting events | | | • |
| Training manager | Documents training events, responds to training inquiries and records the financial consequences of training events | | | • |
| Retail | | Team Members | Activity | Operations |
| Retail warehouse clerk | The retail warehouse clerk performs picking, receiving, and stock counting in a store or warehouse | • | • | • |
| Retail store manager | The retail store manager performs store management functions at the store, such as managing sales reports, inventory movements, and inventory counts | | • | • |
| Retail warehouse manager | Manages order picking, shipping and receiving for retail channels | | • | • |
| Retail catalog manager | At the head office, the retail catalog manager maintains and publishes retail catalogs | | | • |
| Retail merchandising manager | At the head office, the retail merchandising manager maintains and replenishes retail products and assortments | | | • |
| Retail operations manager | At the head office, the retail operations manager is responsible for all non-merchandising operations, such as configuring stores, registers, and staff | | | • |
| Retail service | Retail service account | | | • |

| | | | | |
|---|---|---|---|---|
| Retail store IT | Performs retail point of sale client configuration and installation at the retail store level | | | • |
| C-Suite | | Team Members | Activity | Operations |
| Chief executive officer | Reviews the financial and operational performance | | • | • |
| Chief financial officer | Reviews the financial performance | | • | • |
| Budgeting | | Team Members | Activity | Operations |
| 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 | | Team Members | Activity | Operations |
| Positive pay clerk | Document accounts payable positive pay events | • | • | • |
| Accountant | Documents accounting events and responds to accounting inquiries | | | • |
| Accounting manager | Reviews accounting, customer invoice, vendor invoice, and payment process performance and enables those processes | | | • |
| Accounting supervisor | Reviews accounting process performance and enables the accounting process | | | • |
| Accounts payable centralized payments clerk | Documents accounts payable centralized payment events and responds to centralized payment inquiries | | | • |
| Accounts payable clerk | Documents vendor invoice events and responds to vendor inquiries | | | • |
| Accounts payable manager | Reviews vendor invoice process performance and enables the vendor invoice process | | | • |
| Accounts payable payments clerk | Documents accounts payable payment events and responds to payment inquiries | | | • |
| Accounts receivable centralized payments clerk | Documents accounts receivable centralized payment events and responds to centralized payment inquiries | | | • |
| Accounts receivable clerk | Documents customer invoice events and responds to customer inquiries | | | • |
| Accounts receivable manager | Reviews customer invoice process performance and enables the customer invoice process | | | • |
| Accounts receivable payments clerk | Documents accounts receivable payment events and responds to payment inquiries | | | • |
| Auditor | This role is designed for in-house or external auditors. It provides read-only access to a majority of the system. It is also used for audit policy management | | | • |
| Collections agent | Documents collections events and responds to collections inquiries | | | • |

| | | | | |
|---|---|---|---|---|
| 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 | | | • |
| Project Management | | Team Members | Activity | Operations |
| Project manager, Public sector | Inquire into Purchase order to invoice progress for public sector | • | • | • |
| Project timesheet delegate | Enables creation and approval of project timesheets | • | • | • |
| Project timesheet user | Enables creation and approval of project timesheets | • | • | • |
| Project assistant | Documents project accounting process events and responds to project accounting process inquiries | | • | • |
| Project manager | Documents the project forecast/budget events and responds to project forecast/budget inquiries. Maintains project accounting master information and responds to project accounting master information inquiries. Authorizes project accounting process events | | • | • |
| Resource manager | Maintains project resource tasks | | • | • |
| Project accountant | Maintains project accounting policies | | | • |
| Project supervisor | Enables and reviews the project accounting process | | | • |
| Procurement | | Team Members | Activity | Operations |
| Vendor contact | Views and responds to purchase orders through Vendor Collaboration, for the vendor accounts where the user is a contact person | • | • | • |
| Buying agent | Documents purchase events and responds to purchase inquiries | | • | • |
| Vendor account manager | Documents vendor events and responds to vendor inquiries | | • | • |
| Purchasing agent | Documents request for quotation events and responds to request for quotation inquiries. Documents purchasing events and responds to purchasing inquiries. Maintains purchasing agreements and vendor master information. | | | • |
| Purchasing agent - Public Sector | Documents request for quotation events and responds to request for quotation inquiries. Documents purchasing events and responds to purchasing inquiries | | | • |

| | | | | |
|---|---|---|---|---|
| Purchasing manager | Reviews purchasing process performance and enables the purchasing process. Maintains purchasing agreements and vendor master information. | | | • |
| Sales | | Team Members | Activity | Operations |
| 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 | | | • |
| Customer Service | | Team Members | Activity | Operations |
| Customer service representative | Documents customer service events and responds to customer service inquiries. | | • | • |
| Customer service manager | Reviews customer service process performance and enables the customer service process | | | • |
| Marketing | | Team Members | Activity | Operations |
| Marketing coordinator | Produces and distributes marketing materials | | | • |
| Marketing manager | Manages product marketing | | | • |
| Field Service | | Team Members | Activity | Operations |
| 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 | | | • |
| Transportation | | Team Members | Activity | Operations |
| Transportation coordinator | Enables inbound, outbound, rating, routing, and handling of transportation process | | | • |
| Transportation logistics manager | Set up, maintain, and configure the network planning that are used in transportation management processes | | | • |
| Manufacturing | | Team Members | Activity | Operations |
| Lean waterspider | Responds to inventory needs on the production line | • | • | • |
| Time registration user | Worker enabled to use advanced features for time registration | • | • | • |
| Machine operator | Works on production orders and makes registrations in Manufacturing execution | | • | • |
| Shop supervisor | Reviews the time registration process and maintain corrections. Authorizes production feedback registrations and responds to inquiries from production. | | • | • |
| Production manager | Reviews the production plan and ensures the proper resources are available | | | • |
| Production planner | Schedules and plans productions | | | • |
| Production supervisor | Enables the production process. Ensures the day-to-day execution of orders/jobs so Machine operators | | | • |

| | | | | |
|---|---|---|---|---|
| | know what to work on, who is available and can respond to the main requests from Machine operator. | | | |
| Distribution | | Team Members | Activity | Operations |
| 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. | | | • |
| Cost Accounting | | Team Members | Activity | Operations |
| 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. | | | • |
| Engineering | | Team Members | Activity | Operations |
| Product designer | Designs new and modifies existing BOM structures | | | • |
| Product design manager | Reviews and authorizes product BOM structures | | | • |
| Process engineer | Defines processes to make new products | | | • |
| Process engineering manager | Reviews and authorizes new production processes | | | • |
| Quality Control | | Team Members | Activity | Operations |
| 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 | | | • |

| Administrator | | Team Members | Activity | Operations |
|---|---|---|---|---|
| System user | System role for all users | • | • | • |
| Data Management Operation User | Provides access to all data management workspace menu items. Note that this role does not control access to any of the entity privileges that are required to actually perform the data operation. As such this role can be assigned to any other application role for users that require access to specific entity sets or can be added to any custom roles where users can simply only perform data activities for a restricted set of entities | • | • | • |
| Data Management Administrator | Super user for the data management activities in the system. In addition to the capabilities of the DataManagementMigrationUser and DataManagementOperationsUser, this role provides access to the DataManagementITWorkspace - an operational workspace to monitor all data management activities | | | • |
| Data Management Migration User | User that controls permission to all entities in the system. This role is extended in all models where entities exist and need to be provisioned for data management activities for users. The current pattern is to create - per Entity View and Maintain privileges and then add it to the entity's category bound View and Maintain duties defined in that model. These duties are all part of the DataManagementMigrationUser extension that will be defined in the model. | | | • |
| Electronic reporting developer | Maps database to adversary data models | | | • |
| Electronic reporting functional consultant | Maps data models to formats | | | • |
| System Administrator | System Administrator role for Dynamics AX | | | • |
| System document branding administrator | Controls access to the Document Branding Management forms | | | • |
| Security administrator | Maintains user and security setup in Microsoft 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 | | | • |
| Information technology manager | Maintains servers and software for Microsoft Dynamics AX. Maintains and configures settings for batch servers, load balancing, databases, Enterprise Portal, Services, and Workflow | | | • |

**Note**: Management Reporter functionality is included in the Microsoft Dynamics 365 for Operations. To get the use rights, the Management Reporter Designers require an Operations App and Management Reporter Viewers require a Team Member.

# Appendix D: Operations Customization and Licensing Requirements

Microsoft Dynamics 365 for Operations is fully customizable to provide customers with the right experience for every user. Microsoft Dynamics 365 for Operations has over 10,000 Menu Items which are mapped to the three user types. To make it faster and easier to deploy the solution and determine licensing requirements, these Menu Items are associated with certain Security Roles.

The required SL for a given user is determined by the highest user type classification of the Menu Items to which the user will have access. For example, if you assign an Accountant to a Role that includes access to a Menu Item classified as "Operations App", then that person requires a Dynamics 365 for Operations SL. Menu items that are classified at the "Team Members" level are available to all users to which you have assigned a Team Members User or higher level User.

For an even better fit in their organizations, customers can change which actions may be performed by specific individuals or Roles. When customizing, it is important to remember that the license required is determined by the highest-level Menu Item to which that individual has access.

## Assigning Multiple Roles to a Single User

The straight forward way to customize which actions a specific employee may perform in Microsoft Dynamics 365 for Operations is by assigning multiple Roles to that employee. For example, an employee could be assigned both the Customer Service Rep and the Field Technician Roles and could therefore perform actions associated with both Roles. In this case, the employee would still only need a single User SL. Since the Customer Service Rep Role is designated at a higher user type level (Operations) than the Field Technician Role (Team Members), the employee would only need the Dynamics 365 for Operations User SL to perform actions associated with both Roles.

## Changing Menu Items Associated with a Role

Another way to customize what actions users may perform is by changing which Menu Items are associated with a Role. For example, if a customer wants everyone who is assigned the Field Technician Role to be able to also approve posting of service orders (which is designated as an Operations level action), then they can customize the Role to include the "Approve posting of service order" Menu Item. Because the required SL is determined by the highest level action the user may perform, all users assigned to the Field Technician Role would then require the Operations User SL.

## Changing Menu Items Associated with an Individual

Further, customers may assign specific actions to specific users. Following the example above if the customer has 20 employees assigned to the Field Technician Role and wants to allow only five of those employees the ability to approve posting of service orders, they may assign the "posting of service order" Menu Item to those five individuals. Those five individuals would then require the Operations User SL, while the remaining 15 employees assigned to the Field Technician Role would require the Team Members User SL.

## Creating Menu Items

Partners and customers may also create Menu Items to fit specific customer scenarios. When doing so, those new Menu Items must be mapped to the User SL type that best matches the type of use based on the definitions of user SLs found in this document.

**Notes:**

- Roles in Microsoft Dynamics 365 for Operations are not the same as job titles.
- "Menu Item" means an object that allows users to display or view a form, sub-form, or URL in a browser application; run a task that triggers a system class, function, workflow or web-action initiated by a user; or cause an output in the ERP solution or a separate device.

Menu Items are classified at one of the User SL types. Users with a given SL have access to each Menu Item classified at—or below—that User SL type.

# Appendix E: Support Policies

| SEVERITY | CUSTOMER'S SITUATION | EXPECTED MICROSOFT RESPONSE | EXPECTED CUSTOMER RESPONSE |
|---|---|---|---|
| A | Critical business impact:<br>-Customer's business has significant loss or degradation of services.<br>-Needs immediate attention | Initial response:<br>-1 hour or less for Professional Direct and Premier<br>-2 hours or less for Enhanced<br>-Next business day for Subscription | -Allocation of appropriate resources to sustain continuous efforts all day, every day[1]<br>-Accurate contact information on case owner |
| B | Moderate business impact:<br>-Customer's business has moderate loss or degradation of services but work can reasonably continue in an impaired manner | Initial response:<br>-2 hours or less for Professional Direct and Premier<br>-4 hours or less for Enhanced<br>-Next business day for Subscription | -Allocation of appropriate resources to sustain continuous effort unless customer requests to opt-out of 24x7[2]<br>-Accurate contact information on case owner |
| C | Minimum business impact:<br>-Customer's business is substantially functioning with minor or no impediments of services | Initial response:<br>-4 hours or less for Professional Direct and Premier<br>-8 hours or less for Enhanced<br>-Next business day for Subscription | -Accurate contact information on case owner |

[1] 24x7 support is only available for Professional Direct and Premier. Premier customers login to Microsoft Premier Online to submit. 24x7 support for Severity B incidents is only available for Premier.

[2] Microsoft may downgrade the severity level if the customer is not able to provide adequate resources or responses to enable Microsoft to continue with problem resolution efforts.

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