



# Dynamics 365 Licensing Guide

July 2026



## 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-on applications and capacity
- Use rights

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

Users should always reference the latest version of the licensing guide for the most up-to-date information. The most current version of this guide can be found [here](#). Microsoft reserves the right to review or update this document at any time without notice.

### Other resources you may need

This guide provides an overview of Dynamics 365 licensing. It is not legally binding, and it does not supersede or replace any legal documentation covering use rights. To understand conditions on license acquisition, product-specific terms, and 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](#).

**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 July 2026. See [Appendix K: Change Log](#) for more details.

| Dynamics 365 | Description | New Offer or Change |
|--------------|-------------|---------------------|
|              |             |                     |

# Contents

|                                                                 |    |
|-----------------------------------------------------------------|----|
| How to Buy Dynamics 365 .....                                   | 5  |
| Dynamics 365 Licensing Overview .....                           | 5  |
| User licenses .....                                             | 5  |
| Full-access user licenses .....                                 | 5  |
| Additional user licenses .....                                  | 6  |
| Device licenses .....                                           | 7  |
| Full-access device licenses .....                               | 7  |
| Additional device licenses .....                                | 7  |
| Tenant licenses .....                                           | 7  |
| Full-access tenant licenses .....                               | 7  |
| Capacity licenses .....                                         | 7  |
| Dynamics 365 Applications .....                                 | 8  |
| Dynamics 365 Business Central .....                             | 8  |
| Business Central Agents .....                                   | 8  |
| Business Central Essentials .....                               | 8  |
| Business Central Premium .....                                  | 10 |
| Business Central Device .....                                   | 10 |
| Dynamics 365 Commerce .....                                     | 12 |
| Dynamics 365 Contact Center .....                               | 17 |
| Dynamics 365 Contact Center Digital .....                       | 17 |
| Dynamics 365 Contact Center Voice .....                         | 18 |
| Dynamics 365 Contact Center (Digital + Voice) .....             | 19 |
| Dynamics 365 Customer Insights .....                            | 21 |
| Dynamics 365 Customer Service .....                             | 24 |
| Dynamics 365 Customer Service Professional .....                | 24 |
| Dynamics 365 Customer Service Enterprise .....                  | 24 |
| Dynamics 365 Customer Service Premium .....                     | 25 |
| Dynamics 365 Customer Service Device .....                      | 27 |
| Dynamics 365 Customer Voice .....                               | 29 |
| Dynamics 365 Customer Voice Capabilities .....                  | 29 |
| Dynamics 365 Electronic Invoicing .....                         | 29 |
| Dynamics 365 Field Service .....                                | 30 |
| Dynamics 365 Field Service .....                                | 30 |
| Dynamics 365 Field Service Contractor .....                     | 30 |
| Dynamics 365 Field Service Device .....                         | 32 |
| Dynamics 365 Field Service Resource Schedule Optimization ..... | 32 |
| Dynamics 365 Finance .....                                      | 34 |
| Dynamics 365 Finance .....                                      | 34 |
| Dynamics 365 Finance Premium .....                              | 34 |
| Dynamics 365 Human Resources .....                              | 38 |
| Human Resources Self Service license .....                      | 38 |
| Dynamics 365 Intelligent Order Management .....                 | 41 |
| Dynamics 365 Project Operations .....                           | 41 |
| Dynamics 365 Sales .....                                        | 46 |
| Sales Professional .....                                        | 46 |
| Sales Enterprise .....                                          | 46 |
| Sales Premium .....                                             | 47 |
| Sales Insights .....                                            | 47 |
| Microsoft Relationship Sales .....                              | 48 |
| Dynamics 365 Sales Device .....                                 | 48 |
| Dynamics 365 Supply Chain Management .....                      | 52 |
| Supply Chain Management .....                                   | 52 |
| Supply Chain Management Premium .....                           | 52 |
| Cross-Application Licensing .....                               | 58 |
| Dynamics 365 Agents .....                                       | 58 |
| Dynamics 365 Agents and Copilot Credits .....                   | 58 |
| Model Context Protocol (MCP) for Dynamics 365 .....             | 59 |
| Business Central Team Members .....                             | 59 |
| Team Members .....                                              | 59 |

|                                                                                                        |           |
|--------------------------------------------------------------------------------------------------------|-----------|
| Operations - Activity .....                                                                            | 60        |
| Operations - Device.....                                                                               | 60        |
| Operations – Order Lines .....                                                                         | 61        |
| Capacity .....                                                                                         | 63        |
| Default subscription capacity included per tenant.....                                                 | 63        |
| Capacity add-ons.....                                                                                  | 65        |
| <b>Additional Licensing Requirements .....</b>                                                         | <b>66</b> |
| Minimum license purchase requirements .....                                                            | 66        |
| Licensing requirements for external users .....                                                        | 66        |
| Multiplexing .....                                                                                     | 67        |
| Dual use rights.....                                                                                   | 68        |
| Dual write.....                                                                                        | 69        |
| Dynamics 365 extensibility.....                                                                        | 69        |
| Dynamics 365 Field Service and Finance/Supply Chain Management integration .....                       | 70        |
| Dynamics 365 Field Service, Project Operations and the Modern Project Operations integration .....     | 70        |
| <b>Appendix A: Dynamics 365 Licenses .....</b>                                                         | <b>71</b> |
| <b>Appendix B: Offers in Paid Public Preview.....</b>                                                  | <b>72</b> |
| Dynamics 365 Agents in Paid Public Preview.....                                                        | 72        |
| <b>Appendix C: Definitions .....</b>                                                                   | <b>74</b> |
| <b>Appendix D: Dynamics 365 Team Members Use Rights Overview.....</b>                                  | <b>76</b> |
| <b>Appendix E: Custom Tables (formerly known as 'Entities').....</b>                                   | <b>79</b> |
| <b>Appendix F: Security Role Assignment, Implementation Concerns, and Customization Licensing.....</b> | <b>80</b> |
| <b>Appendix G: Operations – Activity Approval Privileges .....</b>                                     | <b>83</b> |
| <b>Appendix H: Power Platform Use Rights included with Dynamics 365 Applications.....</b>              | <b>85</b> |
| <b>Appendix I: Trials and Service Support.....</b>                                                     | <b>86</b> |
| <b>Appendix J: Additional Resources .....</b>                                                          | <b>87</b> |
| <b>Appendix K: Change Log.....</b>                                                                     | <b>88</b> |

## 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 [Dynamics 365 Sales](#).
- **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<br>(user/month, billed annually) |       | Attach USLs per user/month, billed annually |          |                                   |                                     |                   |         |                    |                       |                  |                     |                       |
|--------------------------------------------|-------|---------------------------------------------|----------|-----------------------------------|-------------------------------------|-------------------|---------|--------------------|-----------------------|------------------|---------------------|-----------------------|
|                                            |       | Business<br>Central<br>Essentials           | Commerce | Customer<br>Service<br>Enterprise | Customer<br>Service<br>Professional | Field<br>Service  | Finance | Human<br>Resources | Project<br>Operations | Remote<br>Assist | Sales<br>Enterprise | Sales<br>Professional |
| Business Central Essentials                | \$80  |                                             |          |                                   | \$20                                |                   |         |                    |                       |                  | \$20                |                       |
| Business Central Premium                   | \$110 |                                             |          | \$20                              | \$20                                | \$20 <sup>1</sup> |         |                    |                       | \$20             | \$20                |                       |
| Commerce                                   | \$210 |                                             |          | \$20                              | \$20                                | \$20              | \$30    | \$30               | \$30                  |                  | \$20                | \$30                  |
| Customers 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                | \$30                  |
| Finance Premium                            | \$300 |                                             | \$30     | \$20                              | \$20                                | \$20              |         | \$30               | \$30                  |                  | \$20                | \$30                  |
| Human Resources (HR)                       | \$135 |                                             |          | \$20                              | \$20                                | \$20              |         |                    | \$30                  |                  | \$20                |                       |
| Microsoft Relationship Sales <sup>2</sup>  | \$177 |                                             |          | \$20                              | \$20                                | \$20              |         | \$30               | \$30                  |                  |                     |                       |
| Project Operations                         | \$135 |                                             |          | \$20                              | \$20                                | \$20              |         | \$30               |                       |                  | \$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                |                       |
| Supply Chain Management Premium            | \$300 |                                             | \$30     | \$20                              | \$20                                | \$20              | \$30    | \$30               | \$30                  |                  | \$20                |                       |

<sup>1</sup> 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 (\$110 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.

<sup>2</sup> Pricing variable. Please [contact](#) the Dynamics 365 sales team 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.

- 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.



## Dynamics 365 Applications

### Dynamics 365 Business Central



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 Business Central 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

|                                            |                                             |                                               |                                                    |
|--------------------------------------------|---------------------------------------------|-----------------------------------------------|----------------------------------------------------|
| <b>Financial Management</b>                |                                             |                                               |                                                    |
| Account Schedules                          | Basic XBRL                                  | Deferrals                                     | Responsibility Centers                             |
| Allocations                                | Budgets                                     | Electronic Payment/Direct Debits <sup>1</sup> | Unlimited Dimensions                               |
| Bank Account Management                    | Cash Flow Forecast                          | Fixed Assets                                  |                                                    |
| Bank Reconciliation                        | Check Writing                               | Multiple Currencies                           |                                                    |
| Basic General Ledger                       | Consolidation                               | Payment Handling                              |                                                    |
| <b>Advanced Financial Management</b>       |                                             |                                               |                                                    |
| Cost Accounting                            | Intercompany Postings                       |                                               |                                                    |
| <b>Artificial Intelligence<sup>2</sup></b> |                                             |                                               |                                                    |
| Cash Flow Forecast                         | Late Payment Prediction                     | Image Recognition                             | Inventory Forecast                                 |
| Sales Forecast                             |                                             |                                               |                                                    |
| <b>Customer Relationship Management</b>    |                                             |                                               |                                                    |
| 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 <sup>3</sup> | Opportunity Management                        |                                                    |
| <b>E-Services</b>                          |                                             |                                               |                                                    |
| Bank Feeds (US, CA)                        | Document Management,<br>Document Capture    | Online Map                                    | Tax. Reg. No. Validation Service (EU) <sup>1</sup> |
| Document Exchange Service                  | Document Management,<br>Document Capture    | PayPal                                        |                                                    |
| <b>Human Resources Management</b>          |                                             |                                               |                                                    |
| Basic Human Resources                      |                                             |                                               |                                                    |
| <b>Project Management</b>                  |                                             |                                               |                                                    |
| Basic Resources                            | Job Quotes                                  | Project Management Jobs                       |                                                    |
| Capacity Management                        | Multiple Costs                              | Time Sheet                                    |                                                    |
| <b>Supply Chain Management</b>             |                                             |                                               |                                                    |
| 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 <sup>4</sup>                         |
| 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                        |                                                    |
| <b>Warehouse Management and Inventory</b>  |                                             |                                               |                                                    |
| Automated Data Capture System              | Internal Picks and Put Aways                | Warehouse Shipment                            | Warehouse Receipt                                  |
| Bin Set-Up                                 | Pick                                        | Warehouse Management Systems                  |                                                    |
| <b>Other Capabilities</b>                  |                                             |                                               |                                                    |
| Analysis Reports                           | Intrastat <sup>1</sup>                      | 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                                    |                                                    |

<sup>1</sup>For feature availability in your region, consult <https://docs.microsoft.com/en-us/dynamics365/business-central/about-localization>.

<sup>2</sup>Requires Intelligent Edge or Azure Machine Learning subscription.

<sup>3</sup>Dynamics 365 Sales Integration requires a Dynamics 365 Sales license.

<sup>4</sup>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.<sup>1</sup>
- 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.

<sup>1</sup>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



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

## Dynamics 365 Business Central Entitlements

| Capabilities/Entitlements <sup>1</sup>            | Business Central Essentials<br>\$80 per user/month | Business Central Premium<br>\$110 per user/month |
|---------------------------------------------------|----------------------------------------------------|--------------------------------------------------|
| Unlimited users                                   | •                                                  | •                                                |
| Customization and extensibility                   | •                                                  | •                                                |
| Multiple environments                             | •                                                  | •                                                |
| Multiple companies <sup>2</sup>                   | •                                                  | •                                                |
| Finance management                                | •                                                  | •                                                |
| Sales and marketing                               | •                                                  | •                                                |
| Fulfillment and delivery                          | •                                                  | •                                                |
| Purchasing and payables                           | •                                                  | •                                                |
| Inventory                                         | •                                                  | •                                                |
| Supply planning and availability                  | •                                                  | •                                                |
| Project management                                | •                                                  | •                                                |
| Warehouse management                              | •                                                  | •                                                |
| Manufacturing                                     | ◊                                                  | •                                                |
| Service management                                | -                                                  | •                                                |
| Dynamics 365 Business Central Agents <sup>3</sup> | Requires Copilot Credits <sup>4</sup>              | Requires Copilot Credits <sup>4</sup>            |
| Business Central Database <sup>5</sup>            | 80 GB                                              | 80 GB                                            |
| Business Central Database: Accrued/USL            | 3 GB                                               | 5 GB                                             |
| Business Central Environments <sup>5,6</sup>      | 1 production / 3 non-production                    | 1 production / 3 non-production                  |

<sup>1</sup> See [Business Central Pricing | Microsoft Dynamics 365](#) for additional details.

<sup>2</sup> Limited number of companies per environment. See Company limit [here](#) for more info.

<sup>3</sup> Dynamics 365 Business Central Agents: [Sales Order Agent](#) and [Payables Agent](#).

<sup>4</sup> Copilot Credits are sold separately. [Learn more](#) about Copilot Credits.

<sup>5</sup> Additional database capacity and environments available for purchase. Please refer to Appendix for more details.

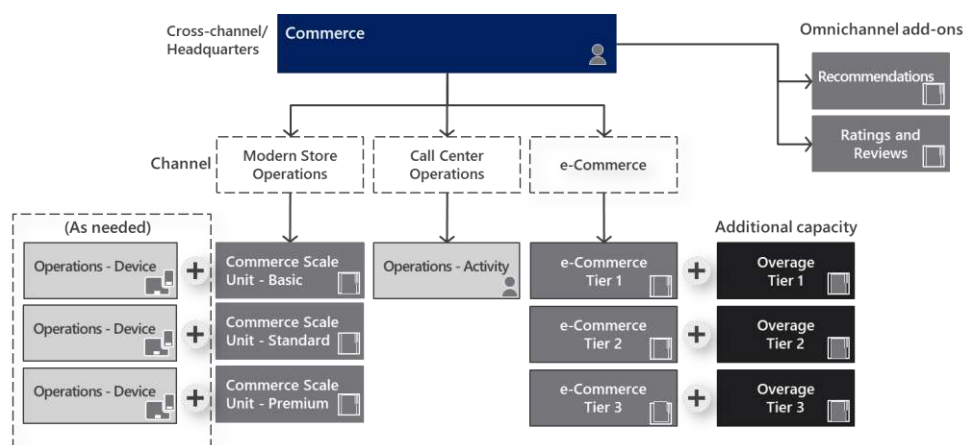
<sup>6</sup> Customers may deploy Business Central Essentials and Business Central Premium in separate environments, on the same tenant. However, licensed users can only access the environment for which they are entitled. See [Microsoft Product Terms](#) for specific terms.

All pricing is (USD), billed annually and subject to change; see [Business Central Pricing | Microsoft Dynamics 365](#) for actual pricing.

## Dynamics 365 Commerce

Commerce, which is licensed per user, helps retailers manage their operations, connect employees with data, and offers 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 into 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                                                                                                                                                                                                                                                                                          |
|-----------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Commerce:</b> <ul style="list-style-type: none"> <li>• Intelligent Order Management</li> <li>• Electronic Invoicing</li> </ul> | <ul style="list-style-type: none"> <li>• 1K order lines/tenant/month</li> <li>• 100 electronic invoice transactions/tenant/month</li> <li>• 100 invoice capture transactions/tenant/month</li> </ul> | Intelligent Order Management: <ul style="list-style-type: none"> <li>• 1K order lines/tenant/month</li> </ul> Electronic Invoicing Add-in: <ul style="list-style-type: none"> <li>• 1K electronic invoicing transactions/tenant/month</li> <li>• 1K invoice capture transactions/tenant/month</li> </ul> |

### 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.

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 |                   | ●                     | ●        |

| Role                                                                                                    | Security Role Description                                                                                                                                                                   | Suggested License |                       |          |
|---------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|-----------------------|----------|
|                                                                                                         |                                                                                                                                                                                             | Team Members      | Operations - Activity | Commerce |
| 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. |                   |                       | •        |
| Retail service                                                                                          | Provides support across retail service processes. Handles tasks such as service order management, returns, and customer interaction tracking in retail environments.                        |                   |                       | •        |
| <b>General</b>                                                                                          |                                                                                                                                                                                             |                   |                       |          |
| 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

Dynamics 365 e-Commerce, 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 <ul style="list-style-type: none"> <li>Transactions</li> <li>Commerce Scale Unit - Cloud</li> </ul> | <ul style="list-style-type: none"> <li>1 Commerce Scale Unit – Cloud</li> <li>Transactions/tenant/month</li> <li>See Tiers 1 – 3 capacity entitlements below in separate table</li> </ul> | <ul style="list-style-type: none"> <li>Transactions/tenant/month</li> <li>See Tiers 1 – 3 overage capacity entitlements below in a separate table</li> </ul> |

Number of monthly transactions per SKU

|                | BAND 1<br>AOV <\$50 | BAND 2<br>AOV \$50-\$150 | BAND 3<br>AOV \$150-\$500 | BAND 4<br>AOV \$500-\$2K | BAND 5<br>AOV \$2K-\$5K | BAND 6<br>AOV \$5K+ |
|----------------|---------------------|--------------------------|---------------------------|--------------------------|-------------------------|---------------------|
| Tier 1         | 4,700               | 2,400                    | 1,100                     | 480                      | <b>275</b>              | 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 go [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 <ul style="list-style-type: none"><li>Operations – Devices</li></ul> | <ul style="list-style-type: none"><li>Basic: 65 devices/tenant/month</li><li>Standard: 225 devices/tenant/month</li><li>Premium: 500 devices/tenant/month</li></ul> | <ul style="list-style-type: none"><li>N/A</li></ul> |

## Dynamics 365 Commerce Entitlements

| Entitlements                                  | Commerce <sup>1</sup><br>\$210 user/month              |
|-----------------------------------------------|--------------------------------------------------------|
| Management <sup>2</sup>                       | 1K order lines per tenant/month                        |
| Electronic Invoicing <sup>2</sup>             | •                                                      |
| + Electronic Invoice transactions             | 100 per tenant/month                                   |
| + Invoice Capture transactions                | 100 per tenant/month                                   |
| Dataverse or Operations Database <sup>2</sup> | 90 GB                                                  |
| Accrued/USL                                   | 5 GB                                                   |
| Dataverse or Operations File <sup>2</sup>     | 80 GB                                                  |
| Accrued/USL                                   | 5 GB                                                   |
| Dataverse Log <sup>2</sup>                    | 2 GB                                                   |
| Environments <sup>2</sup>                     | 1 production (AOS) / 1 non-production (Sandbox Tier 2) |

1. 20 seat minimum purchase requirement. See [Microsoft Product Terms](#) for service specific terms.

2. Additional capacity and environments available for purchase. Please refer to Appendix for details.

All pricing is (USD), billed annually and subject to change; see [Commerce Pricing | Microsoft Dynamics 365](#) for actual pricing.

## Dynamics 365 Contact Center

|                                  |                                     |
|----------------------------------|-------------------------------------|
| Additional capacity              |                                     |
| Contact Center (Digital + Voice) | Unified Routing Add-on              |
| Contact Center Voice             | Intelligent Voicebot Minutes Add-on |
| Contact Center Digital           | Call Intelligence Minutes Add-on    |

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 be licensed with Dynamics 365 Contact Center. For details on Copilot Credit allocation and usage, see the [Copilot Credits Overview](#) section.

- **Knowledge Management Agent** – The 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 Assurance Agent** – The Quality Assurance Agent assesses conversations, providing quality scores and detailed evaluation insights to help supervisors take informed actions that enhance quality. [Learn more.](#)
- **Customer Assist Agent** – The Customer Assist Agent supports customer interactions by combining autonomous self-service with real-time assistance to service representatives. This agent understands customer intents and resolves issues, assists representatives during live interactions and proactively contacts customers. [Learn more.](#)
- **Customer Intent Agent** - The 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.](#)

### 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). Copilot credits are purchased separately; see the [Copilot Credits Guide](#) for more information.

#### Contact Center Digital capacities

| Application/Capacity                                                                                                                | Included Capacity <sup>1</sup>                                                | Add-Ons                                                                                                                                                                                                              |
|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Contact Center Digital <ul style="list-style-type: none"><li>• Record routing (excluding chats, calls, and text messages)</li></ul> | <ul style="list-style-type: none"><li>• 50 record routes/user/month</li></ul> | Unified Routing add-on: <ul style="list-style-type: none"><li>• 10K record routes/tenant/month</li></ul> Microsoft Copilot Studio: <ul style="list-style-type: none"><li>• <a href="#">Copilot Credits</a></li></ul> |

<sup>1</sup>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 35 GB 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 Copilot Credits, purchased separately. Copilot credits are purchased separately; see the [Copilot Credits Guide](#) for more information.

Call Intelligence minutes include entitlements for intelligence features, including call transcription, sentiment analysis, AI suggestions, call insights and topic clustering.

### Microsoft Teams Phone extensibility

Teams Phone extensibility for Dynamics 365 Contact Center provides the flexibility to configure Teams Phone, along with the Teams pay-as-you-go Calling Plan, Operator Connect, or Direct Routing, as a single, integrated telephony solution with Dynamics 365 Contact Center.

[Learn more.](#)

Two sets of licenses are required to use Microsoft Teams Phone extensibility with Dynamics 365 Contact Center: 1) Contact Center service line, and 2) Contact Center service reps.

### Contact Center service line

- Teams Phone Resource Account license: A Microsoft Teams Phone Resource Account license, available through the [Microsoft 365 Admin Center](#), is a specialized, no-cost add-on license required for resource accounts used with Teams Phone features such as Auto Attendants and Call Queues. Resource accounts aren't assigned to a person; they are used to enable voice features like Auto Attendants and Call Queues.
- Teams Phone Public Switched Telephone Network (PSTN) Connectivity: PSTN stands for Public Switched Telephone Network. PSTN connectivity bridges modern internet-based calling systems (like Teams Phone) with the traditional phone network, so the contact center service line can receive and make calls with customer landlines and mobile numbers.

The Teams Phone Resource Account must be licensed using one of the following PSTN connectivity options:

- Microsoft Teams pay-as-you-go Calling Plan: Learn more about Microsoft Teams pay-as-you-go Calling Plan [licensing](#).
- Operator Connect: Learn more about Operator Connect [licensing](#).
- Direct Routing: Learn more about Direct Routing [licensing](#).

### Teams Phone extensibility licensing for end user Contact Center reps

To enable Teams Phone extensibility for Contact Center reps, users must be licensed with all of the following licenses.

- Dynamics 365 Contact Center USL
- Microsoft Teams [license](#) (Microsoft Teams Essentials standalone, or Teams via Microsoft 365 Basic, Standard or Premium, or Microsoft 365 Enterprise plans E1, E3, E5 or F3)
- Microsoft Teams Phone [license](#) (procured through Microsoft 365 E5 or as a standalone add-on)

Teams Phone extensibility for Dynamics 365 Contact Center does not currently support the ability for contact center reps to use their own unique telephone numbers to make and receive calls within the Dynamics 365 Contact Center application. For users who require their own unique telephone number for use in the Teams

client application (not the Dynamics 365 Contact Center application), each user must have a PSTN connectivity option set up for them. [Learn more](#).

### Contact Center Voice capacities

| Application/Capacity                                                                                                                       | Included Capacity <sup>1</sup>                                                                                                                                                                          | Add-On Capacity                                                                                                                                                                                                          |
|--------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Contact Center Voice</b> <ul style="list-style-type: none"><li>Intelligent Voicebot minutes</li><li>Call Intelligence minutes</li></ul> | <ul style="list-style-type: none"><li>2,000 Intelligent Voicebot minutes/user/month</li><li>6,000 Call Intelligence minutes/user/month</li><li>Dataverse File storage 35GB for call recording</li></ul> | Intelligent Voicebot minutes add-on: <ul style="list-style-type: none"><li>500 minutes/tenant/month</li></ul> Call Intelligence minutes add-on: <ul style="list-style-type: none"><li>500 minutes/tenant/month</li></ul> |

<sup>1</sup>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).





## Dynamics 365 Contact Center Entitlements

| Entitlements                                    | Contact Center Digital<br>\$95 per user/month | Contact Center Voice <sup>1</sup><br>\$95 per user/month | Contact Center<br>\$110 per user/month       |
|-------------------------------------------------|-----------------------------------------------|----------------------------------------------------------|----------------------------------------------|
| Unified Routing <sup>2</sup>                    | 50 record routes per user/month <sup>3</sup>  | 50 record routes per user/month <sup>3</sup>             | 50 record routes per user/month <sup>3</sup> |
| Intelligent Voicebot minutes <sup>2</sup>       | -                                             | 2K minutes per user/month                                | 2K minutes per user/month                    |
| Call Intelligence Minutes <sup>2</sup>          | -                                             | 6K minutes per user/month                                | 6K minutes per user/month                    |
| Dynamics 365 Contact Center Agents <sup>4</sup> | Requires Copilot Credits <sup>5</sup>         | Requires Copilot Credits <sup>5</sup>                    | Requires Copilot Credits <sup>5</sup>        |
| Dataverse Database <sup>2</sup>                 | 30 GB                                         | 30 GB                                                    | 30 GB                                        |
| Accrued/USL                                     | 250 MB                                        | 250 MB                                                   | 250 MB                                       |
| Dataverse File <sup>2</sup>                     | 40 GB                                         | 40 GB                                                    | 40 GB                                        |
| Accrued/USL                                     | 2 GB                                          | 35 GB                                                    | 35 GB                                        |
| Dataverse Log <sup>2</sup>                      | 2 GB                                          | 2 GB                                                     | 2 GB                                         |

<sup>1</sup>. Teams Phone extensibility pricing is separate and not included. [Learn more](#). Copilot credits are purchased separately; see the [Copilot Credits Guide](#) for more information.

<sup>2</sup>. Additional capacity available for purchase. Please refer to Appendix for more details.

<sup>3</sup>. Excluding chats, calls, and text messages.

<sup>4</sup>. Dynamics 365 Contact Center Agents: [Customer Intent Agent](#), [Customer Knowledge Management Agent](#), [Quality Assurance Agent](#), [Customer Assist Agent](#)

<sup>5</sup>. Copilot Credits are sold separately. [Learn more](#) about Copilot Credits.

All pricing is (USD), billed annually and subject to change; see [Contact Center Pricing | Microsoft Dynamics 365](#) for actual pricing.

## 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](#) section.

| Application                                                                                                                                                                                                                                                                   | Included Capacity                                                                                                                                                                                                      |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Customer Insights <ul style="list-style-type: none"><li>2 applications<ul style="list-style-type: none"><li>➤ Customer Insights – Data</li><li>➤ Customer Insights - Journeys</li></ul></li><li>Unlimited environments<sup>1</sup></li><li>Data scheduled refreshes</li></ul> | <ul style="list-style-type: none"><li>10K Interacted People/tenant/month</li><li>100K Unified People/tenant/month</li><li>2,000 Customer Voice responses/tenant/month</li><li>4 data scheduled refreshes/day</li></ul> |

<sup>1</sup>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<sup>1</sup> - 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+          |

<sup>1</sup>Additional capacity will be added to 10K Interacted People capacity included with Base or Attach license

### Additional Capacity<sup>1</sup> - 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+         |

<sup>1</sup>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, 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 Insights Entitlements

| Entitlements                     | Customer Insights <sup>1</sup><br>\$1,700 per tenant/month |
|----------------------------------|------------------------------------------------------------|
| Unified People <sup>2,3</sup>    | 100K Unified People per tenant/month                       |
| Interacted People <sup>3,4</sup> | 10K Interacted People per tenant/month                     |
| Customer Voice <sup>3</sup>      | 2K responses per tenant/month                              |
| Dataverse Database <sup>3</sup>  | 45 GB                                                      |
| Accrued/USL                      | 0 GB                                                       |
| Dataverse File <sup>3</sup>      | 60 GB                                                      |
| Accrued/USL                      | 0 GB                                                       |
| Dataverse Log <sup>3</sup>       | 4 GB                                                       |
| Environments <sup>3</sup>        | Unlimited <sup>5</sup>                                     |

<sup>1</sup> Customer Insights Attach SLs include the same default entitlements as Customer Insights Base SLs.

<sup>2</sup> Unified People refers to a uniquely identified individual that is created through a collection of defined data source sets from multiple systems, represented by a profile. Includes Dataverse storage capacity per additional 100K Unified People.

<sup>3</sup> Additional capacity and environments available for purchase. Please refer to Appendix for details.

<sup>4</sup> Interacted People refers to any Dataverse entity (such as a contact, lead, account or an Insights profile) that is interacted with. A person is considered interacted when they are interacted with via either an outbound interaction or an inbound one such as filling out a form via a marketing website. Includes Dataverse storage capacity per additional 50K Interacted People.

<sup>5</sup> Includes entitlements to install both the Customer Insights - Journeys and Customer Insights - Data applications in an unlimited number of production or sandbox environments.

All pricing is (USD), billed annually and subject to change; see [Customer Insights Pricing | Microsoft Dynamics 365](#) for actual pricing.

## 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 be licensed for Dynamics 365 Customer Service. 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** – The 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** - The 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](#).
- **Knowledge Management Agent** - The 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** – The 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. [Learn more.](#)

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 <sup>1</sup>                                                | Add-On Capacity                                                                                          |
|------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|
| Customer Service Enterprise <ul style="list-style-type: none"> <li>Record routing (excluding chats, calls, and text messages)</li> </ul> | <ul style="list-style-type: none"> <li>50 record routes/user/month</li> </ul> | Unified Routing add-on: <ul style="list-style-type: none"> <li>10K record routes/tenant/month</li> </ul> |

<sup>1</sup>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 additional capacity entitlements for both applications with the exception of the Customer Voice entitlement. Customer Voice is included with Customer Service Enterprise, but it is not included with Customer Service Premium. See [Dynamics 365 Contact Center](#) for details. Customer Service Premium is licensed per user.

### Customer Service use rights

| Use Rights                                                             | Team Members        | Customer Service |     |      |
|------------------------------------------------------------------------|---------------------|------------------|-----|------|
|                                                                        |                     | Pro              | Ent | Prem |
| <b>Access</b>                                                          |                     |                  |     |      |
| Dynamics 365 for Outlook and Dynamics 365 App for Outlook <sup>1</sup> | •                   | •                | •   | •    |
| Dynamics 365 Mobile Client Application                                 | •                   | •                | •   | •    |
| Microsoft Dynamics 365 for iPad & Windows                              | •                   | •                | •   | •    |
| Microsoft Dynamics 365 Web application                                 | •                   | •                | •   | •    |
| <b>Read</b>                                                            |                     |                  |     |      |
| All Dynamics 365 application data                                      | •                   | •                | •   | •    |
| Custom table data                                                      | •                   | •                | •   | •    |
| <b>Tables: Create, Update, Delete</b>                                  |                     |                  |     |      |
| Activities                                                             | •                   | •                | •   | •    |
| Announcements                                                          | •                   | •                | •   | •    |
| Calendar: share                                                        | •                   | •                | •   | •    |
| Contacts                                                               | •                   | •                | •   | •    |
| Custom tables (see <a href="#">Appendix E</a> )                        | 15 max <sup>2</sup> | 15 max           | •   | •    |
| Notes                                                                  | •                   | •                | •   | •    |
| Personal views                                                         | •                   | •                | •   | •    |
| Saved views                                                            | •                   | •                | •   | •    |
| Accounts                                                               |                     | •                | •   | •    |
| Case/Incident                                                          |                     | •                | •   | •    |
| Entitlements                                                           |                     | •                | •   | •    |
| Leads (create only)                                                    |                     | •                | •   | •    |
| Product                                                                |                     | •                | •   | •    |
| Resources                                                              |                     | •                | •   | •    |
| Work hours                                                             |                     | •                | •   | •    |
| Embedded Intelligence                                                  |                     |                  | •   | •    |

| Use Rights                                                                                                     | Team Members | Customer Service |     |      |
|----------------------------------------------------------------------------------------------------------------|--------------|------------------|-----|------|
|                                                                                                                |              | Pro              | Ent | Prem |
| Facilities/Equipment                                                                                           |              |                  | •   | •    |
| Product families/hierarchies                                                                                   |              |                  | •   | •    |
| Product relationships                                                                                          |              |                  | •   | •    |
| Service (service scheduling)                                                                                   |              |                  | •   | •    |
| <b>Tables: Actions</b>                                                                                         |              |                  |     |      |
| 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                                                                                             |              |                  | •   | •    |
| <b>General System Use: Actions</b>                                                                             |              |                  |     |      |
| 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 <a href="#">Appendix E</a> )                                                   |              | 2 max            | •   | •    |
| Import data in bulk                                                                                            |              | •                | •   | •    |
| Queue: define and configure (see <a href="#">Appendix E</a> )                                                  |              | 15 max           | •   | •    |
| Tables: define connections and relationships between tables                                                    |              | •                | •   | •    |
| Workflows: define and configure                                                                                |              | •                | •   | •    |
| <b>Additional Services and Software</b>                                                                        |              |                  |     |      |
| Project Operations Team Members app <sup>3</sup>                                                               | •            | •                | •   | •    |
| 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)                                                                  |              |                  |     | •    |

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

<sup>2</sup>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 E](#).



<sup>3</sup> 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 details. Copilot credits are purchased separately; see the [Copilot Credits Guide](#) for more information.

#### **➤ 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 Service Entitlements

| Entitlements <sup>1</sup>                                                                | Customer Service Professional<br>\$50 per user/month | Customer Service Enterprise<br>\$105 per user/month | Customer Service Premium<br>\$195 per user/month |
|------------------------------------------------------------------------------------------|------------------------------------------------------|-----------------------------------------------------|--------------------------------------------------|
| Unlimited named users                                                                    | ●                                                    | ●                                                   | ●                                                |
| Case management                                                                          | ●                                                    | ●                                                   | ●                                                |
| Knowledge management                                                                     | ●                                                    | ●                                                   | ●                                                |
| Mobile                                                                                   | ●                                                    | ●                                                   | ●                                                |
| Leads (creation only)                                                                    | ●                                                    | ●                                                   | ●                                                |
| Microsoft Power BI <sup>2</sup>                                                          | ●                                                    | ●                                                   | ●                                                |
| Microsoft 365 interoperation<br>(Outlook, Exchange, Excel, OneDrive/SharePoint, OneNote) | ●                                                    | ●                                                   | ●                                                |
| Customization and extensibility                                                          | ◇ <sup>1</sup>                                       | ●                                                   | ●                                                |
| Unified service desk                                                                     | -                                                    | ●                                                   | ●                                                |
| Embedded intelligence                                                                    | -                                                    | ●                                                   | ●                                                |
| Context-driven suggestions                                                               | -                                                    | ●                                                   | ●                                                |
| Analytics and KPI reporting                                                              | -                                                    | ●                                                   | ●                                                |
| Multisession support                                                                     | -                                                    | ●                                                   | ●                                                |
| Portals                                                                                  | -                                                    | ●                                                   | ●                                                |
| Copilot in Dynamics 365 Customer Service                                                 | -                                                    | ●                                                   | ●                                                |
| Dynamics 365 Contact Center (Digital + Voice)                                            | -                                                    | -                                                   | ●                                                |
| Dynamics 365 Customer Service Agents <sup>3</sup>                                        | Requires Copilot Credits <sup>4</sup>                | Requires Copilot Credits <sup>4</sup>               | 1K Copilot Credits per user/month <sup>4</sup>   |
| Customer Voice <sup>5</sup>                                                              | -                                                    | 2K responses per tenant/month                       | -                                                |
| Unified Routing <sup>5,6</sup>                                                           | -                                                    | 50 records per user/month <sup>7</sup>              | 50 records per user/month <sup>7</sup>           |
| Dataverse Database <sup>5</sup>                                                          | 30 GB                                                | 30 GB                                               | 30 GB                                            |
| Accrued/USL                                                                              | -                                                    | 250 MB                                              | 250 MB                                           |
| Dataverse File <sup>5</sup>                                                              | 40 GB                                                | 40 GB                                               | 40 GB                                            |
| Accrued/USL                                                                              | -                                                    | 2 GB                                                | 35 GB                                            |
| Dataverse Log <sup>5</sup>                                                               | 2 GB                                                 | 2 GB                                                | 2 GB                                             |

<sup>1</sup> See [Customer Service Pricing | Microsoft Dynamics 365](#) for additional details.

<sup>2</sup> A separate Power BI license may be required to configure access to the content. For more information, see [Power Platform Licensing Guide](#)

<sup>3</sup> Dynamics 365 Customer Service Agents: [Case Management Agent](#), [Customer Intent Agent](#), [Customer Knowledge Management Agent](#), [Quality Evaluation Agent](#)

<sup>4</sup> [Learn more](#) about Copilot Credits.

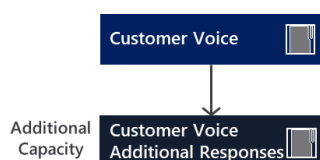
<sup>5</sup> Additional capacity available for purchase. Please refer to Appendix for more details.

<sup>6</sup> See [Overview of unified routing | Microsoft Learn](#) for more information.

<sup>7</sup> Excludes Chat and Digital Messaging conversation records.

All pricing is (USD), billed annually and subject to change; see [Customer Service Pricing | Microsoft Dynamics 365](#) for actual pricing.

## 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 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 <ul style="list-style-type: none"> <li>Responses</li> </ul> | <ul style="list-style-type: none"> <li>2K responses/tenant/month</li> </ul> | Customer Voice Additional Responses (no purchase limit): <ul style="list-style-type: none"> <li>1K responses/tenant/month</li> </ul> |

## 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 <ul style="list-style-type: none"> <li>Transactions</li> </ul> | <ul style="list-style-type: none"> <li>1K electronic invoice transactions/tenant/month</li> <li>1K invoice capture transactions/tenant/month</li> </ul> |



## 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 |
|------------------------------------------------------------------------|--------------|---------------|--------------------------|
| <b>Access</b>                                                          |              |               |                          |
| Dynamics 365 for Outlook and Dynamics 365 App for Outlook <sup>1</sup> | •            | •             |                          |
| 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                   | •            | •             | •                        |
| <b>Read</b>                                                            |              |               |                          |
| All Dynamics 365 application data                                      | •            | •             | •                        |
| Custom table data                                                      | •            | •             | •                        |
| <b>Tables: Create, Update, Delete</b>                                  |              |               |                          |
| Accounts                                                               |              | •             |                          |
| Activities                                                             | •            | •             | •                        |
| Announcements                                                          | •            | •             |                          |
| Calendar: share                                                        | •            | •             |                          |

| Use Rights                                                                                                                                                                                                              | Team Members        | Field Service | Field Service Contractor                 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|---------------|------------------------------------------|
| 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 <a href="#">Appendix E</a> )                                                                                                                                                                         | 15 max <sup>2</sup> | •             | •                                        |
| 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                                                                                                                                                                                                   | • <sup>3</sup>      | •             | •                                        |
| <b>Tables: Actions</b>                                                                                                                                                                                                  |                     |               |                                          |
| 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                                                                                                                                                                                                    |                     | •             |                                          |
| 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: Create and transact against projects using estimates, actuals and materials usage lines                                                                                                                        |                     | •             | •                                        |
| Create a Project Operations project to link to a Work Order <sup>5</sup>                                                                                                                                                |                     | •             | •                                        |
| Create and manage project estimate lines for those linked to work order estimates <sup>5</sup>                                                                                                                          |                     | •             | •                                        |
| Record time, expense and material actuals on projects linked to work orders <sup>5</sup>                                                                                                                                |                     | •             | •                                        |
| Create and manage project contracts and invoices for projects linked to work orders <sup>5</sup>                                                                                                                        |                     | •             | •                                        |
| 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                                                                                                            |                     | •             |                                          |

| Use Rights                                                                              | Team Members | Field Service | Field Service Contractor |
|-----------------------------------------------------------------------------------------|--------------|---------------|--------------------------|
| 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) | •            | •             |                          |
| <b>General System Use: Actions</b>                                                      |              |               |                          |
| 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 <a href="#">Appendix E</a> )                            |              | •             |                          |
| Import data in bulk                                                                     |              | •             |                          |
| Microsoft Excel: export data to Excel                                                   | •            | •             |                          |
| Queue: define and configure (see <a href="#">Appendix E</a> )                           |              | •             |                          |
| 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                                                         |              | •             |                          |
| <b>Additional Services and Software</b>                                                 |              |               |                          |
| Dynamics 365 Customer Voice                                                             |              | •             |                          |
| Dynamics 365 Mobile offline capabilities                                                |              | •             |                          |
| Project Operations Team Members app <sup>4</sup>                                        | •            | •             |                          |

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

<sup>2</sup>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 E](#).

<sup>3</sup>Create, update, and delete work orders for employee self-serve purposes only; see [Appendix E](#).

<sup>4</sup>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.

<sup>5</sup>Project Operations access is limited only to the operations mentioned and does not include access to core Project Operations modules like project planning, budgeting, scheduling, pricing, costing, subcontracting, project-based management etc.

## 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. 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 Field Service Entitlements

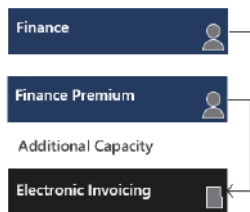
| Entitlements                                                                                                                | Field Service<br>\$105 per user/month | Field Service Contractor <sup>1</sup><br>\$50 per user/month |
|-----------------------------------------------------------------------------------------------------------------------------|---------------------------------------|--------------------------------------------------------------|
| App access from the web, on mobile, and through Microsoft 365                                                               | •                                     | •                                                            |
| Vendor and contractor management                                                                                            | •                                     | ◊                                                            |
| Scheduling and resource dispatching                                                                                         | •                                     | ◊                                                            |
| AI assistance from Copilot in Dynamics 365 Field Service for work order creation and updates, scheduling, and summarization | •                                     | -                                                            |
| Technician performance analysis                                                                                             | •                                     | -                                                            |
| Planned maintenance agreements                                                                                              | •                                     | -                                                            |
| Returns processing                                                                                                          | •                                     | -                                                            |
| Customer Voice <sup>2</sup>                                                                                                 | 2K responses per tenant/month         | -                                                            |
| Dataverse Database <sup>2</sup>                                                                                             | 30 GB                                 | -                                                            |
| Accrued/USL                                                                                                                 | 250 MB                                | -                                                            |
| Dataverse File <sup>2</sup>                                                                                                 | 40 GB                                 | -                                                            |
| Accrued/USL                                                                                                                 | 2 GB                                  | -                                                            |
| Dataverse Log <sup>2</sup>                                                                                                  | 2 GB                                  | -                                                            |

<sup>1</sup>. Field Service Contractor SL does not include any Dataverse capacity entitlements.

<sup>2</sup>. Additional capacity available for purchase. Please refer to Appendix for more details.

All pricing is (USD), billed annually and subject to change; see [Field Service Software Pricing | Microsoft Dynamics 365](#) for actual pricing.

## 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 per tenant/month and 100 invoice capture transactions/tenant/month (see [Electronic Invoicing](#)).

### 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 per tenant/month and 200 invoice capture transactions/tenant/month (see [Electronic Invoicing](#)).

### 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 |
|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------|--------------|----------------|---------|-----------------|
| <b>C-Suite</b>                              |                                                                                                                   |              |                |         |                 |
| Chief executive officer                     | Reviews the financial and operational performance                                                                 |              | •              | •       | •               |
| Chief financial officer                     | Reviews the financial performance                                                                                 |              | •              | •       | •               |
| <b>Budgeting</b>                            |                                                                                                                   |              |                |         |                 |
| Budget contributor                          | Create, update, and approve departmental budget plans.                                                            | •            | •              | •       | •               |
| Budget clerk                                | Documents budget events and responds to budget inquiries                                                          |              | •              | •       | •               |
| Budget manager                              | Reviews budget process performance and enables the budget process                                                 |              |                | •       | •               |
| <b>Financials and Accounting</b>            |                                                                                                                   |              |                |         |                 |
| 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                                                  |              |                | •       | •               |



| Role                                           | Security Role Description                                                                                                                                                                                                                       | Team Members | Ops – Activity | Finance | Finance Premium |
|------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|----------------|---------|-----------------|
| 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.                                                                      |              |                | •       | •               |
| 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 inquiries                                                                                                                                                                                        |              |                | •       | •               |
| Tax engine developer                           | Create and manage taxable document model mappings.                                                                                                                                                                                              |              |                | •       | •               |
| Tax engine functional consultant               | Create and manage generic tax engine components (taxable document and tax document)                                                                                                                                                             |              |                | •       | •               |

| Role                                                                                                    | Security Role Description                                                                                                                                                      | Team Members | Ops – Activity | Finance | Finance Premium |
|---------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|----------------|---------|-----------------|
| Treasurer                                                                                               | Documents treasury events and responds to treasury inquiries                                                                                                                   |              |                | •       | •               |
| <b>General</b>                                                                                          |                                                                                                                                                                                |              |                |         |                 |
| 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 |              |                | •       | •               |

<sup>1</sup> Field Service Contractor SL does not include any Dataverse capacity entitlements.

<sup>2</sup> Additional capacity available for purchase. Please refer to Appendix for more details.

All pricing is (USD), billed annually and, subject to change; see [Field Service Software Pricing | Microsoft Dynamics 365](#) for actual pricing.

## Dynamics 365 Finance Entitlements

| Capabilities/Entitlements <sup>1</sup>                                | Finance<br>\$210 per user/month                           | Finance Premium<br>\$300 per user/month                   |
|-----------------------------------------------------------------------|-----------------------------------------------------------|-----------------------------------------------------------|
| Core financials                                                       | •                                                         | •                                                         |
| Business performance planning                                         | ◊<br>(Read only)                                          | •<br>(Admin/creator access/inputs)                        |
| Business performance analytics (core reporting and insights)          | •                                                         | •                                                         |
| AI and machine learning (AI capabilities within Dynamics 365 Finance) | •                                                         | •                                                         |
| Electronic Invoicing <sup>2</sup>                                     | •                                                         | •                                                         |
| + Electronic Invoice transactions                                     | 100 per tenant/month                                      | 200 per tenant/month                                      |
| + Invoice Capture transactions                                        | 100 per tenant/month                                      | 200 per tenant/month                                      |
| Copilot Credits                                                       | -                                                         | 1K Copilot Credits per user/month <sup>3</sup>            |
| Dataverse or Operations Database <sup>2</sup>                         | 90 GB                                                     | 125 GB                                                    |
| Accrued/USL                                                           | 5 GB                                                      | 10 GB                                                     |
| Dataverse or Operations File <sup>2</sup>                             | 80 GB                                                     | 110 GB                                                    |
| Accrued/USL                                                           | 5 GB                                                      | 10 GB                                                     |
| Dataverse Log <sup>2</sup>                                            | 2 GB                                                      | 3 GB                                                      |
| Environments <sup>2</sup>                                             | 1 production (AOS) / 1 non-production<br>(Sandbox Tier 2) | 1 production (AOS) / 1 non-production<br>(Sandbox Tier 2) |

<sup>1</sup>. See [Finance Management Software Pricing | Microsoft Dynamics 365](#) for additional details.

<sup>2</sup>. Additional capacity and environments available for purchase. Please refer to Appendix for more details.

<sup>3</sup>. [Learn more](#) about Copilot Credits.

All pricing is (USD), billed annually and subject to change; see [Finance Management Software Pricing | Microsoft Dynamics 365](#) for actual pricing.

## Dynamics 365 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                                                                                                                   |                 |              |                       | •               |



| Role                                      | Security Role Description                                                                                                                                                         | HR Self Service | Team Members | Operations – Activity | Human Resources |
|-------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|--------------|-----------------------|-----------------|
| Training manager                          | Documents training events, responds to training inquiries, and records the financial consequences of training events                                                              |                 |              |                       | •               |
| 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 Human Resources Entitlements

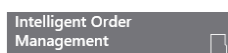
| Entitlements                                  | Human Resources<br>\$135 per user/month |
|-----------------------------------------------|-----------------------------------------|
| Customer Voice <sup>1</sup>                   | 2K responses per/tenant/month           |
| Dataverse or Operations Database <sup>1</sup> | 90 GB                                   |
| Accrued/USL                                   | 1 GB                                    |
| Dataverse or Operations File <sup>1</sup>     | 80 GB                                   |
| Accrued/USL                                   | 2 GB                                    |
| Dataverse Log <sup>1</sup>                    | 2 GB                                    |
| Environments <sup>1</sup>                     | 2 Dataverse + 2 AOS <sup>2</sup>        |

<sup>1</sup>. Additional capacity and environments available for purchase. Please refer to Appendix for more details.

<sup>2</sup>. At any given time, only one of the environments may be in production, but both environments may be in nonproduction.

All pricing is (USD), billed annually and subject to change; see [Human Resources Pricing | Microsoft Dynamics 365](#) for actual pricing.

## Dynamics 365 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, and use of connectors. See [Appendix H](#) for more information.

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. [Learn more.](#)

### Intelligent Order Management capacities

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



## Dynamics 365 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 |
|------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|--------------|--------------------|
| <b>Project Management</b>                      |                                                                                                                                                                                                                                  |              |              |                    |
| 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. |              |              | •                  |
| <b>Project Accounting &amp; Administration</b> |                                                                                                                                                                                                                                  |              |              |                    |
| 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                                                                                                                                                                               |              |              | •                  |

| Role                             | Security Role Description                                                                                                                                                                                               | Team Members | Ops-Activity | Project Operations |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|--------------|--------------------|
| <b>Project Sales</b>             |                                                                                                                                                                                                                         |              |              |                    |
| 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.                                              |              |              | •                  |
| <b>Practice Management</b>       |                                                                                                                                                                                                                         |              |              |                    |
| Practice manager                 | Owns the practice in the project organization. Creates reports and dashboards for deals in the pipeline. Understands resource demand and utilization.                                                                   |              |              | •                  |
| <b>Resource Management</b>       |                                                                                                                                                                                                                         |              |              |                    |
| Resource manager                 | Maintains project resource tasks. Staffs project demand and manages resource utilization to ensure resources are appropriately utilized.                                                                                |              |              | •                  |
| <b>General</b>                   |                                                                                                                                                                                                                         |              |              |                    |
| 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 |
|-----------------------------------------------------------------------------------------------------------------------|--------------|--------------------|
| <b>Access</b>                                                                                                         |              |                    |
| Dynamics 365 for Outlook and Dynamics 365 App for Outlook <sup>1</sup>                                                | •            | •                  |
| Dynamics 365 Mobile Client Application                                                                                | •            | •                  |
| Microsoft Dynamics 365 for iPad & Windows                                                                             | •            | •                  |
| Microsoft Dynamics 365 Web application                                                                                | •            | •                  |
| <b>Read</b>                                                                                                           |              |                    |
| All Dynamics 365 application data                                                                                     | •            | •                  |
| Custom table data                                                                                                     | •            | •                  |
| <b>Approve</b>                                                                                                        |              |                    |
| Time, expense, materials, and invoices                                                                                | •            | •                  |
| <b>Access via Customer Service app for Team Members, Power Pages<sup>2</sup> or API: Create, Read, Update, Delete</b> |              |                    |
| Employee self-serve: cases                                                                                            | •            | •                  |
| Non-employees only: work orders                                                                                       |              | •                  |
| Non-employees only: opportunities                                                                                     |              | •                  |
| <b>Tables: Create, Update, Delete</b>                                                                                 |              |                    |
| Accounts                                                                                                              |              | •                  |
| Activities                                                                                                            | •            | •                  |



| Use Rights                                                                                                       | Team Members        | Project Operations |
|------------------------------------------------------------------------------------------------------------------|---------------------|--------------------|
| Announcements                                                                                                    | •                   | •                  |
| Calendar: share                                                                                                  | •                   | •                  |
| Contacts                                                                                                         | •                   | •                  |
| Custom tables (see <a href="#">Appendix E</a> )                                                                  | 15 max <sup>3</sup> | •                  |
| 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                                                                               |                     | •                  |
| <b>Tables: Actions</b>                                                                                           |                     |                    |
| 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                                                                |                     | •                  |
| 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 |                     | •                  |

| Use Rights                                                                                                                         | Team Members | Project Operations |
|------------------------------------------------------------------------------------------------------------------------------------|--------------|--------------------|
| 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)                                           | •            | •                  |
| <b>General System Use: Actions</b>                                                                                                 |              |                    |
| 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 <a href="#">Appendix E</a> )                                                                       |              | •                  |
| Import data in bulk                                                                                                                |              | •                  |
| Microsoft Excel: export data to Excel                                                                                              | •            | •                  |
| Queue: define and configure (see <a href="#">Appendix E</a> )                                                                      |              | •                  |
| 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                                                                                                    |              | •                  |
| <b>Additional Services and Software</b>                                                                                            |              |                    |
| Project for the Web <sup>4</sup>                                                                                                   |              | •                  |
| Project Operations Team Members app <sup>5</sup>                                                                                   | •            | •                  |

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

<sup>2</sup>When provisioning capacity-based websites using Dataverse capacity, Power Pages licensing use rights apply.

<sup>3</sup>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 E](#).

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

<sup>5</sup> 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 Project Operations Entitlements

| Entitlements                                  | Project Operations <sup>1</sup><br>\$135 per user/month |
|-----------------------------------------------|---------------------------------------------------------|
| Electronic Invoicing <sup>2</sup>             | •                                                       |
| + Electronic Invoice transactions             | 100 per tenant/month                                    |
| + Invoice Capture transactions                | 100 per tenant/month                                    |
| Dataverse or Operations Database <sup>2</sup> | 90 GB                                                   |
| Accrued/USL                                   | 5 GB                                                    |
| Dataverse or Operations File <sup>2</sup>     | 80 GB                                                   |
| Accrued/USL                                   | 5 GB                                                    |
| Dataverse Log <sup>2</sup>                    | 2 GB                                                    |
| Environments <sup>2</sup>                     | 1 production (AOS) / 1 non-production (Sandbox Tier 2)  |

<sup>1</sup> 20-seat minimum purchase requirement. See [Microsoft Product Terms](#) for service specific terms.

<sup>2</sup> Additional capacity and environments available for purchase. Please refer to Appendix for more details.

All pricing is (USD), billed annually and subject to change; see [Project Operations Pricing | Microsoft Dynamics 365](#) for actual pricing.

## 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 Agents, users must have a Dynamics 365 Sales License (e.g., Dynamics 365 Sales, Dynamics 365 Sales Professional, Dynamics 365 Sales Enterprise or 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 Opportunity Agent** – The Sales Opportunity Agent helps sellers uncover deal risks faster to drive smarter sales execution. The agent continuously researches every opportunity in pipeline, synthesizing and interpreting all the real-time signals. It then prioritizes the most important opportunities to focus on, while surfacing risks early and recommending actions to keep deals on track. [Learn more](#).
- **Sales Research Agent** – The 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 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 plus Sales Insights automation and AI offerings.

## **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
- Assistant Studio
- Sales Accelerator
- Pipeline Intelligence
- Notes Analysis
- Conversation Intelligence
- Connection Insights (who knows whom)

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 <sup>1</sup>                                               | Add-On Capacity                                                                             |
|------------------------------------------------------|------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| <b>Sales Insights included with Sales Enterprise</b> |                                                                              |                                                                                             |
| 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                                |
| <b>Sales Insights / Sales Premium Users</b>          |                                                                              |                                                                                             |
| 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                                                                                         |

<sup>1</sup>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 <sup>1</sup> | Ent | Prem |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|------------------|-----|------|
| <b>Access</b>                                                                                                                                                                                                                  |                     |                  |     |      |
| Dynamics 365 for Outlook and Dynamics 365 App for Outlook <sup>1</sup>                                                                                                                                                         | •                   | •                | •   | •    |
| Dynamics 365 Mobile Client Application                                                                                                                                                                                         | •                   | •                | •   | •    |
| Microsoft Dynamics 365 for iPad & Windows                                                                                                                                                                                      | •                   | •                | •   | •    |
| Microsoft Dynamics 365 Web application                                                                                                                                                                                         | •                   | •                | •   | •    |
| <b>Read</b>                                                                                                                                                                                                                    |                     |                  |     |      |
| All Dynamics 365 application data                                                                                                                                                                                              | •                   | •                | •   | •    |
| Custom table data                                                                                                                                                                                                              | •                   | •                | •   | •    |
| <b>Tables: Create, Update, Delete<sup>3</sup></b>                                                                                                                                                                              |                     |                  |     |      |
| 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 <a href="#">Appendix E</a> )                                                                                                                                                                                | 15 max <sup>2</sup> | 15 max           | •   | •    |

| Use Rights                                                                               | Team Members | Pro <sup>1</sup> | Ent | Prem |
|------------------------------------------------------------------------------------------|--------------|------------------|-----|------|
| 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                                                                              |              |                  | •   | •    |
| <b>Tables: Actions<sup>3</sup></b>                                                       |              |                  |     |      |
| 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 <a href="#">Microsoft Learn</a> )                       |              | •                | •   | •    |
| Yammer: use Yammer collaboration (requires the appropriate license, acquired separately) | •            | •                | •   | •    |
| <b>General System Use: Actions</b>                                                       |              |                  |     |      |
| 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                                           |              | •                | •   | •    |
| Email: create, update, and delete templates                                              | •            | •                | •   | •    |
| Forms and views: customize (see <a href="#">Appendix E</a> )                             |              | 2 max            | •   | •    |
| Import data in bulk                                                                      |              | •                | •   | •    |
| Microsoft Excel: export data to Excel                                                    | •            | •                | •   | •    |
| Queue: define and configure (see <a href="#">Appendix E</a> )                            |              | 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                                               | •            | •                | •   | •    |

| Use Rights                                                        | Team Members | Pro <sup>1</sup> | Ent            | Prem |
|-------------------------------------------------------------------|--------------|------------------|----------------|------|
| Workflows: define and configure                                   |              | •                | •              | •    |
| <b>Automation &amp; AI Offerings (Inc Sales Premium Features)</b> |              |                  |                |      |
| Email Engagement                                                  |              |                  | •              | •    |
| Assistant Cards                                                   |              |                  | •              | •    |
| Auto Capture                                                      |              |                  | •              | •    |
| Conversation Intelligence                                         |              |                  | •              | •    |
| Sales Accelerator                                                 |              |                  | • <sup>4</sup> | •    |
| Lead & Opportunity Scoring                                        |              |                  | • <sup>4</sup> | •    |
| Notes Analysis                                                    |              |                  |                | •    |
| Connection Insights (Who Knows Whom)                              |              |                  |                | •    |
| Pipeline Intelligence (Predictive forecasting)                    |              |                  |                | •    |
| Relationship Analytics                                            |              |                  |                | •    |
| <b>Additional Services and Software</b>                           |              |                  |                |      |
| Copilot in Dynamics 365 Sales                                     |              |                  | •              | •    |
| Dynamics 365 Customer Voice                                       |              |                  | •              | •    |
| Dynamics 365 Mobile Offline capabilities                          |              |                  | •              | •    |
| Project Operations Team Members app <sup>5</sup>                  | •            | •                | •              | •    |
| Microsoft Sales Copilot (formerly Microsoft Viva Sales)           |              |                  | •              | •    |

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

<sup>2</sup>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 E](#).

<sup>3</sup>See [Restricted tables requiring Dynamics 365 licenses](#) for more information.

<sup>4</sup>Each of these features are available to Sales Enterprise customers with a limited capacity. See [Sales Enterprise](#) for more details.

<sup>5</sup> 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 Sales Entitlements

| Capabilities/Entitlements <sup>1</sup>                  | Sales Professional <sup>1</sup><br>\$65 per user/month | Sales Enterprise <sup>1,2</sup><br>\$105 per user/month | RECOMMENDED OFFER<br>Sales Premium <sup>2</sup><br>\$150 per user/month | Microsoft Relationship Sales <sup>3</sup><br>(Variable) |
|---------------------------------------------------------|--------------------------------------------------------|---------------------------------------------------------|-------------------------------------------------------------------------|---------------------------------------------------------|
| Sales force automation <sup>4</sup>                     | ●                                                      | ●                                                       | ●                                                                       | ●                                                       |
| Mobile app                                              | ●                                                      | ●                                                       | ●                                                                       | ●                                                       |
| Microsoft 365 interoperation                            | ●                                                      | ●                                                       | ●                                                                       | ●                                                       |
| Reporting and dashboards <sup>4</sup>                   | ●                                                      | ●                                                       | ●                                                                       | ●                                                       |
| Customization and automation <sup>4</sup>               | ◇ <sup>4</sup>                                         | ●                                                       | ●                                                                       | ●                                                       |
| Custom apps                                             | -                                                      | ●                                                       | ●                                                                       | ●                                                       |
| Advanced sales force automation <sup>4</sup>            | -                                                      | ●                                                       | ●                                                                       | ●                                                       |
| Conversation intelligence <sup>4,6</sup>                | -                                                      | ●                                                       | ●                                                                       | ●                                                       |
| Copilot capabilities in Dynamics 365 Sales <sup>4</sup> | -                                                      | ●                                                       | ●                                                                       | ●                                                       |
| Dynamics 365 Sales Agent <sup>5</sup>                   | Requires Copilot Credits <sup>6</sup>                  | Requires Copilot Credits <sup>6</sup>                   | 1K Copilot Credits per user/month <sup>6</sup>                          | -                                                       |
| AI-Powered Data Enrichment <sup>7</sup>                 | -                                                      | -                                                       | ●                                                                       | -                                                       |
| Copilot capabilities in Outlook <sup>4</sup>            | -                                                      | ●                                                       | ●                                                                       | ●                                                       |
| Copilot capabilities in Microsoft Teams <sup>4</sup>    | -                                                      | ●                                                       | ●                                                                       | ●                                                       |
| Sales engagement <sup>4</sup>                           | -                                                      | ●                                                       | ●                                                                       | ●                                                       |
| Advanced sales engagement <sup>4</sup>                  | -                                                      | -                                                       | ●                                                                       | -                                                       |
| LinkedIn Sales Navigator Advanced Plus                  | -                                                      | -                                                       | -                                                                       | ●                                                       |
| Customer Voice <sup>8</sup>                             | -                                                      | 2K responses per tenant/month                           | 2K responses per tenant/month                                           | 2K responses per tenant/month                           |
| Unified Routing <sup>8</sup>                            | -                                                      | 50 records per user/month <sup>9</sup>                  | 50 records per user/month <sup>9</sup>                                  | 50 records per user/month <sup>9</sup>                  |
| Dataverse Database <sup>8</sup>                         | 30 GB                                                  | 30 GB                                                   | 45 GB                                                                   | 10 GB                                                   |
| Accrued/USL                                             | -                                                      | 250 MB                                                  | 500 MB                                                                  | 250 MB                                                  |
| Dataverse File <sup>8</sup>                             | 40 GB                                                  | 40 GB                                                   | 60 GB                                                                   | 20 GB                                                   |
| Accrued/USL                                             | -                                                      | 2 GB                                                    | 2 GB                                                                    | 2 GB                                                    |
| Dataverse Log <sup>8</sup>                              | 2 GB                                                   | 2 GB                                                    | 2 GB                                                                    | 2 GB                                                    |

<sup>1</sup> Customers may deploy Sales Professional and Sales Enterprise in separate environments, on the same tenant. However, licensed users can only access the environment for which they are entitled. See [Microsoft Product Terms](#) for specific terms.

<sup>2</sup> Includes Copilot capabilities like natural language insights, record updates, email and meeting assistance, and opportunity summaries.

<sup>3</sup> 10-seat minimum purchase requirement. See [Microsoft Product Terms](#) for service specific terms. Contact a Dynamics 365 sales specialist for pricing information.

<sup>4</sup> See [Sales Pricing | Microsoft Dynamics 365](#) for additional details.

<sup>5</sup> Dynamics 365 Sales Agent: [Sales Qualification Agent](#), [Sales Opportunity Agent](#), [Sales Research Agent](#)

<sup>6</sup> Copilot Credits sold separately. [Learn more](#) about Copilot Credits.

<sup>7</sup> When [AI-Powered Data Enrichment](#) performs both: opportunity matching (conversations are mapped to opportunities) and opportunity enrichment (field extraction and CRM update suggestions), Copilot Credits are consumed.

<sup>8</sup> Additional capacity available for purchase. Please refer to Appendix for more details.

<sup>9</sup> Excludes Chat and Digital Messaging conversation records.

All pricing is (USD), billed annually and subject to change; see [Sales Pricing | Microsoft Dynamics 365](#) for actual pricing.

## 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 |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|----------------|-----|-------------|
| <b>Asset Management</b>    |                                                                                                                                                                                            |              |                |     |             |
| 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.                                                       |              |                | •   | •           |
| <b>Cost Accounting</b>     |                                                                                                                                                                                            |              |                |     |             |
| 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. |              |                | •   | •           |

| Role                                                                                        | Security Role Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Team Members | Ops – Activity | SCM | SCM Premium |
|---------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|----------------|-----|-------------|
| 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.                                                                                                                                                                                                                                                                                                                                                                                                   |              |                | •   | •           |
| <b>Customer Service</b>                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |              |                |     |             |
| 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |              |                | •   | •           |
| <b>Demand Planning</b>                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |              |                |     |             |
| 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) | <p>Forecasts customer demand for products or services. Analyzes historical sales data, market trends, and other factors to predict future demand, including:</p> <ul style="list-style-type: none"> <li>• Configure the demand planning app (role-level security, time fences, worksheets)</li> <li>• View and create planning data (forecasts and calculations)</li> <li>• View and create tables and import data from excel</li> <li>• View and create transformations</li> <li>• View and create worksheets</li> <li>• Export plans when they're ready to share with Supply Chain Management</li> </ul> |              |                |     | •           |
| <b>Engineering</b>                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |              |                |     |             |
| Process engineer                                                                            | Defines processes to make new products                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |              |                | •   | •           |
| 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.                                                                                                                                                                                                                                                                                                                                                                                             |              |                | •   | •           |
| <b>Distribution</b>                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |              |                |     |             |
| 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |              |                | •   | •           |

| Role                                              | Security Role Description                                                                                                                                                                                                                                                               | Team Members | Ops – Activity | SCM | SCM Premium |
|---------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|----------------|-----|-------------|
| 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.                                                                                        |              |                | •   | •           |
| <b>Field Service</b>                              |                                                                                                                                                                                                                                                                                         |              |                |     |             |
| 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                                                                                                                                                                                                                                           |              |                | •   | •           |
| <b>Marketing</b>                                  |                                                                                                                                                                                                                                                                                         |              |                |     |             |
| 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                                                                                                                                                                                                                                                               |              |                | •   | •           |
| <b>Manufacturing</b>                              |                                                                                                                                                                                                                                                                                         |              |                |     |             |
| 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.                                                                                            |              |                | •   | •           |
| 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 production 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                                                                               |              |                | •   | •           |
| <b>Procurement</b>                                |                                                                                                                                                                                                                                                                                         |              |                |     |             |
| 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                                                                 |              |                | •   | •           |

| Role                                                                                                    | Security Role Description                                                                                                                                                      | Team Members | Ops – Activity | SCM | SCM Premium |
|---------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|----------------|-----|-------------|
| 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                                       |              |                | •   | •           |
| <b>Quality Control</b>                                                                                  |                                                                                                                                                                                |              |                |     |             |
| 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                                                                         |              |                | •   | •           |
| <b>Sales</b>                                                                                            |                                                                                                                                                                                |              |                |     |             |
| 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                                                                                                                |              |                | •   | •           |
| <b>Transportation</b>                                                                                   |                                                                                                                                                                                |              |                |     |             |
| 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                                                                      |              |                | •   | •           |
| <b>General</b>                                                                                          |                                                                                                                                                                                |              |                |     |             |
| 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.                          |              |                | •   | •           |

## 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                                                                                                                                                                                                                                                                                                                                                                                   |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Supply Chain Management</b> <ul style="list-style-type: none"><li>• Asset Management</li><li>• Electronic Invoicing</li><li>• Intelligent Order Management</li></ul> | Supply Chain Management: <ul style="list-style-type: none"><li>• 100 assets/tenant/month</li><li>• 100 electronic invoice transactions/tenant/month</li><li>• 100 invoice capture transactions/tenant/month</li><li>• 1K order lines/tenant/month</li></ul> Supply Chain Management Premium: <ul style="list-style-type: none"><li>• 100 assets/tenant/month</li><li>• 200 electronic invoice transactions/tenant/month</li><li>• 200 invoice transactions/tenant/month</li><li>• 1K order lines/tenant/month</li></ul> | Additional Asset Management: <ul style="list-style-type: none"><li>• 100 assets/tenant/month</li></ul> Electronic Invoicing: <ul style="list-style-type: none"><li>• 1K electronic invoice transactions/tenant/month</li><li>• 1K invoice capture transactions/tenant/month</li></ul> Intelligent Order Management: <ul style="list-style-type: none"><li>• 1K order lines/tenant/month</li></ul> |



## Dynamics 365 Supply Chain Management Entitlements

| Entitlements                                  | Supply Chain Management <sup>1</sup><br>\$210 per user/month | Supply Chain Management Premium <sup>1</sup><br>\$300 per user/month |
|-----------------------------------------------|--------------------------------------------------------------|----------------------------------------------------------------------|
| Core supply chain                             | ●                                                            | ●                                                                    |
| Demand planning                               | ◊<br>(read only)                                             | ●                                                                    |
| Asset Management <sup>2,3</sup>               | 100 Assets per tenant/month                                  | 100 Assets per tenant/month                                          |
| Electronic Invoicing <sup>2</sup>             | ●                                                            | ●                                                                    |
| + Electronic Invoice transactions             | 100 per tenant/month                                         | 200 per tenant/month                                                 |
| + Invoice Capture transactions                | 100 per tenant/month                                         | 200 per tenant/month                                                 |
| Management <sup>2</sup>                       | 1K order lines per tenant/month                              | 1K order lines per tenant/month                                      |
| Copilot Credits                               | -                                                            | 1K Copilot Credits per user/month <sup>4</sup>                       |
| Dataverse or Operations Database <sup>2</sup> | 90 GB                                                        | 125 GB                                                               |
| Accrued/USL                                   | 5 GB                                                         | 10 GB                                                                |
| Dataverse or Operations File <sup>2</sup>     | 80 GB                                                        | 110 GB                                                               |
| Accrued/USL                                   | 5 GB                                                         | 10 GB                                                                |
| Dataverse Log <sup>2</sup>                    | 2 GB                                                         | 3 GB                                                                 |
| Environments <sup>2</sup>                     | 1 production (AOS) / 1 non-production<br>(Sandbox Tier 2)    | 1 production (AOS) / 1 non-production<br>(Sandbox Tier 2)            |

<sup>1</sup> Supply Chain Management has a 20-seat minimum purchase requirement. Supply Chain Management Premium has a 10-seat minimum purchase requirement. See [Microsoft Product Terms](#) for service specific terms.

<sup>2</sup> Additional capacity and environments available for purchase. Please refer to Appendix for more details.

<sup>3</sup> After quantity 50 x Asset Management Additional Assets (5K Additional Assets) have been purchased, customers may manage unlimited assets with no additional purchase necessary. Active and inactive assets carry historical data and count against the capacity limits.

<sup>4</sup> [Learn more](#) about Copilot Credits.

All pricing is (USD), billed annually and subject to change; see [Supply Chain Management Pricing | Microsoft Dynamics 365](#) for actual pricing.

## Cross-Application Licensing

### Dynamics 365 Agents

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. Copilot Credits are required for any Dynamics 365 agents usage. Users must also 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)

### Dynamics 365 Agents and Copilot Credits

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. In addition, Copilot Credit Consumption may be offset through the Microsoft Agent Pre-Purchase Plan, which provides Agent Commit Units to reconcile eligible Copilot Credit usage. [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 USL                | Copilot Credits Required/Included |
|---------------------------------|-----------------------------------|
| <b>Contact Center</b>           |                                   |
| Digital                         | Not included, sold separately     |
| Voice                           | Not included, sold separately     |
| Digital + Voice                 | Not included, sold separately     |
| <b>Customer Service</b>         |                                   |
| Professional                    | Not included, sold separately     |
| Enterprise                      | Not included, sold separately     |
| Premium                         | 1,000 Copilot Credits included    |
| <b>Finance</b>                  |                                   |
| Finance                         | Not included, sold separately     |
| Finance Premium                 | 1,000 Copilot Credits included    |
| <b>Sales</b>                    |                                   |
| Professional                    | Not included, sold separately     |
| Enterprise                      | Not included, sold separately     |
| Premium                         | 1,000 Copilot Credits included    |
| <b>Supply Chain Management</b>  |                                   |
| Supply Chain Management         | Not included, sold separately     |
| Supply Chain Management Premium | 1,000 Copilot Credits included    |



## Model Context Protocol (MCP) for Dynamics 365

The MCP (Model Context Protocol) server provides a standardized, secure way for AI agents to access and act on enterprise data through natural language.

When MCP tools are utilized within Microsoft Copilot Studio, no additional charges for MCP tool execution will be incurred. (Standard orchestration charges for such agents or tool calls continue to apply as published at [billing rates](#).)

Access to MCP tools by agents created outside Microsoft Copilot Studio requires a valid license for authentication and access to the MCP server, as detailed below:

- Access to Dynamics 365 data is included with a Dynamics 365 Premium license (Sales Premium, Finance Premium, Supply Chain Premium, and Customer Service Premium).
- Access to non-Dynamics 365 data is included with the Microsoft 365 Copilot USL.
- Access with other applicable licenses will be billed, as published at:
  - MCP tools are billed at the same rate as AI tools (basic), per [Copilot Credit consumption rates](#).
  - Dataverse grounding resource calls (e.g., Search and Fetch tool calls) are billed at the same rate as tenant graph grounding, per published [billing rates](#).
- Customers are responsible for configuration and covering the orchestration costs associated with other platforms (e.g., Microsoft Foundry, Anthropic Claude).

For a detailed list of MCP tools, please refer to [MCP for ERP Apps](#)

## 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 [Appendix E](#). For additional details, refer 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 G](#) for details).
- Create or edit items related to warehousing, receiving, shipping, orders, vendor maintenance, and related budgets.

Operate a point-of-sale (POS) device, store manager device, production 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, production 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. <ul style="list-style-type: none"> <li>• Managing and replenishing inventory</li> <li>• Balancing cash registers and processing daily receipts</li> <li>• Configuring and maintaining menu options displayed by the software development company devices</li> <li>• Purchasing supplies and services required to run the Commerce location operations</li> <li>• Managing Commerce location staff</li> <li>• Processing reports required to analyze and manage Commerce location results</li> <li>• Managing master data related to Commerce location operations</li> </ul> |
| Production Floor | One device used for manufacturing production floor functions: <ul style="list-style-type: none"> <li>• Clock-in and clock-out</li> <li>• Starting and finishing production jobs (including project activities carried out on the production floor)</li> <li>• Reporting progress</li> <li>• Materials consumption and completion</li> <li>• Viewing documents and instructions related to production jobs</li> <li>• Viewing worker holiday balances</li> </ul>                                                                                                                                                                                                                                                        |
| Warehouse Device | One device used for warehousing functions: <ul style="list-style-type: none"> <li>• Receiving</li> <li>• Putting away</li> <li>• Doing internal stock transfers</li> <li>• Picking, packing</li> <li>• Capturing product attributes</li> <li>• Shipping goods plus performing inventory count checks in the context of a warehouse management system</li> <li>• 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.)</li> </ul>                                                                                                                |



## 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 | <ul style="list-style-type: none"> <li>• PRODJOURNALTRANSBOM (JOURNAL LINE FOR POSTING RAW MATERIAL CONSUMPTION ON PRODUCTION ORDERS)</li> <li>• PRODJOURNALTRANSROUTE (JOURNAL LINE FOR POSTING TIME USED ON PRODUCTION ROUTE OPERATIONS)</li> <li>• PRODJOURNALTRANSJOB (JOURNAL LINE FOR POSTING TIME USED ON PRODUCTION JOBS)</li> <li>• PRODJOURNALTRANSPROD (JOURNAL LINE FOR POSTING FINISHED GOODS COMPLETED ON PRODUCTION ORDERS)</li> </ul> |
| 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.



## 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 <b>or</b> Operations Database |                              | Dataverse <b>or</b> Operations File |                 |
|---------------------------------------------------------------------------------------------------|-------------------------|-----------------|---------------------|-----------------|---------------------|-----------------|-----------------------------------------|------------------------------|-------------------------------------|-----------------|
|                                                                                                   | Included Per Tenant Max | Accrued Per USL | Included Per Tenant | Accrued Per USL | Included Per Tenant | Accrued Per USL | Included Per Tenant <sup>1</sup>        | Accrued Per USL <sup>2</sup> | 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 <sup>3</sup> , Sales Enterprise | 30 GB                   | 250 MB          | 40 GB               | 2 GB            | 2 GB                | -               | -                                       | -                            | -                                   | -               |
| Sales Premium                                                                                     | 45 GB                   | 500 MB          | 60 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 <sup>1</sup> (CI)                                                               | 45 GB                   | -               | 60 GB               | -               | 4 GB                | -               | -                                       | -                            | -                                   | -               |
| CI – Interacted People <sup>4</sup>                                                               | -                       | 1 GB            | -                   | 2 GB            | -                   | -               | -                                       | -                            | -                                   | -               |
| CI – Unified People <sup>4</sup>                                                                  | -                       | 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            |

<sup>1</sup>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.

<sup>2</sup>[Learn more](#) about Finance and Operations Storage Capacity report.

<sup>3</sup>Field Service Contractor SLs do not include any Dataverse capacity entitlements

<sup>4</sup>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 <sup>1</sup>         | -                                 |
| Finance Premium, Human Resources <sup>2</sup> , Supply Chain Management Premium | -                                              | -                                      | 1 AOS                          | 1 Sandbox Tier 2                  |

<sup>1</sup>Includes entitlements to install both the Customer Insights - Journeys and Customer Insights - Data applications in an unlimited number of production or sandbox environments.

<sup>2</sup>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.



## 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 Multiple Lifecycle Services projects and environments on one Microsoft Entra tenant, [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 Copilot Credits do not carry over month to month. Find more details in the [Microsoft Copilot Studio Licensing Guide](#).



## 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

- Power Platform Requests add-on increase the daily service limits for Power Platform requests.
- Power Pages [capacity packs](#) align with peak monthly anticipated usage.

## Additional Dataverse capacity

Dataverse capacity add-ons provide 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/<br>Load Size  | Included Database<br>Capacity         |
|---------|-----------------------------------------|------------------------------------------------------------------------|-------------------------|---------------------------------------|
| Tier 2  | Standard acceptance testing: multi box  | User acceptance, integration testing, and training                     | Any                     | 10 GB/<br>environment                 |
| Tier 3  | Premium acceptance testing: multi box   | Large scale user acceptance testing, integration testing, and training | Small/<br>light load    | 10 GB/<br>environment                 |
| Tier 4  | Standard performance testing: multi box | Performance, load, and staging with user acceptance testing            | Small to<br>medium load | 10 GB/<br>Environment +<br>128 MB/USL |
| Tier 5  | Premium performance testing: multi box  | Performance, load, and staging with user acceptance testing            | Large/<br>heavy load    | 10 GB/<br>Environment +<br>128 MB/USL |



## 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



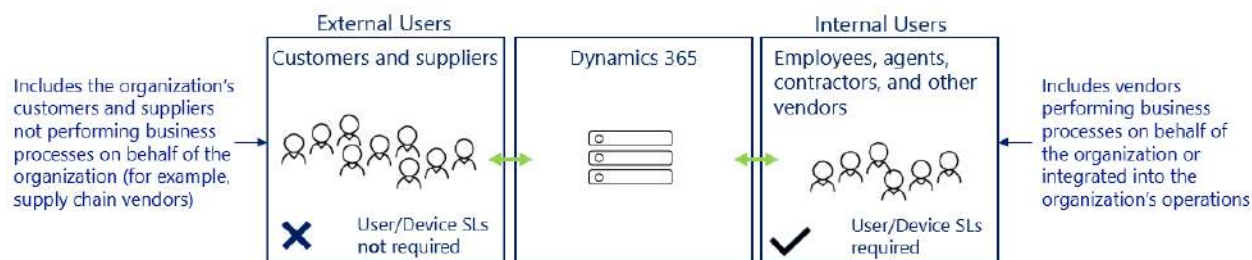
and defined in the Power Platform Licensing Guide. External Users means users that are not (a) employees of Customer or its Affiliates, (b) contractors or agents that typically work for Customer or its Affiliates for more than 30 hours on average per week, or (c) contractors or agents that typically 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.



## Multiplexing

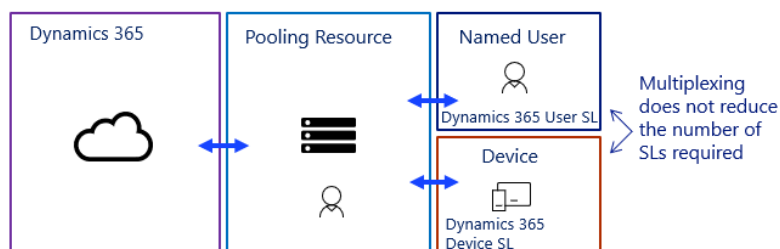
Multiplexing refers to your use of hardware or software to pool connections, reroute information, or reduce the number of devices or users that directly access Dynamics 365. Multiplexing does NOT reduce the required number of licenses of any type. Any user or device that accesses Dynamics 365—whether 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 as 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.



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](#).



## 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.



For a list of restricted tables, please check Restricted tables requiring Dynamics 365 licenses [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.



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 F](#).

## Dynamics 365 Field Service and 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).

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.



## Dynamics 365 Field Service, Project Operations and the Modern Project Operations integration

This out-of-the-box integration enables Dynamics 365 Field Service licensed users to transact against projects through the normal course of their field service operations as a means to align field service operations with project operations, finance and operations applications, or both. When enabled, the Field Service application will automatically sync data with Project Operations and Finance and Supply Chain Management. The following use cases are covered:

- Creating or updating Projects in Field Service so that work orders can be created against a project allowing estimates, actuals, and materials usage lines to be created against the project.
- Reading inventory levels in Field Service from Finance and Supply Chain Management (the system of record for inventory).

Note: This integration pattern makes use of the Modern Project Operations integration between Dynamics 365 Project Operations and Dynamics 365 Finance and Operations applications to ensure that Field Service transactions sync to Finance and Operations applications. This does not license customers to use Project Operations functionality without a proper license except through the data alignment built by Microsoft. Direct access to Dynamics 365 Project Operations, Dynamics 365 Finance, or Dynamics 365 Supply Chain Management application will require licenses. [Learn more.](#)



## 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                              |

## 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 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.

- Business Central
- Contact Center
- Customer Service
- Field Service
- Finance
- Project Operations
- Sales
- Supply Chain Management

#### Business Central

- **Expense Agent** – The Business Central Expense Agent streamlines the entire expense lifecycle: receipt processing, data extraction and itemization, categorization, expense grouping and report creation, policy validation, notifications of pending reports, user review and workflow orchestration capabilities. The agent orchestrates the end-to-end process, from submission through approval, while ensuring compliance with configured business rules. The Business Central license is not required for employees to review and submit expense reports through the web experience. [Learn more](#).

#### Contact Center

- **Service Operations Agent** – The Service Operations Agent is a self-service AI agent that supports configuration, governance, and optimization of the contact center environment while maintaining full operational control. This agent provisions Contact Center components, configures settings using natural language and orchestrates conversations in real time. [Learn more](#).

#### Field Service

- **Scheduling Operations Agent** – The 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](#).

## Finance

- **Account Reconciliation Agent** – The 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.](#)

## Project Operations

- **Expense Agent** – The 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** – The 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.](#)
- **Activity Approvals Agent** - The 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.](#)

## Sales

- **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.](#)

## Supply Chain Management

- **Procurement Agent** – The Procurement Agent in Microsoft Dynamics 365 Supply Chain Management assists procurement and sourcing teams in managing supplier-driven changes that affect purchase orders and supply commitments. It supports key activities such as coordinating supplier communications, evaluating the impact of supplier updates on operations, identifying response options to mitigate disruptions, and surfacing potential issues earlier. By helping teams understand and respond to changes in the context of purchase orders and operational plans, the Procurement Agent enables more timely and informed decision-making within procurement processes. Over time, the capability is designed to expand to support broader coordination and execution across the procure-to-pay lifecycle. [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.



## 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<br>(with Sales, Customer Service, Field Service, Project Operations) | Finance and Operations Platform (with Finance, SCM, Commerce, HR, Project Operations') |
|------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| <b>Access</b>                                              |                                                                                                                                                                                                                                                |                                                                                         |                                                                                        |
|                                                            | Access Anywhere: Web App, Mobile App, Tablet App, via Dynamics 365 App for Outlook and Dynamics 365 for Outlook                                                                                                                                | • <sup>1</sup>                                                                          |                                                                                        |
| <b>Read</b>                                                |                                                                                                                                                                                                                                                |                                                                                         |                                                                                        |
|                                                            | Dynamics 365 Applications: full read across                                                                                                                                                                                                    | • <sup>1</sup>                                                                          | •                                                                                      |
| <b>General System Use</b>                                  |                                                                                                                                                                                                                                                |                                                                                         |                                                                                        |
| Common                                                     | Activities: create, update, and delete                                                                                                                                                                                                         | • <sup>1</sup>                                                                          |                                                                                        |
|                                                            | Announcements: create, update, and delete                                                                                                                                                                                                      | • <sup>1</sup>                                                                          |                                                                                        |
|                                                            | Contacts: create, update, and delete                                                                                                                                                                                                           | • <sup>1</sup>                                                                          |                                                                                        |
|                                                            | Dynamics 365 Mobile Client Application: use (for iPad, Windows) except for Field Service                                                                                                                                                       | • <sup>1</sup>                                                                          |                                                                                        |
|                                                            | Microsoft Excel: export data and access user reports, charts, and dashboard                                                                                                                                                                    | • <sup>1</sup>                                                                          |                                                                                        |
|                                                            | Notes: create, update, and delete                                                                                                                                                                                                              | • <sup>1</sup>                                                                          |                                                                                        |
|                                                            | Yammer: collaboration (needs Yammer license)                                                                                                                                                                                                   | • <sup>1</sup>                                                                          |                                                                                        |
| <b>Customization</b>                                       |                                                                                                                                                                                                                                                |                                                                                         |                                                                                        |
| Apps on Dataverse platform                                 | Additional tables (custom tables or standard Dataverse tables)                                                                                                                                                                                 | 15 per app <sup>2</sup>                                                                 |                                                                                        |
| <b>Pre-approved application scenarios for Team Members</b> |                                                                                                                                                                                                                                                |                                                                                         |                                                                                        |
| 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 <sup>2</sup> 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 <sup>2</sup> or API access only)                                                                 | •                                                                                       |                                                                                        |

| Use Rights              | Description                                                                                                                                              | Dataverse Platform<br>(with Sales, Customer Service, Field Service, Project Operations) | Finance and Operations Platform (with Finance, SCM, Commerce, HR, Project Operations') |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| 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) | •                                                                                       |                                                                                        |
| 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 <sup>3</sup> : 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                                                                                                                 |                                                                                         | •                                                                                      |

| Use Rights         | Description                                                                                | Dataverse Platform<br>(with Sales, Customer Service, Field Service, Project Operations) | Finance and Operations Platform (with Finance, SCM, Commerce, HR, Project Operations <sup>1</sup> ) |
|--------------------|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
|                    | Stock counting: perform in store or warehouse                                              |                                                                                         | •                                                                                                   |
|                    | Time: approve                                                                              |                                                                                         | •                                                                                                   |
| Human Resources    | Absence and leave: approve                                                                 |                                                                                         | •                                                                                                   |
|                    | 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                                     | <ol style="list-style-type: none"><li>1. Full access</li><li>2. No limit on number of custom tables</li><li>3. Full create, read, update, and delete (CRUD) capability on data records associated with custom tables</li></ol>                                                                                                                                                                                  |
| Sales Professional, Customer Service Professional, Operations – Activity | <ol style="list-style-type: none"><li>1. Create and modify up to 15 custom tables (per application) in addition to the included standard tables</li><li>2. No limit on read rights for Dynamics 365 custom tables</li><li>3. Customize/extend applications and workflows within the context of Dynamics 365 application use rights</li><li>4. Full CRUD on data records associated with custom tables</li></ol> |
| Team Members                                                             | <ol style="list-style-type: none"><li>1. Create and modify up to 15 tables (custom tables or standard Dataverse tables) per Team Members application module.</li><li>2. All customization must be per pre-approved scenarios in <a href="#">Appendix D</a>.</li><li>3. No limit on read rights for Dynamics 365 custom tables</li><li>4. Full CRUD on data records associated with custom tables</li></ol>      |



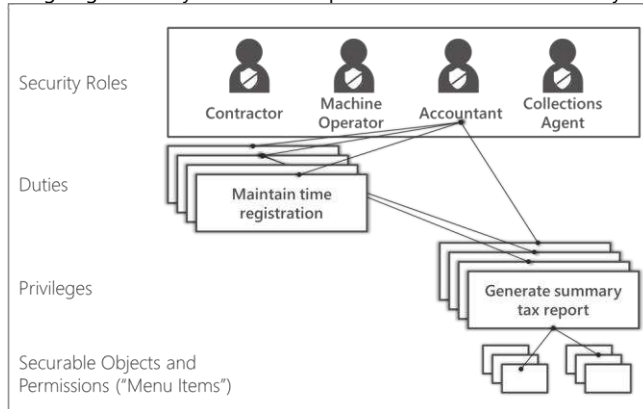
You can add up to 15 tables (standard and/or custom) per Team Members application module. If you want to view (read only) more than 15 tables, you can do so by creating dashboards and sub-grids. See more information on [Team Members license](#) documentation.

## 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.





## 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 <sup>1</sup> |
|---------------------------------------------------|---------------------------------------------------|----------------------|
| 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           |

| Duty name                                    | Privilege name                                    | License <sup>1</sup> |
|----------------------------------------------|---------------------------------------------------|----------------------|
| Maintain payment schedule journal processing | Approve payment schedule journal through workflow | Activity             |
| Maintain planned orders                      | Approve planned orders                            | Enterprise           |
| 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             |

<sup>1</sup>When configuration key is on.



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



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**<sup>1</sup> - 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.



<sup>1</sup> 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                                                                                     | <a href="https://www.microsoft.com/en-us/dynamics-365/">https://www.microsoft.com/en-us/dynamics-365/</a>                                                                   |
| Dynamics 365 Licensing and Pricing                                                               | <a href="https://www.microsoft.com/en-us/dynamics-365/pricing-overview">https://www.microsoft.com/en-us/dynamics-365/pricing-overview</a>                                   |
| Microsoft Power Platform                                                                         | <a href="https://www.microsoft.com/en-us/power-platform">https://www.microsoft.com/en-us/power-platform</a>                                                                 |
| Microsoft Power Automate                                                                         | <a href="https://www.microsoft.com/en-us/power-platform/products/power-automate/pricing">https://www.microsoft.com/en-us/power-platform/products/power-automate/pricing</a> |
| Microsoft Copilot Studio                                                                         | <a href="https://www.microsoft.com/en-us/microsoft-copilot/microsoft-copilot-studio">https://www.microsoft.com/en-us/microsoft-copilot/microsoft-copilot-studio</a>         |
| Microsoft Copilot Studio Licensing Guide                                                         | <a href="https://go.microsoft.com/fwlink/?linkid=2320995">https://go.microsoft.com/fwlink/?linkid=2320995</a>                                                               |
| Copilot Credits Guide                                                                            | <a href="https://go.microsoft.com/fwlink/?linkid=2368800">https://go.microsoft.com/fwlink/?linkid=2368800</a>                                                               |
| Power Apps Pricing                                                                               | <a href="https://www.microsoft.com/en-us/power-platform/products/power-apps/pricing/">https://www.microsoft.com/en-us/power-platform/products/power-apps/pricing/</a>       |
| Power BI Pricing                                                                                 | <a href="https://www.microsoft.com/en-us/power-platform/products/power-bi/pricing">https://www.microsoft.com/en-us/power-platform/products/power-bi/pricing</a>             |
| Microsoft Power Platform Licensing Guide                                                         | <a href="https://go.microsoft.com/fwlink/?LinkId=2085130&amp;clid=0x409">https://go.microsoft.com/fwlink/?LinkId=2085130&amp;clid=0x409</a>                                 |
| Cloud Solution Provider Program (CSP)                                                            | <a href="https://partner.microsoft.com/en-US/">https://partner.microsoft.com/en-US/</a>                                                                                     |
| Dynamics AX (Online) Licensing Guide                                                             | <a href="http://aka.ms/s201h6">http://aka.ms/s201h6</a>                                                                                                                     |
| Dynamics AX 2012 Retail Licensing Scenarios                                                      | <a href="http://aka.ms/Sumqjx">http://aka.ms/Sumqjx</a>                                                                                                                     |
| Dynamics On-Premises Licensing Guides                                                            | <a href="https://partner.microsoft.com/asset/collection/licensing-guide-assets#/">https://partner.microsoft.com/asset/collection/licensing-guide-assets#/</a>               |
| Dynamics Blogs                                                                                   | <a href="https://community.dynamics.com/b/msftdynamicsblog">https://community.dynamics.com/b/msftdynamicsblog</a>                                                           |
| Dynamics 365 Support                                                                             | <a href="https://www.microsoft.com/en-us/dynamics-365/support">https://www.microsoft.com/en-us/dynamics-365/support</a>                                                     |
| Microsoft Volume Licensing                                                                       | <a href="http://www.microsoft.com/licensing">www.microsoft.com/licensing</a>                                                                                                |
| Software Assurance                                                                               | <a href="#">Software Assurance by Benefit   Microsoft Volume Licensing</a>                                                                                                  |
| User Security Role Reporting and Technical Validation for D365 Finance and Operations Apps – FAQ | <a href="#">Dynamics365-Finance-Operations-apps.pdf</a>                                                                                                                     |



## Appendix K: Change Log

| Page(s) | Topic                                  | Change | Action                                                                                       | Date          |
|---------|----------------------------------------|--------|----------------------------------------------------------------------------------------------|---------------|
| 45, 50  | Sales                                  | New    | Sales Research Agent (GA)                                                                    | June 2026     |
| 71      | Business Central                       | New    | Expense Agent (Paid Public Preview)                                                          | June 2026     |
| 71      | Contact Center                         | New    | Service Operations Agent available (Paid Public Preview)                                     | June 2026     |
| Various | Dynamics 365 Applications              | New    | Licensing entitlement tables for Dynamics 365 applications added to the licensing guide      | June 2026     |
| 56      | Supply Chain Management                | New    | Procurement Agent enters Paid Public Preview (replaces Supplier Communications Agent)        | May 2026      |
| 33      | Sales                                  | New    | Sales Opportunity Agent (GA)                                                                 | April 2026    |
| 46      | Sales Premium                          | Update | Increase in Dataverse Database (Default and Accrued) and Dataverse File (Default) capacities | March 2026    |
| 42      | Model Context Protocol                 | New    | Model Context Protocol (MCP) in Dynamics 365                                                 | February 2026 |
| 24, 53  | Field Service and Project Ops          | Update | Field Service and Project Operations integration                                             | February 2026 |
| 44      | Operations-Activity, Operations-Device | Update | Shop floor updated to production floor                                                       | February 2026 |
| N/A     | Dynamics 365 Commerce                  | Remove | Dynamics 365 Commerce <a href="#">Recommendations</a> End of Sale                            | February 2026 |
| N/A     | Dynamics 365 Commerce                  | Remove | Dynamics 365 Commerce <a href="#">Ratings and Reviews</a> End of Sale                        | February 2026 |
| 14      | Contact Center Voice                   | New    | Teams Phone Extensibility                                                                    | January 2026  |
| 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 |

| Page(s) | Topic                                                      | Change | Action                                                                                                                                                                | Date           |
|---------|------------------------------------------------------------|--------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| 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<br>Project Operations for resource/non-stocked scenarios renamed to Project Operations Integrated with ERP | October 2025   |
| 39, 40  | Copilot for Sales<br>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<br>Project timesheet: approve                                                                             | August 2025    |
| 52      | Appendix C: Team Members use rights for Finance            | Update | Vendor invoice: approve<br>Purchase orders: respond to vendor’s PO when listed as contact person; approve<br>Requisitions: create, edit and approve                   | August 2025    |
| 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      |

© 2025 Microsoft Corporation. All rights reserved.

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

