Microsoft

Dynamics 365 Licensing Guide

December 2025

Using This Guide

Use this guide to understand how to license Microsoft Dynamics 365 intelligent business applications. You have a variety of options to suit your situation. Whether you need one Dynamics 365 application or many, they can be easily and independently deployed so you can start with what you need and easily adopt additional capabilities as your business demands.

To improve the readability of this document, we've shortened product names throughout to exclude "Dynamics 365." If you're ever uncertain, see the complete list of full and shortened Dynamics 365 names in Appendix A.

The Contents page shows how this document is structured, with an overview followed by details organized by product. The licensing section for each Dynamics 365 product includes information about:

- The specific application
- Related or add-in applications and capacity that may be licensed with it
- Use rights

To easily maneuver between sections, simply click the TOC symbol (TOC) at the end of each section to return to the Contents page.

Other resources you may need

This document is about Dynamics 365 licenses, but it is not a legally binding licensing rights document. It also does not supersede or replace any legal documentation covering use rights. To understand conditions on license acquisition, product-specific terms, and conditions governing how Microsoft products can be used in Microsoft volume licensing programs, review the complete Product Terms and Licensing Terms.

A complete list of product features and capabilities is available in technical documentation at Dynamics 365 documentation - Dynamics 365 | Microsoft Learn.

For help determining the right technology solution for your organization, including the license requirements for a specific product or scenario, talk to your Microsoft account team or your Dynamics Certified Partner. Microsoft reserves the right to review or update this document at any time without notice.

This document does not apply to Microsoft Dynamics on-premises solutions; the Microsoft Dynamics CRM Online service; or the Microsoft Dynamics AX online service. Appendix I provides links to the applicable licensing guides for these other products, which include details on entitlements and use rights and the benefits derived from Dynamics 365 licenses.

Give your feedback: Please send us feedback and suggestions on how we can improve the Dynamics 365 Licensing Guide by submitting the Dynamics 365 Licensing Guide feedback form.

What's new in this licensing guide?

This licensing guide was updated to reflect licensing updates and new online service offerings as of December 2025 See Appendix J: Change Log for more details.

Dynamics 365	Description	New Offer or Change
Dataverse capacity	Update	Dataverse and Operations capacity increases and consolidation

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How to Buy Dynamics 365

There are three ways to buy Dynamics 365 products and services.

- **Microsoft Partners**
  For customers in need of a fully managed and tailored Dynamics 365 solution, connect with a partner.
- **Microsoft Sales**
  For customers who want to learn more about Dynamics 365, discuss use cases or get pricing information, reach out to Microsoft Sales or call Microsoft Sales at (800) 642-7676.
- **Microsoft Online**
  Dynamics 365 subscriptions are available here.

This table outlines three primary purchasing channels, all offering flexible subscription lengths and support models.

Overview of purchasing options

	Microsoft Partners	Microsoft Sales	Microsoft Online
Subscription length	Monthly / Annual / Multi-Year	Monthly / Annual / Multi-Year	Monthly /Annual / Multi-Year
Customer support	Industry specific	Account specific	Product specific
Eligibility	All customers	Managed accounts	All customers
Implementation	Customized support	Upon request	Independently managed
Scale	Department / Enterprise-wide	Enterprise-wide	Department / Enterprise-wide

Learn more about how to buy from Microsoft.

Dynamics 365 Licensing Overview

Dynamics 365 applications are licensed by subscription per User, Device, or Tenant:

- User licenses: Grants access for a named user with personal login credentials, from any device.
- Device licenses: Grants access to a shared device using either assigned or shared logins.
- Tenant licenses: that provide access to a feature or service at the tenant level, regardless of the user or device involved.

An organization may have a mix of user, device and tenant licenses.

Dynamics 365 cloud subscription licenses grant non-perpetual use rights to one or more specific Dynamics 365 cloud services (not on-premises). Please see the Product Terms for Dynamics 365 online service terms.

NOTE: Users with the Power Platform Administrator or Dynamics 365 Administrator role in Entra do not require a license. Additionally, the System Administrator role in Dataverse and Finance and Operations do not require a license to configure and administer Dynamics 365 applications.

User licenses

User licenses grant a named user full or limited access to specific products. Full-access user licenses are the most common, but user licenses also include several options for additional users (usually with limited functionality).

NOTE: Enterprise and Professional users may not be deployed in the same environment. See Mixed deployments of Dynamics 365 services for full details.

Full-access user licenses

Full-access users are those who require access to the full, feature-rich functionality of one or more Dynamics 365 applications. Options for full-access users include Base and Attach licenses:

➢ Base and Attach licensing

Base license: When purchasing multiple Dynamics 365 applications for a single user, the first application license must be the highest priced license (a.k.a. base license) for the named user. Every full-access user must have a base license.

Attach license: Dynamics 365 attach license pricing is available for users who require multiple Dynamics 365 applications. Attach licenses may only be assigned to users with an appropriate qualifying base license. A named user may have more than one attach license.

NOTE: Base and attach licenses are identical in their core capabilities and are only differentiated in price. Attach licenses do not include additional platform entitlements. They are licensed to access the platform entitlements included with the assigned base license. (exception: Customer Insights attach licenses include the same default capacity entitlements as the Customer Insights base license.)

Base applications and their qualifying products for attach licensing

Base USLs (user/month, billed annually)		Attach USLs user/month, billed annually											
		Business Central Essentials	Commerce	Customer Service Ent	Customer Service Pro	Field Service	Finance	Human Resources	Project Operations	Remote Assist	Sales Ent	Sales Pro	SCM
Business Central Essentials	$70	-	-	-	$20	-	-	-	-	-	-	$20	-
Business Central Premium	$100	-	-	$20[1]	$20	$20[1]	-	-	-	-	$20[1]	$20	-
Commerce	$210	-	-	$20	$20	$20	$30	$30	$30	-	$20	$20	$30
Customer Service Enterprise	$105	$20	-	-	-	$20	-	-	-	-	$20	$20	-
Customer Service Premium	$195	$20	-	-	-	$20	-	-	-	-	$20	$20	-
Field Service	$105	$20	-	$20	$20	-	-	-	-	$20	$20	$20	-
Finance	$210	-	$30	$20	$20	$20	-	$30	$30	-	$20	$20	$30
Finance Premium	$300	-	$30	$20	$20	$20	-	$30	$30	-	$20	$20	$30
Human Resources (HR)	$135	-	-	$20	$20	$20	-	-	$30	-	$20	$20	-
Microsoft Relationship Sales[2]	$177	-	-	$20	$20	$20	-	$30	$30	-	-	-	-
Project Operations	$135	-	-	$20	$20	$20	-	$30	-	-	$20	$20	-
Sales Enterprise	$105	$20	-	$20	$20	$20	-	-	-	-	-	-	-
Sales Premium	$150	-	-	$20	$20	$20	-	$30	$30	-	-	-	-
Sales Professional	$65	-	-	-	$20	-	-	-	-	-	-	-	-
Supply Chain Management	$210	-	$30	$20	$20	$20	$30	$30	$30	-	$20	$20	-
Supply Chain Management Premium	$300	-	$30	$20	$20	$20	$30	$30	$30	-	$20	$20	-

[1] Note: When purchasing multiple Dynamics 365 applications for a single user, the first application license must be the highest priced license (a.k.a. base license) for the named user. As an exception, users who license Business Central Premium as their base license ($100 user/month, billed annually) are eligible to add Customer Service Enterprise, Field Service or Sales Enterprise at the $20 user/month, billed annually attach price.

[2] Pricing variable. Please contact a Dynamics 365 sales specialist for pricing information. 10 seat minimum purchase requirement. See Microsoft Product Terms for service specific terms.
* See Microsoft Product Terms for full details on license availability, pre-requisites, and purchase minimums.
** System administrator will not be able to assign an attach license to a user who does not have the required base license.
All pricing (USD) subject to change, please see Pricing | Microsoft Dynamics 365 for actual pricing.

Additional user licenses

Additional users often represent a large percentage of the total users in an organization. They may consume data or reports from line of business systems; complete light tasks like time or expense entry and HR record updates; or use the system more heavily without requiring full-access user capabilities. Additional users may access all the functionality of the respective Dynamics 365 product within the constraints described below.

- Business Central Team Members license: Assigned to a named user, Business Central Team Members provides read-only access to certain data and limited functionality within Business Central deployments.
- Human Resources Self Service license: Assigned to a named user, HR Self Service provides access to employee and manager self-serve capabilities (such as absence or vacation entry or benefits look-up).

- Team Members license: User license intended for those who support multiple lines of business and are not tied to a specific business unit. Licensed users are granted read-only access to all Dynamics 365 data and basic Dynamics 365 capabilities for designated scenarios, such as expense entry or updating contacts. (See Appendix D.)
- Operations – Activity license: This named user license is intended for users who require more Dynamics 365 capabilities than Team Members licensed users but still do not require the use rights of a full-access user license.

Device licenses

Device licenses grant a dedicated shared device full or limited access to specific products. Full-access device licenses are the most common, but device licenses also include options for additional devices (usually with limited functionality).

Full-access device licenses

Dedicated shared devices that require access to the full, feature-rich functionality of one or more Dynamics 365 application(s). With a device license, any number of users can access the Dynamics 365 application through the licensed dedicated shared device.

Device licenses may use shared logins (such as "Warehouse Computer" and a shared password) or individual logins (each user's personal credentials), depending on the application and license:

- Shared logins are enabled for Sales Device, Customer Service Device, Field Service Device, Operations – Device, and Business Central Device licenses. Note that when individual users share a login, their individual usage cannot be tracked.
- Individual logins are enabled for Business Central Device and Operations – Device licenses (with no separate user license required).

Additional device licenses

In some scenarios, shared operations devices might only be used to consume data or reports from line of business systems or complete light tasks (e.g., time entry, expense entry, and HR record updates), without requiring full-access capabilities. Additional devices may access all the functionality of the respective Dynamics 365 product within the constraints described below.

- Operations – Device licenses provide limited access to a subset of Finance, Supply Chain Management, Commerce, and Project Operations capabilities.

Tenant licenses

Tenant licenses provide tenant level access to Dynamics 365 applications and resources. They are not assigned to specific named users or dedicated shared devices. Options include full-access licenses and additional capacity licenses, for components that may be subject to capacity limits (e.g., Dataverse storage).

Full-access tenant licenses

These licenses are the primary licensing mechanism for certain products, such as Dynamics 365 Electronic Invoicing and Customer Insights, which are only licensed per tenant.

Capacity licenses

The subscriptions for many Dynamics 365 products come with capacity entitlements or allowances, such as for data storage, transaction volume, case routing requests, or customer profiles, for instance. The exact entitlement depends on the specific product and licensing agreement. Capacity add-on licenses provide more flexibility for those components subject to capacity limits but needed to support a product.

- Default subscription capacities leverage the same tenant and infrastructure and accrue across the single tenant. Dataverse capacities are shared between the following products: Sales, Customer Service, Field Service, Finance, Supply Chain Management, Commerce, Human Resources, Project Operations, Business Central Essentials, and Business Central Premium. Operations Database and file storage capacities (as distinct from the Dataverse capacities) are shared between only a few products: Finance, Supply Chain Management, Commerce, Human Resources, and Project Operations. See Appendix D for more details.

- Capacity licenses require a minimum of a one-year subscription commitment with annual allowances for the entitlements (e.g., transactions). The annual allowance, which is pooled across a single tenant, applies even for capacities that are allotted per month. For instance, an annual subscription that provides a total of 36K transactions is licensed at 3,000 transactions per month for 12 months, but those transactions can be consumed at any point in the year, including all in one month. For instance, a seasonal business would be able to use its allowance in six months at a rate of 6,000 transactions per month.
- Capacity add-on licenses, which are pooled across a single tenant, are not associated with a specific user. Additional capacity can be bought at any time and remains a part of the subscription for the remainder of the subscription term.

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Dynamics 365 Applications

Dynamics 365 Business Central

Premium

Essentials

Business Central connects teams across your organization with tools to help them work more efficiently, collaborate better, and respond more quickly to changes to meet your business goals. Business Central Essentials and Premium are licensed per user.

Note: Internal users licensed with Microsoft 365 Business Enterprise, and select other plans, whose organization has one or more Business Central licenses, are granted read-only access to Business Central data from within Microsoft Teams, at no additional cost. See full details here.

Business Central Agents

To use any of the following prebuilt Dynamics 365 Agents, users must have a Dynamics 365 Business Central License. For details about credits, see the Copilot Credits Overview section.

- **Sales Order Agent -** Sales Order Agent helps Business Central users automate capturing sales orders. The agent uses AI to analyze customer requests received via email, locate the customer in Business Central, and engage in multi-turn email conversations to clarify requests if important details are missing or more choices are available. It also checks and informs the customer about the availability of the items they're looking for and follows up with a sales quote. Learn more.

- **Payables Agent** – Payables Agent captures, validates, and matches invoices against purchase orders and receipts, reducing manual data entry and errors. This agent routes invoices to the right approvers with configurable rules, accelerating approvals and improving compliance and provides dashboards and alerts for outstanding payables, enabling better cash flow management and vendor relationship tracking. Learn more.

Business Central Essentials

Business Central Essentials provides a wide range of operational and management capabilities, including:

- Financial Management
- AI-Supported Forecasting
- Customer Relationship Management
- E-Services
- Human Resources Management
- Project Management
- Supply Chain Management
- Warehouse Management and Inventory

Business Central Essentials capabilities

Financial Management			
Account Schedules	Basic XBRL	Deferrals	Responsibility Centers
Allocations	Budgets	Electronic Payment/Direct Debits[1]	Unlimited Dimensions
Bank Account Management	Cash Flow Forecast	Fixed Assets	
Bank Reconciliation	Check Writing	Multiple Currencies	
Basic General Ledger	Consolidation	Payment Handling	
Advanced Financial Management			
Cost Accounting	Intercompany Postings		
Artificial Intelligence[2]			
Cash Flow Forecast	Late Payment Prediction	Image Recognition	Inventory Forecast
Sales Forecast			
Customer Relationship Management			
Business Inbox for Outlook	Contact Classification	Email Logging	Relationship Management
Campaign Management	Contact Management	Interaction/Document Management	Task Management
Campaign Pricing	Dynamics 365 Sales Integration[3]	Opportunity Management	
E-Services			
Bank Feeds (US, CA)	Document Management, Document Capture	Online Map	Tax. Reg. No. Validation Service (EU)[1]
Document Exchange Service	Document Management, Document Capture	PayPal	
Human Resources Management			
Basic Human Resources			
Project Management			
Basic Resources	Job Quotes	Project Management Jobs	
Capacity Management	Multiple Costs	Time Sheet	
Supply Chain Management			
Alternative Order Addresses	Item Attributes	Purchase Invoicing	Sales Line Pricing
Alternative Ship-To Addresses	Item Budgets	Purchase Line Discounting	Sales Order Management
Alternative Vendors	Item Categories	Purchase Line Pricing	Sales Return Order Management
Assembly Management	Item Charges	Purchase Order Management	Sales Tax/VAT[4]
Basic Inventory	Item Cross References	Purchase Return Order Management	Shipping Agents
Basic Payables	Item Substitutions	Requisition Management	Standard Cost Worksheet
Basic Receivables	Item Tracking	Demand Forecasting	Stock keeping Units
Calendars	Location Transfers	Sales Invoice Discounts	Vendor Catalogue Items
Cycle Counting	Multiple Locations	Sales Invoicing	
Drop Shipments	Order Promising	Sales Line Discounting	
Warehouse Management and Inventory			
Automated Data Capture System	Internal Picks and Put Aways	Warehouse Shipment	Warehouse Receipt
Bin Set-Up	Pick	Warehouse Management Systems	
Other Capabilities			
Analysis Reports	Intrastat[1]	Retention Policies	Workflow
Change Log	Job Queue	Unlimited Companies	Word Reporting/Document Reporting
Embedded Power BI	Notifications (On-Premises Only)	User Management	
Extended Text	Reason Codes	User Tasks	

[1]For feature availability in your region, consult https://docs.microsoft.com/en-us/dynamics365/business-central/about-localization.
[2]Requires Intelligent Edge or Azure Machine Learning subscription.
[3]Dynamics 365 Sales Integration requires a Dynamics 365 Sales license.
[4]Support for sales tax or VAT depending on country of deployment.

Business Central Premium

Business Central Premium includes all license capabilities of Essentials, plus Service Order Management and Manufacturing.

Business Central Premium Additional Capabilities

Service Order Management		
Planning and Dispatching	Service Item Management	Service Price Management
Service Contract Management	Service Order Management	
Manufacturing		
Agile Manufacturing	Finite Loading	Production Orders
Basic Capacity Planning	Machine Centers	Sales and Inventory Forecasting
Basic Supply Planning	Production Bill of Materials	Version Management

Essentials and Premium user licenses include:

- Unrestricted Business Central Team Members access.
- Option to procure up to 3 External Accountant licenses per customer tenant for third-party accountants to connect to Business Central. These licenses provide the same use rights as assigned Business Central licenses, except access to user set up or administrative tasks.
- Multiple companies.[1]
- Use of Microsoft Copilot in Dynamics 365 Business Central
- For other AI-powered features: 1800 seconds (30 minutes) per tenant of access to Azure AI, which can compile data from a variety of sources to deliver more actionable insights and analytics.

[1]Limited number of companies per environment. See 'Company limit' here for more info.

Configuration components

Business Central licenses include the following configuration components. Customers choosing to exercise their dual use rights receive the full custom objects range numbered 50,000 – 99,999.

Configuration and Development					
Codeunits	Pages	Queries	Reports	Tables	XML Port

Business Central Device

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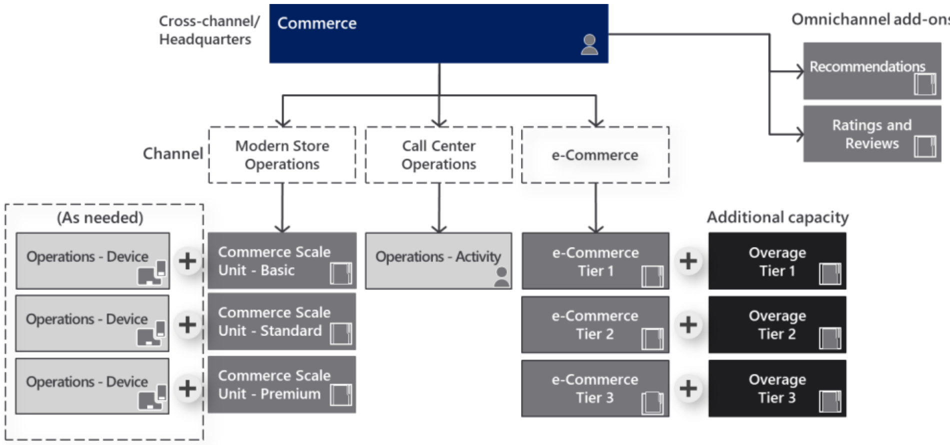
Business Central Device licenses are available and provide limited access to a subset of Business Central capabilities.

Dynamics 365 Commerce

Commerce, which is licensed per user, helps retailers manage their operations, connect employees with data, and offer exceptional shopping experiences. Dynamics 365 Commerce helps unify the customer shopping experience by bringing in-store, back office, and call center functionality together in one end-to-end platform. E-commerce may be added as an option. Commerce also eases integration to emerging channels (such as new social media platforms) through an API-driven, headless commerce engine. Intelligent forecasting and product recommendations enable retailers to:

- Improve in-store and e-commerce profitability.
- Drive intelligent business insights to optimize strategy and cost.
- Accelerate buying behavior through customer experiences that are unified and consistent across buying channels.



When you license Commerce, you automatically become entitled to the transaction capacities noted below.

Application	Included Capacity	Add-On Capacity
Commerce: • Intelligent Order Management • Electronic Invoicing	• 1K order lines/tenant/month • 100 electronic invoice transactions/tenant/month • 100 invoice capture transactions/tenant/month	Intelligent Order Management: • 1K order lines/tenant/month Electronic Invoicing Add-in: • 1K electronic invoicing transactions/tenant/month • 1K invoice capture transactions/tenant/month

Commerce user roles

Full user licenses for Commerce are ideal for employees at the headquarters and central operations of a retail organization. Employees in retail stores will generally use either the Operations – Device license or the Operations – Activity license instead, depending on the scenario and their precise roles or point-of-sale devices. A Team Members license may be sufficient for some employees, as suggested in the table below.

Find Commerce administer roles here, and refer to the Product Terms for minimum purchase requirements.

Commerce security roles

Role	Security Role Description	Suggested License		
		Team Members	Operations - Activity	Commerce
Commerce				
Retail warehouse clerk	Performs picking, receiving, and stock counting in a store or warehouse	●	●	●
Retail store manager	Performs 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 Commerce channels		●	●
Distributed order management (DOM) administrator	Defines and maintains the parameters, rules, fulfillment profile, and frequency of DOM executions for the distributed order management feature			●
Electronic reporting for Commerce	Creates and updates electronic reporting configurations for Commerce channels			●
Retail store IT	Performs POS client configuration and installation at the store level			●
Retail catalog manager	Manages retail product catalogs. Creates and updates product listings, categories, and attributes to support in-store and online merchandising.			●
Retail merchandising manager	Oversees merchandising strategy. Maintains and replenishes products and assortments, defines pricing strategies, and coordinates promotions across sales channels.			●
Retail operations manager	Manages day-to-day retail operations. Configures stores, registers, and staff. Oversees store activities, monitors staff performance, and ensures execution of corporate retail strategies.			●

Role	Security Role Description	Suggested License		
		Team Members	Operations - Activity	Commerce
Retail service	Provides support across retail service processes. Handles tasks such as service order management, returns, and customer interaction tracking in retail environments.			●
General				
Subscription billing allocation manager	Manages allocation of subscription revenue and costs. Defines allocation rules and ensures proper revenue and cost distribution across financial periods.			●
Subscription billing allocation, deferral, and billing manager	Manages end-to-end subscription billing operations. Oversees billing cycles, deferral schedules, and revenue allocation to ensure accurate financial reporting.			●
Subscription billing assign revenue recognition document to imported deferral schedule process manager	Manages the assignment of revenue recognition documents to imported deferral schedules. Ensures accuracy of deferred revenue accounting and compliance with recognition rules.			●
Subscription billing deferral manager	Maintains deferral schedule logic and configuration. Oversees the setup and processing of deferred revenue to ensure proper recognition timelines.			●
Subscription billing manager	Oversees subscription billing lifecycle. Manages billing schedules, pricing models, renewals, and coordination across revenue operations.			●
Subscription billing module user with capabilities including billing, allocation, and deferral features	Accesses core features of the subscription billing module. Performs tasks related to invoice generation, allocation, and deferral without administrative permissions.			●
Tax calculation developer	Develops and configures tax calculation rules and formulas. Ensures compliance with tax regulations and supports integration with global tax engines.			●

Additional Commerce applications and capacities

All optional Commerce licenses and capacities are tenant-based.

➢Dynamics 365 e-Commerce tiers

The Dynamics 365 e-Commerce application, which is licensed per tenant, enables Commerce to support e-commerce. Every e-Commerce Tier license comes with one Commerce Scale Unit – Cloud and includes a specified allowance of e-commerce transactions. A transaction is defined as the final purchase of an e-commerce shopping cart, regardless of the number of items in the cart.

E-Commerce Tiers are purchased based on the anticipated B2B and B2C transactions and average order value (AOV) expected for the year. AOV is the total annual e-commerce Gross Merchandise Value (GMV) divided by total transaction volume. GMV is the total value of all transactions processed through Dynamics 365 including returns, excluding shipping, handling, customs fees, tax or financial charges. If you need additional transactions, you can purchase the corresponding overage tier. If you expect a change in AOV, you need to reassess the appropriate band.

If you need Commerce Scale Unit – Cloud to support your e-Commerce operations, you need to purchase the appropriate e-Commerce Tier license regardless of whether you need Dynamics 365 e-Commerce store front or not. If you need additional environments for e-commerce (more environments for Commerce Scale Unit - Cloud) you can purchase additional units of the e-Commerce Tier. E-Commerce Tier licenses are licensed per month, but transactions are enforced on an annual basis.

➢E-Commerce tiers and transaction capacities

Application/Capacity	Included Capacity	Add-On Capacity
e-Commerce Tier • Transactions • Commerce Scale Unit - Cloud	• 1 Commerce Scale Unit – Cloud • Transactions/tenant/month • See Tiers 1 – 3 capacity entitlements below in separate table	• Transactions/tenant/month • See Tiers 1 – 3 overage capacity entitlements below in a separate table

Number of monthly transactions per SKU

	BAND 1 AOV<$50	BAND 2 AOV $50-$150	BAND 3 AOV $150-$500	BAND 4 AOV $500-$2K	BAND 5 AOV $2K-$5K	BAND 6 AOV $5K+
Tier 1	4,700	2,400	1,100	480	**275**	200
Tier 1 overage	780	365	170	80	45	30
Tier 2	29,000	12,000	5,500	2,900	1,700	1,160
Tier 2 overage	1,250	540	230	125	75	50
Tier 3	86,000	38,750	15,500	8,600	5,065	3,400
Tier 3 overage	1,400	625	250	140	85	55

➢Dynamics 365 Commerce Scale Unit

Scale units are licensed per tenant to enable companies to execute mission-critical processes without interruption even during periods of peak demand. Scale units are offered in three different sizes: Basic, Standard or Premium, with each having a different capacity limit for the number of Operations – Devices entitlements included. Scale units may be in the cloud or self-hosted. You may buy additional scale units if you need additional Commerce cloud environment(s) for co-location, performance, additional redundancy, or customization purposes.

Commerce Scale Unit – Cloud

After the minimum Commerce purchase requirements have been met, you are entitled with default Commerce Scale Unit - Cloud when buying licenses with device use rights. These scale units may only be used to support device transactions.

Default Commerce Scale Unit - Cloud entitlements are based on number of licenses with indicative device use rights. Contact your Microsoft representative for more details on the Commerce Scale Unit - Cloud mapping.

Commerce Scale Unit – Self-Hosted

Customers who license Dynamics 365 Commerce also have the option to use a self-hosted scale unit—a retail server, cloud point-of-sale (POS) website, and channel database deployed locally in a store. This type of scale unit maintains connectivity with and extends a retail Commerce deployment, improving performance, ensuring business continuity, and providing in-store hybrid capabilities.

A self-hosted Commerce scale unit and its use rights are included at no additional cost with a qualifying minimum purchase of Commerce licenses. (It is not available as a standalone license.) All servers, users, and devices accessing the self-hosted scale unit must be appropriately licensed, along with any required hardware and licenses for Windows Client or Windows Server and SQL Server, which must be acquired separately

Note: If dual use rights are being exercised and you use downgrade rights to downgrade to Dynamics AX 2012, the Retail Store Server is not an included use right and appropriate licensing must be obtained. Please see here for more details regarding dual use rights.

Commerce Scale Unit – Cloud capacity

Application/Capacity	Included Ops – Devices	Add-On Capacity
Commerce Scale Unit – Cloud • Operations – Devices	• Basic: 65 devices/tenant/month • Standard: 225 devices/tenant/month • Premium: 500 devices/tenant/month	• N/A

➢Dynamics 365 Commerce Recommendations

The Commerce Recommendations application helps customers easily and quickly find products they want based on the purchase trends of their fellow customers. Recommendations is a tenant-based license.

One purchased Commerce Recommendations license confers an allotment of 20K transactions per month. For this purpose, a transaction is defined as the final checkout of a shopping order, whether in-store or online. As with other capacity licenses, a one-year subscription is required, and the total allotted transactions may be consumed at any point in the year.

➢Dynamics 365 Commerce Ratings and Reviews

The Commerce Ratings and Reviews application helps capture product reviews and ratings from customers. Retailers can then display average ratings and review information across their e-commerce website.

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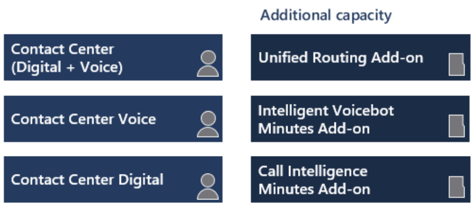
Commerce Ratings and Reviews is a tenant-based license. One license provides up to 250K active ratings and reviews.

Dynamics 365 Contact Center



Contact Center is a Copilot-first contact center solution that brings intelligence, automation, and efficiency to every customer engagement channel. Contact Center is built to work with your existing customer relationship management solution (CRM), or with Dynamics 365 Customer Service Enterprise (see Dynamics 365 Contact Center Add-ons or Dynamics 365 Customer Service Premium for more details).

Dynamics 365 Contact Center Agents

To use any of the following prebuilt Dynamics 365 Agents, users must have a Dynamics 365 Contact Center License. For details on credit allocation and usage, see the Copilot Credits Overview section.

- **Customer Intent Agent** - Customer Intent Agent uses generative AI to autonomously discover intents in your contact center instance. It analyzes past interactions between customer service representatives (service representatives or representatives) and customers to create an intent library that enhances dynamic conversations. Learn more.

- **Customer Knowledge Management Agent** - Customer Knowledge Management Agent helps your organization scale its knowledge with minimal effort from service reps. When admins configure knowledge management and knowledge sources, service reps can generate knowledge assets without spending time synthesizing case data to author them. Learn more.

- **Quality Evaluation Agent** – Quality Evaluation Agent assesses cases and conversations, providing quality scores and detailed evaluation insights to help supervisors take informed actions that enhance quality. Learn more.

Dynamics 365 Contact Center Digital

Contact Center Digital is licensed per user and provides customer engagement across digital messaging and chat channels. Capacity entitlements include Unified Routing with 50 record routes/user/month (excluding chats, calls, and text messages). Chatbot message capacity can be purchased separately via Microsoft Copilot Studio (see Power Platform Licensing Guide for more details).

Contact Center Digital capacities

Application/Capacity	Included Capacity[1]	Add-On Capacity
Contact Center Digital • Record routing (excluding chats, calls, and text messages)	• 50 record routes/user/month	Unified Routing add-on: • 10K record routes/tenant/month Microsoft Copilot Studio: • 25K messages/tenant/month

[1]Capacity pooled at tenant level.

Dynamics 365 Contact Center Voice

Contact Center Voice is licensed per user and provides native voice capabilities as part of your customer engagement. Capacity entitlements include 2,000 Intelligent Voicebot (IVR) minutes/user/month, 6,000 Call Intelligence (transcription) minutes/user/month, and 35GB of Dataverse file storage (capacity accrued per USL and pooled at the tenant level).

Intelligent Voicebot minutes include entitlements to be used as a conversational IVR bot authored using Microsoft Copilot Studio (Any generative AI capabilities require capacity purchased separately via Microsoft Copilot Studio. See [Power Platform Licensing Guide] for more details. Call Intelligence minutes include entitlements for intelligence features, including call transcription, sentiment analysis, AI suggestions, call insights and topic clustering.

Customers are required to connect to an Azure Communication Services resource to use Contact Center Voice. Azure Communication Services provides pay-as-you-go pricing for PSTN, SMS, VOIP (for Direct Routing) and call recording. See here - Azure Communication Services pricing | Microsoft Azure.

Contact Center Voice capacities

Application/Capacity	Included Capacity[1]	Add-On Capacity
Contact Center Voice • Intelligent Voicebot minutes • Call Intelligence minutes	• 2,000 Intelligent Voicebot minutes/user/month • 6,000 Call Intelligence minutes/user/month • Dataverse File storage 35GB for call recording	Intelligent Voicebot minutes add-on: • 500 minutes/tenant/month Call Intelligence minutes add-on: • 500 minutes/tenant/month

[1]Capacity pooled at tenant level.

Dynamics 365 Contact Center (Digital + Voice)

Contact Center is licensed per user and provides customer engagement across digital and voice channels for an all-in-one solution. This license is a bundle and includes both Contact Center Digital and Contact Center Voice, including all capacity entitlements (see above).

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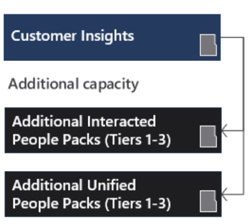
Dynamics 365 Customer Insights



Customer Insights is licensed per tenant and includes rights to two separate applications:

Dynamics 365 Customer Insights - Journeys (formerly Dynamics 365 Marketing): Create and execute personalized customer journeys across multiple channels, including emails, SMS, push notifications, and more.

Dynamics 365 Customer Insights - Data (formerly Dynamics 365 Customer Insights): Unify and enrich customer data with the customer data platform (CDP) to gain deep insights into customer behavior, preferences, and interactions.

Customer Insights includes rights to install both Customer Insights – Journeys (real-time journeys) and Customer Insights - Data applications in an unlimited number of production or sandbox environments. It also includes 10K Interacted People for engagement via the Customer Insights - Journeys app and 100K Unified People for profile unification via the Customer Insights - Data app. Purchase add-on packs of Interacted People and Unified People to accrue additional capacity. Capacity entitlements also includes 2,000 Customer Voice responses/tenant/month, as well as default Dataverse capacity entitlements. See Default subscription capacity for Dataverse entitlement details.

➢ Customer Insights capacities

Customer Insights capacities are based on Interacted People (formerly called Active Contacts) and Unified People (formerly Profiles). Interacted People refers to any Dataverse table (such as a contact, lead, account, or an insights profile) which is interacted with via an inbound or outbound channel such as email, SMS, form submission, etc. in a twelve-month period. A person is no longer counted towards the quota limit if they have not been contacted within the past twelve months. The tenant is also entitled to monthly interactions of up to

10x the interacted people quota limit. Interactions can be sent through out-of-box channels available in Journeys (e.g., emails, SMS, push notifications) or custom channels. Interaction usage is subject to fair use policy limits per environment. For more details on all resource usage limits, please see Service Limit and Fair Usage Policy.

Note: Phone numbers and messaging services are not included in Dynamics 365 Customer Insights. Text messaging from within the app requires a separate provider subscription (e.g., Microsoft ACS or other third-party systems SMS providers) integrated with Journeys to send the messages.

People stored in Dataverse, but not interacted with, do not count towards quota. Interacted status remains for 12 months post-interaction. Unified People refers to a uniquely identified individual that is created through a collection of defined data source sets from multiple systems. Unknown profiles created by the system using cookies are not counted toward the Unified People meter.

Additional capacity is available for both applications and can be purchased independently based on the intended use. Customer Insights licenses also grant capacities for data scheduled refreshes and environments. Buying add-on capacity does not increase the allotment of segments, KPIs, or allowed data scheduled refreshes. Find more details about capacity add-ons and Power Platform requests in the Capacity Licenses section.

Application	Included Capacity

Customer Insights
• 2 applications
  ➢ Customer Insights – Data
  ➢ Customer Insights - Journeys
• Unlimited environments[2]
• Data scheduled refreshes
	• 10K Interacted People/tenant/month
	• 100K Unified People/tenant/month
	• 2,000 Customer Voice responses/tenant/month
	• 4 data scheduled refreshes/day

[1]Addition of the legacy outbound marketing application module is still limited by the legacy license model limits. Marketing standalone licenses are entitled to one installation of the outbound marketing module. Customer Insights licenses are entitled to four installations of the outbound marketing module.

Additional Capacity[1] - Additional Interacted People packs

Tiers	Pack Size	Capacity Threshold	Min-Max Qty
T1	5K	10K-50K	1-8
T2	10K	50K-250K	4-24
T3	50K	250K+	5+

[1]Additional capacity will be added to 10K Interacted People capacity included with Base or Attach license

Additional Capacity - Additional Unified People packs

Tiers	Pack Size	Capacity Threshold	Min-Max Qty
T1	100K	100K-500K	1-4
T2	100K	500K-2M	4-19
T3	100K	2M+	19+

[1]Additional capacity will be added to 100K Unified People capacity included with Base or Attach license.

➢ Customer Insights (attach)

Customer Insights attach license pricing is available for organizations who have a minimum of 10 or more licenses of ONE the following Dynamics 365 applications: Customer Service, Sales, Field Service, Finance,

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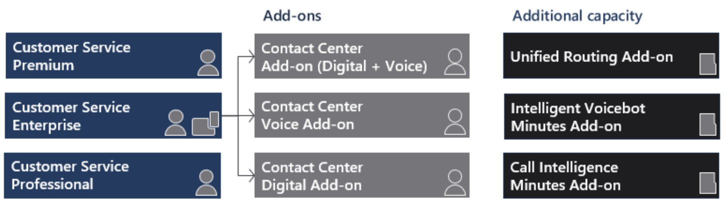
Supply Chain Management, or Commerce. See the Product Terms for more details on Dynamics 365 licensing pre-requisites. Customer Insights attach licenses include the same default capacity entitlements as the base license.

Dynamics 365 Customer Service



Customer Service helps you manage customer relationships, empower your customer service agents, and provides a branded, personalized self-service experience through a searchable knowledge base that delivers consistent, up-to-date answers. Streamline customer support and help customers find the understanding they need to ensure product satisfaction and build customer loyalty.

Customer Service is available in Professional, Enterprise, and Premium editions and offer several optional add-ins to deliver the capabilities needed for your situation. Customer Service Enterprise may also be licensed by device.

Dynamics 365 Customer Service Agents

To use any of the following prebuilt Dynamics 365 Agents, users must have Dynamics 365 Customer Service License. 1K Copilot Credits per user/month are included with Dynamics 365 Customer Service Premium licenses. For details on credit allocation and usage, see the Copilot Credits Overview section.

- **Case Management Agent -** Case Management Agent streamlines the case management process of creating cases, updating details and following up with customers to ensure timely closures, reduce handling time and minimize errors. Learn more.

- **Customer Intent Agent** - Customer Intent Agent uses generative AI to autonomously discover intents in your contact center instance. It analyzes past interactions between customer service representatives (service representatives or representatives) and customers to create an intent library that enhances dynamic conversations. Learn more.

- **Customer Knowledge Management Agent** - Customer Knowledge Management Agent helps your organization scale its knowledge with minimal effort from service reps. When admins configure knowledge management and knowledge sources, service reps can generate knowledge assets without spending time synthesizing case data to author them. Learn more.

- **Quality Evaluation Agent** – Quality Evaluation Agent assesses cases and conversations, providing quality scores and detailed evaluation insights to help supervisors take informed actions that enhance quality. Learn more.

Dynamics 365 Customer Service Professional

Customer Service Professional provides basic resources for customer service agents. It also provides a self-service customer website and access to a knowledge base for end customers. It's meant for less complex scenarios that need streamlined capabilities to support customers and customer service teams.

Dynamics 365 Customer Service Enterprise

Customer Service Enterprise licenses expand on the functionality of Customer Service Professional. In particular, the enterprise license grants use rights that give users the ability to schedule and dispatch service, create teams, and manage resources through integration with other Dynamics 365 applications such as Field Service and Project Operations, when the organization also licenses them.

When you license Customer Service Enterprise, you automatically become entitled to 2,000 Customer Voice responses/user/month.

Unified routing provides intelligent and automated routing and assignment capabilities to customer service organizations. This allows organizations to use advanced capabilities such as multi-stage classification rules and automated assignment based on agent availability, capacity, or specialization. Routing records, excluding Chat and Digital Messaging conversation records, are subject to a licensed capacity. Customer Service Enterprise includes unified routing with 50 record routes/user/month. See [here](#) for more details.

Customer Service Insights provides integrated analytics and AI capabilities to help you better understand support engagements and emerging trends. It helps to identify opportunities for enhancing your automated support system and track the performance of support options and agents. Topic clustering groups related cases or those with commonalities to help customers or service agents to discover the information they need in the knowledge base. These insights capabilities are included in Customer Service Enterprise license. Other service limits apply.

Customer Service Enterprise capacities

Application/Capacity	Included Capacity[1]	Add-On Capacity
Customer Service Enterprise • Record routing (excluding chats, calls, and text messages)	• 50 record routes/user/month	Unified Routing add-on: • 10K record routes/tenant/month

[1]Capacity pooled at tenant level.

Dynamics 365 Customer Service Premium

Customer Service Premium provides an integrated Copilot-first contact center and CRM solution, all powered by generative AI. This license includes Customer Service Enterprise and Contact Center (Digital + Voice) and includes all capacity entitlements for both applications. See Dynamics 365 Contact Center for more details. Customer Service Premium is licensed per user.

Customer Service use rights

Use Rights	Team Members	Customer Service		
		Pro	Ent	Prem
Access				
Dynamics 365 for Outlook and Dynamics 365 App for Outlook[1]	●	●	●	●
Dynamics 365 Mobile Client Application	●	●	●	●
Microsoft Dynamics 365 for iPad & Windows	●	●	●	●
Microsoft Dynamics 365 Web application	●	●	●	●
Read				
All Dynamics 365 application data	●	●	●	●
Custom table data	●	●	●	●
Tables: Create, Update, Delete				
Activities	●	●	●	●
Announcements	●	●	●	●
Calendar: share	●	●	●	●
Contacts	●	●	●	●
Custom tables (see Appendix D)	15 max[2]	15 max	●	●
Notes	●	●	●	●
Personal views	●	●	●	●
Saved views	●	●	●	●
Accounts		●	●	●
Case/Incident		●	●	●
Entitlements		●	●	●
Leads (create only)		●	●	●
Product		●	●	●
Resources		●	●	●
Work hours		●	●	●
Embedded Intelligence			●	●
Facilities/Equipment			●	●

Use Rights	Team Members	Customer Service		
		Pro	Ent	Prem
Product families/hierarchies			●	●
Product relationships			●	●
Service (service scheduling)			●	●
Tables: Actions				
Activity feeds: post & follow activity feeds	●	●	●	●
Activity: convert to a case		●	●	●
Add or remove a connection (stakeholder, sales team) for an account or contact	●	●	●	●
Chat with support team (as chat client for self-service, requires third-party solution)	●	●	●	●
Dialog: start dialog	●	●	●	●
Mail merge: perform mail merge	●	●	●	●
Marketing list: associate a marketing list with an account or contact	●	●	●	●
Open project position: apply for an open project position for Project Operations	●	●	●	●
Project tasks: update the project tasks status for Project Operations	●	●	●	●
Queue: use a queue item	●	●	●	●
Resource competencies: update own resource competencies for Project Operations	●	●	●	●
Viva Engage (formerly Yammer): use collaboration (requires the appropriate license, acquired separately)	●	●	●	●
Case management: reassign, add to queue, route, and resolve cases		●	●	●
Knowledge base: create, update, publish, configure		●	●	●
SLA: manage		●	●	●
Resources (facilities, equipment, people): manage			●	●
Schedule and dispatch capabilities: use scheduling assistant, drag & drop assignment, update resource bookings			●	●
Schedule board: configure and view			●	●
Business units: define and configure			●	●
Teams: define and configure			●	●
Work hours: manage			●	●
General System Use: Actions				
Email: create, update, and delete templates	●	●	●	●
Microsoft Excel: export data to Excel	●	●	●	●
Records: use relationships and connections between records	●	●	●	●
Search and advanced find: use	●	●	●	●
Word: create, update, and delete templates	●	●	●	●
Auditing: configure		●	●	●
Business processes: customize		5 max	●	●
Create and update custom reports, charts and dashboards		5 max	●	●
Customize and extend out of the box reports, charts and dashboards			●	●
Dialogs: define and configure		●	●	●
Duplicate detection: configure rules		●	●	●
Dynamics 365 forms, tables, and fields: create		●	●	●
Forms and views: customize (see Appendix D)		2 max	●	●
Import data in bulk		●	●	●
Queue: define and configure (see Appendix D)		15 max	●	●
Tables: define connections and relationships between tables		●	●	●
Workflows: define and configure		●	●	●
Additional Services and Software				
Project Operations Team Members app[3]	●	●	●	●
Customer Service Hub		●	●	●
Copilot in Dynamics 365 Customer Service			●	●
Unified Service Desk (USD) for Microsoft Dynamics 365			●	●
Dynamics 365 Customer Voice			●	
Dynamics 365 Mobile offline capabilities			●	●
Dynamics 365 Contact Center (Digital + Voice)				●

[1]Dynamics 365 App for Outlook can be customized, however usage must comply with use rights for users' corresponding license and pre-approved application scenarios in Appendix D.

[2]Team Members application module may be customized with maximum 15 additional tables (custom tables or standard Dataverse tables) available to the Team Members license per pre-approved application scenarios in Appendix D.

[3] Dynamics 365 Project Operations Core, deal to proforma invoicing or Dynamics 365 Project Operations Integrated with ERP deployment required for Project Operations Team Members app.

Dynamics 365 Customer Service Device

Customer Service Device licenses are full-access licenses. They include the same rights as the equivalent Enterprise user license, except that access is limited to only the licensed device.

Contact Center Add-ons

Customer Service Enterprise licensed users are eligible to purchase Contact Center add-on options for either Digital, Voice, or both channels (Digital + Voice) in a single bundle.

Note: Customer Service Premium includes Customer Service Enterprise and Contact Center (Digital + Voice).

➢ Contact Center Digital Add-on

Contact Center Digital Add-on is licensed per user and provides customer engagement across digital messaging and chat channels. Capacity entitlements include unified routing with 50 record routes/user/month (excluding chats, calls, and text messages). See Dynamics 365 Contact Center Digital for more details. Message capacity purchased separately via Microsoft Copilot Studio (see Power Platform Licensing Guide for more details).

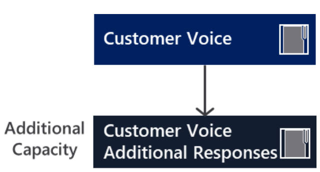
➢ Contact Center Voice Add-on

Contact Center Voice Add-on is licensed per user and provides native voice capabilities as part of your customer engagement. Capacity entitlements include 2,000 Intelligent Voicebot (IVR) minutes/user/month, 6,000 Call Intelligence minutes/user/month, and 35GB of Dataverse file storage. See Dynamics 365 Contact Center Voice for more details.

➢ Contact Center Add-on (Digital + Voice)

Contact Center is licensed per user and provides customer engagement across digital and voice channels for an all-in-one solution. This license is a bundle and includes both Contact Center Digital and Contact Center Voice, including all capacity entitlements (see above).

Dynamics 365 Customer Voice



Customer Voice is a feedback management solution that empowers everyone in the organization to develop enterprise-grade surveys and collect timely feedback from key customers across channels. Customer Voice is licensed per tenant, with capacity allowances based on the number of responses that distributed surveys receive.

Customers of Dynamics 365 enterprise products (Sales Enterprise, Customer Service Enterprise, Customer Insights, Field Service, Marketing, and Human Resources) are automatically entitled to Customer Voice capabilities and 2,000 responses/tenant/month. Customers with Sales Professional or Customer Service Professional licenses may also buy Customer Voice. (See below.)

Survey respondents do not need to be licensed. Only the survey designer/editor must be licensed for the tenant.

Anyone who wants to enable Customer Voice can purchase the license separately. The license comes with 2,000 responses/tenant/month. Any Customer Voice customer can buy additional response packs (in packs of 1,000 responses/tenant/month) as needed. For more details and options, visit How to Buy Customer Voice.

Dynamics 365 Customer Voice Capabilities

Survey authoring	Survey distribution	Insights and follow up
Multi-survey project management	Anonymous survey link	Export results to Excel
Ready-to-use feedback project template	QR code	Survey result summary
Drag-and-drop survey authoring experience	Send survey via email	Satisfaction metrics score and trends
Multi-language support	Personalized email invitation	Link survey results to business application
Advanced branching logic	Non-anonymous external survey recipient	Custom Power BI report dashboard support

Survey authoring	Survey distribution	Insights and follow up
Survey personalization	Unsubscribe support	Auto alert for low satisfaction metric score
Custom styling	Automate sending survey via Power Automate	Manage follow up for low satisfaction metric score
Satisfaction metrics definition	Embed survey in web / app with context data	

Application/Capacity	Included Capacity	Add-On Capacity
Customer Voice • Responses	• 2K responses/tenant/month	Customer Voice Additional Responses (no purchase limit): • 1K responses/tenant/month

Dynamics 365 Electronic Invoicing

Electronic invoicing is the process of creating, presenting, and exchanging structured, transactional invoice documents between businesses and governments for tax reporting purposes, or trading partners in an integrated electronic format.

Dynamics 365 Commerce, Finance, Project Operations, and Supply Chain Management applications include 100 electronic invoice transactions/tenant/month and 100 invoice capture transactions/tenant/month. Dynamics 365 Finance Premium and Supply Chain Management Premium applications include 200 electronic invoice transactions/tenant/month and 200 invoice capture transactions/tenant/month. This included capacity does not rollover and is capped at 100 transactions/tenant/month (or 200 transactions/tenant/month if licensed with either Finance Premium or SCM Premium), regardless of the number of Dynamics 365 licensed applications.

If you need additional transactions, you can buy the Electronic Invoicing additional capacity license for 1K electronic invoice transactions and 1K invoice capture transactions/tenant/month. The transaction capacity resets each month, and customers will need to purchase for peak monthly capacity.

Electronic Invoicing capacity

Application/Capacity	Add-On Capacity (no purchase limit)
Electronic Invoicing • Transactions	• 1K electronic invoice transactions/tenant/month • 1K invoice capture transactions/tenant/month

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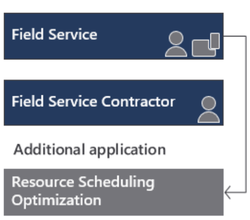
Dynamics 365 Field Service



Field Service connects and empowers field-based service teams. It leverages tight integration between Customer Service case management capabilities and field service work orders to deliver business process-driven, best in class management of your field service operations. Field Service is licensed per user and/or device.

Dynamics 365 Field Service

The Field Service user license includes access to the latest version of Field Service Mobile (a Microsoft product specifically designed for Field Service and distinct from Dynamics 365 Mobile Client). When you license Field Service, you automatically become entitled to 2,000 Customer Voice responses per tenant per month.

Note: Bing Maps Developer license included with limitations (billable transactions) as described at https://www.microsoft.com/en-us/maps/licensing. The Bing Maps Notices apply.

Dynamics 365 Field Service Contractor

Field Service Contractor allows expansion to non-employees by providing essential work order management functionality, making it easier to scale service operations to meet demand.

Field Service Contractor is licensed per user and includes the latest version of Field Service Mobile. Organizations must have a Field Service license before being eligible to purchase and use Field Service Contractor licenses.

Field Service use rights

Use Rights	Team Members	Field Service	Field Service Contractor
Access			
Dynamics 365 for Outlook and Dynamics 365 App for Outlook[1]	●	●	
Dynamics 365 Field Service Outlook Plugin		●	
Dynamics 365 Field Service Teams Application		●	●
Dynamics 365 Mobile Client Application	●	●	●
Microsoft Dynamics 365 for iPad & Windows	●	●	
Microsoft Dynamics 365 Field Service Mobile application		●	●
Microsoft Dynamics 365 Field Service Web application	●	●	●
Read			
All Dynamics 365 application data	●	●	●
Custom table data	●	●	●
Tables: Create, Update, Delete			
Accounts		●	
Activities	●	●	●
Announcements	●	●	
Calendar: share	●	●	
Cases for Field Service: Create cases with limited edit capability. No case SLAs, entitlements, or case routing. Users only licensed with Field Service license cannot act as customer service agents and resolve cases		●	
Contacts	●	●	
Custom tables (see Appendix D)	15 max[2]	●	●
Customer assets		●	●
Dispatch		●	
Inventory management		●	●
Invoices		●	
Leads (create only)		●	●
Notes	●	●	●
Opportunities		●	●
Orders		●	
Personal views	●	●	●
Product		●	
Product families/hierarchies		●	
Product relationships		●	
Purchase orders		●	
Quotes		●	Create only
Repairs and returns management		●	
Resources		●	Own resources only
Routing capabilities		●	
Saved views	●	●	●
Schedule		●	Own resources and manual scheduling only
Service agreements		●	
Territories		●	
Work hours		●	●
Work order management	●[3]	●	●
Tables: Actions			
Activity feeds: post and follow activity feeds	●	●	●
Add or remove a connection (stakeholder, sales team) for an account or contact	●	●	●
Business units: define and configure		●	
Chat with support team (as chat client for self-service, requires third party solution)	●	●	●
Dialog: start dialog	●	●	
Entitlements: manage		●	

Use Rights	Team Members	Field Service	Field Service Contractor
Field Service Mobile application		●	●
Field Service Mobile application Offline sync: use		●	●
Knowledge base: create, update, publish, configure		●	
Mail merge: perform mail merge	●	●	
Marketing list: associate a marketing list with an account or contact	●	●	
Open project position: apply for open project position for Project Operations	●	●	
Project tasks: update project tasks status for Project Operations	●	●	
Queue: use a queue item	●	●	
Repairs: create and manage (RMA)		●	
Resource competencies: update own resource competencies for Project Operations	●	●	
Resource Schedule Optimization: manage		●	
Resources (facilities, equipment, people): manage		●	Own people resources only
Resources: define and configure		●	
Returns: create and manage returns (RTV)		●	
Schedule & dispatch capabilities: use scheduling assistant, drag & drop assignment, update resource bookings		●	
Schedule board: configure and view		●	
Services: define and configure		●	
SLA: manage		●	
Teams: define and configure		●	
Work hours: define and configure		●	●
Work hours: manage		●	●
Yammer: use Yammer collaboration (requires the appropriate license acquired separately)	●	●	
General System Use: Actions			
Auditing: configure		●	
Business processes: customize		●	
Create and update custom reports, charts, and dashboards		●	
Customize and extend out of the box reports, charts, and dashboards		●	
Dialogs: define and configure		●	
Duplicate detection: configure rules		●	
Dynamics 365 forms, tables, and fields: create		●	
Email: create, update, and delete templates	●	●	
Forms and views: customize (see Appendix D)		●	
Import data in bulk		●	
Microsoft Excel: export data to Excel	●	●	
Queue: define and configure (see Appendix D)		●	
Records: use relationships and connections between records	●	●	●
Search and advanced find: use	●	●	●
Tables: define connections and relationships between tables		●	
Word: create, update, and delete templates	●	●	
Workflows: define and configure		●	
Additional Services and Software			
Dynamics 365 Customer Voice		●	
Dynamics 365 Mobile offline capabilities		●	
Project Operations Team Members app[4]	●	●	

[1]Dynamics 365 App for Outlook can be customized, however usage must comply with use rights for users' corresponding license and pre-approved application scenarios in Appendix D.

[2]Team Members application module may be customized with maximum 15 additional tables (custom tables or standard Dataverse tables) available to the Team Members license per pre-approved application scenarios in Appendix D

[3]Create, update, and delete work orders for employee self-serve purposes only; see Appendix D.

[4] Dynamics 365 Project Operations Core, deal to proforma invoicing or Dynamics 365 Project Operations Integrated with ERP deployment required for Project Operations Team Members app.

Dynamics 365 Field Service Device

Field Service Device licenses are full-access licenses. They include the same rights as the equivalent Enterprise user license, except that access is limited to only the licensed device.

Additional Field Service capabilities

Dynamics 365 Field Service Resource Schedule Optimization

Resource Scheduling Optimization is an add-in capability for Field Service that enables you to automatically create a schedule for the appropriate resource—either a person or a non-human asset—while simultaneously optimizing appointments for travel time, mileage, and many other constraints.

Resource Schedule Optimization is licensed per resource. It will typically be used by a scheduler or dispatcher with a Field Service user license, who will designate any number of resources to be included.

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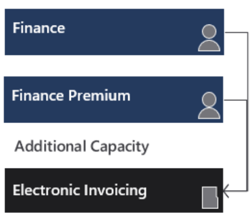
The add-in license allows for unlimited use of schedule optimization, whether on a regular cadence (such as daily or weekly) or ad-hoc.

Dynamics 365 Finance



Finance enables medium-sized organizations and enterprises to monitor the performance of global financial operations in real time and predict future outcomes. It is licensed per user and available in two editions, Finance and Finance Premium. Please refer to the Product Terms for full details regarding minimum purchase requirements.

Dynamics 365 Finance

Finance provides users with access to intelligent, automated, and trusted core financial management capabilities with deep data and process integrations across Dynamics 365, Office 365 and partner applications to offer a centralized source of information that saves time, facilitates collaboration across your organization and enables faster, more data-driven decisions to drive growth. Users that need access to read-only tasks in business performance planning can use a Finance license. Finance also includes default capacity for 100 electronic invoice transaction/tenant/month and 100 invoice capture transactions/tenant/month (see Electronic Invoicing), and 20K AI Builder credits/tenant/month (see AI Builder).

Dynamics 365 Finance Premium

Finance Premium expands on the functionality of Finance and includes advanced business performance management capabilities. Users who need to create plans, budgets, forecasts, or financial analysis reports will need to have a Finance Premium license. Finance Premium also includes default capacity for 200 electronic invoice transaction/tenant/month and 200 invoice capture transactions/tenant/month (see Electronic Invoicing), and 50K AI Builder credits/tenant/month (see AI Builder).

Dynamics 365 Finance Premium – Copilot Credits

1K Copilot Credits per user/month are included with Dynamics 365 Finance Premium licenses. For details on credit allocation and usage, see the Copilot Credits Overview section.

Finance security roles

Role	Security Role Description	Team Members	Ops – Activity	Finance	Finance Premium
C-Suite					
Chief executive officer	Reviews the financial and operational performance		●	●	●
Chief financial officer	Reviews the financial performance		●	●	●
Budgeting					
Budget contributor	Create, update, and approve departmental budget plans.	●	●	●	●

Role	Security Role Description	Team Members	Ops – Activity	Finance	Finance Premium
Budget clerk	Documents budget events and responds to budget inquiries		●	●	●
Budget manager	Reviews budget process performance and enables the budget process			●	●
Financials and Accounting					
Accounts payable positive payment 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			●	●
Credit Management Clerk	Handles day-to-day credit reviews and approvals, updates customer credit limits, and places holds/releases on sales orders based on established policies.			●	●
Credit Management Manager	Oversees overall credit policies, sets or adjusts credit limits, and provides final approval or escalation for high-value credit requests. Typically, responsible for analytics and reporting on credit risks.			●	●
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			●	●
Global cost accountant	Manages global cost accounting processes across legal entities. Analyzes cost data, performs cost roll-ups, and ensures consistency in inventory valuation and standard cost calculations.			●	●
Global cost accounting manager	Oversees global cost accounting strategy and processes. Defines costing policies, ensures cross-entity consistency, and approves cost roll-ups and adjustments in accordance with financial standards.			●	●
Globalization feature developer	Develops and maintains localization and globalization features. Ensures that legal, tax, and regulatory requirements are supported across geographies in compliance with local laws and reporting needs.			●	●
Invoice Capture Operator	Manages the intake and processing of vendor invoices using invoice capture solutions. Reviews scanned or imported invoices for accuracy, ensures correct data extraction, and submits invoices for validation and approval workflows.		●	●	●
Landed cost manager	Leads landed cost processing and configuration. Manages allocation templates, cost components, and monitors accuracy of landed cost calculations for inbound supply chain.			●	●

Role	Security Role Description	Team Members	Ops – Activity	Finance	Finance Premium
Lease accountant	Manages lease accounting processes in compliance with financial reporting standards. Maintains lease schedules, performs lease classification, calculates lease liabilities and assets, and ensures accurate recognition in the general ledger.			●	●
Lease clerk	Supports lease administration by entering and maintaining lease data. Assists with documentation, tracks key lease terms and dates, and ensures data accuracy for accounting and reporting purposes.			●	●
Revenue recognition manager	Oversees the revenue recognition process to ensure compliance with accounting standards. Reviews contracts, applies recognition rules, and ensures timely and accurate posting of revenue transactions to the general ledger.			●	●
Tax accountant	Documents fiscal events and responds to fiscal inquires			●	●
Tax engine developer	Create and manage taxable document model mappings.			●	●
Tax engine functional consultant	Create and manage generic tax engine components (taxable document and tax document)			●	●
Treasurer	Documents treasury events and responds to treasury inquiries			●	●
General					
Subscription billing allocation manager	Manages allocation of subscription revenue and costs. Defines allocation rules and ensures proper revenue and cost distribution across financial periods.			●	●
Subscription billing allocation, deferral, and billing manager	Manages end-to-end subscription billing operations. Oversees billing cycles, deferral schedules, and revenue allocation to ensure accurate financial reporting.			●	●
Subscription billing assign revenue recognition document to imported deferral schedule process manager	Manages the assignment of revenue recognition documents to imported deferral schedules. Ensures accuracy of deferred revenue accounting and compliance with recognition rules.			●	●
Subscription billing deferral manager	Maintains deferral schedule logic and configuration. Oversees the setup and processing of deferred revenue to ensure proper recognition timelines.			●	●
Subscription billing manager	Oversees subscription billing lifecycle. Manages billing schedules, pricing models, renewals, and coordination across revenue operations.			●	●
Subscription billing module user with capabilities including billing, allocation, and deferral features	Accesses core features of the subscription billing module. Performs tasks related to invoice generation, allocation, and deferral without administrative permissions.			●	●
Tax calculation developer	Develops and configures tax calculation rules and formulas. Ensures compliance with tax regulations and supports integration with global tax engines.			●	●

Business Performance Management Capabilities

Capability	Access	Team Members	Ops – Activity	Finance	Finance Premium
Business performance planning (FP&A / xP&A)	Read only		●	●	●
	Restricted Access/Inputs		●	●	●
	Admin/Creator Access/Inputs				●
Business performance analytics	Read only	●	●	●	●
	Core reporting and insights			●	●
AI and machine learning	AI capabilities within Dynamics 365 Finance			●	●

Dynamics 365 Human Resources

Human Resources

Human Resources enables organizations to optimize compensation, benefits, leave and absence tracking, regulatory and policy compliance, performance feedback, standardized training, and self-service programs. Enable HR teams to operate with dexterity by using Dataverse and Power Platform to centralize people data and easily extend the solution. Human Resources is licensed per user. Refer to the [Product Terms] for minimum purchase requirements.

Human resource professionals are typically licensed as full-access users. Users outside of the HR organization, such as employees who need self-serve access, may be licensed through the Team Members license, the Human Resources Self Service license, or the Operations – Activity user license. When you license Human Resources, you automatically become entitled to 2,000 Customer Voice responses per tenant per month.

Human Resources Self Service license

The Human Resources Self Service user licenses enable access to employee and manager self-serve capabilities, such as:

- Update personal employee information
- Manage the human resources activities of direct employees or those reporting up through the user's reporting chain
- Report sick leave
- Submit vacation requests
- View employee benefits
- Approve employee leave as a manager
- View employee information as a manager

The HR Self Service license only grants access to Human Resources, not any other Dynamics 365 product. It does not include full user rights for Human Resources but does provide access to functionality employees often need to manage themselves.

Human Resource security roles

Role	Security Role Description	HR Self Service	Team Members	Operations – Activity	Human Resources
Self-service Contractor	Worker in contractor relationship with legal entities	●	●	●	●
Self-service Employee	Worker in employment relationship with legal entities	●	●	●	●
Pending worker	Worker in pending employment relationship with legal entities	●	●	●	●
Self-service Manager	The manager role represents a direct line manager within HR who is responsible for managing employees based on reporting relationships defined by the position hierarchy. It grants access to the My team page within employee self-service	●	●	●	●
Leave and Absence manager	Reviews and manages leave and absence for a limited group of employees not in a direct reporting relationship	●	●	●	●
Compensation and benefits manager	Documents compensation and benefit events, responds to compensation and benefit inquiries, and records the financial consequences of compensation and benefit events				●
FMLA administrator	Information and functionality around managing employees who are out an FMLA leave				●
Human resource assistant	Documents human resource events and responds to human resource inquiries				●
Human resource manager	Periodically reviews human resource process performance and enables the human resource process				●
Payroll administrator	Documents payroll events, responds to payroll inquiries, and records the financial consequences of payroll events				●
Payroll manager	Authorizes activity in the payroll process				●
Recruiter	Documents recruiting events, responds to recruiting inquiries and records the financial consequences of recruiting events				●
Training manager	Documents training events, responds to training inquiries, and records the financial consequences of training events				●

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Role	Security Role Description	HR Self Service	Team Members	Operations – Activity	Human Resources
Benefits management assistant	Documents benefits-related events, assists with responding to employee benefits inquiries, and supports the administration of benefit plans.				●
Benefits management eligibility processor	Processes and verifies employee eligibility for benefit plans, updates benefit eligibility records and ensures compliance with eligibility rules and policies.				●
Benefits management flex credit assistant	Supports the administration of flex credit programs, assists with credit allocation and adjustments, and responds to employee inquiries regarding flex credit usage and balances.				●

Dynamics 365 Intelligent Order Management

Intelligent Order Management

Intelligent Order Management is an intelligent multi-tenant standalone service that allows customers to adapt quickly and fulfill orders efficiently at the fastest speed and lowest possible cost. It also provides intelligent fulfillment with event driven orchestration and AI rules-based fulfillment, including anomaly detection and inventory reallocation. Intelligent Order Management is licensed per tenant, and it comes with 1K order lines. If you need additional capacity, you can buy multiple units of the same license. Intelligent Order Management license also includes limited Power Automate use rights, such as Power Platform requests per month, and use of connectors. See Appendix G for more details.

Note: Users licensed with a Modern Workplace license, whose organization has an Intelligent Order Management license, can enable Microsoft Teams integration to help users effectively collaborate on the Intelligent Order Management records. See here for more details.

Intelligent Order Management capacities

Application/Capacity	Included Capacity	Add-On Capacity
Intelligent Order Management • Order Lines	• 1K order lines/tenant/month	Intelligent Order Management: • 1K order lines/tenant/month

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Dynamics 365 Project Operations

Project Operations

Project Operations connects sales, resourcing, project management, and finance teams within a single product to help you win more deals, accelerate project delivery, and maximize profitability. It is licensed per user, with a minimum number of users required. Refer to the Product Terms.

Account managers, project managers, project assistants, and project accountants are typically licensed as full users. Users who create and approve project timesheets, such as a user with a Project Timesheet security role, only need a Team Members license. Project Operations licenses have no roles at the Operations – Activity level, but full users of Project Operations have rights to Operations – Activity roles for other Dynamics 365 products, such as Finance and Supply Chain Management.

Project Operations security roles

Role	Security Role Description	Team Members	Ops-Activity	Project Operations
Project Management				
Project resource	Works on the project as a team member, usually fulfilling a specialized role. Records time and expense entries as they make progress on the project.	●	●	●
Project timesheet delegate	Enables creation and approval of project timesheets	●	●	●
Project timesheet user	Enables creation and approval of project timesheets	●	●	●
Project approver	Approves time, expenses, and materials within a project	●	●	●
Project manager	Creates and plans projects and tasks. Plans resources and estimates the cost and revenue for the project. Reviews and Approves all consultant activity on the project and tracks the progress and spend. Reviews draft invoices.			●
Project Accounting & Administration				

Role	Security Role Description	Team Members	Ops-Activity	Project Operations
Project billing administrator	Creates project invoices. Manages and maintains invoice layouts. Reviews invoices for accuracy of sales tax codes and exchange rates. Sends invoices to customers and posts invoices to general ledger.			●
Expense administrator	Configures expense management solution			●
Project assistant	Documents project accounting process events and responds to project accounting process inquiries			●
Project accountant	Maintains project accounting policies			●
Project supervisor	Enables and reviews the project accounting process			●
Project Sales				
Account manager	Manages sales and relationship for customer-facing projects. Creates and manages new project opportunities, builds proposals, and wins quotes to create project contracts.			●
Practice Management				
Practice manager	Owns the practice in the project organization. Creates reports and dashboards for deals in the pipeline. Understands resource demand and utilization.			●
Resource Management				
Resource manager	Maintains project resource tasks. Staffs project demand and manages resource utilization to ensure resources are appropriately utilized.			●
General				
Engineering change request clerk	Documents and processes engineering change requests. Assists in tracking changes to project or product specifications and coordinates updates across teams to ensure change control compliance.		●	●
Field Service Integration User	Enables integration between field service operations and project accounting. Supports synchronization of work orders, resource usage, and service-related data across systems to ensure accurate reporting and billing.		●	●
Expense Copilot Automation Role	Supports AI-driven automation of expense processing. Enables the Copilot to extract, categorize, and submit expenses on behalf of users, streamlining the expense reporting workflow and reducing manual effort.			●
Expense Mobile Role	Enables mobile access to expense entry and management features. Allows users to capture receipts, submit expenses, and track status while on the go using mobile applications.	●	●	●
Field Service Integration Admin	Configures and maintains the integration between Field Service and Project Operations. Ensures accurate synchronization of work orders, resources, and financial data across both workloads.			●
Office integration power user	Uses advanced Office integration features to manage and interact with project data. Supports importing, exporting, and editing project-related data using Microsoft Office tools like Excel and Word.			●
Project account manager	Manages client accounts and financial performance of projects. Oversees billing, monitors project budgets and profitability, and coordinates with stakeholders to ensure financial objectives are met.			●

Project Operations use rights

Use Rights	Team Members	Project Operations
Access		
Dynamics 365 for Outlook and Dynamics 365 App for Outlook[1]	●	●
Dynamics 365 Mobile Client Application	●	●
Microsoft Dynamics 365 for iPad & Windows	●	●
Microsoft Dynamics 365 Web application	●	●
Read		
All Dynamics 365 application data	●	●
Custom table data	●	●
Approve		
Time, expense, materials, and invoices	●	●
Access via Customer Service app for Team Members, Power Pages[2] or API: Create, Read, Update, Delete		

Use Rights	Team Members	Project Operations
Employee self-serve: cases	●	●
Non-employees only: work orders		●
Non-employees only: opportunities		●
Tables: Create, Update, Delete		
Accounts		●
Activities	●	●
Announcements	●	●
Calendar: share	●	●
Contacts	●	●
Custom tables (see Appendix D)	15 max[3]	●
Notes	●	●
Organizational units		●
Personal views	●	●
Price lists		●
Product		●
Product bundles		●
Product families/hierarchies		●
Product relationships		●
Project billing backlog views		●
Project contracts		●
Project estimates		●
Project invoice schedules		●
Project invoices		●
Project management		●
Project opportunity		●
Project price lists		●
Project pricing dimensions		●
Project quotes		●
Project resource requests		●
Project time and expense entries	●	●
Project transaction approval		●
Quick campaigns		●
Resource availability view		●
Resource schedule management		●
Saved views	●	●
Transaction and expense categories		●
Tables: Actions		
Activity feeds: post and follow activity feeds	●	●
Add or remove a connection (stakeholder, sales team) for an account or contact	●	●
Business units: define and configure		●
Chat with support team (as chat client for self-service, requires third-party solution)	●	●
Copying project quotes and project contracts		●
Create and confirm corrective invoices for projects		●
Create and confirm project invoices along a recurring schedule		●
Create custom and configurable project pricing		●
Dialog: start dialog	●	●
Knowledge base: create, update, publish, configure		●
Lead: qualify and convert to an opportunity		●
Mail merge: perform mail merge	●	●
Manage services, resources, work hours, and competencies		●
Marketing list: associate a marketing list with an account or contact	●	●
Project contract confirmation		●
Project tasks: update project task status for Project Operations	●	●
Project transactions: approve		●
Queue: use a queue item	●	●
Resource competencies: update own resource competencies for Project Operations	●	●
Resources (facilities, equipment, people): manage		●

Use Rights	Team Members	Project Operations
Resources: define and configure		●
Resource forecast: update own work forecast for current and future periods	●	●
Schedule and dispatch capabilities: use scheduling assistant, drag and drop assignment, update resource bookings		●
Schedule board: configure and view		●
Services: define and configure		●
Setup cost and bill rates for project resources from same division and resource transfer prices for resources from other divisions		●
Teams: define and configure		●
Territories: manage		●
Time and expense: submit time and expenses for Project Operations	●	●
Use resource availability view and resource schedule management		●
Winning a project quote		●
Work hours: manage		●
Yammer: use Yammer collaboration (requires the appropriate license, acquired separately)	●	●
General System Use: Actions		
Auditing: configure		●
Business processes: customize		●
Dialogs: define and configure		●
Duplicate detection: configure rules		●
Dynamics 365 forms, tables, and fields: create		●
Email: create, update, and delete templates	●	●
Forms and views: customize (see Appendix D)		●
Import data in bulk		●
Microsoft Excel: export data to Excel	●	●
Queue: define and configure (see Appendix D)		●
Records: use relationships and connections between records	●	●
Search and advanced find: use	●	●
System reports, charts, and dashboards: create and update		●
System reports, charts, and dashboards: customize		●
Tables: define connections and relationships between tables		●
Word: create, update, and delete templates	●	●
Workflows: define and configure		●
Additional Services and Software		
Project for the Web[4]		●
Project Operations Team Members app[5]	●	●

[1]Dynamics 365 App for Outlook can be customized, however usage must comply with use rights for users' corresponding license and pre-approved application scenarios in Appendix D.

[2]When provisioning capacity-based websites using Dataverse capacity, Power Pages licensing use rights apply.

[3]Team Members application module may be customized with maximum 15 additional tables (custom tables or standard Dataverse tables) available to the Team Members license per pre-approved application scenarios in Appendix D.

[4]Project for the Web is Microsoft's most recent offering for cloud-based work and project management that is built on the Power Platform.

[5] Dynamics 365 Project Operations Core, deal to proforma invoicing or Dynamics 365 Project Operations Integrated with ERP deployment required for Project Operations Team Members app.

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Dynamics 365 Sales

Choose the level of functionality appropriate for your business with Sales licensing options that include Professional or Enterprise capabilities—or even more features with the Premium or Microsoft Relationship Sales (MRS) licenses. Note: Customers using Professional will not be able to combine Sales Premium, Enterprise, or Sales Insights within the same environment instance.

Each of the Sales application options is licensed per user. Sales Enterprise may also be licensed per device.

Dynamics 365 Sales Agents

To use the following prebuilt Dynamics 365 Agent, users must have a Dynamics 365 Sales License (e.g., Dynamics 365 Sales, Dynamics 365 Sales Professional, Dynamics 365 Sales Enterprise, Dynamics 365 Sales Premium). 1k Copilot Credits are included with Dynamics 365 Sales Premium. For details on credit allocation and usage, see the [Copilot Credits Overview]() section.

Dynamics 365 Sales

- **Sales Qualification Agent** – Sales Qualification Agent automates pipeline qualification and improves lead quality by proactively researching information from internal and external sources, engaging hundreds of leads at once with personalized emails and follow-ups, and identifying buying intent to transition leads further along the journey to sellers. [Learn more]().

Sales Professional

A Sales Professional license provides essential sales force automation (SFA) for organizations without complex sales processes.

Sales Enterprise

A Sales Enterprise license takes your organization beyond sales force automation to meet the needs of more complex sales processes. In addition to all the functionality available with a Sales Professional license, Sales Enterprise capabilities include customization, extensibility, embedded intelligence, and manual forecasting. Sales Enterprise licenses also includes Copilot in Dynamics 365 Sales. Visit [Copilot in Dynamics 365 Sales overview | Microsoft Learn]() for more information.

When you license Sales Enterprise, you automatically become entitled to 2,000 Customer Voice responses per tenant per month.

In addition, Sales Enterprise also includes selected Sales Premium features including assistant cards, email engagement, auto capture of Outlook activity and three new premium features Conversation Intelligence, Sales Accelerator and Lead & Opportunity scoring. The premium features leverage automation and AI to help sellers prioritize their worklist, provide real-time analysis during calls, automate action notifications, and programmatically generate meeting summaries.

Users who license Sales Enterprise and activate Conversation Intelligence will be able to do so with unlimited capacity. Sales Accelerator provides access to the workspace and up to 1500 records connected to any defined sequence per environment per month. Finally, view up to 1500 Leads/Opportunity records scored per environment per month with Predictive Scoring. For additional capacity, or for access to all the Sales Premium features, simply step up your license to Sales Premium. See [Digital selling | Microsoft Learn]() for more details.

Sales Premium

Sales Premium takes the Sales Enterprise capabilities and accelerates engagement and decision-making with prebuilt and embedded business insights that are easy to act upon. Licensed per user, Sales Premium includes Sales Enterprise feature permissions and our Sales Insights automation and AI offerings. Additionally, Sales Premium users can get access to the full Microsoft 365 Copilot for Sales experience, including seller role-specific capabilities, with just the purchase of Microsoft 365 Copilot.

Sales Insights

Sales Insights is part of Sales Premium and can also be added onto a Sales Enterprise or MRS license (Sales Professional users are not entitled to these features). A full Sales Insights license enables the following additional features:

- Predictive Scoring (lead and opportunity)
- Predictive Forecasting
- Business Card Reader
- Relationship Analytics
- Pipeline Intelligence
- Notes Analysis
- Conversation Intelligence
- Connection Insights (who knows whom)

- Assistant Studio
- Sales Accelerator

Sales Enterprise users need to access the Sales Hub Application to set up any of these features. Sales Professional users are only entitled to use the Sales Professional application and are not entitled to use the Sales Hub application. (Learn more)

Sales Insights has full access to the features mentioned above except for Business Card Reader. The capacity limit for Business Card Reader is 200/user/month. If additional Business Card Reader capacity is required, you may buy additional Sales Insights capacity licenses to increase the pooled amount.

When Sales Insights is licensed within Sales Premium, additional Sales Insights capacity can be bought by purchasing additional Sales Premium licenses.

Sales Insights capacities

Application	Included Capacity[1]	Add-On Capacity
Sales Insights included with Sales Enterprise		
Business Card Reader	10 scans/user/month	Available with a purchase of Sales Insights or Sales Premium
Conversation Intelligence	Activated Conversation Intelligence users receive Unlimited hours/user/month	N/A
Sales Accelerator	1500 records connected to a sequence per environment per month	Available with a purchase of Sales Insights or Sales Premium
Lead & Opportunity Scoring	1500 records scored per environment per month	Available with a purchase of Sales Insights or Sales Premium
Sales Insights / Sales Premium Users		
Business Card Reader	200/user/month	Additional Sales Insights user purchase to increase 200/user/month (pooled at tenant level)
Conversation Intelligence	Unlimited hours/user/month	N/A
Sales Accelerator	Full Access	N/A
Lead & Opportunity Scoring	Full Access	N/A

[1]Unused capacity will roll over for up to 12 months. Learn more

Microsoft Relationship Sales

Microsoft Relationship Sales (MRS) helps sales professionals build the relationships they need to harness the power of relationship selling. MRS includes Sales Enterprise and LinkedIn Sales Navigator Advanced Plus. It is licensed per user. All components, software, and entitlements of Microsoft Relationship Sales are limited for use with Dynamics 365 Sales environments only. Refer to the Product Terms for minimum purchase requirements, programs, and conditions.

Learn more about LinkedIn Sales Navigator to understand the full power of the MRS license.

Dynamics 365 Sales Device

Sales Device licenses are full-access licenses. They include the same rights as the equivalent Enterprise user license, except that access is limited to only the licensed device.

Sales use rights

Use Rights	Team Members	Pro[1]	Ent	Prem
Access				
Dynamics 365 for Outlook and Dynamics 365 App for Outlook[1]	●	●	●	●
Dynamics 365 Mobile Client Application	●	●	●	●
Microsoft Dynamics 365 for iPad & Windows	●	●	●	●
Microsoft Dynamics 365 Web application	●	●	●	●
Read				
All Dynamics 365 application data	●	●	●	●

Use Rights	Team Members	Pro[1]	Ent	Prem
Custom table data	●	●	●	●
Tables: Create, Update, Delete[3]				
Accounts		●	●	●
Activities	●	●	●	●
Announcements	●	●	●	●
Calendar: share	●	●	●	●
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			●	●
Contacts	●	●	●	●
Custom tables (see Appendix D)	15 max[2]	15 max	●	●
Embedded intelligence			●	●
Forecasting			●	●
Invoices		●	●	●
Lead management		●	●	●
Marketing campaigns		●	●	●
Marketing list		●	●	●
Notes	●	●	●	●
Opportunities		●	●	●
Orders		●	●	●
Personal views	●	●	●	●
Price lists		●	●	●
Product		●	●	●
Product bundles		●	●	●
Product families/hierarchies			●	●
Product relationships			●	●
Quick campaigns		●	●	●
Quotes		●	●	●
Sales goals			●	●
Sales literature			●	●
Saved views	●	●	●	●
Territories			●	●
Tables: Actions[3]				
Activity feeds: post and follow activity feeds	●	●	●	●
Activity: convert to an opportunity		●	●	●
Add or remove a connection (stakeholder, sales team) for an account or contact	●	●	●	●
Business Card Reader (10/user/month: pooled at tenant level)			●	●
Business units: define and configure			●	●
Chat with support team (as chat client for self-service, requires third-party solution)	●	●	●	●
Dialog: start dialog	●	●	●	●
Knowledgebase: create, update, publish, configure, search (basic)			●	●
Lead: qualify and convert to an opportunity		●	●	●
Mail merge: perform mail merge	●	●	●	●
Marketing list: associate a marketing list with an account or contact	●	●	●	●
Open project position: apply for open project position for Project Operations	●	●	●	●
Project tasks: update project task status for Project Operations	●	●	●	●
Queue: use a queue item	●	●	●	●
Resource competencies: update own resource competencies for Project Operations	●	●	●	●
Teams: define and configure (see Microsoft Learn)		●	●	●
Yammer: use Yammer collaboration (requires the appropriate license, acquired separately)	●	●	●	●
General System Use: Actions				
Auditing: configure		●	●	●
Business processes: customize		5 max	●	●
Create and update custom reports, charts and dashboards		5 max	●	●
Customize and extend out of the box reports, charts and dashboards			●	●
Dialogs: define and configure		●	●	●
Duplicate detection: configure rules		●	●	●

Use Rights	Team Members	Pro[1]	Ent	Prem
Dynamics 365 forms, tables, and fields: create		●	●	●
Email: create, update, and delete templates	●	●	●	●
Forms and views: customize (see Appendix D)		2 max	●	●
Import data in bulk		●	●	●
Microsoft Excel: export data to Excel	●	●	●	●
Queue: define and configure (see Appendix D)		15 max	●	●
Records: use relationships and connections between records	●	●	●	●
Search and advanced find: use	●	●	●	●
Tables: define connections and relationships between tables		●	●	●
Word: create, update, and delete templates	●	●	●	●
Workflows: define and configure		●	●	●
Automation & AI Offerings (Inc Sales Premium Features)				
Email Engagement			●	●
Assistant Cards			●	●
Auto Capture			●	●
Conversation Intelligence			●	●
Sales Accelerator			●[4]	●
Lead & Opportunity Scoring			●[4]	●
Notes Analysis				●
Connection Insights (Who Knows Whom)				●
Pipeline Intelligence (Predictive forecasting)				●
Relationship Analytics				●
Additional Services and Software				
Copilot in Dynamics 365 Sales			●	●
Dynamics 365 Customer Voice			●	●
Dynamics 365 Mobile Offline capabilities			●	●
Project Operations Team Members app[5]	●	●	●	●
Microsoft Sales Copilot (formerly Microsoft Viva Sales)			●	●

[1]Dynamics 365 App for Outlook can be customized, however usage must comply with use rights for users' corresponding license and pre-approved application scenarios in Appendix D.
[2]Team Members application module may be customized with maximum 15 additional tables (custom tables or standard Dataverse tables) available to the Team Members license per pre-approved application scenarios in Appendix D.
[3]See Restricted tables requiring Dynamics 365 licenses for more information.
[4]Each of these features are available to Sales Enterprise customers with a limited capacity. See Sales Enterprise for more details.
[5] Dynamics 365 Project Operations Core, deal to proforma invoicing or Dynamics 365 Project Operations Integrated with ERP deployment required for Project Operations Team Members app.

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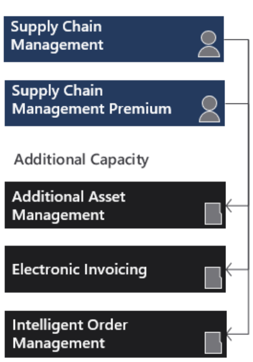
Dynamics 365 Supply Chain Management



Supply Chain Management provides manufacturers, distributors, and retailers with the real-time visibility and intelligence they need for proactive operations. It is licensed per user and available in two editions, Supply Chain Management and Supply Chain Management Premium. Please refer to the Product Terms for full details regarding minimum purchase requirements.

Supply Chain Management

Supply Chain Management unifies data and uses predictive insights from AI and IoT—across order fulfillment, planning, procurement, production, inventory, warehousing, and transportation processes—to maximize operational efficiency, product quality, and profitability.

Supply Chain Management Premium

Supply Chain Management Premium expands on the functionality of Dynamics 365 Supply Chain Management and includes Demand Planning capabilities. Users who need to create plans, budgets, forecasts, or demand analysis reports will need to have a Supply Chain Management Premium license.

Dynamics 365 Supply Chain Management Premium – Copilot Credits

1K Copilot Credits per user/month are included with Dynamics Supply Chain Management Premium licenses. For details on credit allocation and usage, see the Copilot Credits Overview section.

Supply Chain Management security roles

Role	Security Role Description	Team Members	Ops – Activity	SCM	SCM Premium
Asset Management					
Maintenance requester	Creates maintenance requests	●	●	●	●
Maintenance worker	Documents maintenance events and responds to maintenance inquiries		●	●	●
Maintenance clerk	Plans and authorizes maintenance events. Maintains maintenance planning master data and responds to maintenance related inquiries.			●	●
Maintenance manager	Enables and reviews the performance of the maintenance process. Maintains master data and responds to maintenance related inquiries.			●	●
Cost Accounting					
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			●	●
Global cost accountant	Manages global cost accounting processes across legal entities. Analyzes cost data, performs cost roll-ups, and ensures consistency in inventory valuation and standard cost calculations.			●	●
Global cost accounting manager	Oversees global cost accounting strategy and processes. Defines costing policies, ensures cross-entity consistency, and approves cost roll-ups and adjustments in accordance with financial standards.			●	●
Globalization feature developer	Develops and maintains localization and globalization features. Ensures that legal, tax, and regulatory requirements are supported across geographies in compliance with local laws and reporting needs.			●	●
Customer Service					
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			●	●
Demand Planning					
Demand Planning Contributor	View worksheets (see shared worksheets and save their own views). Collaborate using Microsoft Teams and in-app comments.			●	●
Demand Planning Manager (incl. Forecast analyst, Market researchers, and promotion planner)	Forecasts customer demand for products or services. Analyzes historical sales data, market trends, and other factors to predict future demand, including: • Configure the demand planning app (role-level security, time fences, worksheets) • View and create planning data (forecasts and calculations) • View and create tables and import data from excel • View and create transformations • View and create worksheets • Export plans when they're ready to share with Supply Chain Management				●
Engineering					
Process engineer	Defines processes to make new products			●	●

Role	Security Role Description	Team Members	Ops – Activity	SCM	SCM Premium
Process engineering manager	Reviews and authorizes new production processes			●	●
Product designer	Designs new and modifies existing Bill of Materials (BOM) structures			●	●
Product design manager	Reviews and authorizes product BOM structures			●	●
Product engineer	Manages product design data and engineering change orders. Supports the creation and maintenance of product specifications, bills of materials, and version control to ensure manufacturing readiness.			●	●
Product engineering manager	Leads product engineering activities across design and manufacturing. Oversees engineering change management, approves design revisions, and ensures product data integrity across development and operations.			●	●
Distribution					
Landed cost agent	Manages landed cost calculations and processes. Tracks and allocates additional costs such as freight, duties, and insurance to inbound shipments to ensure accurate inventory valuation and cost accounting.			●	●
Landed cost manager	Leads landed cost processing and configuration. Manages allocation templates, cost components, and monitors accuracy of landed cost calculations for inbound supply chain.			●	●
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 manager on workload	Manages warehouse operations and resource workloads. Oversees task assignments, monitors throughput and capacity, and ensures timely execution of receiving, picking, packing, and shipping activities.			●	●
Warehouse planner	Plans and authorizes warehouse work. Maintains warehouse planning master information and responds to warehouse work planning inquiries			●	●
Warehouse system integration operator	Maintains the integration between warehouse execution systems and core ERP. Ensures real-time data exchange for inventory updates, task confirmations, and automation equipment synchronization.			●	●
Field Service					
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			●	●
Marketing					
Kit Manager	Oversees the creation and management of product kits and bundled offerings, maintaining component accuracy across sales and inventory processes.			●	●
Marketing coordinator	Produces and distributes marketing materials			●	●
Marketing manager	Manages product marketing			●	●
Manufacturing					
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		●	●	●
Maintenance Clerk	Supports maintenance operations by entering and updating maintenance requests, tracking asset repair histories, and assisting in the scheduling of routine and corrective maintenance tasks.			●	●

Role	Security Role Description	Team Members	Ops – Activity	SCM	SCM Premium
Manufacturing execution workload machine operator	Operates and monitors machinery within the manufacturing execution system. Records production activities, reports job progress, and ensures adherence to production schedules and quality standards on the shop floor.		●	●	●
Manufacturing execution workload shop supervisor	Oversees production floor operations within the manufacturing execution system. Monitors job progress, assigns tasks to machine operators, ensures safety and compliance, and addresses production issues in real time.			●	●
Hazardous materials manager	Oversees the classification, handling, storage, and documentation of hazardous materials in compliance with safety and regulatory standards. Manages safety data sheets, monitors inventory of hazardous substances, and ensures proper labeling and reporting across the supply chain.			●	●
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 and who is available and can respond to the main requests from machine operator			●	●
Procurement					
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			●	●
Quality Control					
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			●	●
Sales					
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			●	●
Transportation					
Transportation coordinator	Enables inbound, outbound, rating, routing, and handling of transportation process			●	●
Logistics manager	Set up, maintain, and configure the network planning that are used in transportation management processes			●	●
General					
Subscription billing allocation manager	Manages allocation of subscription revenue and costs. Defines allocation rules and ensures proper revenue and cost distribution across financial periods.			●	●
Subscription billing allocation, deferral, and billing manager	Manages end-to-end subscription billing operations. Oversees billing cycles, deferral schedules, and revenue allocation to ensure accurate financial reporting.			●	●
Subscription billing assign revenue recognition document to imported deferral schedule process manager	Manages the assignment of revenue recognition documents to imported deferral schedules. Ensures accuracy of deferred revenue accounting and compliance with recognition rules.			●	●

Role	Security Role Description	Team Members	Ops – Activity	SCM	SCM Premium
Subscription billing deferral manager	Maintains deferral schedule logic and configuration. Oversees the setup and processing of deferred revenue to ensure proper recognition timelines.			●	●
Subscription billing manager	Oversees subscription billing lifecycle. Manages billing schedules, pricing models, renewals, and coordination across revenue operations.			●	●
Subscription billing module user with capabilities including billing, allocation, and deferral features	Accesses core features of the subscription billing module. Performs tasks related to invoice generation, allocation, and deferral without administrative permissions.			●	●
Tax calculation developer	Develops and configures tax calculation rules and formulas. Ensures compliance with tax regulations and supports integration with global tax engines.			●	●

Source to Pay (procurement)

For customers that are looking for source to pay solutions, these capabilities are licensed on a per-user basis. The licensing model offers modularity and composability, allowing customers to tailor their licensing requirements to match their organizational needs precisely.

Customers are required to purchase licenses based on the user personas defined within Dynamics 365 Supply Chain Management and/or Dynamics 365 Finance security roles. These personas and roles are categorized based on specific functions and responsibilities, such as purchasing manager or accounts payable manager, ensuring that users have access to the relevant features and capabilities to perform their tasks efficiently. By adopting this modular approach, you can scale your procurement capabilities efficiently, adding or removing licenses as your business evolves. Whether you require access for a small team or an entire department, our licensing model allows you to align your investment with your usage, optimizing costs and maximizing value.

Additional Supply Chain Management applications and capacities

➢ Asset Management capacities

Additional Asset Management capacities are licensed per tenant. If you use Asset Management, you must license sufficient Asset Management capacity to meet or exceed the number of assets you want to manage. For example, if you have 1,500 assets to manage in Asset Management, you'll need 14 additional asset capacity licenses. Once 50 additional Asset Management capacity licenses have been purchased - enough for 5,000 assets - you may manage an unlimited number of assets with no additional purchase.

The only assets that must be counted against these capacities are:

- Assets you choose to manage with Asset Management
- Parent level assets you choose to track maintenance, costs, and/or location

Note: Active and inactive assets carry historical data and count against the capacity limits.

Application/Capacity	Included Capacity	Add-On Capacity
Supply Chain Management • Asset Management • Electronic Invoicing • Intelligent Order Management	Supply Chain Management: • 100 assets/tenant/month • 100 electronic invoice transactions/tenant/month • 100 invoice capture transactions/tenant/month • 1K order lines/tenant/month Supply Chain Management Premium: • 100 assets/tenant/month • 200 electronic invoice transactions/tenant/month • 200 invoice transactions/tenant/month • 1K order lines/tenant/month	Additional Asset Management: • 100 assets/tenant/month Electronic Invoicing: • 1K electronic invoice transactions/tenant/month • 1K invoice capture transactions/tenant/month Intelligent Order Management: • 1K order lines/tenant/month

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Cross-Application Licensing

Dynamics 365 Agents and Copilot Credits Overview

Dynamics 365 agents are intelligent services within the following Dynamics 365 applications. These agents provide AI-driven automation and orchestration features that operate as part of the licensed product functionality. To use these agents, users must have a valid license for the corresponding application.

- Dynamics 365 Customer Service:
- Dynamics 365 Contact Center
- Dynamics 365 Field Service
- Dynamics 365 Sales
- Dynamics 365 Business Central
- Dynamics 365 Enterprise Resource Planning (ERP)

Copilot Credits are the common currency across Copilot Studio capabilities and are required for executing and extending Dynamics 365 agents. The number of credits decremented for each response or action is dependent on the complexity of the task completed by the agent. Copilot Credits are offered through the Copilot Studio pay-as-you-go meter, the Copilot Studio Copilot Credit pack subscription license and the Copilot Credit Pre-Purchase Plan. [Learn more.]

Dynamics 365 Sales Premium, Customer Service Premium, Finance Premium and Supply Chain Management Premium licenses include 1,000 Copilot Credits per user/month. These credits can be used to run prebuilt Dynamics 365 Agents or custom agents built with Microsoft Copilot Studio. Copilot Credits accrue at the tenant level and should be allocated to environments to prevent credits being used in other workloads (e.g., prevent finance agents from running on Copilot Credits accrued from Sales Premium licenses).

Copilot Credit Entitlements

Dynamics 365 User SL	Copilot Credits Required/Included
Contact Center	
Digital	Not included, sold separately
Voice	Not included, sold separately
Digital + Voice	Not included, sold separately
Customer Service	
Professional	Not included, sold separately
Enterprise	Not included, sold separately
Premium	1,000 Copilot Credits included
Finance	
Finance	Not included, sold separately
Finance Premium	1,000 Copilot Credits included
Sales	
Professional	Not included, sold separately
Enterprise	Not included, sold separately
Premium	1,000 Copilot Credits included
SCM – Premium	
Supply Chain Management	Not included, sold separately
Supply Chain Management Premium	1,000 Copilot Credits included

Business Central Team Members

The Dynamics 365 Business Central Team Members license, not to be confused with Dynamics 365 Team Members license, grants a named user the following rights for their own use only (not for, or on behalf of, others):

- Read data within Business Central
- Update existing data and entries in Business Central, such as previously created customer, vendor, or item records. Entries are defined as specific accounting information that may be updated, such as a due date on customer ledger entries.
- Approve or reject tasks in all workflows assigned to that user, with the limit that approvals and rejections can only update data in records that Business Central Team Members can access.
- Create, edit, and delete a sales or purchase quote
- Create, edit, and delete personal information
- Edit job time sheets for approval
- Use the Dynamics 365 Power Apps/Power Automate use rights provided with a Dynamics 365 license
- Business Central Team Members application module may be customized with maximum 15 additional tables (custom tables or standard Dataverse tables) available to the Business Central Team Members license.

For additional details, refer to the Essentials and Premium capabilities.

Team Members

The Dynamics 365 Team Members user license grants a named user the following rights for Customer Service Team Members, Sales Team Members and Project Operations Team Members application modules. These rights are for their own use and not for activities for, or on behalf of, other people. (For instance, the license doesn't grant managers the right to perform the same actions for direct reports.)

- Create, read, update, and delete contacts, activities, and notes
- Update their own employee information
- Record time, materials, and expenses
- Approve time, expenses, materials, and vendor invoices
- User reporting and dashboards
- Participate as a consumer of Dynamics 365 services, such as responding to surveys

The Dynamics 365 Team Members user license also grants a named user the following rights for Finance, Supply Chain, Commerce, Human Resources, and Project Operations. Again, these rights are for their own use, or for limited HR use by managers, and not for activities for, or on behalf of, others.

- Record any type of time or expense
- Approve time, expenses, and vendor invoices
- Create requisitions
- Create or edit items related to quality control and departmental budgets
- Manage their own employee information
- Manage human resources activities for direct employees or those reporting up through the user's reporting chain
- Use Human Resources Self Service functionality (when Human Resources is licensed by the organization)

A Dynamics 365 Team Members license holder may customize a maximum of 15 additional tables (custom tables or standard Dataverse tables) that are available to licensed users per the pre-approved scenarios in

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Appendix D. For additional details, refer also to the use rights and security rights for each Dynamics 365 product provided previously in this guide.

Operations - Activity

The Operations – Activity user license provides limited access to the Commerce, Finance, Human Resources, Project Operations, and Supply Chain Management applications. Operations – Activity use rights include all Team Members use rights as well as the right to:

- Approve all Operations – Activity related transactions (see Appendix F for details).
- Create or edit items related to warehousing, receiving, shipping, orders, vendor maintenance, and all budgets

Operate a point-of-sale (POS) device, store manager device, shop floor device, or warehouse device.

Operations - Device

Operations – Device licenses provide limited access to a subset of Finance, Supply Chain Management, Commerce, and Project Operations capabilities.

These device licenses allow multiple users to operate a licensed point-of-sale device, shop floor device, warehouse device, or store manager device. If multiple users, who only require these limited use rights, work exclusively on shared devices, it will generally be more cost effective to license those devices than the users themselves.

Operations – Device license use rights are also available to Operations – Activity users. However, an Operations – Device license does not include all the capabilities of the Operations – Activity user license. When a single user needs to work on one or more dedicated personal devices, it will be more cost effective to license that user with an Operations – Activity user license.

A single device can provide any of the following functionality in any combination. Operations – Device or Business Central Device licenses do not include full user capabilities.

Device License	Operations – Device and Business Central Device capabilities
Point of Sale	One device located in the Commerce location or store, used by any individual, for completing customer-facing sales of goods or services transactions. Note that a Commerce location or store is a physical location (static or mobile, such as a food truck) operated by you when closing goods or services transactions with customers.
Store Manager	One device located in the Commerce location, used by any individual, dedicated to performing the following tasks solely for that location. • Managing and replenishing inventory • Balancing cash registers and processing daily receipts • Configuring and maintaining menu options displayed by the software development company devices • Purchasing supplies and services required to run the Commerce location operations • Managing Commerce location staff • Processing reports required to analyze and manage Commerce location results • Managing master data related to Commerce location operations
Shop Floor	One device used for manufacturing shop-floor functions: • 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 • Viewing worker holiday balances
Warehouse Device	One device used for warehousing functions: • Receiving • Putting away • Doing internal stock transfers • Picking, packing • Capturing product attributes • Shipping goods plus performing inventory count checks in the context of a warehouse management system • 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.)

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Operations – Order Lines

Operations – Order Lines is licensed per tenant and allows you to extend the use of the Commerce, Finance, Project Operations, or Supply Chain Management applications with an alternative to user and device-based licensing. The Operations – Order Lines license enables internal users, partners, customers, connected automated systems, IoT devices and bots to update specific tables with transactional licensing based on the number of transactions updated in those tables.

Operations – Order Lines licenses:

- Support more scenarios that involve external users.
- Alleviate pricing and licensing friction in many common multiplexing scenarios.
- Enable licensing of automated systems and devices that don't include users, such as in IoT scenarios.
- Improve licensing cost transparency and predictability.
- Tie licensing costs more directly with business outcomes.

To qualify for Operations – Order lines licensing, a transaction must:

- Be indirect access. Direct use of the Dynamics application do not qualify.
- Only update data in the tables designated as qualifying for Operations – Order Lines use. The table below determines the relevant entity even if you use custom entities on these operations tables. Access to any other tables or user actions requires a user license.

Order Line	Order Line Type	Operations Table
Sales	Sales Order Lines	SALESLINE
Invoicing	Free Text Invoice	CUSTINVOICELINE
Invoicing	Vendor Invoice	VENDINVOICEINFOLINE
Purchasing	Purchase Order	PURCHLINE
Accounting	General Journal	LEDGERJOURNALTRANS
Cost Accounting	Cost Entries	camdatacostobjectcostentry
WMS	Inbound Transaction	WHSINBOUNDSHIPMENTORDERLINE
TMS	Inbound Transaction	WHSOUTBOUNDSHIPMENTORDERLINE
Production Management	Production Order Journal	• PRODJOURNALTRANSBOM (JOURNAL LINE FOR POSTING RAW MATERIAL CONSUMPTION ON PRODUCTION ORDERS) • PRODJOURNALTRANSROUTE (JOURNAL LINE FOR POSTING TIME USED ON PRODUCTION ROUTE OPERATIONS) • PRODJOURNALTRANSJOB (JOURNAL LINE FOR POSTING TIME USED ON PRODUCTION JOBS) • PRODJOURNALTRANSPROD (JOURNAL LINE FOR POSTING FINISHED GOODS COMPLETED ON PRODUCTION ORDERS)
IoT	Messages Transmitted	IOTINTCORENOTIFICATION
Maintenance Management	Work Order	ENTASSETWORKORDERLINE

If a transaction type includes a qualifying order line type, then use of Operations – Order Lines is permitted.

The following scenarios require a user or device license:

- Direct access to the Commerce, Finance, Project Operations, or Supply Chain Management applications.
- Indirect access to these applications with a transaction type or action that is not covered by the qualifying order line types.

While order line licensing is restricted to designated order line types, additional entity records that are required to support and are directly referenced by an order line, may be created, or updated with the order line without a user or device license. Those additional entity records will not be counted as extra order lines unless they are a designated order line record type (see table above).

Operations – Order Lines capacity details

Operations – Order Lines is licensed by tenant per month, with an annual commitment, and includes an allowance of 100K transactions per month, enforced annually for a total of 1.2 million transactions. The creation of new order lines and updates to existing order lines count against the 100K transaction allowance. Deletions do not count. If you reach the transaction limit before the subscription year is complete, orders will not be blocked, but you'll receive warnings and can address the difference on your subscription anniversary by purchasing additional capacity.

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Capacity

Default subscription capacity included per tenant

The first base license (subscription) for a Dynamics 365 product includes its default capacity, which is shared per tenant. Default capacity is not cumulative, so additional licenses (either base or attach) do not increase your initial default per tenant capacity. However, each user license accrues additional database and file capacities at no charge per enterprise base license.

Attach licenses do not include additional capacity entitlements (except for Customer Insights, which includes the same default capacity entitlements as the base license). Attach licenses only allow users to access the default capacity entitlements included with the first base license. For bundled offers such as Sales Premium and MRS, the capacity entitlements come with the core application (in this case, Sales Enterprise).

Capacity Included/Accrued	Dataverse Database		Dataverse File		Dataverse Log		Dataverse **or** Operations Database		Dataverse **or** Operations File	
	Included Per Tenant Max	Accrued Per USL	Included Per Tenant	Accrued Per USL	Included Per Tenant	Accrued Per USL	Included Per Tenant[1]	Accrued Per USL[2]	Included Per Tenant	Accrued Per USL
Contact Center, Contact Center Voice, Customer Service Premium	30 GB	250 MB	40 GB	35 GB	2 GB	-	-	-	-	-
Contact Center Digital Customer Service Enterprise, Field Service[3], Sales Enterprise, Sales Premium	30 GB	250 MB	40 GB	2 GB	2 GB	-	-	-	-	-
Customer Service Professional, Sales Professional	30 GB	-	40 GB	-	2 GB	-	-	-	-	-
Intelligent Order Management	30 GB	-	40 GB	-	2 GB	-	-	-	-	-
Customer Insights[1] (CI)	45 GB	-	60 GB	-	4 GB	-	-	-	-	-
CI – Interacted People[4]	-	1 GB	-	2 GB	-	-	-	-	-	-
CI - Unified People[4]	-	15 GB	-	20 GB	-	-	-	-	-	-
Commerce, Finance, Project Operations, Supply Chain Management					2 GB	-	90 GB	5 GB	80 GB	5 GB
Finance Premium, Supply Chain Management Premium					3 GB	-	125 GB	10 GB	110 GB	10 GB
Human Resources					2 GB	-	90 GB	1 GB	80 GB	2 GB
Operations – Activity					-	-	-	1 GB	-	2 GB
Operations – Device								2 GB		3 GB

[1]Customer Insights Attach SLs include the same default capacity entitlements as Customer Insights Base SLs. Dataverse entitlements are only granted once per tenant, for the first Customer Insights Base or Attach SL. Customer Insights $0 user licenses do not accrue additional Dataverse entitlements.
[2]Learn more about Finance and Operations Storage Capacity report.
[3]Field Service Contractor SLs do not include any Dataverse capacity entitlements
[4]Per additional 100K Unified People or 50K Interacted People add-on pack.

Capacity Included/Accrued	Business Central Database: Included/AAD Tenant	Business Central Database: Accrued/USL	Production: Environment/ Tenant	Nonproduction: Environment/ Tenant
BC Essentials	80 GB	3 GB	1 BC	3
BC Premium	80 GB	5 GB	1 BC	3
BC Device	-	1.5 GB/device	-	-
Commerce, Finance, Project Operations, Supply Chain Management	3	3	1 AOS	1 Sandbox Tier 2
Customer Insights	-	-	Unlimited[1]	-

Capacity Included/Accrued	Business Central Database: Included/AAD Tenant	Business Central Database: Accrued/USL	Production: Environment/ Tenant	Nonproduction: Environment/ Tenant
Finance Premium, Human Resources[2], Supply Chain Management Premium	-	-	1 AOS	1 Sandbox Tier 2

[1]Includes entitlements to install both the Customer Insights - Journeys and Customer Insights - Data applications in an unlimited number of production or sandbox environments.
[2]Before May 1, 2025 – For Human Resources, at any given time, only one of the environments may be in production, but both environments may be in nonproduction.

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Types of default capacity

- Dataverse database: Stores and manages table definitions and data. This relational database capacity is for any Dynamics 365 product that utilizes Dataverse. You can increase available capacity, shared tenant-wide, in 1 GB increments.
- Dataverse file: Stores attachments to notes or emails, which may include documents, image files, videos, PDF files, and other crucial files. This file capacity is for any Dynamics 365 product that utilizes Dataverse. You can increase available capacity, shared tenant-wide, in 1 GB increments.
- Dataverse log: Records table and attribute data changes over time for use in analysis and reporting. This log data (audit/tracing) capacity is for any Dynamics 365 product that utilizes Dataverse for Apps. You can increase available capacity, shared tenant-wide, in 1 GB increments.
- There are additional Microsoft subscriptions beyond Dynamics 365 that grant Dataverse capacity entitlement. Please see the Power Platform Licensing guide for other entitlements, as well as this page for details related to Project for the web.
- Operations database capacity: Relational database capacity for all applicable products (specified in the table above) that have storage requirements outside of Dataverse for Apps. This Operations database capacity is inclusive of all storage in Production, Nonproduction, Reporting, and Entity Store databases.
- Operations file capacity: Stores attachments to notes or emails, which may include documents, image files, videos, PDF files, and other crucial files. This file capacity is for applicable products (specified in the table above) that have storage requirements outside of Dataverse for Apps.
- Business Central database storage: Structured database storage.
- Environments:
    - Production: a service that can be accessed by end users and is designed, built, and scaled to accommodate your applications to process live and/or real-time data in connection with your ongoing business operations and is deployed within a single geographic region
        - Dataverse environment: The foundation for Power Platform and Sales, Customer Service, Field Service, Customer Insights, Human Resources, and Project Operations, which partially run on Dataverse environments.

          NOTE: Dataverse structures a variety of data and business logic to support interconnected applications and processes. Entitlement to various Dataverse features and components are included in many, but not all, licenses for Dynamics 365 products. Access to Dataverse, through an individual product or service, does not grant access to unrelated products, services, features, or data for which users are not licensed. Users only have rights to access data, services, features and Dynamics 365 app components within Dataverse for the Dynamics 365 product they are properly licensed for.
        - Application object server (AOS): For Human Resources, Finance, Supply Chain Management, Commerce, and Project Operations. Note that the production environment

for Finance, Supply Chain Management, Commerce, and Project Operations comes with disaster recovery and high availability and is monitored 24x7 for service health. To ensure the environment is used for live operations, Microsoft will provision the production environment only after your Dynamics 365 implementation nears the operational phase, after completion of required activities in the Lifecycle Services (LCS) methodology. See here for more information on licensing requirements for multiple LCS projects and environments.

    - Business Central environment: For Business Central Premium or Essentials

  - Nonproduction: User acceptance testing (UAT), sandbox, and testing environments. These environments cannot be used to process live and/or real-time data in connection with ongoing business operations.

- Power Platform requests (formerly known as API call requests): To ensure service levels, availability, and quality, Microsoft enforces limits on the number of requests users can make each day across their Dynamics 365 products. Power Apps and Power Automate usage counts against the Power Platform request entitlements provided by your license. If you exceed these limits, overage charges may apply. For more details, refer to Requests limits and allocations - Power Platform | Microsoft Docs.
- Power Pages: Capacity is enforced monthly and based on user type: authenticated users per website per month and anonymous users per website per month. See Power Platform licensing FAQs - Power Platform | Microsoft Learn for more details.
- Microsoft Copilot Studio: Capacity is enforced monthly, and unused messages do not carry over month to month. Find more details in the Power Platform Licensing Guide.

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Capacity add-ons

If the default subscription capacity is not sufficient for your tenant, additional capacity is available for Power Platform, Dataverse, Operations and Business Central capacity and sandbox environments.

Power Platform capacity add-ons

- You may buy the Power Platform Requests add-on to increase the daily service limits for Power Platform requests.
- You may buy the Power Pages capacity packs to align with peak monthly anticipated usage.
- You may buy the Microsoft Copilot Studio capacity add-on to increase the number of chat bot sessions and daily Power Platform request limit.

For more information, refer to the Power Platform Licensing Guide.

Additional Dataverse capacity

Dataverse capacity add-ons provide the flexibility to increase the storage capacity associated with your Dynamics 365 subscription in increments of 1GB for Dataverse Database and 1GB for Dataverse File or Dataverse Log capacity. Any capacity add-on purchased is pooled at the tenant level and tracked against all environments associated with the tenant.

Additional Operations capacity (only for Dynamics 365 Finance, Supply Chain Management, Commerce, Project Operations and Human Resources)

Additional Operations capacity add-ons are available for Dynamics 365 Finance, Supply Chain Management, Commerce, Project Operations and Human Resources in increments of 1GB for Operations Database and 1G for Operations File capacity. Any capacity add-on purchased is pooled at the tenant level and tracked against all environments associated with the tenant.

Additional Dynamics 365 Business Central Capacity

Business Central Database capacity add-ons give you the option to increase the storage capacity associated with your Dynamics 365 Business Central subscription. Business Central Database Capacity add-ons are available in 1GB or 100GB increments.

Additional environments are available in Business Central with one license providing 1 production environment, 3 sandbox environments and 4GB of Business Central Database Capacity.

Operations sandbox add-ons

These Operations nonproduction sandbox add-on environments may be configured for testing and training. Users licensed for Commerce, Finance, Human Resources, Project Operations and Supply Chain Management, can access associated licensed nonproduction environments. Note: For Tiers 4 and Tier 5, Finance, Commerce, Supply Chain Management, Human Resources, and Project Operations accrue an additional 128 MB of Operations database and file capacity for each full user license.

Operations sandbox add-ons

Sandbox	Description	Purpose	Customer/ Load Size	Included Database Capacity
Tier 2	Standard acceptance testing: multi box	User acceptance, integration testing, and training	Any	10 GB/ environment
Tier 3	Premium acceptance testing: multi box	Large scale user acceptance testing, integration testing, and training	Small/ light load	10 GB/ environment
Tier 4	Standard performance testing: multi box	Performance, load, and staging with user acceptance testing	Small to medium load	10 GB/ Environment + 128 MB/USL
Tier 5	Premium performance testing: multi box	Performance, load, and staging with user acceptance testing	Large/ heavy load	10 GB/ Environment + 128 MB/USL

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Additional Licensing Requirements

Minimum license purchase requirements

To activate a Dynamics 365 subscription, you must buy a minimum quantity of qualifying licenses for some products. See the [Product Terms] for details about minimum purchase requirements.

Licensing requirements for external users

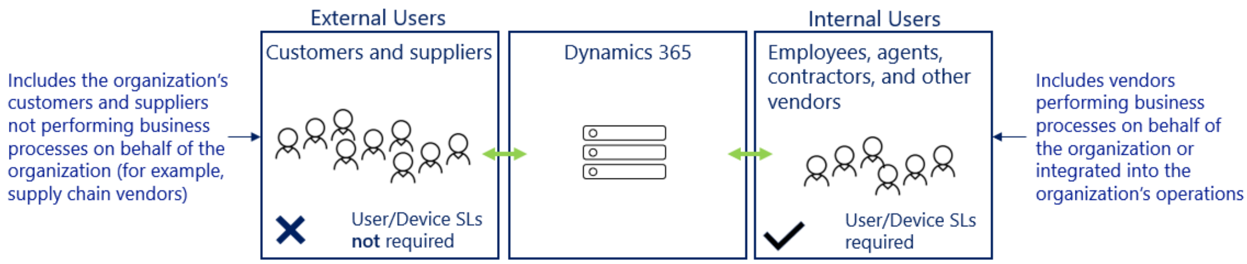
External users do not require user licenses to access Dynamics 365 applications. However, custom applications that provide external users access to Dynamics 365 are covered under Power Apps use rights for Dynamics 365 and defined in the Power Platform Licensing Guide. External Users means users that are not (a) employees of Customer or its Affiliates, (b) contractors or agents that typically work for Customer or its Affiliates for more than 30 hours on average per week, or (c) contractors or agents that typically work onsite for Customer or its Affiliates on each working day.

Limited external user access is included with your internal user licenses. However, the graphical interfaces for Business Central, Sales, Customer Service, Field Service and Project Operations may not be accessed by external users. You also have the option to license Power Pages to provide external access to your business processes or data.

Power Apps use rights for Dynamics 365 internal and external users are outlined in the Power Platform Licensing Guide. For details, refer to the Power Apps and Licensing Requirements for External Users sections in the Power Platform Licensing Guide.

External user access does not include your employees, onsite or independent contractors, vendors, agents, or affiliates who perform business processes on you or your affiliate’s behalf. These users are considered internal users and require licenses to access Dynamics 365 applications. Please note, the "External Accountant" user license included with Business Central is not an external user, as described above. Please see the Business Central section of this guide for more information regarding the "External Accountant" user license.

Neither internal nor external user access extends to use of your Dynamics 365 environment to provide outsourced business services (i.e., day-to-day managing of unaffiliated third-party sales orders, invoices, purchase orders, payments, payroll, human resources, telemarketing, data recording, or social media marketing). In this sense, you may not use Dynamics 365 to provide outsourced business services. However, as internal users, your employees, agents, contractors, and vendors may use your Dynamics 365 environment to prepare periodic financial statements for your clients or customers (such usage is not considered an outsourced business service).



Additional licensing information and requirements for external users can be found on Product Terms and Commercial Licensing Terms. Note that for qualifying indirect transaction types, the Operations – Order Lines license may be used by internal or external users for indirect access scenarios where a user or device license is not required. Please see the Operations – Order Lines license section for more details.

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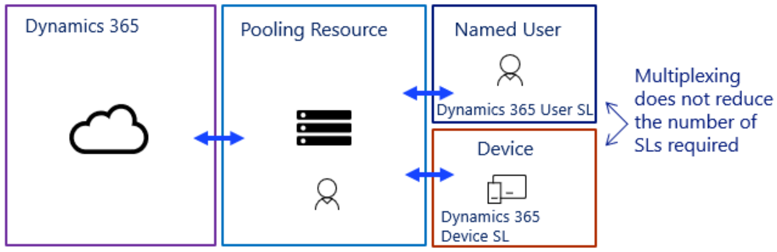
Multiplexing

Multiplexing refers to your use of hardware or software to pool connections, reroute information, or reduce the number of devices or users that directly access Dynamics 365. Multiplexing does NOT reduce the required number of licenses of any type. Any user or device that accesses Dynamics 365—whether directly or indirectly—must be properly licensed or otherwise granted access (such as for external users) in one of the manners already discussed.

Dynamics 365 licenses are required for users or devices that directly input, query, or view data from Dynamics 365. Similarly, licenses are required for users or devices that input, query, or view data from Dynamics 365 through a pooling device. Pooled connections use a non-interactive Dynamics 365 user account (or application access in Business Central) that can access the system but only via the web service layer. Internal users and devices accessing Dynamics 365 data indirectly through a website or via an API to a separate service (such Microsoft Outlook) must also be properly licensed, regardless of whether they are set up as a Dynamics 365 user for the service.

For example:

- 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 Dynamics 365 license.
- The number of tiers of hardware or software between Dynamics 365 and the ultimate user or devices does not affect the number of licenses required.



Dynamics 365 applications use Dataverse capacity and features to store and secure data. Power Apps users who have a Power Apps license may use custom applications to access (that is, create, read, update or delete) any Dynamics 365 non-restricted table in the Dataverse. However, Power Apps users and devices that need to create, update, or delete data in Dynamics 365 restricted tables must be properly licensed for Dynamics 365. For more details on Dynamics 365 restricted tables, see Restricted tables requiring Dynamics 365 licenses.

Note that if a licensed user receives data from an unlicensed user, the licensed user may manually enter this information into Dynamics 365. This scenario is not considered multiplexing because the manual action of moving and entering the data is performed by a licensed user.

For qualifying indirect transaction types, the Operations – Order Lines license may also be used for indirect access without a user or device license. Please see the Operations – Order Lines license section for details.

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For additional information about multiplexing, see the Microsoft Multiplexing Overview.

Dual use rights

Dual use rights are one of the advantages of Dynamics 365. These rights allow you to deploy Dynamics applications either in Microsoft's cloud or in a private on-premises or partner-hosted cloud. See Microsoft's Outsourcing Management licensing brief for more information. In some cases, you may want to deploy in multiple environments simultaneously. For instance, you might do this to help migrate a Dynamics 365 on-premises deployment to Dynamics 365 while running private dev/test deployments in Microsoft Azure. Dual use rights mean that properly licensed users do not also need additional client access licenses (CALs) to access applications hosted in on-premises environments.

Users with Dynamics 365 licenses have use rights equivalent to a CAL for the purpose of accessing equivalent on-premises workloads. Device use rights are equivalent to the cloud device use rights. Any server licenses that would be otherwise required for an on-premises deployment are included with the Dynamics 365 licenses.

Access to the on-premises server software provided via dual use rights is reserved for users assigned a qualifying Dynamics 365 license and external users. Reference the applicable on-premises licensing guides for more details. For an online user/device license to on-premises user/device CALs mapping, see the Dynamics 365 Dual Use Rights section in the Product Terms.

You may use downgrade rights to deploy an earlier version of a server, but downgrade rights are limited to:

- Dynamics AX 2012 R3 for Dynamics 365 for Operations on-premises server (or later)
- Dynamics CRM 2016 for Dynamics 365 (On-Premises) Server (or later)
- Dynamics 365 Business Central, on-premises server (current released version with downgrade rights of minus 2 versions)

Note:

- Dual use rights included with Dynamics 365 licenses are non-perpetual and expire when the cloud subscription expires.
- Dynamics CALs have no reciprocal rights to access functionality provided exclusively to Dynamics 365 licenses. Nor do dual use rights imply equivalent capabilities between Dynamics CALs and Dynamics 365 licenses.
- Licenses for all supporting servers (such as Windows Server and any CALs) must be obtained separately.

- If you choose to deploy with dual use rights, Microsoft technical support will assist with resulting issues, but support is not included for the on-premises deployment.
- If you choose to deploy on-premises, you have the following technical support options:
    - Seek support from your partner.
    - Buy professional support incidents to get support directly from Microsoft.
    - Use support incidents from an existing Software Assurance (SA) contract. (if you have transitioned to From SA, those support incidents are no longer available for on-premises)
    - Buy Premier or Unified Support resources or use resources you've already paid for.
- Reference product activation and key information for more information. Dynamics 365 on-premises licensing guides can be found here.

Registration may be required. For more information regarding on-premises licensing see the Microsoft Dynamics 365 Business Central, on-premises, Microsoft Dynamics 365 (On-Premises), and Microsoft Dynamics 365 for Operations on-premises licensing guides here.

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Dual write

Dual write enables customers to synchronize data from the AOS applications Commerce, Finance, Supply Chain Management, and Project Operations into Dataverse. The dual write capability is configured at the table level, enabling you to designate the specific tables to synchronize with Dataverse. Find more details here.

A specific license is not required to enable dual write, nor is additional licensing required if you want to configure dual write against unrestricted tables. When dual write is configured against a restricted table, however, users making updates in Dynamics 365 that result in updates to those restricted tables must be appropriately licensed. For example, if Finance users are leveraging dual write to integrate the Invoice Process (a Dataverse restricted table), these users need to be appropriately licensed.

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For a list of restricted tables, please check here.

Dynamics 365 extensibility

Power Platform: Dynamics 365 extensibility is provided through Power Platform. The Power Platform functionality available to Dynamics users is detailed in the Power Platform Licensing Guide.

Power BI: Some Dynamics 365 applications may embed Power BI content within the user interfaces, such as the ability to view embedded tables and charts. This is simply a product feature, to the extent it is provided; a Power BI license is not required to access this content. Dynamics 365 users are not provided with any standalone or general-purpose Power BI license or use rights. A Power BI Pro or Power BI Premium per user license is required to customize the content. See Microsoft Power BI for more information.

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Other extensibility: For applicable products, Dynamics 365 licenses also include the right to use custom tables, as described in Appendix D, and create custom security roles, as described in Appendix E.

Dynamics 365 Field Service & Finance/Supply Chain Management integration

This out-of-the-box integration enables Dynamics 365 Field Service licensed users to be assigned a security role within Dynamics 365 Finance and Dynamics 365 Supply Chain Management. When this integration is active, transactions performed by field service technicians (licensed with D365 Field Service) within the Field Service application will automatically sync data with Finance and Supply Chain Management. The following use cases are covered:

- Creating or updating work orders in Field Service will create and update projects and project journals in Finance and Supply Chain Management.
- Reading inventory levels in Field Service, which will be virtual tables exposing inventory from Finance and Supply Chain Management (the system of record for inventory).

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Note: Integration is available for organizations licensed with D365 Field Service, D365 Finance, and D365 Supply Chain Management. Direct access to the D365 Finance or D365 Supply Chain Management application will require a license.

Appendix A: Dynamics 365 Licenses

Dynamics 365 Licenses	Short Names
Dynamics 365 Account Protection	Account Protection
Dynamics 365 Business Central Device	Business Central Device
Dynamics 365 Business Central Essentials	Business Central Essentials
Dynamics 365 Business Central Premium	Business Central Premium
Dynamics 365 Business Central Team Members	Business Central Team Members
Dynamics 365 Contact Center	Contact Center
Dynamics 365 Commerce	Commerce
Dynamics 365 Customer Insights	Customer Insights
Dynamics 365 Customer Service Enterprise	Customer Service Enterprise
Dynamics 365 Customer Service Premium	Customer Service Premium
Dynamics 365 Customer Service Professional	Customer Service Professional
Dynamics 365 Electronic Invoicing	Electronic Invoicing
Dynamics 365 Field Service	Field Service
Dynamics 365 Field Service Contractor	Field Service Contractor
Dynamics 365 Finance	Finance
Dynamics 365 Finance Premium	Finance Premium
Dynamics 365 Human Resources	Human Resources
Dynamics 365 Human Resources Self Service	Human Resources Self Service
Dynamics 365 Intelligent Order Management	Intelligent Order Management
Dynamics 365 Loss Prevention	Loss Prevention
Dynamics 365 Operations – Activity	Operations – Activity
Dynamics 365 Operations – Device	Operations – Device
Dynamics 365 Operations – Order Lines	Operations – Order Lines
Dynamics 365 Project Operations	Project Operations
Dynamics 365 Purchase Protection	Purchase Protection
Dynamics 365 Resource Scheduling Optimization	Resource Scheduling Optimization
Dynamics 365 Sales Enterprise	Sales Enterprise
Dynamics 365 Sales Insights	Sales Insights
Dynamics 365 Sales Premium	Sales Premium
Dynamics 365 Sales Professional	Sales Professional
Dynamics 365 Supply Chain Management	Supply Chain Management
Dynamics 365 Supply Chain Management Premium	Supply Chain Management Premium
Dynamics 365 Team Members	Team Members
Microsoft Dataverse	Dataverse
Microsoft Relationship Sales	MRS
Microsoft 365 Copilot for Sales	Copilot for Sales
Microsoft 365 Copilot for Service	Copilot for Service

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Appendix B: Offers in Paid Public Preview

Dynamics 365 Agents in Paid Public Preview

*See disclaimer

As part of Microsoft's ongoing investment in generative AI, this guide highlights the availability of Dynamics 365 agents built with Copilot Studio and now offered in Paid Public Preview. Learn more about these capabilities. When these agents reach Generally Available (GA), they will be incorporated into the Dynamics 365 Agents section of this licensing guide.

These agents are designed to accelerate time to value and are configured to scale operational efficiency and elevate customer experiences across roles and functions. Collectively these agents learn to address emerging issues, uncover new knowledge, and automate manual processes to boost business efficiency and reduce costs.

These agents are also extensible. Organizations can enhance them with Copilot Studio capabilities such as agent flows, AI Builder tools, custom actions, REST APIs, computer use for GUI automation, tenant graph grounding, autonomous actions, and deep reasoning via generative orchestration.

To use Microsoft-built agents in Dynamics 365, users must first be licensed for one of the following respective Dynamics 365 applications.

- Dynamics 365 Customer Service
- Dynamics 365 Contact Center
- Dynamics 365 Field Service
- Dynamics 365 Sales
- Dynamics 365 Business Central
- Dynamics 365 Enterprise Resource Planning (ERP)

Dynamics 365 Field Service

- **Scheduling Operations Agent** - Scheduling Operations Agent for Dynamics 365 Field Service equips dispatchers with an agent to optimize technician schedules as conditions change throughout the day. Learn more.

Dynamics 365 Finance

- **Account Reconciliation Agent** - Account Reconciliation Agent enables users to deliver timely, compliant financial statements with fewer manual fixes. This agent accelerates the period-end close by matching ledger entries, flagging discrepancies, and recommending resolution steps. Learn more.

Dynamics 365 Sales

- **Sales Research Agent** - Sales Research Agent enables the use of natural language to start a dialog with data or pick from AI-suggested topics. This dialog helps facilitates a deeper understanding of sales performance across a team, territory, and product portfolio. Learn more.

- **Sales Close Agent** – The Sales Close Agent focuses on the final stages of the sales cycle, negotiation and closing. It identifies high-value deals and ranks them for seller attention and flags potential blockers and suggests proactive actions. It autonomously closes deals, by completing low-complexity transactions without manual intervention. Learn more.

Dynamics 365 Supply Chain Management

- **Supplier Communications Agent** - The Supplier Communications Agent takes charge of supplier interactions, acting instantly on supplier emails, chasing missing order confirmations and delayed shipments. By closing the loop on every critical supplier touchpoint, the agent slashes rush charges, prevents costly disruptions, and protects margins. Learn more.

Dynamics 365 Project Operations

- **Expense Agent** - Expense Agent simplifies and automates the process of managing employee or worker expenses in an organization. It reduces manual effort by processing receipts, creating expense lines, and generating expense reports with minimal user intervention. Learn more.

- **Time Entry Agent** - Time Entry Agent helps to ensure timely, accurate capture of project hours by prompting employees to log time with smart reminders and context. It enhances billing accuracy, payroll, and visibility into project performance. Learn more.

- **Approvals Agent** - Approvals Agent uses the text of policy documents to determine how submitted time, expense, and material records should be classified. It streamlines the approval process for time, expense and material transactions. Learn more.

***Disclaimer**
These previews are subject to the terms applicable to Previews as detailed in the relevant sections of the Microsoft Product Terms, the Supplemental Terms of Use for Microsoft Power Platform and Dynamics 365 Preview for Online Services, and the Microsoft Products and Services Data Protection Addendum.

Microsoft reserves the right to change the pricing, business models, or services (including but not limited to branding, features, functionality, and availability) at any time in its discretion prior to GA without prior notice.

Appendix C: Definitions

- **Attach license:** A lower-cost license for a product, sometimes referred to as the subsequent qualifying application, for a user already licensed for another base product. For instance, a user licensed for Commerce might have an attach license for Customer Service Professional. Not every Dynamics 365 product qualifies for attach licensing.
- **Base product or base license:** The first product licensed for a given user, such as Commerce. Sometimes referred to as the first license. Only user licenses qualify for base license treatment.
- **Device license**: Device licensing, an alternative to user licensing, enables any number of users to access a product through a single licensed device, without the need for separate user licenses. Only the user or the device requires a license, not both. You may mix user and device licenses. Device licenses may be referenced in some documents or diagrams as device subscription license (SL) and indicated on diagrams with .
- **Environment:** An environment is a space to store, manage, and share your organization's business data, apps, and flows. It also serves as a container to separate apps that may have different roles, security requirements, or target audiences. Power Apps automatically creates a single default environment for each tenant, which is shared by all users in that tenant.
- **Privileges**: Specify the level of access that is required to perform a job, solve a problem or complete an assignment. Privileges are comprised of permissions and represent access to tasks, such as canceling payments and processing deposits.
- **Securable Objects**: Include items such as tables (entities), forms, fields, and reports. Access to these objects is managed by assigning security roles to users which define what actions (like create, read, update, delete) they can perform on specific securable objects. This ensures that users only have the permissions necessary to carry out their work.
- **Tenant:** A tenant contains uniquely identified domains, users, security groups, and licenses. Your organization may have multiple tenants (for example, for different geographical regions), and a single tenant can contain multiple Dynamics 365 (online) environments. For example, an organization may have a European tenant with environments for sales, operations, and service, plus a North American tenant with only a sales environment. Each environment is always associated with only one tenant.

  In a multi-tenant scenario like the example, a licensed Dynamics 365 user associated with one tenant can only access environments mapped to the same tenant. To access another tenant, the user would need a separate license and a unique set of sign-in credentials. That means a sales manager with appropriate licenses as a user for the European tenant in the example could access both the sales and operations environments in Europe but would need separate licensing to access the North American environment.

  Any combination of products may be deployed at the tenant level, except if you buy both Enterprise and Professional licenses for the same product (such as Customer Service), you must install them on separate environments. In addition, a user with a Professional license is entitled only to the functionality granted by that license and may not directly or indirectly access another environment with an Enterprise license for the same workload. Conversely, since an Enterprise license includes the Professional capabilities for the same workload, an Enterprise user may access the Professional license environment—but the features available to them will still be limited to the Professional features for that workload.

  Tenants may be indicated on diagrams with . Find more information on the differences between tenants and instances.
- **Tenant license**: Some Dynamics 365 products (such as Customer Insights) are available through a tenant license instead of a user or device license. Tenant licenses confer access to the default Dynamics 365

environment(s) included in the subscription account, and every additional Dynamics 365 environment (production or nonproduction) is associated with the same online services tenant.

In theory, anyone in the organization may access the functionality of tenant licenses. In some cases, license administrators may need to assign a (no-cost) user license to those individuals who need access to products licensed at the tenant level. Find more information on how to assign the tenant license see [the Dynamics 365 Licensing Brief].

Tenant licenses also may be indicated on diagrams with .

- **User license**: Access to Dynamics 365 products is primarily accomplished by licenses assigned to a named user for a specific product. Each user requires their own license, with a few exceptions (such as a device license, below). User licenses cannot be shared, but an individual with a user license may access the product through any number of devices. User licenses may be referenced in some documents or diagrams as user subscription licenses (SLs) and indicated on diagrams with .
- **Workload:** A workload is a defined set of business functionality (such as Sales, Customer Service, Finance, or Business Central Essentials) applied to a specific application.

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Appendix D: Dynamics 365 Team Members Use Rights Overview

This table provides an overview of the use rights granted through a Dynamics 365 Team Members license (not applicable for Dynamics 365 Business Central Team Members) for Sales, Customer Service, and Field Service, as well as for Finance, Supply Chain Management, Commerce, Human Resources, and Project Operations.

Use Rights	Description	Dataverse Platform (with Sales, Customer Service, Field Service, Project Operations)	Finance and Operations Platform (with Finance, SCM, Commerce, HR, Project Operations[1])
Access			
	Access Anywhere: Web App, Mobile App, Tablet App, via Dynamics 365 App for Outlook and Dynamics 365 for Outlook	•[1]	
Read			
	Dynamics 365 Applications: full read across	•[1]	•
General System Use			
Common	Activities: create, update, and delete	•[1]	
	Announcements: create, update, and delete	•[1]	
	Contacts: create, update, and delete	•[1]	
	Dynamics 365 Mobile Client Application: use (for iPad, Windows) except for Field Service	•[1]	
	Microsoft Excel: export data and access user reports, charts, and dashboard	•[1]	
	Notes: create, update, and delete	•[1]	
	Yammer: collaboration (needs Yammer license)	•[1]	
Customization			
Apps on Dataverse platform	Additional tables (custom tables or standard Dataverse tables)	15 per app[2]	
Pre-approved application scenarios for Team Members			
General	Employee: Employee self-serve		•
	Manager: Review team-related data and perform light actions such as approving time, expenses, or leave requests.		•
	Purchase requisitions: create, edit and approve (4)		•
	Contractor: worker in contractor relationship with legal entities		•
Sales	Only employee self-serve:__ customer management - work with contacts or read accounts; lead and opportunity management - read leads and opportunities linked with accounts (Sales for Team Members, Power Pages[2] or API access only)	•	
Customer Service	Only employee self-serve: _create, update, and delete on own case; read knowledgebase articles (Customer Service for Team Members, Power Pages[2] or API access only)	•	
Field Service	Work orders - create, update, and delete for employee-self-serve; internal create on behalf of customers for internal users (Users cannot resolve/close)	•	

Use Rights	Description	Dataverse Platform (with Sales, Customer Service, Field Service, Project Operations)	Finance and Operations Platform (with Finance, SCM, Commerce, HR, Project Operations[1])
Finance	Accounts payable: view positive pay events	-	•
	Cost objects: monitor monetary and non-monetary performance of assigned cost objects	-	•
	Department budget: create and edit		•
	Employee self-serve: record and update personal information, record time and expense		•
	Vendor invoice: approve		•
	Inventory: respond to inventory needs on production line		•
	Manager self-serve: manage direct reports, record, and update employee information_		•
	Purchase orders: respond to vendor's PO when listed as contact person; approve		•
	Time and expense: approve		•
Supply Chain Management	Employee self-serve		•
	Asset management: creates maintenance requests		•
	Time and attendance: approve		•
	Cost accounting: monitor monetary and non-monetary performance of assigned cost objects		•
	Distribution: confirm shipments and receipts, update delivery status	-	•
	Engineering: view BOM and product details	-	•
	Manufacturing: responds to inventory needs on the production line and worker enabled to use advanced features for time registration	-	•
	Procurement: approve purchase order, and approve vendor's PO when listed as contact person	-	•
	Quality control: create, edit and update_		•
	Sales order[3]: edit	-	•
	Monitor transportation operations	-	•
Commerce	Employee self-serve: record and update personal information,_-record time and expense		•
	Expense: approve		•
	Invoice: approve		•
	Manager self-serve: manage direct reports, record, and update employee information _		•
	Picking: perform in store or warehouse		•
	Receiving: perform in store or warehouse		•
	Stock counting: perform in store or warehouse		•
	Time: approve		•
Human Resources	Absence and leave: approve		•

Use Rights	Description	Dataverse Platform (with Sales, Customer Service, Field Service, Project Operations)	Finance and Operations Platform (with Finance, SCM, Commerce, HR, Project Operations[1])
	Employee self-serve: record and update personal information, and request leave and absence		•
	Manager self-service: manage direct reports, record, and update employee information		•
Project Operations	Approve time, expense and material usage entries,	•	•
	Create and submit time entries	•	•
	Create and submit expense entries	•	•
	Create and submit material usage	•	•
	Access assigned work for current and future periods	•	•
	Purchase order, purchase request, time and expense: approve		•
	Project timesheet: approve		•

1. Dynamics 365 Project Operations Team Members app provides Dataverse capabilities only when Dynamics 365 Project Operations is installed in Dataverse.
2. When provisioning capacity-based websites using Dataverse capacity, Power Pages licensing use rights apply.
3. Custom security role required.

Appendix E: Custom Tables (formerly known as 'Entities')

Dynamics 365 licenses provide the right to use custom tables.

Custom table overview:

A table defines information that you want to track in the form of records, which typically include properties such as company name, location, products, email, and phone.

Dynamics 365 products offer standard tables to cover typical scenarios. However, there may be times when you or your business partners need to create tables to store data that is specific to your organization - namely, custom tables. Note that adding a field to existing standard tables does not make it a custom table.

Custom tables may be created by you or a partner. They can either map to existing Dynamics 365 tables (that is, you can directly change Dynamics 365 tables), or they can be brand new tables.

Dynamics 365 Licenses	Custom Table Use Rights
Enterprise Applications – Full Users	1. Full access 2. No limit on number of custom tables 3. Full create, read, update, and delete (CRUD) capability on data records associated with custom tables
Sales Professional, Customer Service Professional, Operations – Activity	1. Create and modify up to 15 custom tables (per application) in addition to the included standard tables 2. No limit on read rights for Dynamics 365 custom tables 3. Customize/extend applications and workflows within the context of Dynamics 365 application use rights 4. Full CRUD on data records associated with custom tables
Team Members	1. Create and modify up to 15 tables (custom tables or standard Dataverse tables) per Team Members application module. 2. All customization must be per pre-approved scenarios in Appendix D. 3. No limit on read rights for Dynamics 365 custom tables 4. Full CRUD on data records associated with custom tables

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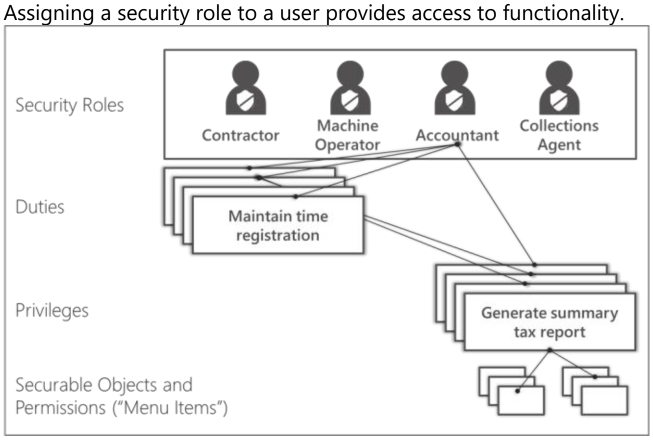
You can add up to 15 tables (standard and/or custom) per Team Members application module. If you want to view (read only) more than 15 tables, you can do so by creating dashboards and sub-grids. See more information on Team Members license documentation.

Appendix F: Security Role Assignment, Implementation Concerns, and Customization Licensing

Security role assignment

Provide users with access to Dynamics 365 functionality by assigning each user one or more security roles. Commerce, Finance, Finance Premium, Human Resources, Project Operations, Supply Chain Management and Supply Chain Management Premium security roles combine meaningful packages of functionality and access rights required to perform actions relevant to each role.

Assigning a security role to a user provides access to functionality.



Licensing requirements for these applications are determined by the role-based security assigned to each user.

To make it easier to understand the licenses required, all applications have standard out of the box user security roles with the respective licenses defined in the use rights tables. By assigning security roles to users, you can determine the appropriate license(s) required for each use. Please refer to Customization/Licensing Requirements for more information about how such customization can impact licensing requirements.

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, you can ensure they get the functionality they need and determine the user license type that is required.

Notes:

- Please refer to Customization/Licensing Requirements for more information about how such customization can impact licensing requirements.
- Financial reporting functionality is included in select Dynamics 365 products. To get use rights for this functionality, financial report designers need a Finance user license, and financial report viewers need a Team Members license.
- Operations – Activity and Team Members use rights are included in full user licenses, and those rights apply across products. For instance, a Finance user has use rights to Operations – Activity level access to Commerce and Supply Chain Management, as well as the use rights for Team Members level access to those workloads and to Customer Service, Field Service, Project Operations, and Sales.

- Human Resources Self Service use rights are included in the Team Members and full user licenses. Those use rights apply across Commerce, Customer Service, Field Service, Finance, Finance Premium, Human Resources, Supply Chain Management, Supply Chain Management Premium, and Sales.

Implementation concerns

Development and testing with Visual Studio subscriptions

Commerce, Finance, Finance Premium, Supply Chain Management, and Supply Chain Management Premium development requires a Visual Studio Professional license 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 Commerce, Finance, Finance Premium, Human Resources, Supply Chain Management, or Supply Chain Management Premium licenses and must be acquired separately.

Lifecycle Services

Lifecycle Services (LCS) provides a cloud-based collaborative workspace shared between Microsoft customers and partners that helps you improve the predictability and quality of your Commerce, Finance, Finance Premium, Human Resources, Project Operations, Supply Chain Management, and Supply Chain Management Premium implementations by simplifying and standardizing the implementation process to realize business value faster. Once you sign up for one or more of these products, you are provided with a project workspace that includes methodologies and services to help you manage the service lifecycle. LCS provides a variety of services to help you navigate the various phases of the project including:

- Defining your business processes and any customization needed.
- Developing additional functionality using best practices.
- Operating your environment to reduce the time it takes to resolve issues and realize greater return on investment while reducing the total cost of ownership.

Customization licensing requirements

This section applies only to Commerce, Finance, Finance Premium, Human Resources, Project Operations, Supply Chain Management, and Supply Chain Management Premium. These applications are fully customizable to provide you with the right experience for every user. The products have over 10,000 securable objects, which are mapped to full user, Operations – Activity or Team Members license users, or Human Resources Self Service users.

To make it faster and easier to deploy and determine licensing requirements, these securable objects are associated with certain security roles. Note that roles are different from job titles.

Each securable object is classified as one of the user license types (from full user access to Human Resources Self Service). Users with a given license have access to each securable object classified at, or below, that license type. That means that the required license for a given user is determined by the highest classification of the securable object the user will need access to.

For example, if you assign an accountant to a role that includes access to a securable object classified as "Finance, SCM or Commerce App," then that person needs a full user license. Full user licensing includes Team Members access. That means securable objects classified at the Team Members level are available to all users who have a Team Members license or any higher license.

For an even better fit, you 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 securable object that individual has access to.

Assigning multiple roles to a single user

The straightforward way to customize which actions a specific user may perform is by assigning multiple roles to that employee. For example, an employee could be assigned both the Buying agent and the Accounts payable roles. That user can then perform actions associated with both roles and still only need a single user license. Since the Accounts payable role is classified at a higher user type (Finance) than the Buying agent (which has an Activity classification), the employee would only need a full user license for Finance to perform actions associated with both roles.

Changing securable objects associated with a role

Another way to customize which actions users may perform is by changing which securable objects are associated with a role. For example, if you want everyone who is assigned a customized Buying agent role to be able to also Approve vendor disbursement journal (which is classified as a Commerce, Finance, Human Resources, or Supply Chain Management user license level securable object), you can customize the role to include the “Approve vendor disbursement journal” securable object. Because the required license is determined by the highest-level action the user may perform, all users assigned to the customized Buying agent role would then require a full user license.

Changing securable objects associated with an individual

Further, you may assign specific actions to specific users. Following the example above, if you have 20 employees assigned to the field technician role and you want to allow only five of them to approve posting of service orders, you can assign the “posting of service order” securable objects to those five individuals. Those five individuals would then need a full user license, while the remaining 15 employees assigned to the field technician role would only need the Team Members user license.

Creating securable objects

You and your business partners may also create securable objects to fit specific business scenarios. Any new securable objects must be mapped to the user license type that best matches the type of use, based on the user license definitions in this guide.

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Appendix G: Operations – Activity Approval Privileges

Enterprise product licenses include Operations – Activity use rights, and those rights cross applications. The license required for specific actions—whether an enterprise or Operations – Activity license—is indicated in the table below.

For instance, if a user needs to approve budget account entry through workflow (line 5 in the table), this user must have an Operations – Activity license. If the same user needs to approve fixed assets journal (line 14), this user will need an enterprise license, which will provide use rights for both tasks.

Duty name	Privilege name	License[1]
Approve advanced ledger entry transactions	Approve the advanced ledger entry	Enterprise
Approve and activate product changes	Approve and activate product changes	Enterprise
Approve bill of exchange transactions	Approve customer bills of exchange journal	Enterprise
Approve BOMs	Approve BOM versions	Enterprise
Approve BOMs	Approve BOMs	Enterprise
Approve budget register entries	Approve budget account entry through workflow	Activity
Approve closing transactions	Approve ledger elimination journal	Enterprise
Approve credit limit adjustments workflow	Approve credit limit adjustments workflow	Enterprise
Approve credit management holds workflow	Approve credit management holds workflow	Enterprise
Approve customer invoices	Approve free text invoices	Enterprise
Approve customer invoices	Approve recurring invoice through workflow	Enterprise
Approve customer payment transactions	Approve customer payment journal	Enterprise
Approve fixed assets budget entries	Approve fixed asset budget entry through workflow	Enterprise
Approve fixed assets transactions	Approve fixed assets journal	Enterprise
Approve ledger allocation transactions	Approve ledger allocation journal	Enterprise
Approve ledger transactions	Approve ledger allocation journal	Enterprise
Approve ledger transactions	Approve ledger journal	Enterprise
Approve netting transactions	Approve netting journal	Enterprise
Approve nonconformances	Approve nonconformance	Enterprise
Approve promissory note transactions	Approve vendor promissory note journal	Enterprise
Approve purchase agreement	Approve the purchase agreement through workflow	Activity
Approve routes	Approve route versions	Enterprise
Approve routes	Approve routes	Enterprise
Approve vendor payment transactions	Approve vendor disbursement journal	Enterprise
Approve vendor user requests	Approve vendor user requests	Enterprise
Approves generated customer rebates	Maintain rebate approvals	Enterprise
Enable bank management process	Approve bank account reconciliation	Enterprise
Enable purchasing process	Maintain approved vendor list	Enterprise
Enable recruitment process	Approve applications	Enterprise
Maintain approved vendors	Maintain approved vendor list	Enterprise
Maintain purchase order	Maintain purchase order	Activity
Maintain budget register entries	Approve budget account entry through workflow	Activity
Maintain catalogs	Review and approve vendor catalogs	Activity
Maintain commitment documents	Approve commitment documents through workflow	Activity
Maintain compensation transactions	Change compensation event status to Approved	Enterprise
Maintain credit card payments	Maintain refund approvals	Activity
Maintain overdue vendor debt CIT and PIT journals	Approve overdue vendor debt CIT and PIT journals	Enterprise
Maintain payment schedule journal processing	Approve payment schedule journal through workflow	Activity
Maintain planned orders	Approve planned orders	Enterprise

Duty name	Privilege name	License[1]
Maintain purchase rebates	Maintain vendor rebate approvals	Enterprise
Maintain refund check processing	Maintain refund approvals	Enterprise
Maintain royalty information	Maintain royalty approvals	Enterprise
Maintain vendor invoices	Maintain vendor invoice matching approval	Enterprise
Maintain vendor invoices	Post invoice approval journal transactions	Enterprise
Manage fixed asset impairment	Approve fixed assets journal	Enterprise
Retail catalog approval workflow duty	Retail catalog approval workflow privilege	Activity
Review bank management process performance	Review and approve bank reconciliation	Activity

[1]When configuration key is on.

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Appendix H: Power Platform Use Rights included with Dynamics 365 Applications

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Select Dynamics 365 applications include limited Power Apps, Power Automate, Power Pages, and Microsoft Copilot Studio use rights. See the Power Platform Licensing Guide and the Microsoft Copilot Studio Licensing Guide for full details.

Appendix I: Trials and Service Support

Trials

Try a range of intelligent CRM and ERP business applications free for 30 days. Access trials here.

Service support

Learn more about support options, which include:

- **Standard Support** (included with any Dynamics 365 purchase) - Best for businesses operating a simple environment or using a full-service partner.
- **Professional Direct Support**[1] - Best for businesses with a continuously operating production environment requiring faster response times and access to experts for advisory and escalation services.
- **Unified Support** (custom) - Best for businesses that need comprehensive end-to-end support for the entire organization, covering all Microsoft technologies.

[1] Professional Direct does not cover Business Central. Business Central customers should contact their reselling partner to get help with technical problems. Learn more at Help and Support.

Appendix J: Additional Resources

Resource	Link
Dynamics 365	https://dynamics.microsoft.com/
Dynamics 365 Licensing and Pricing	https://dynamics.microsoft.com/pricing/
Microsoft Power Platform	https://powerplatform.microsoft.com/en-us/
Microsoft Power Automate	https://flow.microsoft.com/en-us/pricing/
Microsoft Copilot Studio	https://www.microsoft.com/en-us/microsoft-copilot/microsoft-copilot-studio
Microsoft Copilot Studio Licensing Guide	https://go.microsoft.com/fwlink/?linkid=2320995
Power Apps Pricing	https://powerapps.microsoft.com/en-us/pricing/
Power BI Pricing	https://powerbi.microsoft.com/en-us/pricing/
Microsoft Power Platform Licensing Guide	https://go.microsoft.com/fwlink/?LinkId=2085130&clcid=0x409
Cloud Solution Provider Program (CSP)	https://mspartner.microsoft.com/Pages/solutions/cloud-reseller-overview.aspx
Dynamics AX (Online) Licensing Guide	http://aka.ms/s201h6
Dynamics AX 2012 Retail Licensing Scenarios	http://aka.ms/Sumqjx
Dynamics On-Premises Licensing Guides	https://partner.microsoft.com/asset/collection/licensing-guide-assets#/
Dynamics Blog	https://community.dynamics.com/b/msftdynamicsblog
Dynamics 365 Support	https://dynamics.microsoft.com/support/plans/
Microsoft Volume Licensing	www.microsoft.com/licensing
Partner Center	https://partnercenter.microsoft.com/pcv/dashboard/overview
Software Assurance	https://www.microsoft.com/en-us/Licensing/licensing-programs/software-assurance-default?rtc=1
User Security Role Reporting and Technical Validation for D365 Finance and Operations Apps – FAQ	dynamics365-finance-operations-apps.pdf

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Appendix K: Change Log

Page(s)	Topic	Change	Action	Date
44	Dataverse and Operations capacity	Update	Dataverse and Operations capacity increases and consolidation	December 2025
Various	Dynamics 365 Premium licenses	New	Dynamics 365 Premium licenses: Copilot Credits entitlement included	November 2025
7	Business Central	New	Business Central Agents generally available (GA)	November 2025
Various	Guides and Remote Assist	Remove	End of Sale	November 2025
45	Business Central	Update	Pricing and capacity increase for Business Central Essentials, Premium and Device	November 2025
58	Team Members	Update	Appendix E: Team Members use rights clarified	November 2025
39	Dynamics 365 Agents	New	Dynamics 365 Agents generally available (GA)	October 2025
54	Dynamics 365 Agents	New	Dynamics 365 Agents available in Paid Public Preview	October 2025
10, 11	Commerce	Update	Commerce security role names updated	October 2025
10	Commerce	Update	General subheading added to security roles section	October 2025
24	Finance	Update	Finance security roles General section updated	October 2025
Various	Project Operations	Update	Project Operations Lite renamed to Project Operations Core Project Operations for resource/non-stocked scenarios renamed to Project Operations Integrated with ERP	October 2025
39, 40	Copilot for Sales Copilot for Service	Remove	Now included in Microsoft 365 Copilot	October 2025
4	How to buy	Update	How to buy Dynamics 365 section updated	October 2025
40	Cross-App Licensing	Add	Team Members: Specified “vendor” invoice. Approve time, expenses, materials, and vendor invoices, Approve time, expenses, and vendor invoices	September 2025
56	Appendix C: Team Members use rights for Project Operations	Update	Project Operations: updated to include a section of the table previously removed.	September 2025
52	Appendix C: Team Members use rights for Project Operations	Add	Purchase order, purchase request, time and expense: approve Project timesheet: approve	August 2025
52	Appendix C: Team Members use rights for Finance	Update	Vendor invoice: approve Purchase orders: respond to vendor’s PO when listed as contact person; approve Requisitions: create, edit and approve	August 2025

Page(s)	Topic	Change	Action	Date
52	Appendix C: Team Members use rights for Supply Chain Mgmt.	Add	Purchase order, purchase request, time and expense: approve	August 2025
27	Project Operations	Update	Expense Mobile Role – only requires a Team Member license.	July 2025
62	Microsoft Copilot Studio	Remove	Appendix G: Microsoft Copilot Studio Offers in Paid Public Preview	July 2025
28 – 29	Project Operations	Update	Ops Activity added to - Project Resource, Project timesheet delegate, Project timesheet user, and Project approver roles Project Operations added to - Engineering change request clerk & Field Service Integration User roles	June 2025
36	Supply Chain Management Premium	Update	SCM Premium added to - Global cost accounting manager & Globalization feature developer roles	June 2025
47	External Users	Update	Licensing Requirement for External Users – language updated	June 2025
62	Microsoft Copilot Studio	Add	Microsoft Copilot Studio Offers in Paid Public Preview	June 2025
3	Power Platform and D365 admin	Update	Updated administrator role requirements	May 2025
9-10	Commerce	Update	Security roles added and updated	May 2025
23-24	Finance	Add	Security roles added	May 2025
26	Human Resources	Update	Security roles updated	May 2025
28-30	Project Operations	Add	Security roles added	May 2025
35-38	Supply Chain Management	Add	Security roles added	May 2025
44	Default subscription capacity – HR	Update	Production: Environment/Tenant updated to 1 AOS	May 2025
46	External Users	Update	Licensing requirements for external users updated	May 2025
51	Appendix B: Definitions	Update	Privileges and Securable Objects definitions added	May 2025
53-54	Appendix C: Team Members Use Rights	Update	Use rights added and updated	May 2025
57-58	Appendix E: Security Role Assignment, Implementation Concerns, and Customization Licensing	Update	Language updated	May 2025
15	Customer Insights Attach	Update	Eligibility updated/simplified by removing edition specifics from Customer Service and Sales.	April 2025
12	Customer Insights	Update	Customer Insights capacities -Interactions can be sent through out-of-box channels available in Journeys (e.g., emails, SMS, push notifications) or custom channels.	March 2025
18	Field Service	Update	Field Service Mobile application name updated for consistency	March 2025
18	Field Service	Update	Team Members removed from Field Service Mobile application	March 2025
22	Fraud Protection	Update	Fraud Protection removed from price list	March 2025
45	Dual Use Rights	Update	Link added to Outsourcing Software Management Licensing Brief	February 2025
16	Customer Voice	Update	Customer Service Premium removed	January 2025