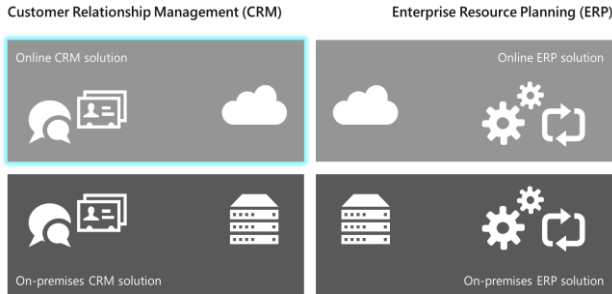


Licensing the Dynamics 365 CRM applications

Dynamics 365

Dynamics 365 offers both CRM and ERP functionality deployed as either online or on-premises solutions. This handout focuses on licensing the online CRM applications.



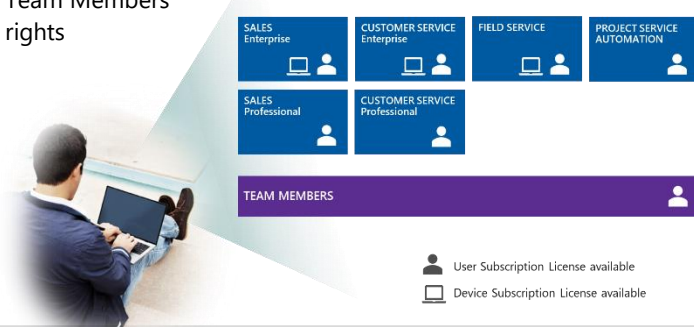
What is CRM?

CRM is a category of integrated, data-driven software solutions that improve how organizations do business with their customers, streamlining administrative processes in sales, marketing and service divisions.



Licensing the Dynamics 365 CRM apps

A Team Members license should be assigned to users who need light access across the full range of apps. These are likely to be support staff rather than full time workers in these different professional capacities. Note that all app licenses also include Team Members rights



The blue boxes represent the CRM applications and organizations assign licenses to users according to their role:

- A Territory Sales Manager managing sales pipelines and closing deals: **Sales**
- A Customer Service Rep managing cases: **Customer Service**
- A Field Technician managing site repairs and updating work orders: **Field Service**
- A user in the Project Management Office: **Project Service Automation**

Choosing User or Device Subscription Licenses

- **FIELD SERVICE** \$95 (User icon)
- Multiple users may access the applications through a shared Device SL
- User and Device SLs give access to the same functionality
- User and Device SLs may be mixed
- **FIELD SERVICE** \$145 (Device icon)

For example

Mobile care teams sharing a vehicle with 3 shifts of 2 people:

- User licensing: 6 x \$95 = \$570
- Device licensing: \$145



Choosing Enterprise or Professional licenses

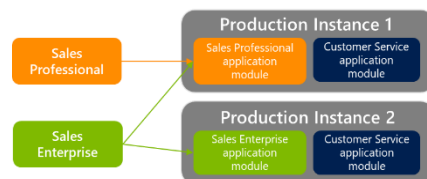
- **SALES Enterprise** \$95 (User icon)
- **CUSTOMER SERVICE Enterprise** \$95 (User icon)
- **SALES Professional** \$65 (User icon)
- **CUSTOMER SERVICE Professional** \$50 (User icon)

The Enterprise and Professional application modules are not meant to be combined within an organization and customers should choose one or the other license type for all users.

To decide which one might be right, customers may use the Dynamics 365 Licensing Guide (example below):

Use Rights	Team Members	Sales		Customer Service	
		Pro	Ent	Pro	Ent
Accounts		•	•	•	•
Cases for Sales: Create cases with limited edit capability. No case business process flow, SLAs, entitlements, or case routing. Users only licensed with Sales license cannot act as customer service agents and resolve cases.		•	•		
Competitors			•		
Embedded Intelligence			•		•
Forecasting			•		
Invoices		•	•		
Lead Management		•	•		
Marketing Campaigns			•		
Marketing List			•		
Opportunities		•	•		
Orders		•	•		
Price lists		•	•		

Enterprise and Professional application modules may not be deployed on the **same instance**. However, they may be deployed on the **same tenant** to support more complex customer scenarios as shown in this diagram.



Note that the Sales Professional user is only able to access that module, while the Sales Enterprise user can access either.

Licensing a user for more than one app

Users who need to be licensed for more than one app are licensed with a Base license for the first app, and an Attach license for further apps.

Base licenses

SALES Enterprise \$95	CUSTOMER SERVICE Enterprise \$95	FIELD SERVICE \$95
SALES Professional \$65	CUSTOMER SERVICE Professional \$50	PROJECT SERVICE AUTOMATION \$95

Attach licenses

SALES Enterprise \$20	CUSTOMER SERVICE Enterprise \$20	FIELD SERVICE \$20
SALES Professional \$20	CUSTOMER SERVICE Professional \$20	

Base and Attach licenses provide access to same application functionality. The Base license must always be the higher priced app

Using the Team Members license

A Team Members license is a named user subscription, designed for users who are not tied to a particular function, but who require basic Dynamics 365 functionality, priced at \$8 per user per month

A Team Members license does **not** provide access to custom applications, and a Power Apps license or a full Dynamics 365 license is then required, dependent on the scenario



Users can:

- Read Dynamics 365 data across all apps
- Participate in a specific set of scenarios for the CRM apps which are detailed in the Dynamics 365 Licensing Guide

Licensing external users

No licenses are required for external users

✓ External users

- End customers of the organization
- Off-site vendors not in an employee-like relationship with the organization



NO LICENSE REQUIRED

✗ NOT external users

Contractors, vendors or agents who:

- Provide business processes on the customer's behalf
- Use Microsoft Dynamics 365 to manage any portions of their business



LICENSE REQUIRED

Step-up licenses

Step-up licenses enable an EA customer to move from a lower license to a higher one at any time. They are **not required** in CSP since a new Subscription is started for the higher license, and the Subscription for the lower license is reduced or suspended

Original license	Can step up to
Team Members User SL	<ul style="list-style-type: none"> • Sales Professional User SL • Sales Enterprise User SL • Customer Service Professional User SL • Customer Service Enterprise User SL • Field Service User SL
Sales Professional User SL	<ul style="list-style-type: none"> • Sales Enterprise User SL
Customer Service Professional User SL	<ul style="list-style-type: none"> • Customer Service Enterprise User SL

Availability of Dynamics 365 CRM licenses

	Team Members User SLs	Sales, Customer Service, Field Service, Project Service Automation SLs
EA	✓	✓
MPSA	✓	✓
Open/OV		
CSP	✓	✓
Web Direct	✓	✓
DPL		
SPLA		

The Dynamics 365 Licensing Guide

Great to refer to for:

- Information on the licenses for the different apps
- The types of people who will use each of the apps
- Examples of external users
- Licenses required for internal users by task
- Default Subscription capacities

Download the guide here:
<http://bit.ly/D365LicensingGuide>

