

Microsoft Dynamics 365 for Financials Partner FAQ

Updated: Nov 1, 2016

Find answer to commonly asked questions in the following sections of this document:

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General

What is Microsoft Dynamics 365 and how does it benefit customers?

Dynamics 365 takes a new approach to business applications. It brings together the best of our CRM and ERP cloud offerings into one cloud service with specific, purpose built, apps for each of your key business processes. Dynamics 365 provides customers a modern and familiar experience with built-in insights, intelligence and workflow. Customers also use a common data model and consistent application platform to ensure consistency, interoperability, and extensibility.

Is Microsoft Dynamics 365 for enterprise customers, or also smaller customers?

Dynamics 365, Enterprise edition is optimized for organizations with 250+ employees.

Dynamics 365, Business edition is optimized for organizations with 10-250 employees.

How does Microsoft Dynamics 365 for Financials relate to Microsoft Dynamics 365?

Microsoft Dynamics 365 for Financials is an app in the **Dynamics 365, Business edition**. Additional apps within the Business edition (Dynamics 365 for Sales, Dynamics 365 for Marketing, Dynamics 365 for Customer Service) are currently planned to be available in CY2017. When additional apps become available, the Dynamics 365, Business edition "Plan" will also become available. See additional details about the Plan in the [Dynamics 365, Business edition licensing guide](#).

Dynamics 365 for Financials is based on **Project "Madeira"** which was in public preview in the US and Canada since April 2016. Dynamics 365 for Financials launched on November 1, 2016 in the United States and Canada, and intends to expand to additional countries in CY2017. Dynamics 365 for Sales, Dynamics 365 for Marketing, and Dynamics 365 for Customer Service within the Business edition will also be optimized for SMB customers.

General Continued

How does Microsoft Dynamics 365 for Financials relate to the other Dynamics products (AX, NAV, GP, SL, CRM)?

Microsoft Dynamics NAV, Microsoft Dynamics GP, and Microsoft Dynamics SL continue to be enhanced, supported, and licensed to new customers (roadmap info [here](#)). New versions of our Microsoft Dynamics **AX** and Microsoft Dynamics **CRM** offerings have come together to create the Dynamics 365, Enterprise edition

When and where will Microsoft Dynamics 365 be available?

The **Enterprise edition** of Dynamics 365 is available worldwide in Q4 CY2016 (see more details about the Enterprise edition [here](#)). The **Business edition** (including Dynamics 365 for Financials) will be made available on November 1, 2016 **in the US and Canada**, with intensions to additional countries in CY2017. For additional details about the country availability and localization of Dynamics 365 for Financials, visit <https://aka.ms/availabilitydyn365financials>.

How can customers buy Microsoft Dynamics 365 for Financials?

Dynamics 365 for Financials is part of the **Dynamics 365, Business edition**. As such, the only way to currently purchase Dynamics 365 for Financials is via partners who participate in the **Cloud Solution Provider (CSP) program**. Visit <http://aka.ms/csp> to learn more about the CSP program.

Product

Who is the audience for Microsoft Dynamics 365 for Financials?

Dynamics 365 for Financials is optimized to meet the needs of SMBs with roughly **10-250 employees**. These companies typically need more robust capabilities than the financial and accounting packages they started with, but are not yet ready to make a significant investment in highly customized ERP systems.

What are the capabilities of Microsoft Dynamics 365 for Financials?

Dynamics 365 for Financials capabilities span financials management, reporting, fixed assets, supply chain and inventory management, contact/opportunity management, and project management. It also offers multi-company and multi-currency capabilities. Please see the Dynamics 365 for Financials [more details](#).

What is the difference between Microsoft Dynamics NAV and Microsoft Dynamics 365 for Financials?

Dynamics NAV is **software**, available via perpetual, subscription, and/or SPLA licensing, that can be deployed on-premises or in the cloud and extended using Dynamics NAV customizations or extensions.

Dynamics 365 for Financials is a new SaaS (cloud-only) **service**, available only via CSP, that can be extended via apps (validated extensions) in [Microsoft AppSource](#).

Which Microsoft Dynamics NAV functionality is/isn't included in Microsoft Dynamics 365 for Financials?

Many of the capabilities available in Dynamics NAV will also be available in Dynamics 365 for Financials. However, they will be available in a way that is customer-ready out of the box, so these capabilities may surface differently in Financials than Dynamics NAV.

We do not currently have plans to make advanced manufacturing capabilities customer-ready out of the box, and surfaced in Dynamics 365 for Financials. However, organizations interested in making Dynamics NAV manufacturing capabilities customer-ready out of the box and bringing them to market within Dynamics 365 for Financials should visit the link [here](#) to learn more about Solution Apps.

Does Microsoft Dynamics 365 for Financials include Payroll?

Dynamics 365 for Financials does not include Payroll capabilities built right into the service; however, customers will be able to continue using their Payroll solution of choice and integrate Financials with the Payroll solution by leveraging apps we anticipate being available in [Microsoft AppSource](#).

How will customers upgrade to new versions of Microsoft Dynamics 365 for Financials?

Dynamics 365 for Financials customers will receive service updates automatically as they become available (approximately one update/month).

Where can partners see what features have recently been released and which features are coming soon?

Partners can see which features have been recently released on the Dynamics 365 for Financials [blog](#). A Dynamics 365 for Financials roadmap tool will be available in the future to illustrate upcoming features.

Is Microsoft Dynamics 365 for Financials a true SaaS/public cloud/multitenant offering managed by Microsoft?

Yes.

Product Continued

Is Microsoft Dynamics 365 for Financials available on mobile devices?

Yes, a Dynamics 365 for Financials mobile app is available. Financials users can get the app during the “Getting Started” tour that launches when a user logs into Financials the first time or they could search for it in their mobile app store (Windows Store, Apple Appstore, or Google Play)

Is Microsoft Dynamics 365 for Financials built on Microsoft Dynamics NAV/GP/SL?

Microsoft Dynamics 365 for Financials is based on the Microsoft Dynamics NAV platform and several other Microsoft technologies.

Will customers buy Microsoft Dynamics 365 for Financials directly from Microsoft?

No. Dynamics 365 for Financials is part of the Dynamics 365, Business edition. As such, the only way to currently purchase Dynamics 365 for Financials is via partners who participate in the Cloud Solution Provider (CSP) program. Visit <http://aka.ms/csp> to learn more.

Is Microsoft Dynamics 365 for Financials designed to compete with QuickBooks?

No. Dynamics 365 for Financials is specifically targeted at SMBs that have outgrown basic accounting/financial tools (e.g. Intuit QuickBooks).

Is a Microsoft Dynamics 365 for Financials trial available, and how long is the trial?

Yes. Prospects can sign up for a free trial from the Dynamics 365 for Financials landing page or by going [here](#). Prospects who sign up for the trial are allowed to use the demo Company (with demo data) for as long as they'd like (no expiration). However, if the prospect chooses to set up a new Company within the trial tenant (to view their own data in the system, for example), they will only be able to access the new Company for 30 days. However, they will be able to continue to use the demo Company (with demo data) for as long as they'd like (no expiration).

What happens to Microsoft Dynamics 365 for Financials prospects who sign up for a Microsoft-led trial?

Prospects who initiate a trial will begin their experience with the **Getting Started Tour**, which will encourage them to move through additional aspects of Financials, including uploading their own data. During the trial, users will receive in-trial **nurture touches** and will be encouraged to reach out to Microsoft tele-sales for pre-sales assistance and to be **connected with a CSP partner**. Resellers who wish to be considered for lead distribution should contact their local Microsoft subsidiary.

Does a customer need to have a Microsoft Office 365 subscription to use Microsoft Dynamics 365 for Financials?

No. However, to seamlessly experience Dynamics 365 for Financials from within Office 365, customers must have an Office 365 subscription that includes Exchange Online.

Will Microsoft Dynamics 365 for Financials work with Microsoft Dynamics CRM Online (Dynamics 365, Enterprise edition Plan 1)?

Yes.

Product Continued

What's the difference between the opportunity management capabilities in Microsoft Dynamics 365 for Financials and the CRM capabilities in Dynamics 365 for Sales?

The opportunity management capabilities in Financials focus on sales transactions in the quote-to-cash process including quotes, orders and invoice. Microsoft Dynamics 365 for Sales, Enterprise edition offers much richer marketing, opportunity management and sales forecasting capabilities. Additional details about the Business edition versions of Dynamics 365 for Sales, Dynamics 365 for Marketing, and Dynamics 365 for Customer Service will be available soon.

What SLA does Microsoft Dynamics 365 for Financials have?

Refer to details found [here](#).

Where can partners and customer find Microsoft Dynamics 365 for Financials Help documentation?

Help documentation can be accessed in a variety of ways. For example, users can click a field label to get a tool tip explaining the purpose of the field, from within Dynamics 365 for Financials. If there is more information available, then "Learn more" will be displayed in the tool tip to get more information. Additionally, Help will be displayed on the Financials [website](#).

Is it possible for partners to get access to the Microsoft Dynamics 365 for Financials Help videos?

Partners and customers can view the Dynamics 365 for Financials Help videos from within Dynamics 365 for Financials in the new Business Assistance overview that helps customers and partners set Microsoft Dynamics 365 up in a structured and guided way. Microsoft does not currently make these video files available to partners to use for purposes such as exposing on partner websites.

How do customers get support for Microsoft Dynamics 365 for Financials?

Dynamics 365 for Financials can be purchased through a CSP partner. CSP partners are responsible for providing end-customer support. However, CSP partners can use Microsoft support to address undocumented questions or service issues. Click [here](#) to see partner support options offered by Microsoft.

Is it possible to customize Microsoft Dynamics 365 for Financials?

It is possible to extend Dynamics 365 for Financials with apps available in [Microsoft AppSource](#).

If you have experience with Microsoft Dynamics NAV, you can find additional documentation on how to build apps for AppSource here: <http://aka.ms/AppsForFinancials>.

If you do not have experience with Microsoft Dynamics NAV, visit [Microsoft AppSource](#) → "Submit an app" and you will be contacted by a Microsoft representative to discuss your app idea and available guidance/programs.

Who can install / uninstall Microsoft Dynamics 365 for Financials apps from Microsoft AppSource?

When using the Dynamics 365 for Financials trial, all users can install/uninstall apps by default. However, when a customer has a paid subscription, only the CSP partner (delegated admin) can install/uninstall apps – customer users are not allowed to do this themselves.

Product Continued

What is the Common Data Service (CDS)?

The common data service (CDS) is a capability available through PowerApps, a cloud-resident business database, built on years of experience with Microsoft customers. It will come with a large set of standard business entities spanning both business process (Dynamics 365) and productivity (Office 365). The standardization and consistency of schema enables partners and customers to build innovative applications and to automate business processes spanning the entire business process spectrum with confidence their solutions can be easily deployed and used across Microsoft's entire customer base.

Will the Common Data Service (CDS) be available for Microsoft Dynamics 365 for Financials? If so, when?

Yes. However, timing on when this is available has not yet been released.

Where can product feedback be submitted?

<https://community.dynamics.com/business/f/758>

Pricing & Licensing

How does a customer purchase Microsoft Dynamics 365 for Financials?

Dynamics 365 for Financials is part of the Dynamics 365, Business edition. As such, the only way to purchase Dynamics 365 for Financials is via partners who participate in the Cloud Solution Provider (CSP) Program. Visit <http://aka.ms/csp> to learn more.

How much will Microsoft Dynamics 365 for Financials cost?

Pricing information about Dynamics 365 for Financials is available in the Dynamics 365, Business edition [learning path](#) in early November.

What is the difference between a full user and a light (Team Member) user?

A full user of Dynamics 365 for Financials can utilize the feature rich functionality of this app. A light user (Dynamics 365 for Team Members, Business edition) can do the following:

- **Read** anything that's enabled in Financials or any other Dynamics 365 Application
- **Update** existing data and entries in Financials. Existing data are records like customer, vendor or item records which are already created. Entries means entries on which it is specifically allowed from an accounting perspective to update specific information. (e.g. due date on customer ledger entries)
- **Approve** or **reject** tasks in all workflows assigned to a user
- **Create, edit, delete** a quote or requisition
- **Create, edit, delete** personal information
- Enter a **Time Sheet** for Jobs
- Use **PowerApps** for Dynamics 365

See the Dynamics 365 Business edition [licensing guide](#) for more information.

Will Microsoft Dynamics 365 for Financials be available on-premises?

No. Dynamics 365 for Financials is a SaaS cloud service so it will not be available on premise or in private clouds.

Is there a minimum number of Microsoft Dynamics 365 for Financials seats a customer must purchase?

No.

Are Internal Use Rights (IUR) available for Microsoft Dynamics 365 for Financials?

We plan to make Dynamics 365 for Financials Internal Use Rights (IUR) available to partners who qualify; however, details are not yet available. To learn more about what Internal Use Rights are, go [here](#).

Is it possible to set up a tenant with 1 Team Member user, and no Full Users?

Per the [licensing guide](#), Dynamics 365 for Team Members, Business edition requires that at least one full user be licensed with Dynamics 365 for Financials.

Pricing & Licensing Continued

Can a customer's external accountant access Microsoft Dynamics 365 for Financials?

Yes. Customers who have external accountants who wish to connect to the Financials Application can purchase one External Accountant license per tenant at no additional cost. External Accountant Licenses contain all the same use rights as Dynamics 365 for Financials full user license with the exception of the following: Access to user set up or admin tasks and CRM.

Is Microsoft Office 365 included in Microsoft Dynamics 365?

No. Office 365 is not included or required. However, to seamlessly experience Dynamics 365 for Financials from within Office 365, customers must have an Office 365 subscription that includes Exchange Online.

Which PowerApps capabilities are included with Microsoft Dynamics 365 applications (e.g. Dynamics 365 for Financials)?

PowerApps and Microsoft Flow capabilities are included in all of the Dynamics 365 applications and Team Members subscriptions so that users can create, modify and use mobile apps based on Dynamics 365 data.

Microsoft Dynamics 365 for Financials users have PowerApps and Flow use rights...when would I need to also license them with standalone P1 or P2 licenses?

Dynamics applications (e.g. Dynamics 365 for Financials) include PowerApps and Flow use rights that are limited to the data sources associated with these services plus the [standard connectors](#) for common cloud services. If you need users to run applications that access data outside this scope (e.g. Salesforce, the Common Data Service, SAP, etc.) these users will need a **PowerApps P1** license. If you need users to run applications that access data outside the scope of Dynamics apps, and need the ability to model business data in the Common Data Service (CDS), or perform administrative tasks such as viewing usage and setting policy they will need a **PowerApps P2** license which will also be included in the Dynamics 365 Business edition **Plan** (when available).

Aside from PowerApps/Flow, does Microsoft Dynamics 365 for Financials include any additional product licenses (e.g. Power BI, Cortana Intelligence, Azure IoT)?

Dynamics 365 for Financials enables customers and partners to seamlessly expose (e.g. Power BI) and utilize (e.g. Cortana Intelligence) Microsoft technologies within Dynamics 365 for Financials. However, when customers or partners choose to do this, additional licenses are often required. For example, a customer's [Power BI SaaS subscription](#) is required to set up Power BI SaaS within Financials.

However, each Dynamics 365 for Financials tenant does include 1800 seconds per month/tenant of Cortana analytics. This can currently be used to consume Azure Machine Learning from functionality that utilizes the Dynamics 365 Time Series API (e.g. the [Sales and Inventory Forecast app](#)). Partners can also build extensions leveraging the Time Series API that could take advantage of the Cortana Analytics allowance. However, if partners build Cortana analytics solutions that do not utilize a Dynamics 365-provided API (ex: Bing Autosuggest, Recommendations, etc), the appropriate incremental licensing will need to be in place.

Where can I find more information about what's available for CRMOL SMB customers?

Pricing and licensing information can be found [here](#).

Pricing & Licensing Continued

What are the options for existing Microsoft Dynamics customers who want to transition to Microsoft Dynamics 365 for Financials?

Discounted Dynamics 365 for Financials pricing is available to qualifying existing Dynamics customers for a limited amount of time. Pricing information about Dynamics 365 for Financials is available in the Dynamics 365, Business edition [learning path](#) in early November.

Partners

Why is Microsoft Dynamics 365 for Financials good news for existing Microsoft Dynamics partners?

Dynamics 365 for Financials provides Dynamics partners with a strong new cloud first, mobile first offering to compete and drive revenue in the SaaS ERP/Accounting space for organizations with roughly 10-250 employees. SMBs in this traditionally underserved segment have an affinity to SaaS solutions, have typically outgrown their entry level accounting and financial management solutions, and understand the productivity benefits of embedding business process within Office 365.

Why is Microsoft Dynamics 365 for Financials good news for CSP partners?

Dynamics 365 for Financials will provide all CSP partners with a highly differentiated and compelling pure cloud business management solution to add to their portfolio. Dynamics 365 for Financials delivers a natural upsell/cross-sell motion for Office 365, while also helping to drive increased consumption, high-value usage of Office 365 capabilities, and an additional partner revenue opportunity.

With the new SaaS option, will Microsoft eventually start selling directly to customers?

Microsoft has no plans currently to sell Dynamics 365 for Financials directly to customers. Dynamics 365 for Financials is part of the Dynamics 365, Business edition. As such, the only way to purchase Dynamics 365 for Financials is via partners who participate in the Cloud Solution Provider (CSP) Program. Visit <http://aka.ms/csp> to learn more.

Where can partners learn more about Microsoft Dynamics 365 for Financials, to determine if it is something to add to your solution set?

The Microsoft Dynamics 365 for Financials Partner Getting Started Guide will include high-level guidance and links to relevant tools for interested partners to utilize. Partners can access the Guide in the Dynamics 365, Business edition [learning path](#) in early November.

Additionally, if you are interested in selling Financials in to the US or Canada, contact d365-smb@microsoft.com to learn about local readiness activities. If you are interested in selling in other countries, contact your local Microsoft subsidiary to learn about activities that might be upcoming when Financials becomes available in additional geographies.

Is it possible to get in-person training on Microsoft Dynamics 365 for Financials?

If you are interested in selling Dynamics 365 for Financials in the US or Canada, contact d365-smb@microsoft.com to learn about local readiness options. If you are interested in selling in other countries, contact your local Microsoft subsidiary to learn about training activities that might be upcoming when Financials becomes available in additional geographies.

Is there a Microsoft Dynamics 365, Business edition competency?

Microsoft will have a new competency available; however, details are not yet available.

What thru-partner marketing materials are available for Microsoft Dynamics 365 for Financials?

Dynamics 365 for Financials marketing materials can be found on the [MPN Marketing site \(RTG\)](#) in early November. Additionally, we have plans to make additional tools and videos in the coming weeks/months.

Partners Continued

When will the Microsoft Dynamics 365 logo be released, and where can partners find it?

Per Microsoft branding policy, partners are not allowed to use the Microsoft logo, Microsoft Dynamics 365 iconography, or any other Microsoft brand assets on materials without explicit approval.

Are there plans to add Microsoft Dynamics 365 for Financials to the Customer Immersion Experience (CIE)?

Yes. However, we do not have information at this time regarding when it will be available. Until it is available in [CIE](#), partners can leverage demo.microsoft.com to provision an Office 365 demo environment that will be good for 3 months. Additionally, partners can sign up for a trial of Dynamics 365 for Financials, and use the trial demo data company (Cronus) with no expiration date.

What happens to Microsoft Dynamics 365 for Financials prospects who signs up for a Microsoft-led trial?

See answer [above](#).

How can a partner purchase Microsoft Dynamics 365 for Financials for a customer?

Dynamics 365 for Financials is part of the Dynamics 365, Business edition. As such, the only way to purchase Dynamics 365 for Financials is via partners who participate in the Cloud Solution Provider (CSP) program. Visit <http://aka.ms/csp> to learn more about the CSP program, including how to sign up.

Is it possible for partners to see Microsoft Dynamics 365 for Financials customer consumption reporting?

At this time, this capability is not available.

My organization doesn't have Microsoft Dynamics experience, but we're interested in offering Microsoft Dynamics 365 for Financials to our Office 365 customers. Where can I find a list of partners to engage with?

Partners who offer packaged Dynamics 365 for Financials service offerings can be found by going to <http://appsource.microsoft.com> → Partners → filter on Dynamics 365 for Financials. Additionally, you can speak to your local Microsoft representative for details.

My organization doesn't have Microsoft Office 365 experience, but we're interested in offering Office 365 to our Microsoft Dynamics customers. Where can I find a list of partners to engage with?

Speak to your local Microsoft representative for information available in your country.

How do I convert a trial customer to a paid subscription? Will it require a data migration?

Converting a Dynamics 365 for Financials trial customer to a paid subscription will not require a data migration. Partners can find step-by-step instructions on how to do this in the Dynamics 365, Business edition [learning path](#) in early November.

Is it possible for partners to get access to the Microsoft Dynamics 365 for Financials Help videos?

See answer [above](#).

Partners Continued

Is it possible to customize Microsoft Dynamics 365 for Financials?

See answer [above](#).

Do I need to have Microsoft Dynamics technical experience to build a Microsoft Dynamics 365 for Financials app?

If you are developing a service-to-service integration, only basic Dynamics data synchronization mechanism knowledge is required.

If you are extending the functionality in Financials, more in-depth Dynamics technical experience is required.

We will be announcing new tools (date TBD) that will make it easier for partners to build any Dynamics 365 for Financials apps without requiring Dynamics experience.

How do apps work and how can partners troubleshoot?

Apps are installed at a per-tenant level (not per-user). At this time, if a customer would like to try an app outside of their production environment, they would need to do so within a Dynamics 365 for Financials trial tenant.

Partners can troubleshoot app issues by logging into the customer's tenant, leveraging the admin-on-behalf-of functionality provided in CSP.

Is it possible to offer Microsoft Dynamics 365 for Financials in a country where it has not yet launched?

Not at this time.