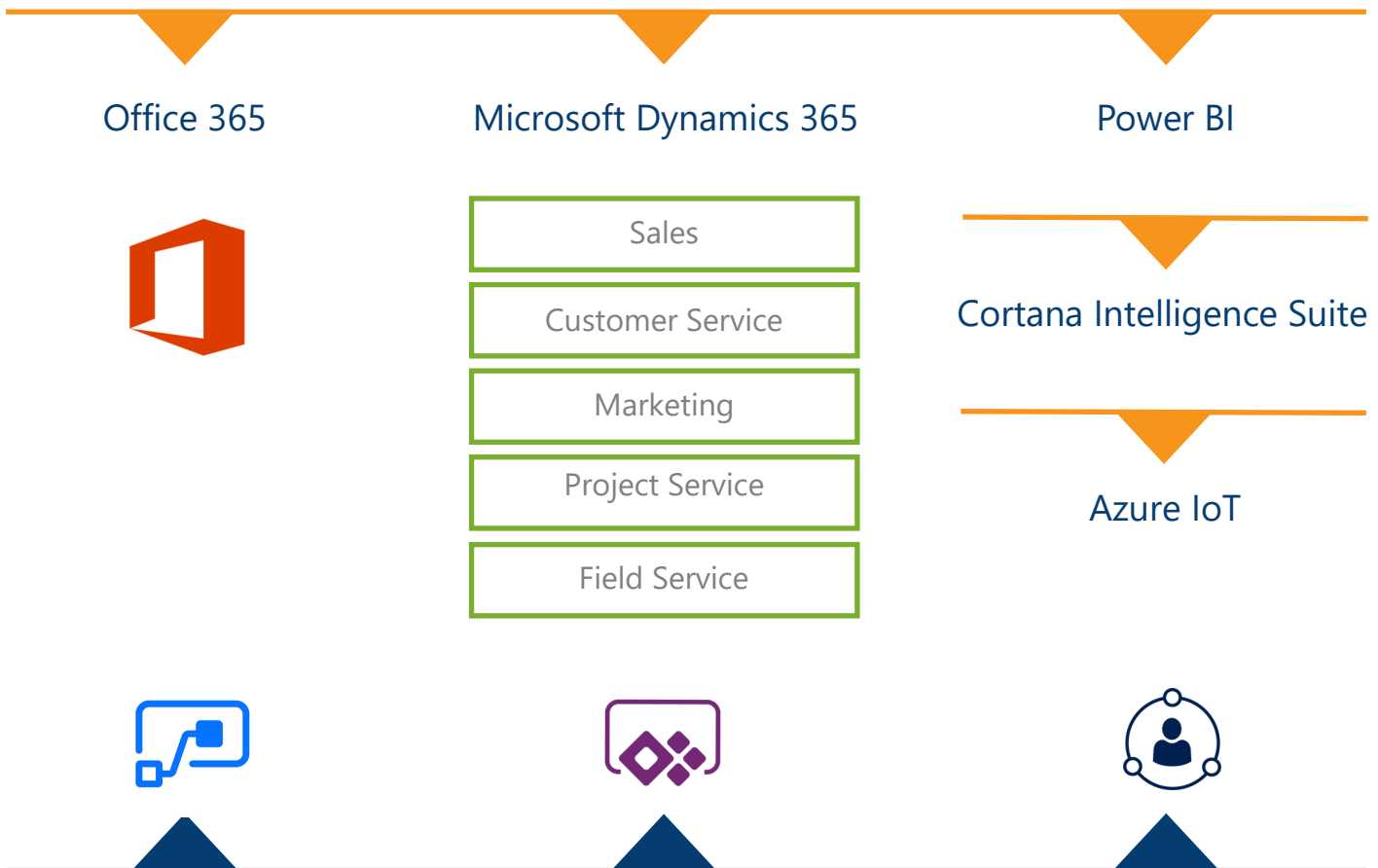


Concise Licensing Guide

Information to help you license
Microsoft Dynamics 365 Customer Engagement apps

THE MICROSOFT TECHNOLOGY STACK CONSISTS OF



Common Application Platform:
PowerApps, Microsoft Flow & Common Data Service for Apps

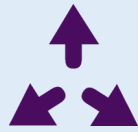


Gold Cloud Customer Relationship Management
Gold Cloud Business Applications
Gold ISV



Microsoft Dynamics 365

Customer Engagement Licensing Overview



Simplified Licensing

Choose a role based app, a plan across all apps, a licence for light usage needs, or a custom app licence.



Non Production Instance

Includes a non-production instance for testing and development. *(with Plan & Enterprise licences)*



Generous Cloud Storage

Generous default data storage (10GB) with additional free capacity accruing at an extra 5GB per 20 x Dynamics 365 full licences.



Includes Web Portal

Default entitlement for one self-service portal for customers, partners, communities or employees. *(Subject to a minimum of 10 licences - does not include Professional or Team Member licences)*



Full Social Engagement

Plans & apps fully integrated with Microsoft Social Engagement



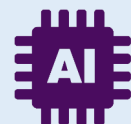
Full Knowledge Capabilities

Knowledge sharing and management in a single offering.



Includes Voice of the Customer Surveys

Gather customer feedback with integrated surveys and gain insight with survey analytics.



AI Features

Powered by advanced analytics and machine learning.



Licence by User or Device

Mix and match user or device licences to fit all scenarios.

Microsoft Dynamics 365

Comparing Customer Engagement Licence Types

Mix and match, and only pay for what you need:

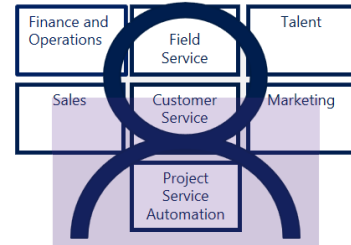
FULL USER

Licence by App



Licence individual users by a single application defined by their role, e.g. Customer Service app

Licence by Plan



Utilise functions across all Customer Engagement apps to fit specific user roles

Team Member Licence

LIGHT USER



- Share Dynamics 365 with more people who only have light usage needs for a low price per seat
- Consume data and reports, and complete light tasks including activities, adding notes and updating contact records
- Read access to any Dynamics 365 data - subject to user permissions
- Limits access to 15 custom entities per Dynamics 365 app

PowerApps Plan 2

CUSTOM APP

- Uses the full power of Common Data Service for Apps to extend Dynamics 365 with powerful model-driven apps
- Create and run Dynamics 365 custom model-driven apps
- Use Business Process Flows in model-driven apps
- Unrestricted access to Dynamics 365 custom entities
- Includes Microsoft Flow

MICROSOFT DYNAMICS 365 Customer Engagement PLAN Overview

Choose the Microsoft Dynamics 365 Customer Engagement Plan for the best value across these connected apps, services and entitlements



**SALES
ENTERPRISE**



**CUSTOMER
SERVICE ENTERPRISE**



**PROJECT
SERVICE**



**FIELD
SERVICE**



**MARKETING
APP***

Microsoft Social Engagement

Social listening, intent analysis and CRM integration - includes tracking for up to 10k social posts per month

Web Portal

Includes x1 self-service integrated web portal for customers, partners or employees
(subject to a minimum of 10 full licences)

Surveys

Voice of the Customer survey integration

Gamification

Apply the concept of fantasy sports to drive user participation

Knowledge

Full knowledge management capabilities including authoring

Mobile Apps

Free Tablet and Mobile apps for iOS, Android and Windows devices.

10GB

Cloud Storage
+ 5GB for every
20 x full licences

x 1

Sandbox
Instance

PowerApps P2

Microsoft Flow

App for Outlook

Track emails and check contact interactions from virtually any device in Outlook

Microsoft Office Online

Includes web apps for Excel, Word, Powerpoint & OneNote for non-O365 users

* Entitlement to the Dynamics 365 for Marketing App within a Plan subscription is subject to a minimum of 10 x Dynamics 365 Customer Engagement Plan licences. Includes capacity for up to 2000 contacts - additional capacity can be applied by purchasing contact packs.

Microsoft Dynamics 365

Sales App - at a glance



Get an instant quote now!



For users engaging in field sales, inside sales, sales management, partner sales, or any other sales role.

- **Sales Enterprise license** - allows organisations to go beyond sales force automation and meets the needs of more complex sales processes
- **Sales Professional licences** - essential sales force automation capabilities to manage leads and opportunities

ACCESS

Access anywhere: web app, tablet, mobile app and via Outlook

READ

Read access capabilities across all Dynamics 365 applications including customer service

EDIT

Leads	Quotes & Price Lists
Opportunities	Marketing Lists
Accounts	Quick Campaigns
Contacts	Case Management
Sales Goals*	Custom Entities^
Embedded Intelligence*	Territory Management*
Custom Workflows^	Web Portal *

IMPORTANT: Professional and Enterprise licences may not be deployed on the same Dynamics 365 instance.

* Not available using Dynamics 365 for Sales PROFESSIONAL

^ Limited use in Dynamics 365 for Sales PROFESSIONAL

SALES ENTERPRISE INCLUDES

PowerApps P2*
Microsoft Social Engagement *
Voice of the Customer*
Non-Production Instance*
Mobile App
Gamification *
AI Features ^

Microsoft Dynamics 365

Customer Service App - at a glance



Empowers sellers with insights to personalize relationships, predict customer needs, and increase sales.

- **Customer Service Enterprise license** - full functionality for advanced call centre scenarios.
- **Customer Service Professional licence** - streamlined functionality for less complex service desk requirements

ACCESS

Access anywhere: web app, tablet, mobile app and via Outlook

READ

Read access capabilities across all Dynamics 365 applications including sales and project service

EDIT

Case Management

Contacts

Create Leads

Service Queues

Work Hours

Accounts

Service Level Agreements

Knowledge Management

Contracts & Entitlements

Web Portal *

Unified Service Desk *

Embedded Intelligence *

Voice of the Customer *

Schedule Board *

Custom Entities ^

IMPORTANT: Professional and Enterprise licences may not be deployed on the same Dynamics 365 instance.

* Not available using Dynamics 365 for Customer Service PROFESSIONAL

^ Limited use in Dynamics 365 for Customer Service PROFESSIONAL

CUSTOMER SERVICE ENTERPRISE ALSO INCLUDES

PowerApps P2*

Microsoft Social Engagement *

Mobile App

Non-Production Licence *

Gamification *

Microsoft Dynamics 365

Marketing App - at a glance



Offers comprehensive capabilities for creating and running multi-channel campaigns to generate leads

- Dynamics 365 for Marketing app is licensed per organisation and is based on the total number of marketing contacts.
- Customers who purchased Dynamics 365 Customer Engagement Plan with a minimum of 10 Plan licences receive entitlement to one Marketing Application for up to 2000 contacts. Capacity for additional contacts can be purchased separately.
- Other Dynamics 365 customers can purchase the Base package of the Marketing app which includes entitlement for up to 10,000 contacts - capacity for an increased number of contacts can be purchased for an add-on cost.
- Marketing contacts are counted on the basis of marketing activity via Marketing emails, landing pages, forms, LinkedIn integration, events, surveys and any other custom channel.

FUNCTIONS

Contact Segments

Marketing Lists

Landing Pages

Customer Journey Designer

Campaign Automation

Quick Campaigns

Connector for LinkedIn Lead

Gen Forms *(requires LinkedIn Sales Navigator Team or higher)*

Email Marketing

Event Management

Lead Scoring

Sales Readiness Grading

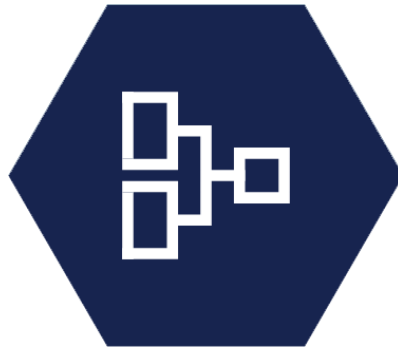
Voice of the Customer

Web Forms

Sales Literature

Microsoft Dynamics 365

Project Service Automation App - at a glance



Complete projects on-time and on-budget

- For users engaging in a project or resource management role
- Includes end to end functions spanning the project lifecycle from estimating, planning and scheduling resources
- Includes Project Online and Project Online Desktop

ACCESS

Access anywhere: web app, tablet, mobile app and via Outlook

READ

Read access capabilities across all Dynamics 365 applications including sales and customer service

EDIT

Project Management

Project Expenses

Project Contracts

Work Hours

Resource Competencies

Custom Entities

Schedule Board

Project Estimates

Resource Availability

Project Invoices

Resource Management

Approve Project Entries

Contacts & Accounts

ALSO INCLUDES

PowerApps P2

Mobile App

Voice of the Customer

AI Features

Microsoft Dynamics 365

Field Service App - at a glance



Proactive and connected field service

- For users engaging in any field scheduler or field technician role
- Includes all core field Field Service functionality featuring work order management and resource scheduling

ACCESS

Access anywhere: web app, tablet, mobile app and via Outlook

READ

Read access capabilities across all Dynamics 365 applications including project service and sales

EDIT

Work Order Management
Schedule Board
Inventory Management
Repair & Return
Work Hours
Resources
Accounts & Contacts

Scheduling Assistant
Resource Bookings
Field Service Invoices
Customer Agreements
Territory Management
Custom Entities
Activities

ALSO INCLUDES

Mobile App
PowerApps P2
Microsoft Social Engagement
Voice of the Customer
AI Features

Microsoft Dynamics 365

Team Member Licenses - at a glance



- Designed for users who only need to perform basic Dynamics 365 functions
- Includes read access as well as limited create / update / delete permissions to carry out light usage tasks across all Customer Engagement apps
- Can be used in combination with applications and plan
- Execute basic customer and business processes and gain insights from data
- Lowest price entry point for Dynamics 365 licenses

ACCESS

Access anywhere: web app, tablet, mobile app and via Outlook

READ

Full read access across all Dynamics 365 applications: sales, customer service, project service automation and field service.

CREATE / EDIT



Contacts
Activities
Dashboards
Custom Entities
(maximum of 15 custom entities per app)



Accounts
Sales Opportunities
Leads
Knowledge Articles
Sales Quotes & Orders
Cases
Marketing Lists
Full Mobile Offline Sync

Microsoft Dynamics 365 Licence Comparison



Selected Create / Edit / Delete Capabilities	Team	Sales	Customer	Project	Field	CUSTOMER ENGAGEMENT PLAN
	Member	Enterprise	Service Ent.	Service	Service	
Contacts, Activities & Notes	Available	Available	Available	Available	Available	Available
Search & Advanced Find	Available	Available	Available	Available	Available	Available
Mobile & Tablet Apps	Available	Available	Available	Available	Available	Available
Use Dashboards & Charts	Available	Available	Available	Available	Available	Available
Dynamics 365 for Outlook	Available	Available	Available	Available	Available	Available
Create Personal Views	Available	Available	Available	Available	Available	Available
Run Workflows & On-Demand Processes	Available	Available	Available	Available	Available	Available
Custom Entities	Max 15	Available	Available	Available	Available	Available
Accounts	Available	Available	Available	Available	Available	Available
Create & Publish Knowledge Articles	Available	Available	Available	Available	Available	Available
Voice of the Customer Surveys	Available	Available	Available	Available	Available	Available
Gamification Players	Available	Available	Available	Available	Available	Available
Microsoft Social Engagement	Available	Available	Available	Available	Available	Available
Leads Management	Available	Available	Create Only	Available	Available	Available
Opportunity Management	Available	Available	Available	Available	Available	Available
Products & Price Lists	Available	Available	Available	Available	Available	Available
Quotes, Orders & Invoices	Available	Available	Available	Available	Available	Available
Marketing Lists & Quick Campaigns	Available	Available	Available	Available	Available	Available
Territories	Available	Available	Available	Available	Available	Available
Case Management	Available	Available	Available	Available	Available	Available
Contracts & Entitlements	Available	Available	Available	Available	Available	Available
Configure Service Level Agreements	Available	Available	Available	Available	Available	Available
Projects & Project Expenses	Available	Available	Available	Available	Available	Available
Project Contracts & Project Invoices	Available	Available	Available	Available	Available	Available
Manage Work Hours	Available	Available	Available	Available	Available	Available
Resource Availability View	Available	Available	Available	Available	Available	Available
Resource Schedule Management	Available	Available	Available	Available	Available	Available
Work Orders Management	Available	Available	Available	Available	Available	Available
Schedule & Despatch Capabilities	Available	Available	Available	Available	Available	Available
Configure Schedule Board	Available	Available	Available	Available	Available	Available

Includes Dynamics 365 Web Portal — Subject to a minimum of 10 Enterprise app or Plan licences —

Team Member Sales Enterprise Customer Service Ent. Project Service Field Service Customer Engagement Plan



Gold Cloud Customer Relationship Management
Gold Cloud Business Applications
Gold ISV

Download the full Microsoft licence guide: www.preact.co.uk/365licensing

Comparing Sales Professional & Enterprise Licences

Selected Create / Edit / Delete Capabilities

Sales PROFESSIONAL

Sales ENTERPRISE

Selected Create / Edit / Delete Capabilities	Sales PROFESSIONAL	Sales ENTERPRISE
Users Licences	No minimum or maximum	No minimum or maximum
Licensed to	Named user	Named user or device
Read / Limited Access to Dynamics 365 Data	Yes	Yes
Accounts, Contacts, Activities & Notes	Yes	Yes
Search & Advanced Find	Yes	Yes
Mobile & Tablet Apps	Yes	Yes
Create & Publish Knowledge Articles	Yes	Yes
Use Dashboards & Charts	Yes	Yes
Dynamics 365 for Outlook	Yes	Yes
Create Personal Views	Yes	Yes
Leads Management	Yes	Yes
Opportunity Management	Yes	Yes
Products & Price Lists	Yes	Yes
Quotes, Orders & Invoices	Yes	Yes
Basic Case Management	Yes	Yes
Marketing Lists & Quick Campaigns	Yes	Yes
Custom Entities	Maximum of 15	Unlimited
Run Workflows & On-Demand Processes	Max 15 custom workflows	Unlimited
Guided processes	Maximum 5 process flows	Unlimited
Customisable record form layouts	Maximum 2 forms per entity	Unlimited
Non-Production Dynamics 365 Instance	Yes	Yes
Hierarchies	Yes	Yes
Sales Goals	Yes	Yes
Territory Management	Yes	Yes
Gamification	Yes	Yes
Embedded Sales Insights / Relationship Insights	Yes	Yes
Voice of the Customer Surveys	Yes	Yes
Microsoft Social Engagement	Yes	Yes
PowerApps P2	Yes	Yes
Installation of 3rd Party App Installs	Maximum of 10 installs	Unlimited
Entitlement to deploy an integrated Dynamics 365 Web Portal	Yes	Subject to a min of 10 users



Comparing Customer Service Professional & Enterprise Licences

Selected Microsoft Dynamics 365 Capabilities & Entitlements

Customer Service PROFESSIONAL

Customer Service ENTERPRISE

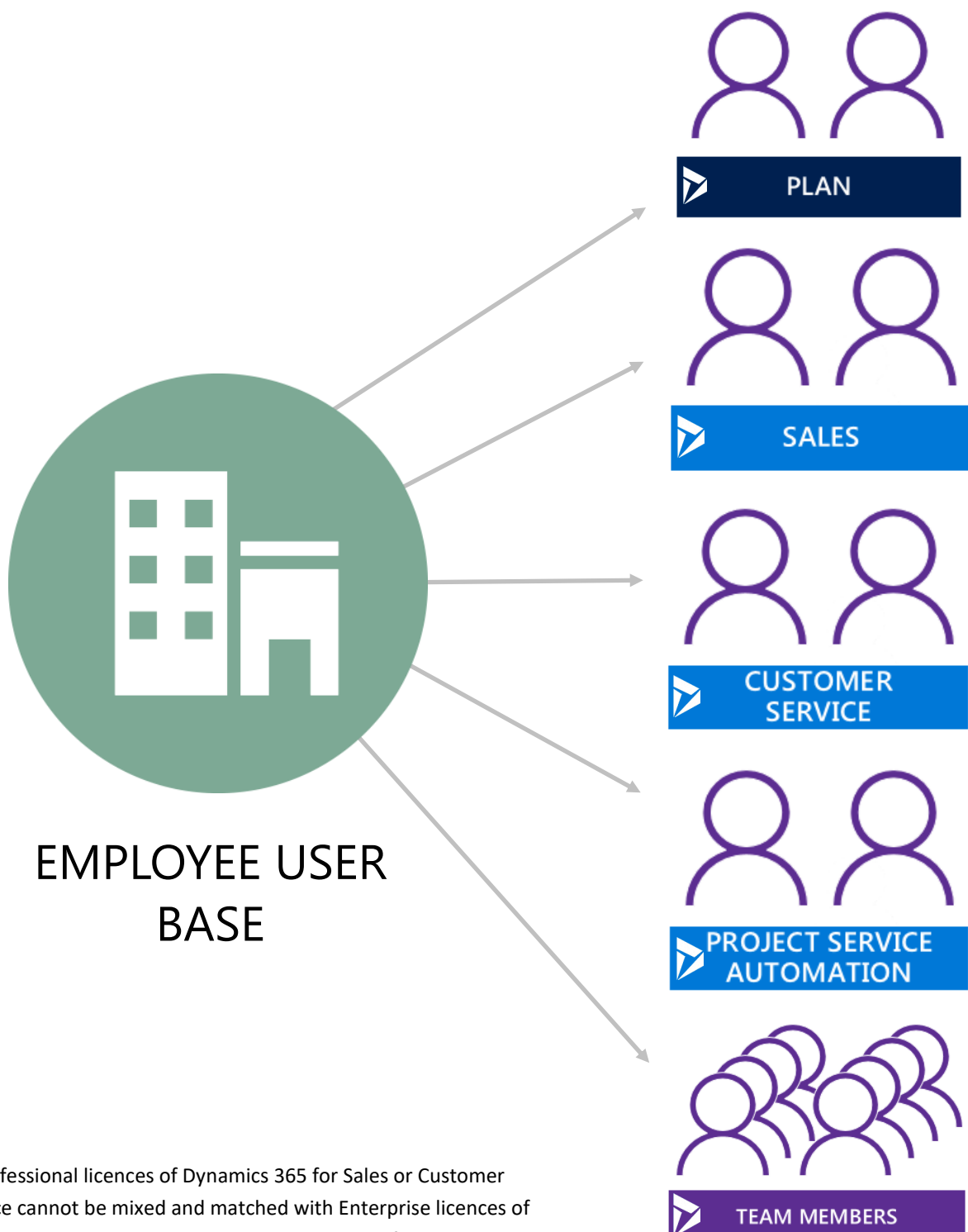
Users Licences	No minimum or maximum	No minimum or maximum
Licensed to	Named user	Named user or device
Read / Limited Access to Dynamics 365 Data		
Accounts, Contacts, Activities & Notes		
Search & Advanced Find		
Mobile & Tablet Apps		
Case Management		
Contracts & Entitlements		
Service Level Agreements		
Create & Publish Knowledge Articles		
Facilities & Equipment		
Use Dashboards & Charts		
Dynamics 365 for Outlook		
Create Personal Views		
Create Leads		
Marketing Lists & Quick Campaigns		
Customer Service Hub		
Custom Entities	Maximum of 15	
Run Workflows & On-Demand Processes	Max 15 custom workflows	
Guided processes	Maximum 5 process flows	
Customisable record form layouts	Maximum 2 forms per entity	
Non-Production Dynamics 365 Instance		
Gamification		
Embedded Sales Insights / Relationship Insights		
Voice of the Customer Surveys		
Service Scheduling		
Unified Service Desk		
PowerApps P2		
Microsoft Social Engagement		
Installation of 3rd Party Solutions	Maximum of 10 installs	Unlimited
Entitlement to deploy an integrated Dynamics 365 Web Portal		Subject to a min of 10 users

Microsoft Dynamics 365 Licensing

Mix and Match



License users for only for the functionality needed. Mix and match licenses across the Customer Engagement Plan, Apps and Team Members.*



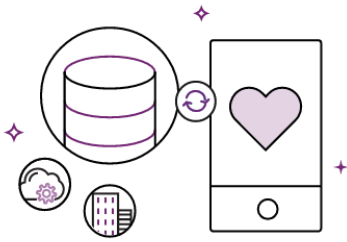
* Professional licences of Dynamics 365 for Sales or Customer Service cannot be mixed and matched with Enterprise licences of Sales or Customer Service on the same instance of Dynamics 365.

Microsoft Dynamics 365

A unique approach to building custom business apps

Quickly build apps with a full featured low-code / no-code platform.

PowerApps uses visual drag and drop tools to quickly create new web and mobile connected apps that pull data from multiple sources to extend the capabilities of Dynamics 365 and other business applications.



Connect to your systems and create new data



Build apps without writing code



Publish and use apps on web and mobile

Connect your data with pre-built connectors or custom connectors



Sharepoint Online



Office 365



Dynamics 365



SQL Server



Microsoft Azure



Excel



Custom API's

+ many more

Put your data to work by creating automated workflows between your favourite apps and cloud services

Microsoft Flow is a workflow of the Microsoft Cloud connecting PowerApps with cloud applications. Workflows can span multiple apps in Dynamics 365, Office 365 and the wider landscape including Twitter, Dropbox, OneDrive, Facebook and more.



Start with a template



Find a Flow template and create automated workflows to get notifications, manage approvals, sync files, collect data and more.

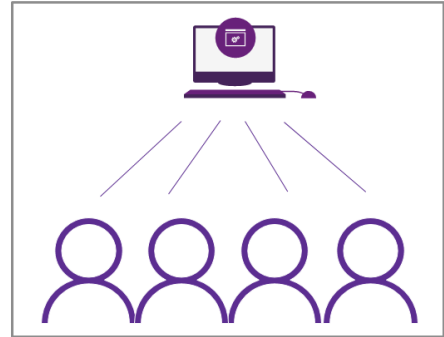
Microsoft Dynamics 365

Each app supports named users & devices*



User Licence

Named user licence enabling employees to access an application across multiple devices.



Device Licence

Enables any number of individuals to access an application from the same device using a shared device ID.

Licensing Questions?

Get in touch with Preact and we'll help you select the best Dynamics 365 licences for your business. Contact us to get started.

www.preact.co.uk

| 0800 381 1000

* Excludes Microsoft Dynamics 365 for Marketing app which is licensed per organisation. Device licensing is not available for Professional licences of Dynamics 365 for Sales / Customer Service.