QBS TALK

Microsoft Dynamics 365
Licensing & Pricing
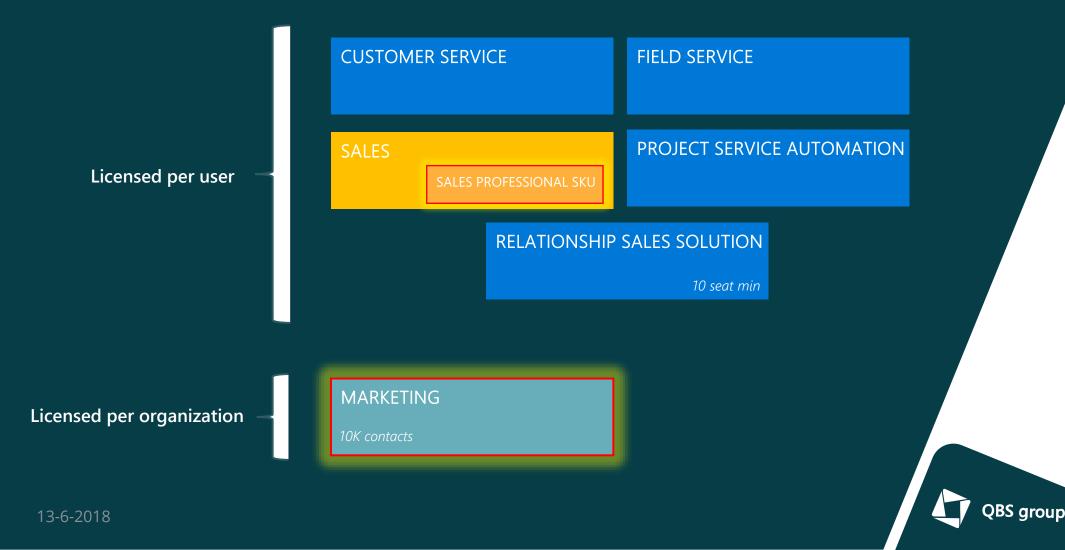
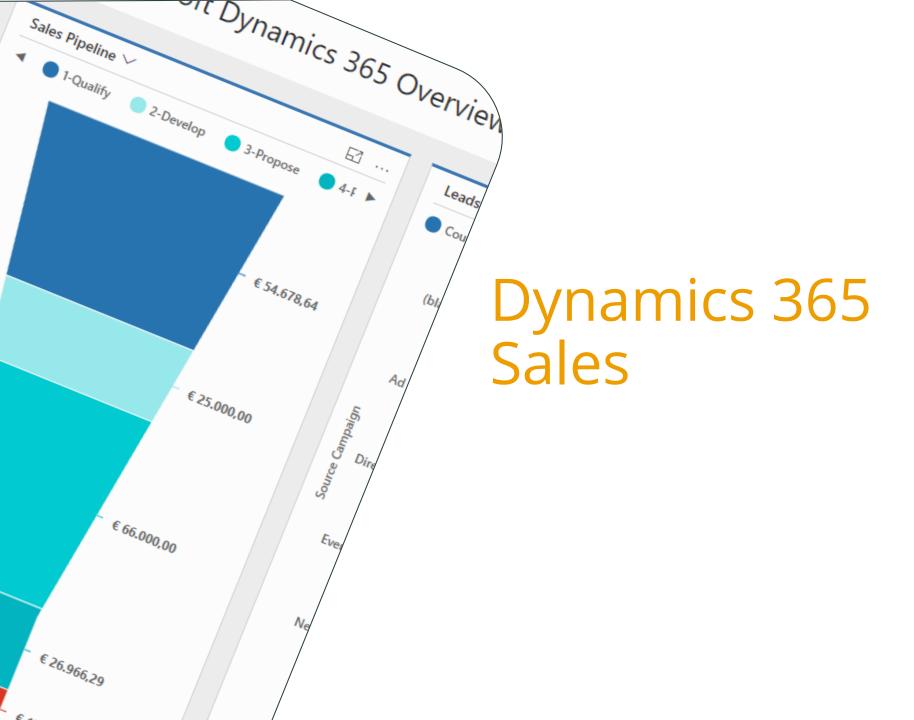Arjen Jansen

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Dynamics 365 overview

Plans ↔

Full Users ↕

Applications ↕

Additional Users ↕

DYNAMICS 365 PLAN			

	CUSTOMER ENGAGEMENT PLAN		UNIFIED OPERATIONS PLAN *20 seat min*

LINKEDIN SALES NAVIGATOR *10 seat min*	SALES *SALES PROFESSIONAL*	CUSTOMER SERVICE	RETAIL *20 seat min*	FINANCE AND OPERATIONS	BUSINESS CENTRAL

	FIELD SERVICE	PROJECT SERVICE AUTOMATION	TALENT *5 seat min*	*Included with Unified Operations Plan*

MARKETING *10K contacts*	MARKETING *2K contacts* *Included with 10 seats of Customer Engagement Plan*	POWERAPPS	POWERAPPS

DEVICE *50 seat min*
ACTIVITY

TEAM MEMBERS

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Customer Engagement Apps

Licensed per user

CUSTOMER SERVICE	FIELD SERVICE

SALES	PROJECT SERVICE AUTOMATION
SALES PROFESSIONAL SKU	

RELATIONSHIP SALES SOLUTION

10 seat min

Licensed per organization

MARKETING

10K contacts

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Dynamics 365
Sales

Dynamics 365 for Sales SKUs Lineup

More complex, configurable and intelligent

More out-of-the-box and MVP

Relationship Sales	$135-$97
Sales Enterprise	$95
Sales Professional	$65
Team Members	$8

Sales Professional is a SKU for customers that need core sales functionality

Offering Terms:
- Tenant level mix and match is allowed when Sales Enterprise and Sales Professional are separated by instance
- CRM online Basic users are eligible to the lower priced transition SKUs to Sales Professional

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Dynamics 365 for Sales entitlement

	Dynamics 365 for Sales Enterprise	Dynamics 365 for Sales Professional
Production Instance	1 included	1 included
Non-Production Instance	1 included	NA*
Portal	1 included (5 Sale Enterprise users minimum)	NA*
Dual Use Rights	Dynamics 365 (on-premises)	NA
Subscription Licenses	Named users and devices	Named users

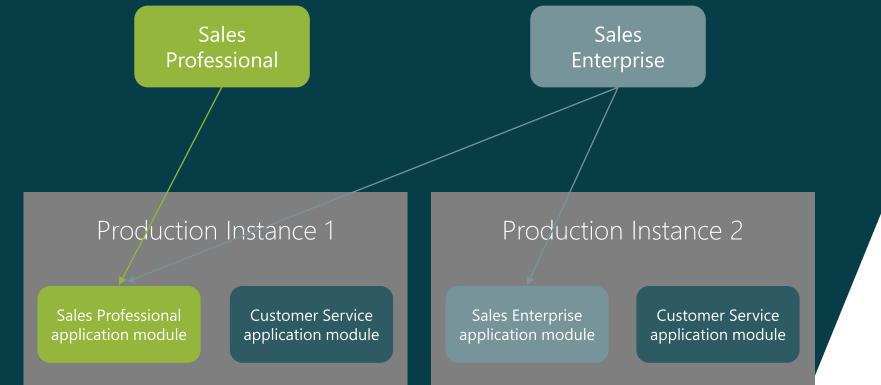*Additional Non-Production Instance and additional Portal Add-ons available today may be purchased

All included items are per tenant

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Professional vs. Enterprise features

*3rd Party solutions added from AppSource do not count against this limit. Limit to size of 3rd party solution.

		Sales Professional	Sales Enterprise
		Per User	Per User
User Cap		No cap	No cap
Sales Management	Lead and opportunity management	●	●
	Marketing lists, sales campaigns	●	●
	Product, price lists	●	●
	Quotes, orders, invoices	●	●
	Competitors, sales goals, territory management		●
	Product taxonomy, relationships, hierarchies		●
Social Engagement			●
Gamification			●
Voice of Customer			●
Mobile offline sync			●
PowerApps for Dynamics 365			included
Dynamics 365 for Sales embedded intelligence			● (new)
Case management	Create, read, update, delete cases	● (new)	● (new)
Customization in application module	Custom entities*	max 15	unlimited
	Business Process Flows*	max 5	unlimited
	Custom Workflows*	max 15	unlimited
	3rd Party Application Installs	max 10	unlimited
	Forms per entity	max 2	unlimited
Team Members	Functionality: Accounts, Contacts, Activities, Knowledge, etc.	●	●
	Custom Entities*	●	●
Reporting and analysis	Export to Microsoft Excel, Advanced Analytics with Power BI license	●	●
	Real-time sales reports and dashboards	max 5 report customizations	standard & custom R/D + SRS reports

Dynamics 365 for Sales instance separation

Sales Professional

Sales Enterprise

Production Instance 1

Sales Professional application module

Customer Service application module

Production Instance 2

Sales Enterprise application module

Customer Service application module

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Dynamics 365 for Sales mix and match deployment

Customers may purchase a combination of Sales Professional and Sales Enterprise to meet their organizations' n
Sales Enterprise and Sales Professional <u>must</u> be deployed in separate instances

Customer Scenario – 1 Tenant	Comment
Sales Enterprise + Sales Professional	Sales Enterprise users may access to all instances on a tenant. Sales Enterprise users may access Sales Professional instance but Sales Professional may not access Sales Enterprise instance
Customer Engagement Plan + Sales Professional	Customer Engagement Plan, Dynamics 365 Plan and Relationship Sales users may access both Sales Enterprise and Sales Professional instances
Customer Engagement Plan + Sales Professional + Team Members	Team member use rights do not change. The Customer Engagement Plan, Sales Professional scenario is as listed in the above section

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Microsoft Dynamics 365 Offer for SMB

- **SMB offer extended to 30-6-2018**
- Existing customer may continue to renew per offer terms until November 2019

Current License		Transition License		Customer Needs
Dynamics 365 for Sales	$40	Dynamics 365 Customer Engagement Plan	$115-$60	Full Sales functionality or other enterprise features
		Dynamics 365 for Sales Enterprise	$95	Advanced sales functionality (goals, hierarchy, etc.) or other enterprise features
		Dynamics 365 for Sales Professional	$65	Simple sales and values cases or simple sales only
Dynamics 365 for Sales and Customer Services	$65	Dynamics 365 Customer Engagement Plan	$115-$60	Full Customer Services or other enterprise features
		Dynamics 365 for Sales Professional	$65	Cases

Available in CSP

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Dynamics 365 Marketing

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Microsoft Dynamics 365 for Marketing

Capabilities Summary

Multi-channel campaigns	Email Marketing	landing pages & forms	Webinars, phone calls & In-person events	LinkedIn Connector
Lead Nurturing	Campaign designer	360 degree view	Behavior based lead nurture	Lead prioritization
Embedded intelligence	Multiple lead scoring	Dynamic segmentation	Customer Insights	Notifications
Event management	Webinars using ON24	Events portal	Attendance tracking	Speaker management
Reporting	Dashboards	Surveys	Embedded PowerBI	Configurable

Dynamics 365 for Marketing packaging

Offer until 30-9-2018:
50% discount on additional 5K contacts SKU's

Learn more about Marketing application here

	Dynamics 365 Marketing Application Standalone	Dynamics 365 Marketing Plan "Attach"	Dynamics 365 Marketing Application "Attach"	Transition "Attach" offer for MDM Customers
Base Package (per month)	**$1500** (10k Contacts)	**Included** min 10 plan seats[+] (2k Contacts)	**$750** (10k Contacts)	**Free** (10k Contacts)
Additional Contacts (per month)	**$250** (5K Contacts)	**$600 for 1st 8K*** **$250** (5K Contacts)*	**$250** (5K Contacts)	**$250** (5K Contacts)
Customer	Non-Dynamics customer	Dynamics 365 Customer Engagement Plan customers	Dynamics 365 Customer Engagement Application customers	Existing MDM Customers
GA date	**4/1**	**4/1**	**4/1**	**2/1** (Lead Status)
Channels	EA, CSP, Web-direct, MPSA	EA, CSP, Web-direct, MPSA	EA, CSP, Web-direct, MPSA	EA only

[+]Customers with at least 10 seats of Dynamics 365 Customer Engagement Plan and/or Dynamics 365 Plans will get Marketing application with 2K contacts
*Additional Contact SKU available on May 2018 price list
NOTE: The 1st 8K contacts pack must be purchased for $600 before the Additional 5K contact pack ($250) may be purchased.

13-6-2018

All pricing subject to change please consult price list for actual pricing

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Dynamics 365 for Marketing inclusions and entitlement limits

	Dynamics 365 Marketing Application Standalone	Dynamics 365 Marketing Plan "Attach"	Dynamics 365 Marketing Application "Attach"	Transition "Attach" offer for MDM Customers
Base Package (per month)	**$1500** (10k Contacts)	**Included** min 10 plan seats[+] (2k Contacts)	**$750** (10k Contacts)	**Free** (10k Contacts)
Inclusions	• Microsoft Social Engagement • Voice of the Customer for Microsoft Dynamics 365 • 1 Portal • Non-Production/ Production Instance • Storage	No additional entitlements *(Entitlements included with Dynamics 365 Customer Engagement Plan)*	No additional entitlements *(Entitlements included with Dynamics 365 Customer Engagement Applications)*	No additional entitlements *(Entitlements included with Dynamics 365 Customer Engagement Plan/ Applications)*
Entitlement Limits	• Email/month = Up to 10 times the number of contacts purchased • Up to 100 active live segments			

[+]Customers with at least 10 seats of Dynamics 365 Customer Engagement Plan and/or Dynamics 365 Plans are entitled to Marketing application with 2K contacts
*Additional Contact SKU available on May 2018 price list
 NOTE: The 1st 8K contacts pack must be purchased for $600 before the Additional 5K contact pack ($250) may be purchased.

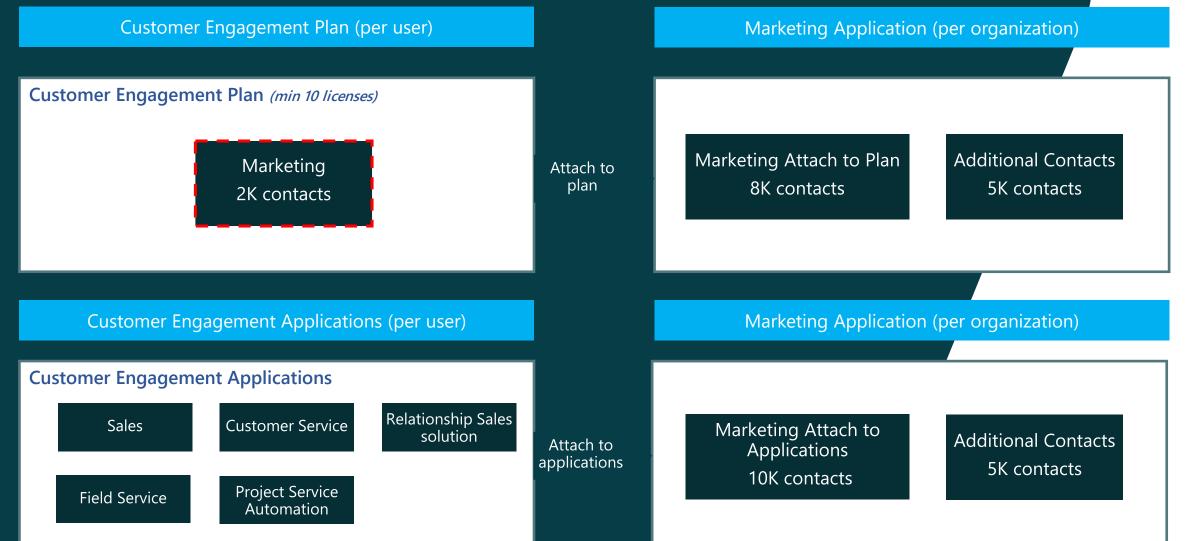QBS group

Dynamics 365 for Marketing standalone packaging

Marketing Application (Per Organization)

Marketing Standalone
application
10K contacts

Additional Contacts
5K contacts

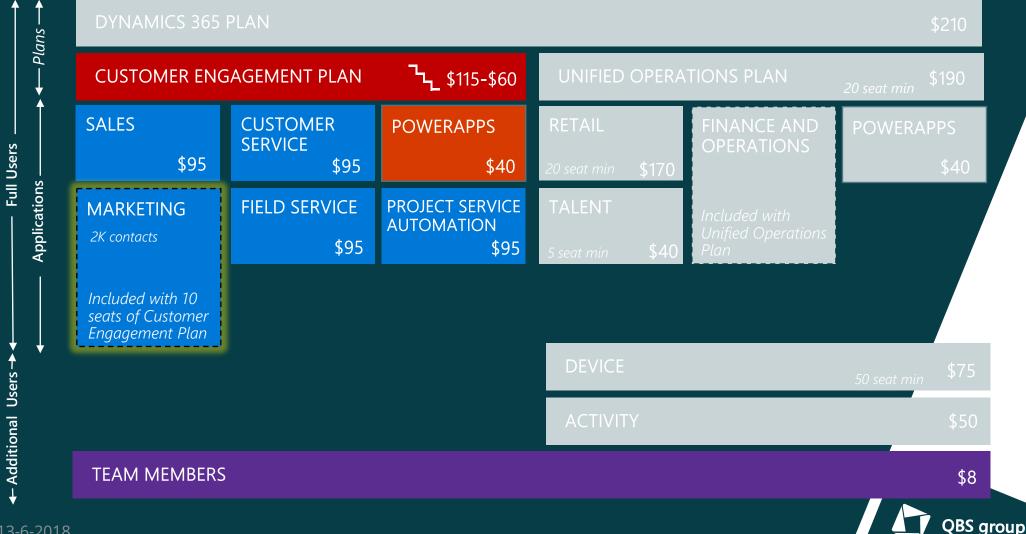QBS group

Dynamics 365 for Marketing attach packaging

Customer Engagement Plan (per user)

Customer Engagement Plan *(min 10 licenses)*

Marketing
2K contacts

Attach to plan

Marketing Application (per organization)

Marketing Attach to Plan
8K contacts

Additional Contacts
5K contacts

Customer Engagement Applications (per user)

Customer Engagement Applications

Sales

Customer Service

Relationship Sales solution

Field Service

Project Service Automation

Attach to applications

Marketing Application (per organization)

Marketing Attach to Applications
10K contacts

Additional Contacts
5K contacts

Packaging & Pricing

Customer Engagement Plan add-ons

Infrastructure Add-Ons

$550	$150	$500	$5
Production Instance	Additional Non-Production Instance	Additional Portal	Additional Database Storage (1GB)

Consumption Add-Ons

$50	$100	$700	$4000	$250
Additional Portal Page Views (500K)	Social Engagement Additional Posts (10K)	Social Engagement Additional Posts (100K)	Social Engagement Additional Posts (1M)	Marketing Additional 5K Contacts

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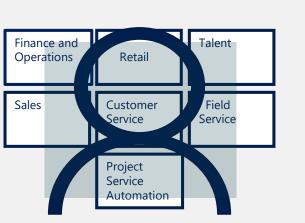
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Optimized licensing for each company

Mix and Match

Each user may be licensed only for the functionality they need across Plans, Applications, Activity, and Team Members

Plans*	Applications*	Activity	Team Members

CONTOSO EMPLOYEE BASE

*Includes Team Members functionality

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Team Members

- Share knowledge across your organization
- Provide all people with valuable insights
- Execute basic customer and business processes

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Plans, Applications and Team Members

Plans

Finance and Operations	Retail	Talent
Sales	Customer Service	Field Service
	Project Service Automation	

Full extensibility, workflow, & embedded business intelligence

Applications

Finance and Operations	Retail	Talent
Sales	Customer Service	Field Service
	Project Service Automation	

Application specific extensibility, workflow, & embedded business intelligence

Activity

Transactional use of applications & embedded business intelligence

Team Members

Execute basic processes, **share knowledge**, and leverage embedded business intelligence

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Example: License comparison in Dynamics 365 for Sales

		Team Members	Sales Professional	Sales Enterprise
		Per User	Per User	Per User
Access	Access anywhere: Web, Mobile, and Tablet applications via Outlook	●	●	●
Read	Full read across all Dynamics applications	●	●	●
Team Members	Team Members functionality: accounts, contacts, activities, knowledge, etc.	●	●	●
	Custom entities*	●	15 max	●
Edit	Lead management		●	●
	Opportunity management	See details+	●	●
	Marketing lists, sales campaigns		●	●
	Product, price lists		●	●
	Quotes, orders, invoices		●	●
	Competitors, sales goals, territory management			●
	Product taxonomy, relationships, hierarchies			●
	Voice of Customer, Social Engagement, Mobile Offline, Gamification (Admin & Player)			● (online)
	Dynamics 365 for Sales embedded intelligence			●
	Case management		●	●
Platform	PowerApps			● (online)
Price		$8 per user/month	$65 per user/month	$95 per user/month

*Actions may be performed only against records corresponding to entities included in the use rights
+Create and update Opportunities via Portal only for non-employee or non-dedicated contractor users
Online means there is no equivalent on-premises functionality for dual use rights

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External users

External Users

Customers and suppliers

✕ User SLs not required

↑ Includes the organization's customers and suppliers not performing business processes on behalf of the organization (for example, supply chain vendors).

Microsoft Dynamics 365

Internal Users

Employees, agents, contractors, and other vendors

✓ User SLs required

↑ Includes vendors performing business processes on behalf of the organization or integrated into the organization's operations.

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Pricing & licensing resources

Microsoft.com

Microsoft.com
- Licensing Guides
- Support Plans
- Availability & Localizations

Yammer Communities

Dynamics 365 Licensing and Pricing

LinkedIn Microsoft Sales Integration

Microsoft Social Selling program

Microsoft Cloud Partner Community

PartnerSource

Dynamics 365 Pricing and Licensing
- Licensing Overview Deck
- Licensing Guides
- Transition guidance
- Term Sheets for Dynamics 365 Offers
- Dynamics 365 SKU Cheat Sheet
- FAQs

Dynamics 365 Services Support
- Datasheets
- Quick Start Guide
- Support Plan Comparison

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Q&A

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Arjen Jansen

Arjen Jansen has more than 25 years experience in various fields in the IT industry, creating and building numerous businesses and product offerings to help both customers and partners in achieving optimal business value.

Arjen is active in the Microsoft Dynamics (CRM) channel for about 17 years and has built several Dynamics CRM partner companies, the last one being MindsUnited. MindsUnited is an independent ISV for Dynamics and the creator of JumpStart 365 and Cloud Partner Panel, solutions to quickly onboard, extend and manage Dynamics solutions in the cloud.

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