

# Microsoft Dynamics 365 Licensing Guide



May 2018

## Contents

Subscription Licensing Requirements .....	1
Licensing Programs .....	6
International Availability .....	6
Minimum License Purchase Requirements .....	6
Microsoft Dynamics 365 Subscription License Types .....	7
Custom Entities .....	9
Dynamics 365 Applications .....	9
Dynamics 365 Modular Applications.....	16
Dynamics 365 Plans.....	16
Microsoft Relationship Sales.....	18
Tiered Pricing Policies.....	18
Dynamics 365 Device Subscription License .....	19
Additional Services and Software .....	20
Default Subscription Capacities.....	22
Microsoft PowerApps .....	25
Microsoft Power BI in Dynamics 365 .....	25
Visual Studio subscriptions.....	25
Microsoft Dynamics Lifecycle Services.....	26
Free Trial.....	26
Dynamics 365 Support Policies.....	26
Premier Support Services .....	28
Links for Additional Information .....	28
Appendix A: Key Team Members Features .....	29
Appendix B: Customer Engagement Plan Applications .....	30
Appendix D: Dynamics 365 Unified Operations Plan Security Roles by User SL Level .....	35
Appendix E: Operations Customization and Licensing Requirements .....	42
Appendix F: Microsoft Dynamics 365 Add-on .....	44
Appendix G: Support Policies .....	49
Appendix H: Change Log .....	50

# 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 365 on-premises, Microsoft Dynamics 365 for Operations on-premises, Microsoft Dynamics NAV, Microsoft Dynamics GP, Microsoft Dynamics SL, Microsoft Dynamics AX 2012 or prior versions, 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. Microsoft 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 Marketing, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, Dynamics 365 for Project Service Automation, Dynamics 365 for Finance and Operations, Dynamics 365 for Retail, and Dynamics 365 for Talent. Designed to be personalized, enable greater productivity, deliver deeper insights and adapt to business needs, Microsoft Dynamics 365 applications help businesses accelerate digital transformation to meet the changing needs of customers and capture the new business opportunities of tomorrow.

## Subscription Licensing Requirements

### Licensing Requirements for Internal Users

Customers must purchase Subscription Licenses (SLs) for their organization or their affiliates' employees and on-site agents, vendors or contractors who directly or indirectly access the Microsoft Dynamics 365 services.

Microsoft Dynamics 365 has two types of SLs:

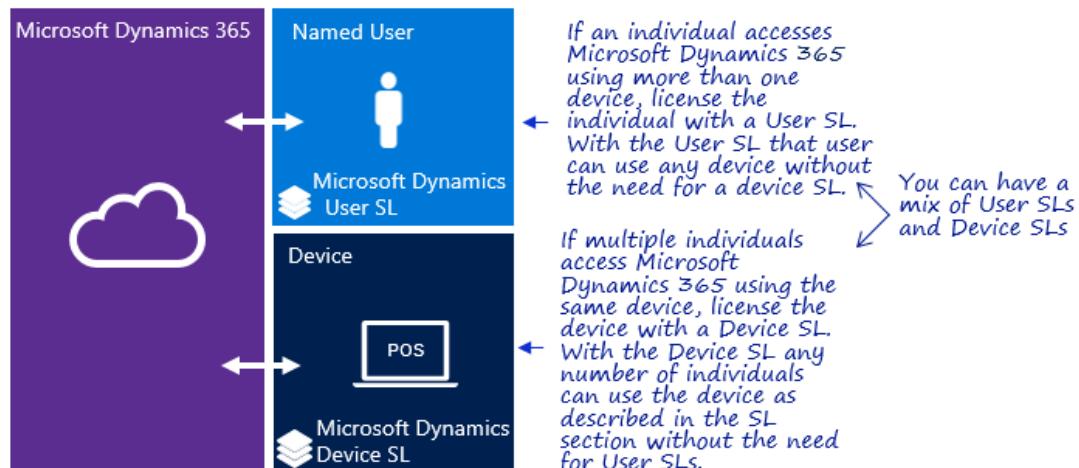
- (i) User SLs are assigned on a "named user" basis, meaning each user requires a separate User SL; User SLs cannot be shared but an individual with a User SL may access the service through multiple devices.
- (ii) Device SLs are assigned to license a device.
  - a. With the Customer Engagement Plan 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. Customer Engagement Plan device licenses are full devices – they include the same rights as the equivalent user license.
  - b. 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 Unified Operations capabilities.

Since Microsoft Dynamics 365 may be licensed with User or Device SL, only the user or the device requires a SL, but 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. Customers can mix both User and Device SLs.

Subscription duration requirements are determined by the licensing program under which a SL is licensed. Short term subscriptions are available exclusively through the MPSA licensing program. More information on MPSA is available [here](#).

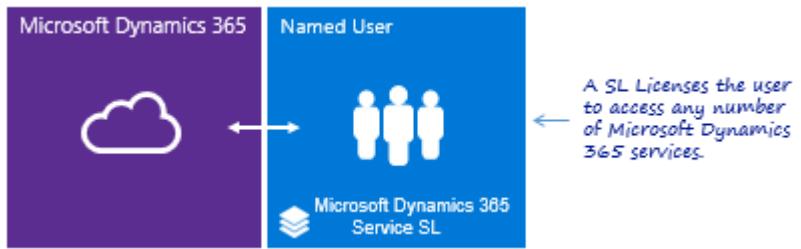
The User and Device SL grants users non-perpetual rights (with no buy-out rights) to the use of the Dynamics 365 service. As long as you are current on your subscription payments and adhere to the [Product Terms and the Online Service Terms](#), you will have access to the most up-to-date version of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

Figure 1: 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 2: Accessing multiple instances



## Licensing Requirements for External Users

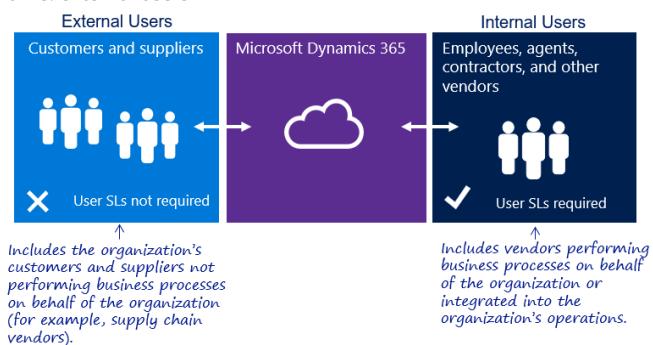
External users are end customers and third-party users of the organization or its affiliates and do not require SLs to access Microsoft Dynamics 365. External user access is included with the organization's internal user SLs. Customer Engagement Applications graphical user interfaces may not be accessed by external users.

In addition, external users include off-site vendors not on an employee-like relationship with the organization or its affiliates (e.g. IT help desk support vendors serving multiple customer organizations).

However, external user access does not extend to the customer or the customer's affiliate's contractors, vendors, or agents providing business processes on the customer's behalf or using Microsoft Dynamics 365 to manage any portions of their business. In this sense, the customer may not use Microsoft Dynamics 365 to provide business process outsourcing services to its clients.

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

Figure 3: Internal vs. external users



## 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 the Microsoft Dynamics 365 service. 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 the Microsoft Dynamics 365 service — 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. Similarly, Microsoft Dynamics 365 SLs are required for users or devices that input data into, query, or view data from the Microsoft Dynamics 365 service through a pooling device. Pooled connections use a non-interactive user account in Microsoft 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

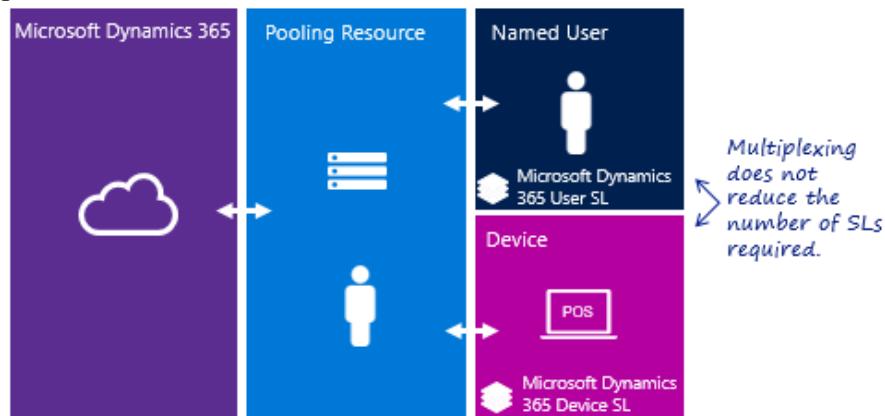
must also be properly licensed, regardless of if they are set up as a Microsoft Dynamics 365 user in the service, for example:

- Internal users and devices access Microsoft Dynamics 365 data indirectly through a PowerApps 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 service 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 Microsoft 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 the server software 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 Microsoft 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 the Unified Operations Plan and applicable Unified Operations applications, this is the Microsoft Dynamics 365 for Operations Server and for the Customer Engagement Plan Business Applications this is the Microsoft Dynamics 365 on-premises Server. Customers may use downgrade rights to deploy an earlier version of a server, however, downgrade rights are limited to Dynamics AX 2012 R3 Server for Microsoft Dynamics 365 for Operations Server, and Dynamics CRM 2016 for Microsoft Dynamics Customer Engagement Server. Licenses for all supporting servers (e.g., Windows Server and CAL(s)) must be obtained separately.

Users or devices licensed with the Dynamics 365 Plan, Dynamics 365 Customer Engagement Plan, Dynamics 365 for Sales, Dynamics 365 for Customer Service, or Dynamics 365 for Team Member SLs may access the on-premises Microsoft Dynamics 365 Server software provided via dual use rights.

Users or devices licensed with the Microsoft Dynamics 365 Plan, Dynamics 365 Unified Operations Plan, Dynamics 365 for Retail, Dynamics 365 for Operations Device, or Dynamics 365 for Team Member SLs may access the on-premises Microsoft Dynamics 365 for Operations Server software provided via dual use

rights. Access to the Microsoft Dynamics 365 for Operations Server software provided via dual use rights is exclusive to those users assigned a qualifying Microsoft Dynamics 365 SL and External Users and not provided for users licenses with on-premises CALs.

Figure 5: Dual Use Rights

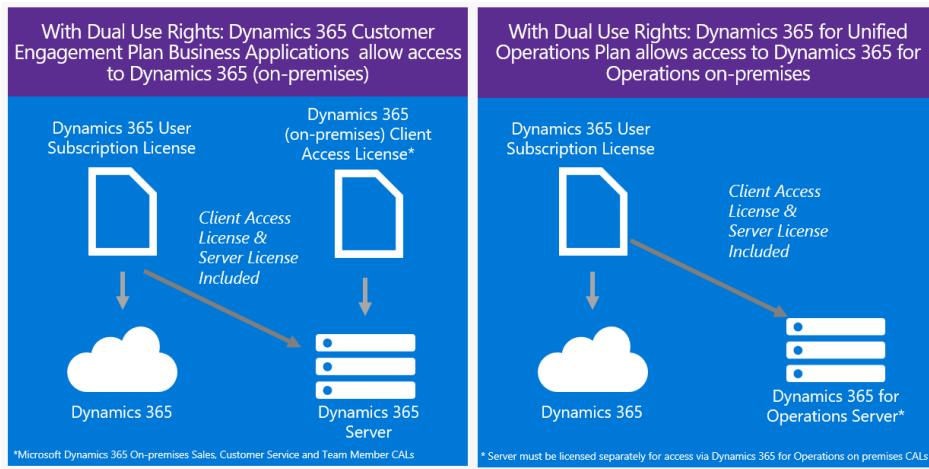
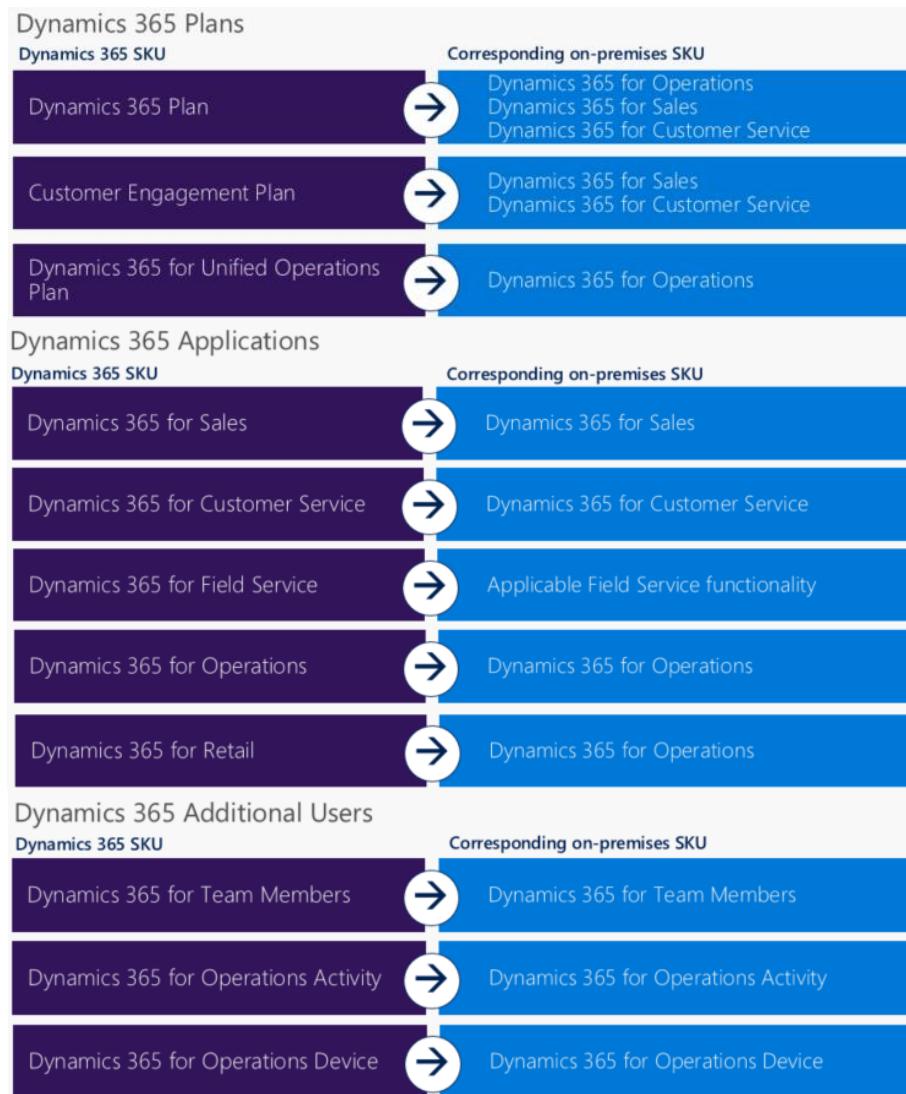


Figure 6: Dual Use Rights Mapping



Field Service (on-premises) is available for Dynamics 365 Customer Engagement Plan and Field Service customers through dual use rights

Dual Use Rights included with Microsoft 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 Microsoft 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. For more information regarding on-premises licensing, see [Microsoft Dynamics 365 On-premises](#) and [Microsoft Dynamics 365 for Operations, on-premises](#) licensing guides.

## 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
- Service and Cloud Enrollment
- Enrollment for Education Solutions (under the Campus and School Agreement)
- Microsoft Dynamics Online Government (except Dynamics 365 Unified Operations Plan, Operations Activity and Dynamics 365 Plan)
- Microsoft Products and Services Agreement (MPSA)
- Microsoft Online Subscription Program (MOSP) (except Dynamics 365 Unified Operations Plan, Dynamics 365 for Operations Activity and Dynamics 365 Dynamics 365 Plan)

Mixing of licenses across different licensing programs on a single tenant is not recommended and could lead to incompatible subscriptions. As previously stated, MPSA licenses may be mixed with EA licenses if short term subscriptions are required.

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.

## International Availability

Country, language, and localization availability for Dynamics 365 is available [here](#).

## Minimum License Purchase Requirements

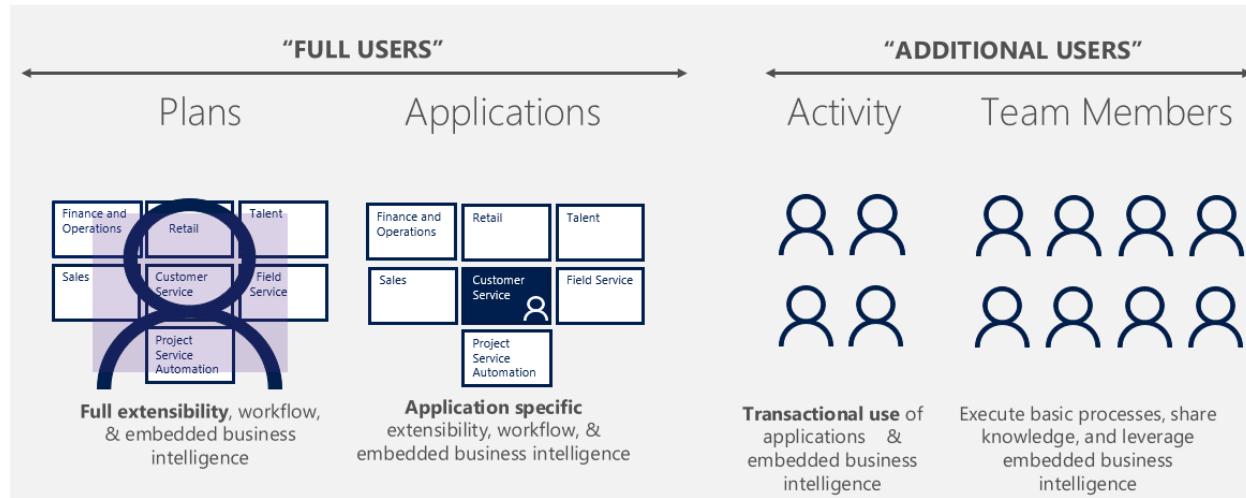
To activate the paid subscription, new customers enrolling in Microsoft Dynamics 365 for Customer Engagement Plan Business Applications on the Academic price list must purchase a minimum of 20 full user licenses (Dynamics 365 Plan, Customer Engagement Plan, Dynamics 365 for Sales, Dynamics 365 for Customer 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.

# Microsoft Dynamics 365 Subscription License Types

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

Figure 7: 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 and supply chain managers. These users have also been referred to in the past as Professional users or Power Users. These full users are licensed with a Dynamics 365 Plan, or Dynamics 365 application subscription (not including Dynamics 365 for Talent).

**Additional 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 or expense entry and HR record updates or be heavier users of the system, but not require full user capabilities. These additional users are licensed with Dynamics 365 for Team Members, Dynamics 365 for Operations Activity or Dynamics 365 for Talent subscriptions.

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

## Dynamics 365 for Team Members

The Microsoft 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 Dynamics 365 for 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 Unified Operations Plan and Dynamics 365 Customer Engagement Plan Applications. Note, at least one full user must be assigned to the tenant to administer and configure the service. A Plan subscription is the most cost-effective option to provide ultimate flexibility for a user to administer and configure more than one Dynamics 365 application.

The Dynamics 365 for Team Members SL grants a user full read access across all the Dynamics 365 applications for a given tenant. In addition, the Dynamics 365 for Team Members SL includes some limited

use write access across Dynamics 365 Unified Operations Plan and Dynamics 365 Customer Engagement Plan Business Applications as defined below.

Dynamics 365 for Team Members also includes the "PowerApps for Dynamics 365 Team Members" license. Dynamics 365 for Team Members users can use PowerApps to access Dynamics 365 within the bounds of their Team Members license. For more information on Microsoft PowerApps, please see Microsoft PowerApps [section](#).

### **Dynamics 365 for Team Member use rights for Dynamics 365 Unified Operations Plan Applications**

The Team Members SL grants a user the following Dynamics 365 for Finance and Operations, Dynamics 365 for Retail and Dynamics 365 for Talent 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 and candidate activities for hiring, onboarding, and 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

### **Dynamics 365 for Team Member use rights for Dynamics 365 Customer Engagement Plan 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

\*Customizations can only be performed against entities included in the Dynamics 365 for Team Member use rights. Custom Entities may be either based on entities included in Dynamics 365 or created by a customer or partner. Access to Custom Entities based on entities not part of Dynamics 365 for Team Members rights require a higher USL, depending on the required access.

Please review [Appendix A](#) for a more detailed list of the Dynamics 365 for Team Members use rights.

## **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 Dynamics 365 for Team Member user rights as well as the right to:

- (i) 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 Point-of-Sale (POS) device, store manager device, shop floor device, or warehouse device.

Please review [Appendix D](#) for a list of the out of the box Dynamics 365 Unified Operations Plan roles and associated user types.

## 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 Plan use. Rights to create or replicate new custom entities are not included with Dynamics 365 for Team Members and Dynamics 365 for 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.

## Dynamics 365 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. For more information on Microsoft PowerApps, please see Microsoft PowerApps [section](#).

Dynamics 365 has the following applications:

- Dynamics 365 for Sales
- Dynamics 365 for Marketing
- Dynamics 365 for Field Service
- Dynamics 365 for Customer Service
- Dynamics 365 for Project Service Automation
- Dynamics 365 for Finance and Operation
- Dynamics 365 for Retail
- Dynamics 365 for Talent

### Microsoft Dynamics 365 for Sales

For your sales team, Microsoft Dynamics 365 for Sales provides licensed users with access to core Salesforce automation capabilities such as:

- (i) Lead and opportunity management
- (ii) Products and price lists management
- (iii) Quotes, orders and invoices management
- (iv) Sales group management functionality
- (v) Case for Sales

Customers may choose what level of functionality is appropriate for their business with two options for licensing Microsoft Dynamics 365 for Sales: Dynamics 365 for Sales Enterprise and Dynamics 365 for Sales Professional.

The Sales Enterprise and Sales Professional application modules may not be deployed on the same instance; however, they may be deployed on the same tenant. Customers may mix and match Enterprise licenses (e.g. Customer Engagement Plan or Enterprise Applications) with Sales Professional on the same

tenant. A user with Sales Professional license is licensed only for that application and therefore may not directly or indirectly access another instance with Sales Enterprise application. Conversely, as Sales Enterprise includes Sales Professional capabilities, a Sales Enterprise user may access the Sales Professional instance. However, the functionality in the Sales Professional application will still be limited to the Sales Professional features.

Figure 8: Instance separation

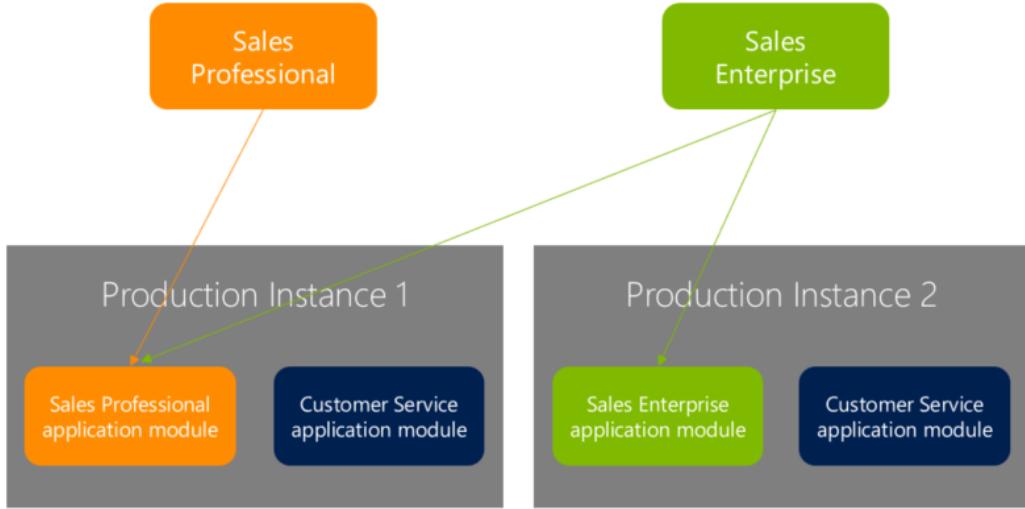


Figure 9: Mix and match deployment

Customer Scenario – 1 Tenant	Comment
Sales Enterprise + Sales Professional	Sales Enterprise users may access to all instances on a tenant. Sales Enterprise users may access Sales Professional instance but Sales Professional may not access Sales Enterprise instance
Customer Engagement Plan + Sales Professional	Customer Engagement Plan, Dynamics 365 Plan and Relationship Sales users may access both Sales Enterprise and Sales Professional instances
Customer Engagement Plan + Sales Professional + Team Members	Team member use rights do not change. The Customer Engagement Plan, Sales Professional scenario is as listed in the above section

### Dynamics 365 for Sales Professional

Dynamics 365 for Sales Professional is for customers who have simpler needs for their sales force automation solution:

- (i) Opportunity management
- (ii) Sales planning
- (iii) Performance management

### Dynamics 365 for Sales Enterprise

Dynamics 365 for Sales Enterprise goes beyond core sales force automation and meets the needs of more complex sales processes. In addition to all the functionality available in the Dynamics 365 for Sales Professional User SL, Dynamics 365 for Sales Enterprise User SL includes rights:

- (i) Advanced customization and extensibility
- (ii) Embedded intelligence features
- (iii) Advanced sales force automation
- (iv) Unified Service Desk for Microsoft Dynamics 365
- (v) Microsoft Social Engagement
- (vi) Voice of the Customer for Microsoft Dynamics 365

- (vii) Dynamics 365 Mobile Offline Sync
- (viii) Dynamics 365 – Gamification
- (ix) Microsoft PowerApps Plan 2

Additionally, this license includes rights to configure and administer the Dynamics 365 for Sales Enterprise application.

For detailed view of the use rights associated with Dynamics 365 for Sales Enterprise, refer to [Appendix B](#). [Appendix C](#) provides a comparison of features for Dynamics 365 Sales Enterprise and Dynamics 365 Sales Professional.

## Microsoft Dynamics 365 for Marketing

The Marketing application is licensed per organization and is based on contacts in the database (active and inactive). "Contact" refers the contact entity in Customer Engagement database. The Administrator may assign relevant users in the organization with a license for access to the Marketing Application. There is no purchase requirement for user licenses. The administrator will be able to assign user licenses through the admin portal for users that need access to the Marketing application. Since Marketing is an organization-based license, customers are allowed to install, use, and configure one Dynamics 365 for Marketing application with only one Dynamics 365 instance.

The Base package of Marketing includes 1 Marketing Application instance and an entitlement of 10K contacts. Customers who need additional contacts are required to purchase the "Additional Contacts" pack in increments of 5K contacts. Only one of the "base package" with 10K contacts may be purchased.

For customers who purchased Dynamics 365 Customer Engagement Plan or Dynamics 365 Plan will receive an entitlement of 2K contacts and one Marketing Application instance included with purchase of 10 seats of the Plan offers. For additional contacts pack for Dynamics 365 Customer Engagement or Dynamics 365 Plan, customers must purchase one-time "Plan Attach" offer that provides 8K additional contacts. For all additional contacts requirement, customers must purchase the "Additional Contacts" pack in increments of 5K contacts.

Dynamics 365 Customer Engagement capacity add-ons (e.g. Portal, Non-Production Instance) may also be purchased as needed at an additional cost.

Figure 10: Marketing applications

	Dynamics 365 Marketing Application Standalone	Dynamics 365 Marketing Plan "Attach"	Dynamics 365 Marketing Application "Attach"
Base Package	10k Contacts	2k Contacts included min 10 plan seats* + 8K Contacts with Plan Attach	10k Contacts
Additional Contacts	5K Contacts		
Eligible Customers	Anyone	Dynamics 365 Customer Engagement Plan customers	Dynamics 365 Customer Engagement Application customers
Inclusions	<ul style="list-style-type: none"> <li>Microsoft Social Engagement</li> <li>Voice of the Customer for Microsoft Dynamics 365</li> <li>1 Portal</li> <li>Non-Production/ Production Instance</li> <li>Storage</li> </ul>	No additional entitlements (Entitlements included with Dynamics 365 Customer Engagement Plan)	No additional entitlements (Entitlements included with Dynamics 365 Customer Engagement Applications)
Entitlements Limits	<ul style="list-style-type: none"> <li>Email/month = Up to 10 times the number of contacts purchased</li> <li>Up to 100 active live segments</li> </ul>		

\*Customers with at least 10 seats of Dynamics 365 Customer Engagement Plan and/or Dynamics 365 Plans are entitled to Marketing application with 2K contacts

Please review [Appendix B](#) for Dynamics 365 for Marketing use rights.

## 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 including:

- (i) Case Management
- (ii) Interactive Service Hub
- (iii) Unified Service Desk for Microsoft Dynamics 365
- (iv) SLAs and Entitlements
- (v) Other Service group management functionality

Each Dynamics 365 for Customer Service User SL also includes rights:

- (i) To Microsoft Social Engagement
- (ii) Voice of the Customer for Microsoft Dynamics 365
- (iii) Dynamics 365 Mobile Offline
- (iv) Microsoft Dynamics 365 - Gamification
- (v) Microsoft PowerApps Plan 2

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:

- (i) Field service capabilities including work order management
- (ii) Schedule
- (iii) Dispatch
- (iv) Routing capabilities
- (v) Repairs and returns management
- (vi) Inventory management.

Each Dynamics 365 for Field Service User SL also includes rights to:

- (i) To Microsoft Social Engagement
- (ii) Voice of the Customer for Microsoft Dynamics 365
- (iii) Dynamics 365 Mobile Offline
- (iv) Microsoft Dynamics 365 - Gamification
- (v) Microsoft PowerApps Plan 2

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:

- (i) Setting up a project organization
- (ii) Engaging with customers
- (iii) Project scheduling and costing
- (iv) Managing and approving time and expense
- (v) Closing projects

Each Dynamics 365 for Project Service Automation Service User SL also includes rights to:

- (i) To Microsoft Social Engagement
- (ii) Voice of the Customer for Microsoft Dynamics 365
- (iii) Dynamics 365 Mobile Offline
- (iv) Microsoft Dynamics 365 - Gamification
- (v) Microsoft PowerApps Plan 2

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	Customer Engagement Plan
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	● <sup>1</sup>	● <sup>1</sup>	● <sup>1</sup>	● <sup>1</sup>	● <sup>1</sup>	● <sup>1</sup>
Dual Use Rights for equivalent Dynamics 365 CAL (if exists)	●	●	●	●	●	●
Run workflows & On-demand processes	● <sup>2</sup>	● <sup>2</sup>	● <sup>2</sup>	● <sup>2</sup>	● <sup>2</sup>	●
Microsoft Project Online Essentials, Gamification Fan & Spectator rights	●	●	●	●	●	●
Portal Only: Self-Serve Case Submission & Chat initiation as supportee (not agent)	● <sup>3</sup>	● <sup>3</sup>	● <sup>3</sup>	● <sup>3</sup>	● <sup>3</sup>	● <sup>3</sup>
Portal Only, Non-Employee Only: Update Work Orders, Create & Update Opportunities	● <sup>3</sup>	● <sup>3</sup>	● <sup>3</sup>	● <sup>3</sup>	● <sup>3</sup>	● <sup>3</sup>
User reports, dashboards, and charts	●	●	●	●	●	●
Configure System reports, system charts, system dashboards	✗	○	○	○	○	●
Unified Service Desk	○	●	●	○	○	●
Leads, Opportunities, goals, quotes, orders, invoices, competitors	○	●	○	○	○	●
Sales Campaigns, quick campaigns, marketing lists, prices lists, product lists	○	●	○	○	○	●
Case Management, Contracts, Entitlements, Facilities/Equipment & Define and configure services, resources, and work hours	○	○	●	○	○	●
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	○ <sup>4</sup>	○ <sup>4</sup>	○ <sup>4</sup>	○ <sup>4</sup>	○ <sup>4</sup>	●
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

<sup>1</sup>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.

<sup>2</sup>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 Customer Engagement Plan).

<sup>3</sup>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.

<sup>4</sup>Creation of PowerApps can only leverage data included within the individual application.

## Microsoft Dynamics 365 for Finance and Operations

The Microsoft Dynamics 365 for Finance and Operations includes full read, edit and approval access across the Finance and Operations application plus Microsoft PowerApps. Finance and Operations provides the operations features and capabilities including but not limited to financial, manufacturing and supply chain capabilities that are not included in other standalone Dynamics 365 Unified Operations Plan applications.

The Dynamics 365 for Finance and Operations application cannot be licensed as a standalone application and is licensed exclusively with the Dynamics 365 Unified Operation Plan or Dynamics 365 Plan SLs. For Plan SLs purchase requirements, refer to Dynamics 365 Plans section in this licensing guide document.

Please review [Appendix D](#) for a list of the out of the box Dynamics 365 Unified Operations Plan roles and associated user types. For a description of how to create custom roles for Dynamics 365 Unified Operations Plan and how to license them please refer to [Appendix E](#).

## Dynamics 365 for Retail

The Dynamics 365 for Retail application is designed to help retailers manage their operations, deliver a connected employee experience, and offer exceptional shopping experiences. By leveraging intelligent forecasting and product recommendations, retailers may:

- (i) Improve in-store and e-commerce profitability
- (ii) Drive intelligent business insights to optimize strategy and cost
- (iii) Accelerate buying behavior through ubiquitous customer experiences

The Retail application is optimized for full users, including headquarter and central operation employees of retail organizations. Depending on the scenario, employees in retail stores will generally be licensed with either the [Operations Device SL](#) or [Operations Activity SL](#). Examples of these scenarios may include store employees, store managers and point of sale devices. For Operations Device and Operations Activity use rights, refer to those licenses descriptions in this licensing guide document.

There is a 20-seat minimum of Dynamics 365 for Retail (or Dynamics 365 Plan or Unified Operations Plan) SLs required to license the application.

Retail deployments may also utilize the Retail Store Scale Unit, which is a retail server, cloud POS website and channel database deployed locally in a store. It maintains connectivity with and extends a Dynamics 365 for Retail deployment, providing improved performance, business continuity and hybrid capabilities in store.

The Retail Store Scale Unit installation and use rights are included with a qualifying minimum purchase of Dynamics 365 for Operations Plan, Unified Operations Plan and Retail Application SLs and may be downloaded and installed at no additional cost. All servers, users and devices accessing the Retail Store Scale Unit must be appropriately licensed. The Retail Store Scale Unit is not available as a standalone license. Required hardware, Windows Client or Windows Server and SQL licenses must be acquired and licensed separately.

If dual use rights are being exercised and downgrade rights are utilized to downgrade to AX 2012, the Retail Store Server is not an included use right and appropriate licensing must be obtained. Please see AX 2012 Retail Licensing Guide and refer to the AX downgrade mappings table in the Dynamics 365 for Operations on-premises licensing guide to determine appropriate licensing.

Please review the retail section of [Appendix D](#) for a list of the out of the box retail roles and associated user types. For a description of how to create custom roles for Dynamics 365 for Retail and how to license them please refer to [Appendix E](#).

## Dynamics 365 for Talent

The Microsoft Dynamics 365 for Talent application helps organizations strategically attain, empower and optimize human resources to achieve high-impact, sustainable results for the organization. There are two sets talent experiences:

- (i) HR Experience: strategic HR experience to drive operational excellence through intuitive experiences, visibility and collaboration and impactful programs
- (ii) Talent Experiences: hire the best talent faster, build high performing agile teams and maximize the potential of your team

Both experiences are licensed together in the Dynamics 365 for Talent application. Examples of full users who would be licensed with Talent application SLs would include human resource professionals and recruiters.

Users who sit outside of HR and recruiting, such as employees who need self-serve HR access and hiring managers who will be hiring for their own teams would be licensed through the Team Members SL.

There is a 5-seat minimum of full Dynamics 365 for Talent (or Dynamics 365 Plan or Unified Operations Plan) SLs required to license the Talent application.

For more information on the default capacities included for the Talent subscription, click [here](#).

Please review the Dynamics 365 for Talent section in [Appendix D](#) for a list of the out of the box Dynamics 365 for Talent roles and associated user types. For a description of how to create custom roles for Dynamics 365 for Talent and how to license them please refer to [Appendix E](#).

## Dynamics 365 Modular Applications

Dynamics 365 Modular Applications allow you to take advantage of Dynamics 365 Application capabilities in a lighter weight, more targeted solution. Modular applications represent a subset of the capabilities in their respective Dynamics 365 Applications but are fully functional standalone experiences that can also integrate with and extend Microsoft and third-party business applications.

### Talent Modular Applications

Two Talent modular applications are available:

- Talent: Attract
- Talent: Onboard

The Talent Attract and Onboard applications are sold individually or together as a discounted bundle. Pricing is per user per month with a one-year minimum commitment and there is no minimum purchase requirement. The capabilities in these applications are targeted at hiring managers. These capabilities are also included for users who are licensed for Dynamics 365 for Talent. These applications are only available for direct purchase and are licensed under the Microsoft Online Subscription Program (MOSP).

## 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.

### Dynamics 365 Customer Engagement Plan

Dynamics 365 Customer Engagement Plan gives you the flexibility to work with any application functionality. Dynamics 365 Customer Engagement Plan includes flexibility to use:

- Dynamics 365 for Sales
- Dynamics 365 for Marketing
- Dynamics 365 for Field Service
- Dynamics 365 for Customer Service
- Dynamics 365 for Project Service Automation
- Microsoft PowerApps Plan 2

Licensing becomes simpler because all Customer Engagement Plan business application rights are included.

Figure 11: Customer Engagement Plan



## Dynamics 365 Unified Operations Plan

Dynamics 365 Unified Operations Plan includes full read, edit and approval access across the entire ERP solution (formerly known as Microsoft Dynamics AX) plus Microsoft PowerApps capabilities. Dynamics 365 for Finance and Operations Plan includes flexibility to use Dynamics 365 for Talent, Dynamics 365 for Retail, and PowerApps Plan 2.

Figure 12: Unified Operations Plan



Please note there is a minimum quantity of SLs required:

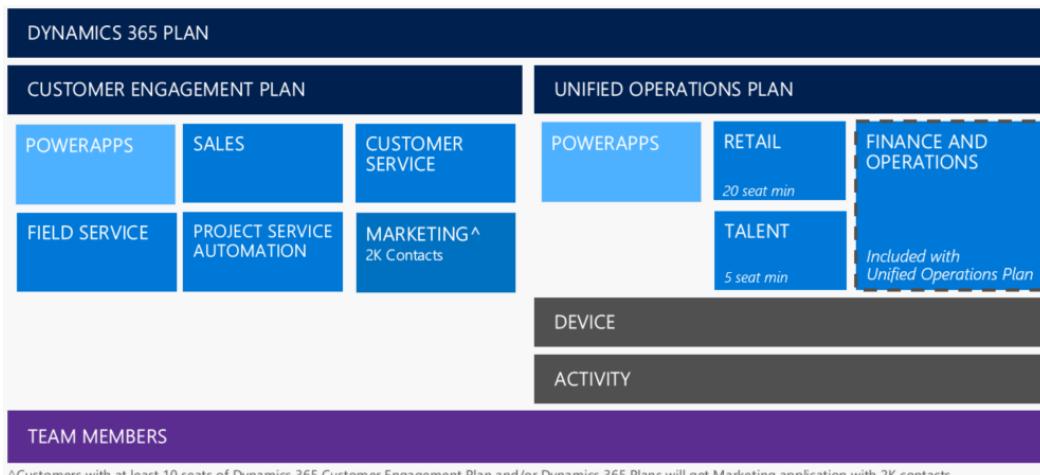
- (i) 20 Microsoft Dynamics 365 Unified Operations Plan or Dynamics 365 Plan User SLs, 20 Dynamics 365 for Retail SLs and 5 Dynamics 365 for Talent SLs
- (ii) Customers may also license equivalent Microsoft Dynamics 365 for Operations Device SLs per tenant
  - a. Dynamics 365 Plan, Dynamics 365 Unified Operations Plan and Dynamics 365 for Retail application SLs may be combined to satisfy the 20-user minimum for a Dynamics 365 for Finance and Operations and/or Dynamics 365 for Retail deployment.
  - b. Dynamics 365 for Operations Device SLs may also be applied toward satisfying the 20-user minimum with 2.5 Device SLs to equal 1 Dynamics 365 Unified Operations Plan User SL.
  - c. Dynamics 365 Plan, Dynamics 365 Unified Operations Plan and Dynamics 365 for Talent application SLs may be combined to satisfy the 5-user minimum for a Talent deployment.
  - d. For example, a customer could meet the minimum requirement with 10 Dynamics 365 Unified Operations Plan User SLs and 25 Dynamics 365 for Operations Device SLs
  - e. The Microsoft Cloud Solution Provider (CSP) program does not allow for mixing of SKU types to satisfy the minimum requirement. The CSP minimum is 20 Dynamics 365 Plan SLs, 20 Dynamics 365 Unified Operations Plan User SLs, 20 Dynamics 365 for Retail SLs or 5 Dynamics 365 for Talent SLs.

Please review [Appendix D](#) for a list of the out of the box Dynamics 365 Unified Operations Plan roles and associated user types. For a description of how to create custom roles for Dynamics 365 Unified Operations Plan and how to license them please refer to [Appendix E](#).

## Dynamics 365 Plan

Dynamics 365 Plan includes access to Customer Engagement Plan functionality plus Dynamics 365 Unified Operations Plan.

Figure 13: Dynamics 365



## Microsoft Relationship Sales

Microsoft Relationship Sales solution helps sales professionals build the relationships they need to win, from a single, trusted vendor. This solution will help connect more businesses with the power of relationship selling.

Microsoft Relationships Sales solution includes Dynamics 365 for Sales and LinkedIn Sales Navigator. Microsoft Relationship Sales solution seats will contribute towards the Dynamics 365 Customer Engagement Plan tiers. See Tiered Pricing section in this licensing guide document to learn more.

For more information and list of features included with LinkedIn Sales Navigator see <https://business.linkedin.com/sales-solutions/sales-navigator>. For a detailed view of the use rights associated with Dynamics 365 for Sales please refer to [Appendix B](#).

## Tiered Pricing Policies

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

Additionally, customers may purchase Microsoft Relationship Sales solution with tiered pricing based on number of users for the subscription offer.

Other considerations:

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

# Dynamics 365 Device Subscription License

## 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 Customer Engagement Plan device license. For a detailed view of the use rights associated with Dynamics 365 for Sales device please refer to [Appendix B](#).

## 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 Customer Engagement Plan device license. For a detailed view of the use rights associated with Dynamics 365 for Customer Service device please refer to [Appendix B](#).

## 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 Customer Engagement Plan device license. For a detailed view of the use rights associated with Dynamics 365 for Field Service device please refer to [Appendix B](#).

## Dynamics 365 for Operations Device SL

With the Dynamics 365 for Operations Device license, multiple users can use a device that is licensed with a Dynamics 365 Operations device SL to operate a point of sale device, shop floor device, warehouse device or store manager device. A single device can provide any of the following functionality in any combination.

- (i) "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.
- (ii) "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.
- (iii) "Commerce Location" or "Store" means a physical location (static or itinerant) operated by you when closing goods or services transactions with customers.
- (iv) "Shop Floor Device" means one device used for manufacturing shop-floor functions
- (v) "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.
- (vi) "Warehouse Device" means one device used for Warehousing Functions.

(vii) "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).

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.

## Additional Services and Software

Microsoft offers additional services and software that work in tandem with Microsoft Dynamics 365.

Dynamics 365 for	Social Engagement	Unified Service Desk	Interactive Services Hub	Voice of the Customer	Mobile Offline	Gamification
Sales Enterprise	10K posts /month*	✓	✓	✓	✓	✓ +
Sales Professional			✓			✓ ^
Marketing Standalone	10K posts /month*			✓	✓	
Customer Service	10K posts /month*	✓	✓	✓	✓	✓ +
Field Service	10K posts /month*		✓	✓	✓	✓ +
Project Service Automation	10K posts /month*		✓	✓	✓	✓ +
Team Members			✓			✓ ^

\*Unused posts expire at the end of the month and do not roll over to the next month

+Microsoft Dynamics 365 - Gamification Commissioner, Game Manager and Player rights

^Fan and Spectator rights

## 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. Customers who need more than 10K posts per month per tenant may purchase additional posts as a subscription add-on. For more details see [Appendix F](#). Microsoft Social Engagement functionality included with select Dynamics 365 applications:

- |                                     |  |
|-------------------------------------|--|
| (i) Social Listening                | (ix) Social insights                       |
| (ii) Social sentiment detection     | (x) Social Engagement                      |
| (iii) Social analytics              | (xi) Social center: unlimited streams      |
| (iv) Activity map                   | (xii) Social center: sharing streams       |
| (v) Trend and post alerts           | (xiii) Social center: assign posts to user |
| (vi) Private messages               | (xiv) Link to Dynamics 365                 |
| (vii) Export widgets to Excel       | (xv) Automation rules                      |
| (viii) Azure Event Hub integration* | (xvi) 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 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.

## 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.

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 - 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.

Role	Use Rights	Included in Team Members and Sales Professional	Included in select applications
Spectator	View results on leaderboards (web, mobile, and TV screens), and chats with participants	✓	✓
Fan	Draft personal Fantasy Teams, earn points, badges, and trophies on team results	✓	✓
Player	Play/compete in game (earn points, badges, and trophies) and participate in Chat		✓
Game Manager	Setup games: define game model, metrics, positions, and prizes		✓
Commissioner	Oversee games: admin, role management		✓

# 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 Dynamics 365 Customer Engagement Plan Business Applications, or the Unified Operations Plan Applications. We have broken this default section down into all Customer Engagement Plan Business Applications, which will leverage the same tenant and infrastructure will accrue across this one tenant. Unified Operations Plan Applications leverages an entirely different tenant and will have its own set of default capabilities.

## Customer Engagement Plan Business Applications

Customer Engagement Plan Business Applications share the same tenant and share infrastructure capacity. If a customer purchases Dynamics 365 Plan they will obtain default access to both the Customer Engagement Plan Business Applications and the Dynamics 365 Unified Operations Plan Application.

	Default Instance per Tenant shared across all Customer Engagement Applications					
Dynamics 365 for	Production Instance	Portal Instance	Non-production Instance	Dynamics 365 Portal <sup>^</sup>	Dynamics 365 Portal Page Views	Database Storage
Sales Enterprise*	1	1	1	1	1 million/month	10GB
Sales Professional*	1	-	-	-	-	10GB
Marketing Standalone <sup>+</sup>	1	1	1	1	1 million/month	10GB
Customer Service*	1	1	1	1	1 million/month	10GB
Field Service*	1	1	1	1	1 million/month	10GB
Project Service Automation*	1	1	1	1	1 million/month	10GB

\*Default instance and infrastructure capacity are shared per tenant, not cumulative

<sup>+</sup>Marketing Attach licenses share default instance and infrastructure capacity per tenant, not cumulative

<sup>^</sup>Requires 5-seat minimum of Dynamics 365 Customer Engagement Plan, Customer Engagement Plan Business Applications or a combination

## Default Dynamics 365 Portal and Page Views

The Dynamics 365 Portal provides you the capability to extend your Dynamics 365 applications into cloud hosted web portals, each of which is easily configurable for your employees, partners and customers.

A Customer Engagement Plan Business Application subscription is required to administer and configure the portal. Each portal may only be associated with one instance.

Effective August 1<sup>st</sup>, 2017, access to the first included portal for the tenant requires the purchase of a minimum of 5 Full User licenses of Dynamics 365 Customer Engagement Plan, Dynamics 365 Customer Engagement Business Applications (Sales, Customer Service, Field Service or Project Service Automation) or a combination. Existing customers are not impacted with this change until renewal. New customers who need to purchase less than 5 users, may purchase the Portal "Add-on" (see "Microsoft Dynamics 365 Add-on section" in [Appendix F](#)).

Note: Team Member Licenses will not contribute to the minimum user requirement.

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

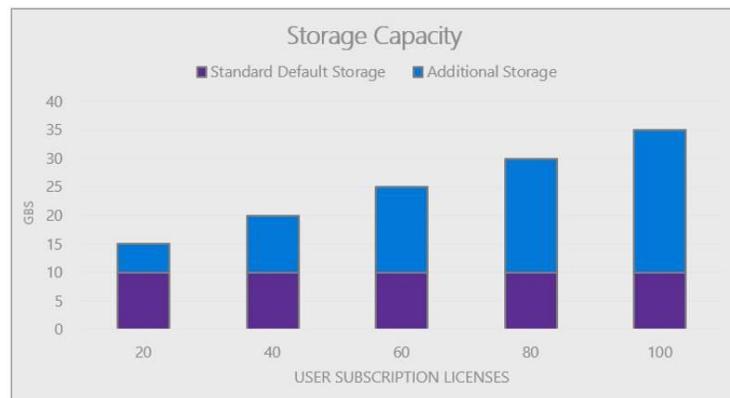
## Default Database Storage

The tenant for Customer Engagement Plan 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. 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 per tenant is subject to the technical limit of 30 TB.

The Customer Engagement Plan applications storage and the Dynamics 365 Unified Operations Plan storage are not shared. See descriptions of the additional capacity Dynamics 365 Add-on in [Appendix E](#).

Figure 14: Database Storage Capacity



## Dynamics 365 Unified Operations Plan Applications

Unified Operations Plan Applications share the same tenant and share infrastructure capacity. If a customer purchases Dynamics 365 Plan they will obtain default access to both the Customer Engagement Plan Business Applications and the Unified Operations Plan Applications.

Default Instance per Tenant shared across all Unified Operations Applications				
Dynamics 365 for	Production Instance	Non-production Instance Capacity	Database Storage	File Storage Capacity
Finance and Operations*^	1	1 Sandbox Tier 1 1 Sandbox Tier 2	10K	100GB of file/Azure Binary Large Objects (BLOBs)
Retail*	1	1 Sandbox Tier 1 1 Sandbox Tier 2	10K	100GB of file/Azure Binary Large Objects (BLOBs)

\*Default instance and infrastructure capacity are shared per tenant, not cumulative

<sup>^</sup>Dynamics 365 for Finance and Operations is only licensed with Dynamics 365 Unified Operations Plan subscriptions

### Default infrastructure capacity for Dynamics 365 for Talent

Customers who purchase the full Talent User SL (5-seat minimum) are entitled to 2 identical environments/ instances for the tenant (not per seat). At any given time, only one of the identical instances may be in production but alternatively both instances may be in non-production (UAT, pre-production). Dynamics 365 for Finance and Operations and Dynamics 365 for Retail sandbox and database storage add-ons are not compatible with Talent. Additional instances cannot be added at this time, but file and database storage can be extended by purchasing additional storage through the PowerApps subscription that is included with the Dynamics 365 for Talent SKU. Dynamics 365 for Finance and Operations and Dynamics 365 for Retail both only support a single production instance per tenant. If multiple instances are needed each instance will need to reside on its own subscription and tenant. Users must then be licensed separately for each of those instances.

## Default Production Instance

Each Dynamics 365 Unified Operations Plan 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 Unified Operations Plan User SLs and/or equivalent Device SL per tenant. 2.5 Device SLs are equal to 1 Dynamics 365 Unified Operations Plan User SL. For example, 25 device SLs plus 10 Unified Operations would meet the 20-user minimum. 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. See descriptions of the additional capacity Dynamics 365 Add-on in [Appendix F](#).

## Default Non-Production Instance Capacity

The Dynamics 365 Unified Operations Plan and Dynamics 365 for Retail Application will come with one Sandbox Tier 1 and one Sandbox Tier 2 environment per customer. Additional non-production instances can be purchased. Subscription duration requirements are determined by the licensing program under which the sandbox is licensed. Short term subscriptions are available exclusively through the MPSA licensing program. More information on MPSA is available [here](#).

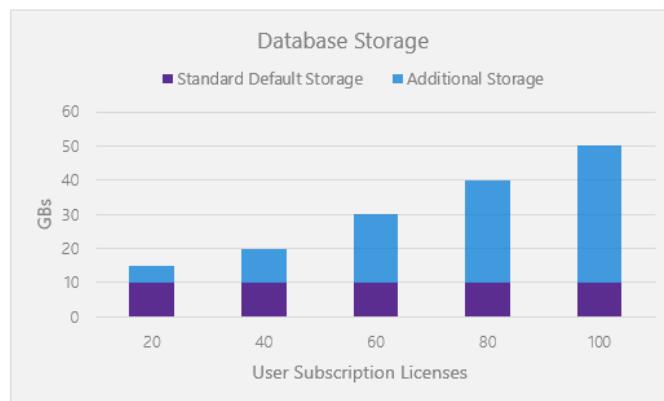
- (i) **Sandbox Tier 1:** Developer Instance is provided for the life of the tenant. Additional Developer Instances can be purchased separately as an optional add-on. This is a non-production single box instance that customers can use to customize Dynamics 365 Unified Operations Plan and unit test their changes. The Non-Production Developer Instance add-on license does not include any incremental default storage capacity.
- (ii) **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.

See descriptions of the additional capacity Dynamics 365 Add-on in [Appendix F](#).

## Default Database Storage

The tenant for the Dynamics 365 Unified Operations Plan and Dynamics 365 for Retail Application subscriptions 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 5 GB for every 20 Dynamics 365 Unified Operations Plan, Dynamics 365 Plan or Dynamics 365 for Retail users. The Customer Engagement Plan application storage and the Dynamics 365 Unified Operations Plan storage are not shared between them. See descriptions of the additional capacity Dynamics 365 Add-on in [Appendix F](#).

Figure 15: Database Storage Capacity



## Default File Storage Capacity

Each Dynamics 365 Unified Operations Plan or Dynamics 365 for Retail application 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. See descriptions of the additional capacity Dynamics 365 Add-on in [Appendix F](#).

## Microsoft PowerApps

PowerApps and Microsoft Flow capabilities are included in Dynamics 365 subscriptions, allowing users to create and run applications and flows based on Dynamics 365 data. Dynamics 365 Applications and Plans include PowerApps Plan 2, which provides users full create and run capabilities across data sources including the ability to model business data in the Common Data Service (CDS).

	Dynamics 365 Team Members/Activity	Dynamics 365 Applications	Dynamics 365 Plans
Included PowerApps Plan	PowerApps for Dynamics 365	PowerApps Plan 2	PowerApps Plan 2
Service included	PowerApps & Flow	PowerApps & Flow	PowerApps & Flow
Service key features	Create & run apps and flows within the context of the Team Members and Activity use rights  Be monitored	Create & run apps and flows within the context of the Application use rights  Create & run canvas apps  Use Business process flows  Model business data in the Microsoft Common Data Service (CDS)  Set policy and view usage	Create & run apps and flows within the context of the Plans use rights  Create & run canvas apps  Use Business process flows  Model business data in the Microsoft Common Data Service (CDS)  Set policy and view usage
Included capacity	2,000 flow runs/user/month	15,000 flow runs/user/month  200 MB data storage/user/month  20 GB file storage/user/month	15,000 flow runs/user/month  200 MB data storage/user/month  20 GB file storage/user/month

## Microsoft Power BI in Dynamics 365

Dynamics 365 Unified Operations Plan and Dynamics 365 Plan 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.

The Dynamics 365 Unified Operations applications themselves may embed Power BI content within the service User Interfaces. 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 Customer Engagement Plan and Customer Engagement Plan 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](#).

## Visual Studio subscriptions

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

# 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 Unified Operations Plan Applications implementation by simplifying and standardizing the implementation process to realize business value faster. Once you sign up for Microsoft Dynamics 365 Unified Operations Plan, you are provided with a project workspace including methodologies and services that help you manage the service lifecycle. LCS provides a variety of services to assist and help customers navigate through the various phases of the project including: (i) defining your business processes and any customization needed, (ii) develop additional functionality using best practices, and (iii) help operate their environment to reduce the time it takes to resolve issues to realize greater return on investment, while reducing the total cost of ownership.

## Free Trial

### Customer Engagement Plan Business Application Trial

You can sign-up for a free 30-day trial of Microsoft Dynamics 365 Customer Engagement Plan 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 <https://www.microsoft.com/en-us/dynamics365/home>.

### Dynamics 365 for Finance and Operations Trial

You can sign-up for a free 30-day trial of Dynamics 365 for Finance and Operations through a simple email signup. The trial version of Dynamics 365 for Finance and 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 buy experience can be initiated at that time to complete the purchase. Get details at [www.microsoft.com/en-us/dynamics365/operations](http://www.microsoft.com/en-us/dynamics365/operations).

**Note:** Support included for Trial is the same as what customers receive when purchasing Microsoft Dynamics 365 services. Premium level support options are not available for purchase during the trial period.

## Dynamics 365 Support Policies

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

- (i) Technical support is included in the online subscriptions when a customer chooses to deploy online (Volume Licensing and Web Direct. CSP support is though partner).
- (ii) If a customer chooses to deploy with dual-use rights, Microsoft Technical support will assist with support issues resulting with the deployment of dual use rights, however, support is not included for the on-premises deployment.
- (iii) Support offerings for on-premises are sold separately when a customer chooses to deploy on-premises. The customer has the following options:
  - a. Seek support from their partner
  - b. Purchase professional support incidents from support.microsoft.com to get support directly from Microsoft

Response times for technical support incidents vary by case severity. Definitions are included in [Appendix G](#). 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 \$180USD per month (equivalent to 20-seats) for Dynamics 365 Customer Engagement and Unified Operations Plans and Applications, and \$300USD per month (equivalent to 20-seats) for Dynamics 365 Plan. When purchasing through Volume Licensing, ensure the minimum threshold is entered when placing the order.

## 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:

- (i) Unlimited Break/Fix Support
- (ii) CustomerSource
- (iii) Microsoft Dynamics Community
- (iv) "Getting Started Catalog" and Self-Help Resources

## Enhanced Support Plan

[Enhanced Support](#) includes all the Support Subscription Plan benefits, plus,

Unlimited Access to Online Training:

- (i) E-learning
- (ii) Training Materials
- (iii) Learning Plans

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 G](#).

## Professional Direct Services

[Professional Direct Services](#) includes all the Support Subscription Plan benefits, plus:

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 G](#).

24x7 Support: Available for Severity A cases only. Direct access to tier 2 escalation engineers.

Service Delivery Management

- Escalation Specialists
- Red Carpet Welcome
- Light Advisory Services
- Release Upgrade Readiness
- Monthly Review
- Service Interruption Handling
- Case Wellness

- Product Onboarding Assistance
- Ask the Expert Webinars

## Premier Support Services

Premier Support is a comprehensive support solution for your large business that helps reduce costs, enhance productivity, and use technology to realize new business opportunities for any stage of the IT lifecycle.

- (i) Proactive services help maintain and improve health of your customers' IT infrastructure and operations.
- (ii) Service Delivery Management facilitates planning and implementation
- (iii) Prioritized 24x7 problem resolution services provide rapid response to minimize downtime
- (iv) Exclusive access to advanced technical training to improve IT staff productivity
- (v) Customized support service add-ons available to meet the specific support needs of your business

For more information, visit [Premier Support Services](#).

## Links for Additional Information

Microsoft Dynamics 365	<a href="https://www.microsoft.com/en-us/dynamics/erp-ax-overview.aspx">https://www.microsoft.com/en-us/dynamics/erp-ax-overview.aspx</a>
Online Licensing Guides:	
Microsoft Dynamics AX	<a href="http://aka.ms/s201h6">http://aka.ms/s201h6</a>
Microsoft Dynamics CRM	<a href="http://aka.ms/gtn5wt">http://aka.ms/gtn5wt</a>
On-premises Licensing Guides:	
AX 2013 R3	<a href="http://aka.ms/Jswgcc">http://aka.ms/Jswgcc</a>
CRM 2016	<a href="http://aka.ms/kn26ux">http://aka.ms/kn26ux</a>
Dynamics 365 On-premises	<a href="https://www.microsoft.com/en-us/dynamics365/pricing">https://www.microsoft.com/en-us/dynamics365/pricing</a>
Microsoft Dynamics Blog	<a href="https://community.dynamics.com/b/msftdynamicsblog">https://community.dynamics.com/b/msftdynamicsblog</a>
Microsoft Volume Licensing	<a href="http://www.microsoft.com/licensing">www.microsoft.com/licensing</a>
Software Assurance	<a href="http://www.microsoft.com/licensing/software-assurance/default.aspx">http://www.microsoft.com/licensing/software-assurance/default.aspx</a>
Activate Software Assurance Benefits	<a href="https://www.microsoft.com/en-us/Licensing/existing-customer/product-activation.aspx">https://www.microsoft.com/en-us/Licensing/existing-customer/product-activation.aspx</a>
Microsoft License Advisor	<a href="http://www.microsoft.com/licensing/mla/default.aspx">http://www.microsoft.com/licensing/mla/default.aspx</a>
Microsoft Dynamics Online Support	<a href="http://www.microsoft.com/en-us/dynamics/dynamics-online-support.aspx">http://www.microsoft.com/en-us/dynamics/dynamics-online-support.aspx</a>
CustomerSource	<a href="https://mbs.microsoft.com/customersource/">https://mbs.microsoft.com/customersource/</a>
Microsoft Downloads Center	<a href="http://www.microsoft.com/downloads">http://www.microsoft.com/downloads</a>
Cloud Solution Provider Program (MPN)	<a href="https://mspartner.microsoft.com/en/us/Pages/solutions/cloud-reseller-overview.aspx">https://mspartner.microsoft.com/en/us/Pages/solutions/cloud-reseller-overview.aspx</a>

## 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 license which provides access to both Dynamics 365 Customer Engagement Plan Business Application and Dynamics 365 Unified Operations Plan features. The table calls out which Application to which a given feature applies. Additional details on Customer Engagement Plan Business Application functionality for Team Members is also shown in Appendix B.

Access Rights	Description	Customer Engagement Plan Business Applications	Unified Operations Plan Application
Access	Access Anywhere: Web App, Mobile App, Tablet App, via Outlook Use Relationship and Connections between records	● ●	
General System Use	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	●	●
	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*	●	
Edit/Actions	Custom Entities*	●	
	Record time and Expenses (including for projects)	●	●
	Manage personal info	●	●
	Manage direct reports and candidates	●	
	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: Customer Engagement Plan 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 Customer Engagement Plan 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. A Plan subscription is the most cost-effective option to provide ultimate flexibility for a user to administer and configure more than one Dynamics 365 application.

Since Marketing is an organization-based license, "For App" refers to access or execution allowed in the context of Marketing Application alone. If user is also licensed with Team Member or other Dynamics 365 Application licenses, they will continue to have the rights associated with the license type.

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

Use Rights	Team Members	Sales Enterprise	Customer Service	Field Service	Project Service Automation	Marketing
Dynamics 365 Unified Operations Plan 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	●	●	●	●	●	For App
Associate a Marketing List with an Account or Contact	●	●	●	●	●	For App
Activities and Notes	●	●	●	●	●	For App
Post & follow activity feeds	●	●	●	●	●	For App
Yammer collaboration*	●	●	●	●	●	
Use a queue item	● <sup>+</sup>	● <sup>+</sup>	● <sup>+</sup>	● <sup>+</sup>	● <sup>+</sup>	For App
Start dialog	● <sup>+</sup>	● <sup>+</sup>	● <sup>+</sup>	● <sup>+</sup>	● <sup>+</sup>	For App
Shared Calendar	●	●	●	●	●	For App
View Announcements	●	●	●	●	●	For App
Run as an on-demand process	● <sup>+</sup>	● <sup>+</sup>	● <sup>+</sup>	● <sup>+</sup>	● <sup>+</sup>	For App
Run an automated workflow	● <sup>+</sup>	● <sup>+</sup>	● <sup>+</sup>	● <sup>+</sup>	● <sup>+</sup>	For App
Use relationships and connections between records	● <sup>+</sup>	● <sup>+</sup>	● <sup>+</sup>	● <sup>+</sup>	● <sup>+</sup>	For App
Write custom entity records	● <sup>^</sup>	● <sup>^</sup>	● <sup>^</sup>	● <sup>^</sup>	● <sup>^</sup>	For App
Read custom entity data	●	●	●	●	●	For App
Personal views; Saved Views	●	●	●	● <sup>+</sup>	●	For App
Search & Advanced find search	●	●	●	● <sup>+</sup>	●	For App
Export data to Microsoft Excel	●	●	●	●	●	For App
Perform mail merge	●	●	●	●	●	For App
Dynamics 365 Mobile Client Application	●	●	●	●	●	For App
Microsoft Dynamics 365 for iPad & Windows	●	●	●	●	●	For App
Microsoft Dynamics 365 for Outlook	●	●	●	●	●	For App
Microsoft Dynamics 365 Web application	●	●	●	●	●	For App
Read All Dynamics 365 application data	●	●	●	●	●	For App
Portal or API access Only: Employee Self Service: Submit cases and update Cases user has submitted (as a support client/customer)	●	●	●	●	●	

Use Rights	Team Members	Sales Enterprise	Customer Service	Field Service	Project Service Automation	Marketing
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	●	●	●	●	●	
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	●	●	●	●	●	
Read user reports, charts, and dashboards	●	●	●	●	●	For App
Create, update, customize, and run Reports	●	●	●	●	●	For App
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	For App
Configure auditing		For App	For App	For App	For App	For App
Configure duplicate-detection rules		For App	For App	For App	For App	For App
Define connections and relationships between entities		For App	For App	For App	For App	For App
Define and configure queues		For App	For App	For App	For App	For App
Define and configure dialogs		For App	For App	For App	For App	For App
Define and configure workflows		For App	For App	For App	For App	For App
System reports, charts, and dashboards		For App	For App	For App	For App	For App
Customize forms and views		For App	For App	For App	For App	For App
Create Dynamics 365 forms, entities, and fields		For App	For App	For App	For App	For App
Administer Dynamics 365		For App	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	●					For App
Opportunities	●					
Qualify and convert a Lead to an Opportunity	●					
Convert an activity to an Opportunity	●					

Use Rights	Team Members	Sales Enterprise	Customer Service	Field Service	Project Service Automation	Marketing
Competitors		●				
Product families		●				
Price lists		●				
Quotes		●				
Orders		●				
Invoices		●				
Goals		●				
Territories		●				
Embedded intelligence Relationship assistance, auto capture, email engagement		●				
Sales literature		●				●
Marketing Lists		●				●
Quick campaigns		●				●
Marketing campaigns		●				●
Define and configure business units		●				●
Define and configure teams		●				●
Unified Service Desk for Microsoft Dynamics 365	●		●			
Case management: Create, read, update, reassign, add to queue, route, resolve, and delete cases		●	●			
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 <sup>1</sup>				●		
Projects					●	
Project Expenses and Project Estimates					●	
Resource Availability View and Resource Schedule Management					●	
Project Price Lists					●	
Project Contracts					●	
Project Invoices					●	
Approve Project Transactions					●	

Use Rights	Team Members	Sales Enterprise	Customer Service	Field Service	Project Service Automation	Marketing
Manage Services, Resources, Work Hours, and Competencies				●		
Microsoft Project Online Premium~				●		
Email Marketing						Max 10X contacts
Lead Scoring						For App
Active Segments						Max 100
Multi-Channel Campaign Management (Customer Journeys, Marketing Pages, etc.)				●		
Event Management				●		
Connector for LinkedIn Lead Gen Forms				●		

\*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>

\*\*Marketing standalone only

<sup>1</sup>This application is technically limited to only Field Service entities and a maximum of 10 custom entities

'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 Sales Features

Features	Description	Sales Professional per user	Sales Enterprise per user
Sales Management	Lead and opportunity management	•	•
	Marketing lists, sales campaigns	•	•
	Product, product bundles, price lists	•	•
	Quotes, orders, invoices	•	•
	Competitors, sales goals, territory management,		•
	Product families, product relationships		•
	Hierarchies		•
Social Engagement			•
Gamification			•
Voice of Customer			•
Mobile offline sync			•
PowerApps for Dynamics 365			included
Dynamics 365 for Sales embedded intelligence			• (new)
Case for Sales	Create, read, update, reassign, add to queue, route, resolve, convert an activity to a case, and delete cases^	• (new)	• (new)
Customization in application module	Custom entities*	max 15 <sup>+</sup>	unlimited
	Business Process Flows*	max 5 <sup>+</sup>	unlimited
	Custom Workflows*	max 15 <sup>+</sup>	unlimited
	3rd Party Application Installs	max 10 <sup>+</sup>	unlimited
Team Members	Forms per entity	max 2 <sup>+</sup>	unlimited
	Functionality: Accounts, Contacts, Activities, Knowledge, etc.	•	•
	Custom Entities*	•	•
Reporting and analysis	Export to Microsoft Excel, Advanced Analytics with Power BI license	•	•
	Real-time sales reports and dashboards	max 5 <sup>+</sup> report customizations	standard & custom R/D and SRS reports

\*3rd Party solutions added from AppSource do not count against this limit. Limit to size of 3rd party solution installs

<sup>^</sup>This does not include hierarchies and SLAs available with Dynamics 365 for Customer Service application

<sup>+</sup>Per instance, not cumulative

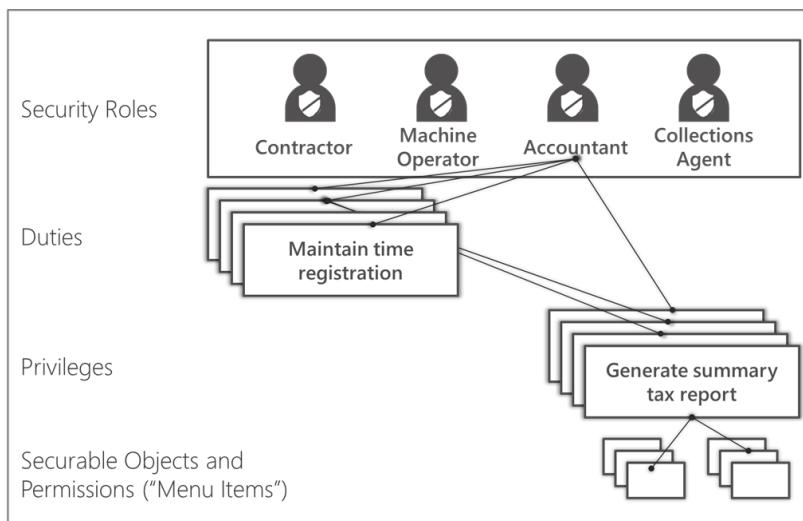
# Appendix D: Dynamics 365 Unified Operations Plan

## 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 Unified Operations Plan Security Roles combine meaningful packages of solution functionality and access rights required to perform actions relevant to that role.

Figure 16: 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 Unified Operations Plan 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 Unified Operations Plan

Role	Description	User SL		
		Team Members	Activity	Unified Operations Plan or Talent
Talent				
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 on 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	Unified Operations Plan or Retail
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 Unified Operations Plan
Chief executive officer	Reviews the financial and operational performance		• •
Chief financial officer	Reviews the financial performance		• •
Budgeting		Team Members	Activity Unified Operations Plan
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 Unified Operations Plan
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 inquiries	•
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	•
<b>Project Management</b>		Team Members      Activity      Unified Operations Plan
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	•
<b>Procurement</b>		Team Members      Activity      Unified Operations Plan
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	Unified Operations Plan
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	Unified Operations Plan
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	Unified Operations Plan
Marketing coordinator	Produces and distributes marketing materials			•
Marketing manager	Manages product marketing			•
Field Service		Team Members	Activity	Unified Operations Plan
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	Unified Operations Plan
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	Unified Operations Plan
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	Unified Operations Plan
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	Unified Operations Plan
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	Unified Operations Plan
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	Unified Operations Plan
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	Unified Operations Plan
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 Unified Operations Plan. To get the use rights, the Management Reporter Designers require an Operations App and Management Reporter Viewers require a Team Member.

# Appendix E: Operations Customization and Licensing Requirements

Microsoft Dynamics 365 Unified Operations Plan is fully customizable to provide customers with the right experience for every user. Microsoft Dynamics 365 Unified Operations Plan 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 Unified Operations Plan 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 Unified Operations Plan 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 Unified Operations Plan 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 F: Microsoft Dynamics 365 Add-on

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 Customer Engagement Plan Business Applications, which will leverage the same tenant and infrastructure will accrue across this one tenant. Dynamics 365 Unified Operations Plan Applications leverages an entirely different tenant and will have its own set of add-on capabilities.

## Customer Engagement Plan Business Applications

The following Customer Engagement Plan Business Application subscriptions share the same tenant and share infrastructure capacity:

- Dynamics 365 for Sale
- Dynamics 365 for Field Service
- Dynamics 365 for Customer Service
- Dynamics 365 for Project Service Automation

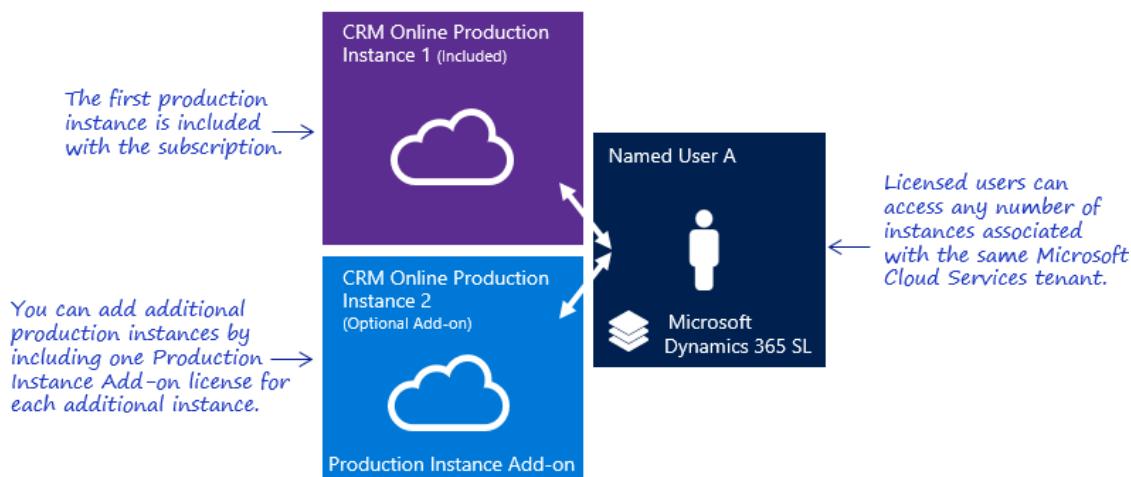
They will have access to the following Customer Engagement Plan Business Application default subscription capacities, shared across the Customer Engagement Plan Business Applications. If a customer purchases Dynamics 365 Plan they will obtain default access to both the Customer Engagement Plan Business Applications and the Dynamics 365 Unified Operations Plan 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 Customer Engagement Plan Business Application subscription can access the default Dynamics 365 Customer Engagement Plan Business Applications instance included in the subscription, and every Dynamics 365 Customer Engagement Plan Business Application additional instance associated with the same tenant, shared across the Customer Engagement Plan Business Applications.

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

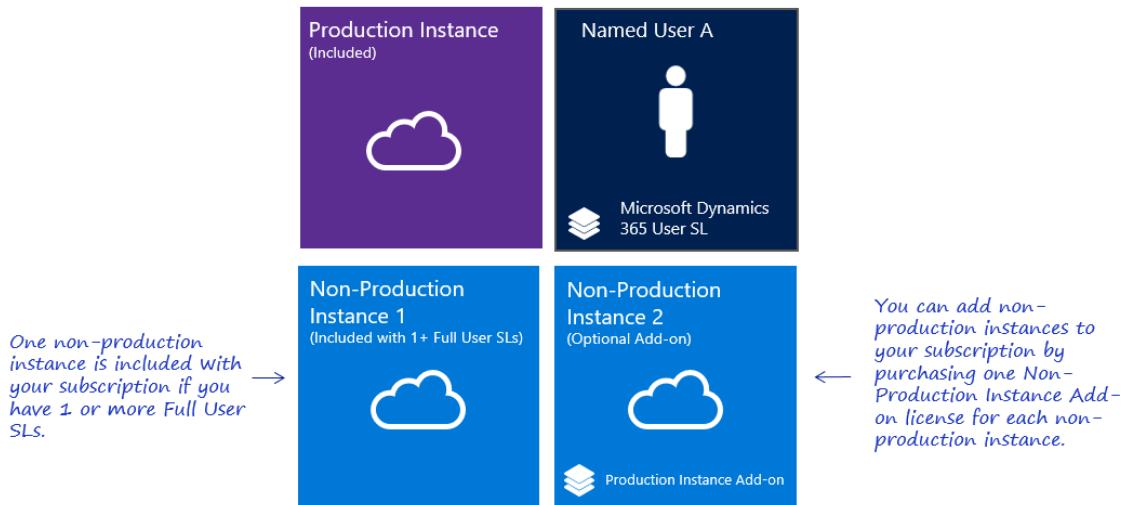
Figure 17: Customer Engagement Plan Business Applications Production Instance Add-on



## 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 Customer Engagement Plan Business Application subscription can access the default Dynamics 365 Customer Engagement Plan 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 18: Non-Production Instance Add-on



## Additional Portals and Page Views

The default Portal provided with Dynamics 365 Customer Engagement Plan 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 purchase additional page views.

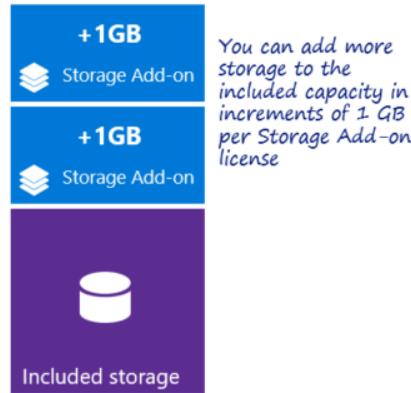
Subscription Capacity – Per Portal	Included Capacity	Additional Increment
<b>Page views:</b> Access/utilization of the Dynamics 365 Portal	1 million/month	500,000/month

## 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 30 TB of storage.

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

Figure 19: Storage Add-on



### Social Engagement Additional Posts Add-on

The Additional Posts Add-on provides additional posts to a Microsoft Social Engagement subscription in increments of 10,000, 100,000, or 1,000,000 posts per month. On the first day of the month, the number of purchased additional posts is added to the included quantity of 10,000 posts. All unused posts expire at the end of each month.

Figure 20: 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.

## Unified Operations Plan Applications

The following Unified Operations Plan Applications share the same tenant and share infrastructure capacity: Dynamics 365 for Finance and Operations and Dynamics 365 for Retail. They will have access to the following additional capacities, shared across the Unified Operations Plan Applications. If a customer purchases Dynamics 365 Plan they will obtain default access to both the Customer Engagement Plan Business applications and the Dynamics 365 Unified Operations Plan 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 Unified Operations Plan and Retail application and unit test their changes. Licensed users associated with a Dynamics 365 Unified Operations Plan or Retail subscription can access the default developer instance included in the subscription, and every 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 Unified Operations Plan or Retail application subscription can access the default Standard Acceptance Testing instance included in the subscription and every 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 Unified Operations Plan or Retail application subscription can access every 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 is intended for smaller to medium sized customers or customers with medium load. Licensed users associated with a Dynamics 365 Unified Operations Plan or Retail application subscription can access every 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.

### **Sandbox Tier 5 Add-on**

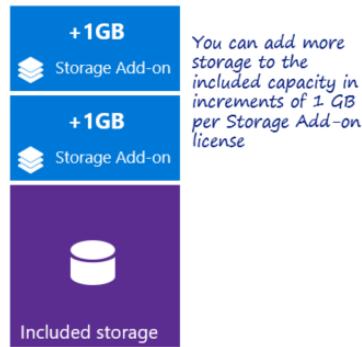
This is a non-production multi-box Premium Performance Testing instance that customers can use for performance testing, load testing and staging along with user acceptance testing. This sandbox environment is intended for larger sized customers or customers with heavier load. Licensed users associated with a Dynamics 365 Unified Operations Plan or Retail application subscription can access every 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.

## Additional Storage Add-on

The Additional Storage Add-on provides flexibility to increase the SQL database storage capacity associated with your Dynamics 365 Unified Operations Plan or Retail application 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 Unified Operations Plan instances associated with the tenant.

Figure 21: Storage Add-on



## Appendix G: Support Policies

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

<sup>1</sup>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.](#)

<sup>2</sup>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.

## Appendix H: Change Log

Page	Topic	Change	Action	Date
25	PowerApps	Clarified	Clarified language for PowerApps	May 2018
Various	Dyn 365 Unified Operations	Corrected	Dynamics 365 for Operations Plan was corrected to read Dynamics 365 Unified Operations Plan	May 2018
34	Sales table	Clarified	Limit to size of 3rd party solution installs (footnote) & Case for Sales description	April 2018
34	Product	Clarified	Product and product bundles are in Sales Enterprise Product families and product relationships are in Sales Professional	April 2018
32	Product	Clarified	Product should be Product families	April 2018
19	Device (iv and vi)	Clarified	"One device dedicated.." changed to "one device used for.."	April 2018
23	Talent	Clarified	Default infrastructure capacity language added	March 2018
various	Sales Professional and Marketing	Added	Spring launch	March 2018
23	Finance and Operations, Retail	Added	Multi-instance language added	March 2018
30 - 33	Appendix B	Updated	To include Marketing	March 2018
34	Appendix C	Added	Sales features table	March 2018
44 - 48	Appendix F	Moved	Microsoft Dynamics 365 Add-ons	
various	Enterprise edition	Removed	Rebranded and removed "Enterprise edition"	March 2018
3 & 21	Internal Users	Clarified	Short term subscriptions are available exclusively through the MPSA licensing program	February 2018
4	Dual Use rights	Added	CRM 2016 Server for Dynamics customer Engagement	February 2018
7 & 33	Team Members	Updated	(iv)Manage direct employee and candidate activities for hiring, onboarding, and human resources	February 2018
13	Talent	Clarified	Customers that purchase the full Talent SKU (5-seat minimum) are entitled to 2 environments/instances for the organization (not per seat). Of those two only 1 can be used in production, the second one is only for non-production use (UAT, pre-production, etc.).	February 2018
13	Modular Applications	Added	Talent Modular Applications	February 2018
16	Operations Device	Clarified	A single device can provide any of the following functionality in any combination.	February 2018
17, 21, 24, 25	Social Engagement	Updated	Language for SE and Additional posts	February 2018
Various	Name changes	Updated	Plan 1 = Customer Engagement Plan, Plan 2 = Dynamics 365 Plan, Operations = Unified Operations Plan	July 2017
2 & 3	Licensing requirements	Clarified	Internal and External Users	July 2017
5 & 6	Dual Use Rights	Updated	Figure	July 2017
8	Operations Activity	Added	User	July 2017
11	User SL Comparison	Corrected	Table	July 2017
11	Dyn 365 for Retail	Added	Application	July 2017
11	Dyn 365 for Talent	Added	Application	July 2017
15	MRSs	Added	Solution	July 2017
19	Default Dyn 365 Portal	Updated	Starting August 1st, 2017	July 2017
25	Dyn 365 Unified Ops	Updated	Language	July 2017
29	Premier Support	Added	Support plan information	July 2017

© 2018 Microsoft Corporation. All rights reserved.

This document is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS DOCUMENT. This information is provided to help guide your authorized use of products you license; it is not your agreement. Your use of products licensed under your license agreement is governed by the terms and conditions of that agreement. In the case of any conflict between this information and your agreement, the terms and conditions of your agreement control. Prices for licenses acquired through Microsoft resellers are determined by the reseller.