

Microsoft

Microsoft
Dynamics
CRM Online

Licensing and Pricing Guide



Microsoft
Dynamics CRM

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Using This Guide

Use this guide to improve your understanding of how to license Microsoft Dynamics CRM Online. It is not intended to guide you in choosing your products and services. The examples presented in this guide are illustrative. Microsoft Corporation reserves the right to revise the existing version without prior notice.

For help determining the right technology solution for any given organization, including the license requirements for a specific product or scenario, consult with your Microsoft Dynamics Certified Partner or your Microsoft account team.

This guide does not supersede or replace any of the legal documentation covering use rights.

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Introduction

Microsoft Dynamics CRM provides flexible, high value, and simple-to-understand licensing for Dynamics CRM in the cloud. The new multi-tiered licensing model offers a variety of benefits, including:

- **Flexibility.** Customers can mix and match various types of user licenses within a deployment to accommodate the specific needs of their businesses.
- **High value.** Customers can choose from highly competitive licensing offerings to optimize the Total Cost of Ownership.
- **Easy-to-Understand.** Customers can obtain licenses based on the functionality that users require (rather than how users access the application).
- **Choice.** Equivalency in the licensing use rights of online and on- premises licenses makes it easier for customers to compare and decide what works best for them.

User-based Subscription Licensing Requirements

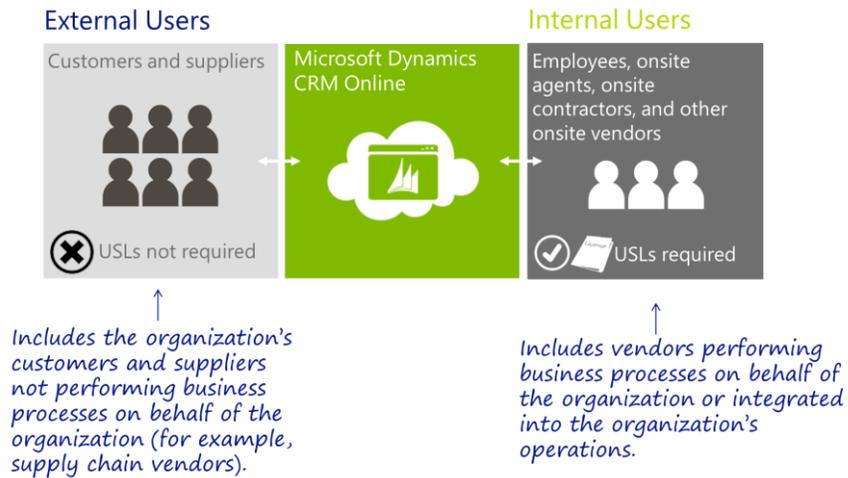
Internal and External Users

With Microsoft Dynamics CRM Online and Parature, from Microsoft, you must license each internal user who will access the service with a USL. Access by external (third party) users is included with the subscription; these users do not require USLs unless using Microsoft Dynamics CRM client applications and graphical user interface (GUI). Third party users are users that are not either (i) the customer's or the customer's affiliates' employees, or (ii) the customer's or the customer's affiliates' contractors or agents. In this sense, the definition of third party users does not extend to onsite contractors, vendors, and users performing business processes on the customer's behalf.

Microsoft Dynamics Marketing and Microsoft Social Listening do not distinguish internal and external users in their licensing terms. You must license external users as well as internal users who will access these services.

Note: Offsite vendors are considered external users when their time is shared in between multiple customer organizations (for example, IT support service vendors serving multiple customer organizations) and they are not in an employee-like relationship.

Figure 1: Internal vs. external users



Basic Licensing Requirements for Internal Users

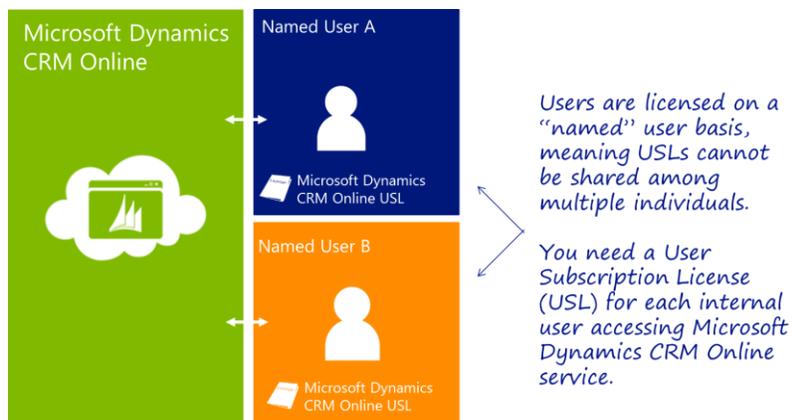
You license access to the Microsoft Dynamics CRM Online service by purchasing a USL for every internal user who will access the service.

Note: Microsoft Dynamics CRM Online does not support device-based licensing.

USLs are assigned on a “named user” basis, meaning each user requires a separate USL; USLs cannot be shared.

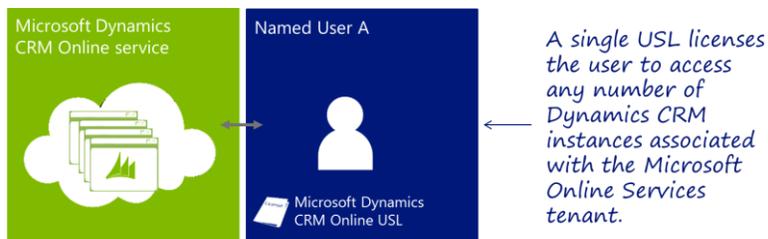
The USL grants users non-perpetual rights (with no buy-out rights) to the use of the Microsoft Dynamics CRM Online service. As long as you are current on your subscription payments and adhere to the Terms of Service, you will have access to the most up-to-date version of Microsoft Dynamics CRM Online.

Figure 2: Basic licensing requirements for Microsoft Dynamics CRM Online



The license includes access rights to the default Microsoft Dynamics CRM Online instance included in the subscription account, and every additional Microsoft Dynamics CRM Online instance associated with the same tenant.

Figure 3: Accessing multiple instances



Other Product Licenses

Licenses for Microsoft Dynamics CRM Online do not include licenses for other products that may be required for your installation; product licensing rights for these must be established separately. The following resources can help you to determine the required products:

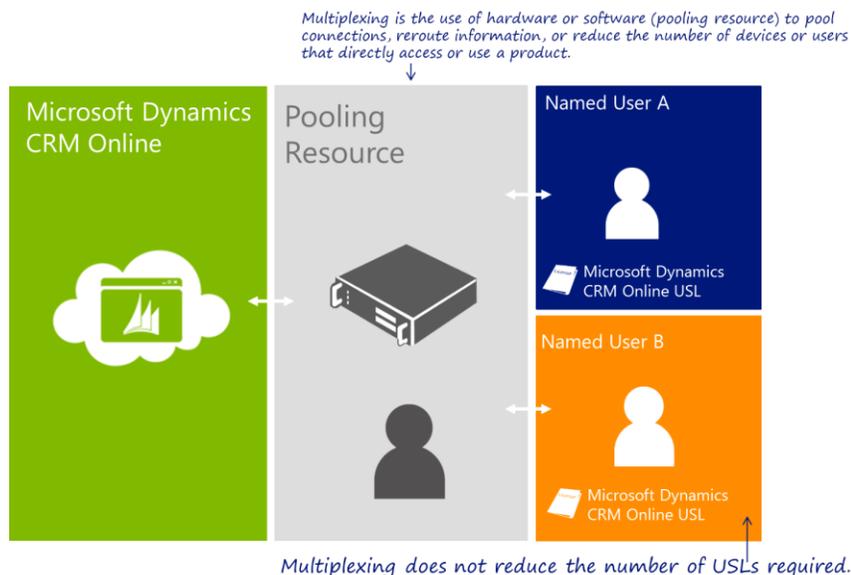
- Implementation Guide and System Requirements for Microsoft Dynamics CRM 2015: <http://go.microsoft.com/fwlink/?LinkID=306081>
- Microsoft License Advisor Tool: <http://mla.microsoft.com/default.aspx>

Multiplexing

Multiplexing is the use of hardware or software (including manual procedures) to reduce the number of devices or individuals that access or use the Microsoft Dynamics CRM Online service by pooling connections. Multiplexing does not reduce the number of licenses required to access the Microsoft Dynamics CRM Online service. Any internal user who accesses the Microsoft Dynamics CRM Online service—whether directly or indirectly—must be properly licensed.

Note: Licensed users may manually rekey information (when coming from non-licensed users) into the Microsoft Dynamics CRM Online service. This scenario is not considered to be multiplexing.

Figure 4: Multiplexing



Note: For additional information about Multiplexing, please refer to the Microsoft Volume Licensing Brief [Multiplexing—Client Access License \(CAL\) Requirements](#).

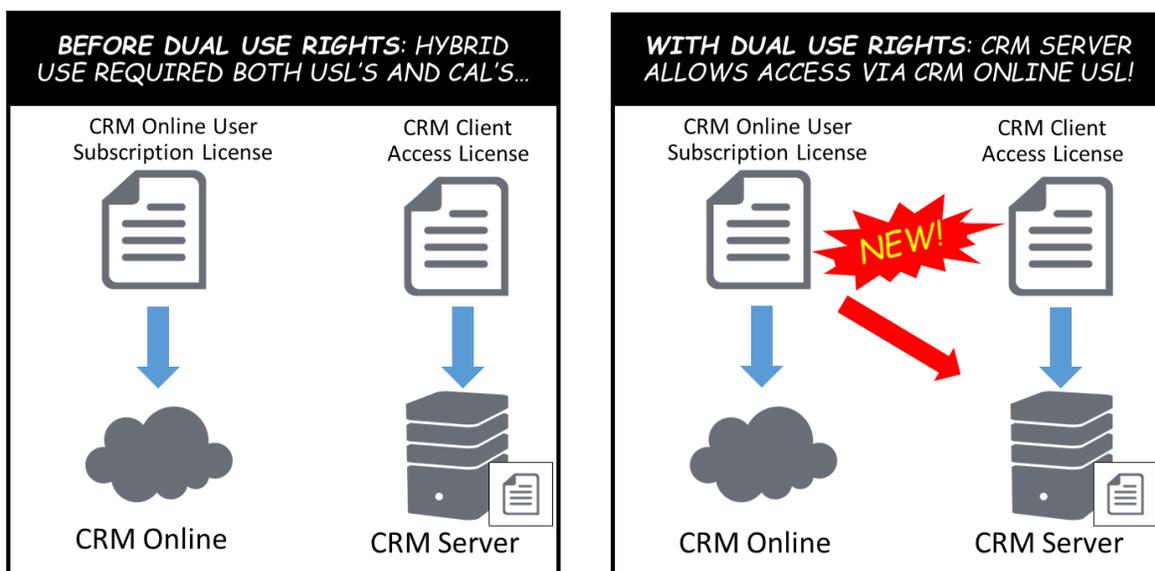
Dual Use Rights

One of the advantages of Microsoft Dynamics CRM is the option to deploy either in Microsoft's Cloud as CRM Online or in a private on-premises or partner-hosted cloud with CRM Server. In some cases, customers may want to deploy both modes simultaneously, for migrating a CRM Server deployment to CRM Online, running private Dev/Test deployments in Azure, or other applications. In the past, customers had to acquire both CALs for CRM Server and CRM Online USL's to allow such hybrid deployments. However, with Dual Use Rights, CRM Online Users no longer need to acquire CALs to access CRM Server instances.

Users licensed with Microsoft Dynamics CRM Online USLs have use rights equivalent to a CAL for the purpose of accessing equivalent on premises workloads. Dynamics CRM Server instances must still be licensed normally, as must all related CALs and supporting servers (e.g., Windows Server and CALs).

Qualifying License:	CRM 2015 Server CAL Right:
CRM Online Enterprise CRM Online Professional	CRM 2015 Professional CAL
CRM Online Basic	CRM 2015 Basic CAL
CRM Online Essential	CRM 2015 Essential CAL

Dual Use Rights are conveyed through Dynamics CRM 2015 Server's license, so Dual Use Rights may only be exercised with servers licensed with Dynamics CRM 2015 server. However, customers may use downgrade rights to deploy a Dynamics CRM 2015 Server license with an earlier version of Dynamics CRM Server and use Dual Use rights to access it with CRM Online USL's.



Available USLs for Microsoft Dynamics CRM Online

Microsoft Dynamics CRM Online offers four levels of user subscription licenses (USLs). To provide you with the flexibility to license the solution based on how your users use Dynamics CRM functionality you have the ability mix-and-match these licenses within a deployment.

Microsoft Dynamics CRM Online Enterprise

For your marketing and customer service departments, Microsoft Dynamics CRM Online Enterprise provides licensed users with access to all of the capabilities of Microsoft Dynamics CRM Online Professional plus Microsoft Dynamics Marketing Enterprise and Parature Enterprise functionality.

Microsoft Dynamics CRM Online Professional

Microsoft Dynamics CRM Professional is the recommended choice your sales teams. It provides licensed users with access to sales, service, and marketing capabilities for a significantly lower price than comparable offerings from other vendors¹. Each CRM Online Professional USL includes rights to Microsoft Social Listening Professional, Microsoft Dynamics Marketing Sales Collaboration, and Unified Service Desk. Subscriptions licensed through Microsoft Online Services Program (MOSP) require a 10-seat minimum purchase of CRM Online Professional to qualify for Microsoft Social Listening functionality. There is no minimum purchase of CRM Online Professional required for Enterprise Agreement customers to qualify for Microsoft Social Listening functionality.

Microsoft Dynamics CRM Online Basic

Microsoft Dynamics CRM Basic is designed for entry level CRM users who need access to basic CRM functionality such as account, contact, lead, and case management. This license is also designed for business analysts who require reporting capabilities of Microsoft Dynamics CRM.

Microsoft Dynamics CRM Online Essential

Microsoft Dynamics CRM Essential is designed for organizational users who are not necessarily tied to sales, services, or marketing functions but still require specific access to activities management and feeds.

USL Comparison

The following provides a summary of the use rights associated with each of the four USL levels. For a detailed comparison, refer to [Appendix A](#).

¹Microsoft Dynamics CRM Professional U.S. list price of \$65/user/month via MOSP compared to Salesforce.com Enterprise list price of \$125/user/month listed at <http://www.salesforce.com/sales-cloud/overview/> as of May 20, 2014.

Figure 5: Available USLs and Capabilities

		Enterprise \$200/u./mo.	Professional \$65 / u./mo.	Basic \$30 / u./mo.	Essential \$15 / u./mo.	
		● Full access rights ○ READ only / Limited access rights ✕ No access rights				
Entities and functionality	Marketing Enterprise, Parature Enterprise	●	✕	✕	✕	Included capacity 1 production instance Up to 1 non-production instance At least 5GB of storage
	Unified Service Desk	●	●	✕	✕	
	Dynamics Marketing Sales Collaboration	●	●	✕	✕	
	Microsoft Social Listening Professional	●	● ¹	✕	✕	Mobile access
	Create workflows, bulk data import and customizations across any entity	●	●	✕	✕	
	Run workflows ²	●	●	○	○	Faster response time
	Opportunities, goals, contracts, quotes, orders, invoices, competitors	●	●	○	✕	
	Sales campaigns, quick campaigns, marketing lists, price lists, product lists	●	●	○	✕	
	Services, resources, work hours, facility, equipment, articles	●	●	○	✕	Premium support offerings
	System reports, system charts, system dashboards, CRM application data	●	●	○	✕	
	User reports, dashboards and charts	●	●	●	✕	
	Accounts, contacts, cases and leads	●	●	●	✕	Optional add-ons Production Instances: \$549/inst./mo. Non-Production Instances: \$150/inst./mo. Storage: \$9.99/GB/month
	Custom entities	●	●	● ³	● ³	
	Activities, notes	●	●	●	●	
	Dual Use Rights for equivalent CRM CAL	●	●	●	●	

See Volume Licensing [Product List](#) and [Online Services Use Rights](#) for a complete list of capabilities. U.S. List prices through Microsoft Online Services Portal (MOSP) shown.

¹Ten-seat minimum deployment of CRM Online Professional to qualify when purchasing through MOSP.

²Creating, updating and deleting via workflows can only be performed against entities included in the use rights (i.e. update an opportunity requires Professional).

³Custom entities (either based on entities included in CRM or created by a customer or partner) may require a higher CAL or USL, depending on the required access. Customizations can only be performed against entities included in the use rights.

Additional Services

Microsoft offers additional services that work in tandem with Microsoft Dynamics CRM Online, including Microsoft Social Listening, Microsoft Dynamics Marketing, Parature, from Microsoft, and Unified Service Desk. With the exception of Unified Service Desk, these are separate services that you can license independently or as part of Microsoft Dynamics CRM Online.

Microsoft Social Listening

Microsoft Social Listening Professional provides volume and sentiment analysis of social networking data and is recommended for sales, marketing and customer service workers interested in social media discussion of their products, competitors, and industry.

Microsoft Social Listening Professional functionality is included with the Microsoft Dynamics CRM Online Professional and Enterprise USLs. It is also available as a standalone USL or as an Add-On USL for Dynamics CRM Professional CALs with Software Assurance. For more on the Add-On USL, please see "Adding Access to Microsoft Dynamics CRM Online for Microsoft Dynamics CRM On-Premises Users via the USL for Software Assurance" [below](#).

Microsoft Dynamics Marketing

Microsoft Dynamics Marketing Enterprise provides a full suite of data segmentation, behavioral tracking, digital asset management, and brand management capabilities. It is recommended for users in

marketing roles, and when delivered as part of Microsoft Dynamics CRM Online Enterprise, allows users to combine Microsoft Dynamics Marketing's capabilities with the marketing and sales capabilities of Dynamics CRM Online.

Microsoft Dynamics Marketing Enterprise functionality is included with the Microsoft Dynamics CRM Online Enterprise USL or as a standalone USL. Users configured at Portal Users do not require a USL.

Microsoft Dynamics Marketing Sales Collaboration provides sales teams with visibility into the marketing calendar. Sales now can offer more insights into campaigns and targeting. Both sales and marketing can share the same view of the customer journey.

Microsoft Dynamics Marketing Sales Collaboration is included with the Microsoft Dynamics CRM Online Professional USL or as a standalone USL. However, customers need at least one USL for either Microsoft Dynamics Marketing Enterprise or CRM Online Enterprise in order access Microsoft Dynamics Marketing with a Sales Collaboration user.

Parature, from Microsoft

Parature, from Microsoft delivers multi-channel customer service capabilities. Parature's complete offering of cloud-based, multi-channel customer support solutions is enhanced by seamless integration, robust reporting, a wealth of on-demand support services and affordable pricing.

Parature Enterprise functionality is included with the Microsoft Dynamics CRM Online Enterprise USL or as a standalone USL.

Unified Service Desk

Unified Service Desk (USD) consolidates numerous communication channels (such as phone, chat, email, and social media) and relevant services to enable greater efficiency and productivity.

USD installation rights are included with Microsoft Dynamics CRM Online Professional and Enterprise USLs and with Microsoft Dynamics CRM 2015 Professional CAL Software Assurance. USD is not available as a standalone license.

USD software is installed and run locally on the user's device. The use rights expire upon expiration of the qualifying USL subscription term or Software Assurance subscription. Only licensed users may use the software.

Subscription Capacities and Optional Add-ons for Microsoft Dynamics CRM Online

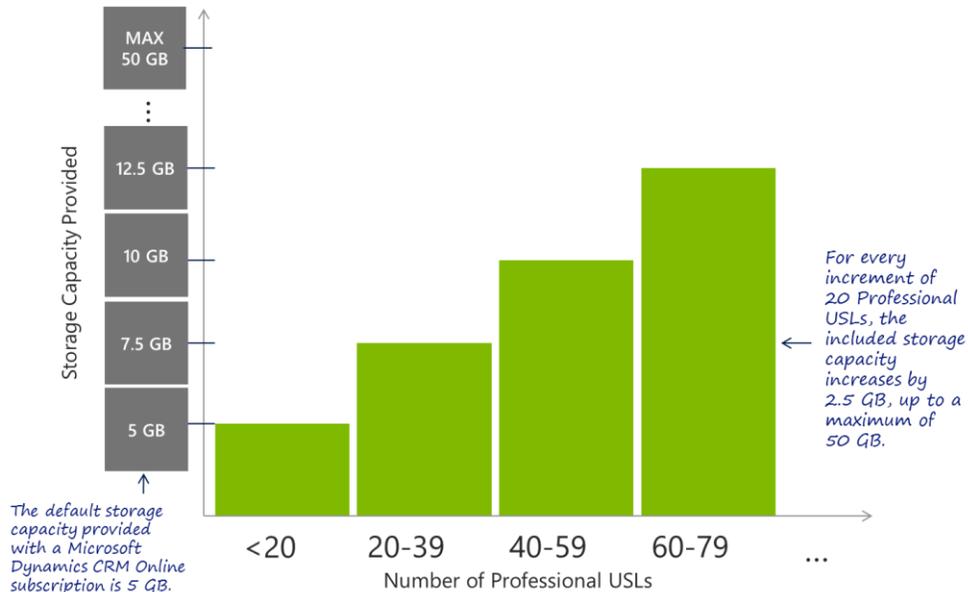
Each customer enrolled in a Microsoft Dynamics CRM Online subscription receives default storage and one production instance of Microsoft Dynamics CRM Online.

Subscription Capacities

DEFAULT STORAGE CAPACITY

At a minimum, Microsoft Dynamics CRM Online subscription includes 5 GB of storage at no additional charge. Additional storage capacity is granted at no charge as an organization increases the number of Professional USLs. For every increment of 20 Professional USLs, the included storage capacity increases by 2.5 GB. So a customer with 20 Professional USLs receives a default storage capacity of 7.5 GB. At 40 Professional USLs, the included storage capacity increases of 10 GB, and so on. The maximum default storage included in a subscription is capped at 50 GB per customer.

Figure 6: Storage Capacity



DEFAULT PRODUCTION INSTANCE CAPACITY

Microsoft Dynamics CRM Online subscription offers one production instance per tenant.

DEFAULT NON-PRODUCTION INSTANCE CAPACITY

Microsoft Dynamics CRM Online subscription offers one non-production instance per customer with a minimum purchase of 25 Professional USLs.

MICROSOFT DYNAMICS MARKETING ENTERPRISE CAPACITY

Microsoft Dynamics Marketing subscriptions provide storage according to the same policies as Microsoft Dynamics CRM Online. However, included subscription capacity for CRM Online and Dynamics marketing are calculated and allocated independently of one another.

Microsoft Dynamics Marketing deployments include 50,000 messages per month, per organization. Unused message capacity expires at the end of the month; they do not roll over to the next month. Additional messaging capacity is available for purchase as a subscription add-on in increments of 10,000 additional messages per month.

PARATURE ENTERPRISE CAPACITY

Parature, from Microsoft deployments include the following capacities, with additional capacity available for purchase in the increments shown below. Unused capacity expires at the end of the month and does not roll over to the next month.

Subscription Capacity	Included Capacity	Additional Increment
File Storage	2GB	1GB
Records	1 million/month	500,000/month
Page views	1 million/month	500,000/month
Departments	1 Department	1 Department

MICROSOFT SOCIAL LISTENING PROFESSIONAL CAPACITY

Microsoft Social Listening deployments include 10,000 documents per month, per organization. Unused documents expire at the end of the month and do not roll over to the next month. Additional capacity is available for purchase as a subscription add-on in increments of 10,000, 100,000 and 1 million additional documents per month.

Optional Add-ons

If you require additional subscription capacity (such as additional instances or storage), you can include the add-on licenses to your subscription.

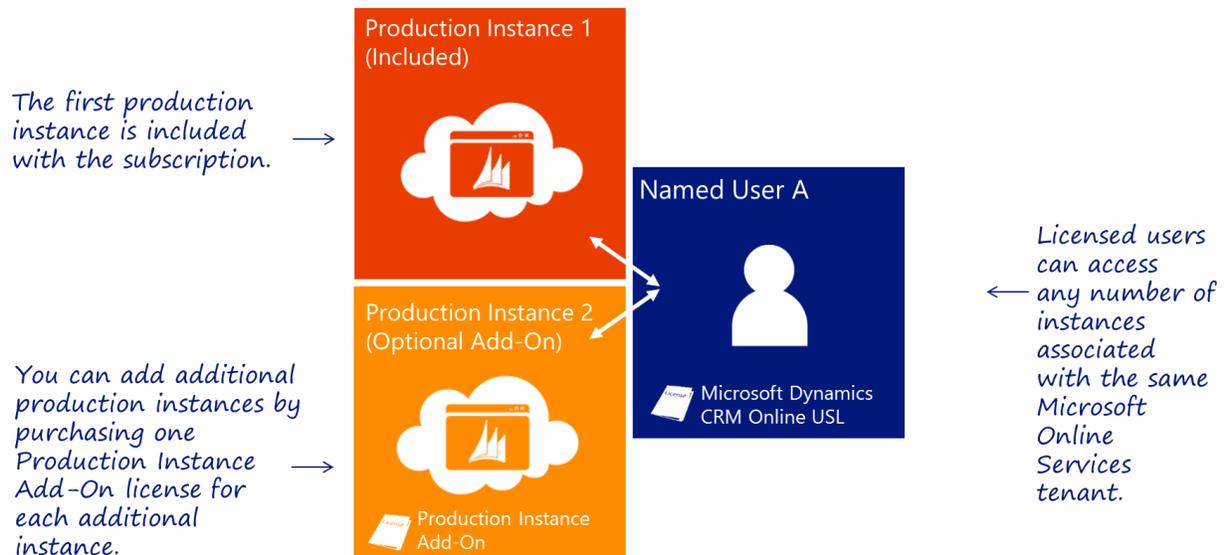
Subscription add-ons apply across an entire organization; they are not tied to a specific user. Subscription add-ons can be purchased at any time and remain a part of the subscription for the remainder of the subscription term.

PRODUCTION INSTANCE ADD-ON

The Production Instance Add-On is well suited for multi-instance deployments such as departmental applications configured within an organization. Licensed users associated with a Microsoft Dynamics CRM Online subscription can access the default Microsoft Dynamics CRM Online instance included in the subscription, and every Microsoft Dynamics CRM Online additional instance associated with the same tenant.

The Production Instance Add-On license does not include any default storage capacity.

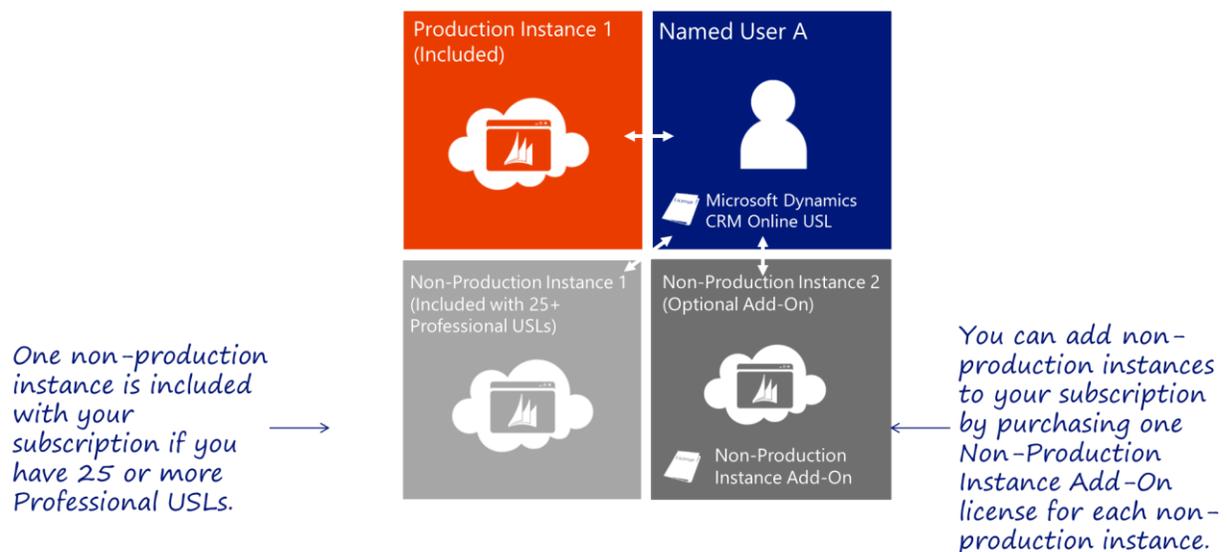
Figure 7: Production Instance Add-on



NON-PRODUCTION INSTANCE ADD-ON

The Non-Production Instance Add-On is well suited for deployments such as test environments, training applications, and sandbox environments configured within an organization. Licensed users associated with a Microsoft Dynamics CRM Online subscription can access the default Microsoft Dynamics CRM Online instance included in the subscription, and every Microsoft Dynamics CRM Online additional instance associated with the same tenant. The additional Non-Production Instance Add-On license does not include any default storage capacity.

Figure 8: Non-Production Instance Add-On



ADDITIONAL STORAGE ADD-ON

The Additional Storage Add-On provides flexibility to increase the storage capacity associated with your Microsoft Dynamics Online subscription in increments of 1 GB per Additional Storage Add-On license, up to 995 GB of storage.

Note: The subscription storage corresponding to a customer subscription is tracked against all the Microsoft Dynamics CRM Online instances associated with the tenant.

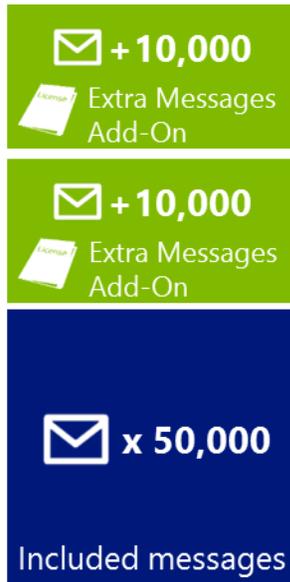
Figure 9: Storage Add-On



DYNAMICS MARKETING EXTRA MESSAGES ADD-ON

The Extra Messages Add-On provides additional capacity to a Microsoft Dynamics Marketing Subscription in increments of 10,000 email messages per month. On the first day of the month, the number of purchased extra messages are added to the included capacity of 50,000 messages. All unused messages expire at the end of each month.

Figure 10: Extra Messages Add-on

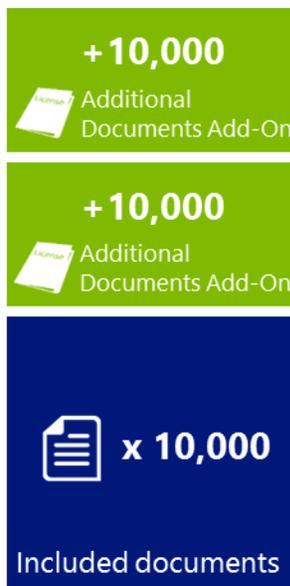


You can add more messages to the included capacity in increments of 10,000 messages per Extra Message Add-On license.

SOCIAL LISTENING ADDITIONAL DOCUMENTS ADD-ON

The Additional Documents Add-On provides additional capacity to a Microsoft Social Listening subscription in increments of 10,000, 100,000, and one million documents per month. On the first day of the month, the number of purchased additional posts is added to the included capacity of 10,000 posts. All unused posts expire at the end of each month.

Figure 11: Social Listening Additional Documents Add-on



You can add more documents to the included capacity in increments of 10,000 documents per Additional Documents Add-On license.

PREMIUM SUPPORT OFFERINGS

Microsoft Dynamics CRM Online, Microsoft Dynamics Marketing, Microsoft Social Listening, and Parature, from Microsoft offers four levels of subscription support offerings—Subscription, Enhanced Support, Professional Direct Services and Premier Services—each of which provides increasing benefits. The support offering allows you the flexibility to choose the offering that best fits your support needs.

- Subscription:** Support is included for in the base subscription for all Dynamics CRM Online Microsoft Dynamics Marketing, Microsoft Social Listening and Parature, from Microsoft customers, and provides small and medium businesses with unlimited technical support incidents, accelerated response times and access to subject matter experts to help creatively solve technical issues.
- Enhanced Support:** Provides support for small and medium businesses, providing faster response times, and E-Learning development materials.
- Professional Direct Services:** Provides first-class support designed especially for mid-sized customers that require elevated support, access to experts, Service Delivery Management, case wellness, enhanced service interruption event handling, limited onboarding services, advisory cases and educational events.
- Premier Services:** Provides support for complex or business-critical applications with mentoring, technical account management, dedicated support engineers and onsite services.

The following provides a summary of the benefits associated with each of the support levels, with price points in U.S. Dollars.

Figure 12: Microsoft Dynamics Online Support Offerings

Microsoft Dynamics Cloud Support		Premier	Professional Direct	Enhanced	Default Paid/Trial Subscription
		Varies	\$9**	\$5	Included
Self-Service Capabilities	Community Forums	•	•	•	•
	Service Health Dashboard	•	•	•	•
	Customer Source, CRM Customer Center	•	•	•	•
Reactive Support	Response Times	Sev A: 1h Sev B: 2h Sev C: 4h	Sev A: 1h Sev B: 2h Sev C: 4h	Sev A: 2h Sev B: 4h Sev C: 8h	Sev A: Next Biz Day Sev B: Next Biz Day Sev C: Next Biz Day
	Web & Phone Submission	•	•	•	•
	Billing & Subscription Support	•	•	•	•
	Unlimited Technical Break-Fix Incidents	•	•	•	•
	Callback Available	•	•	•	•
	24x7 Technical Support	•	•	•	•
	Priority Handling	•	•	•	•
	Critical Situation Support	•	•	•	•
Proactive Services	Training Materials*	+ Full access to Premier Catalog	+ Customizable Training Materials	+ Full access to eLearning and Training Manuals	Getting Started Catalog
	Advisory Support	Full	Limited		
Service Delivery Management	Technical Account Management	Assigned	Pooled		
	Enhanced Reporting	•	•		
	Escalation Phone Line	•	•		
	Case Wellness	•	•		
	Onboarding Services	•	•		
	Enhanced SIE Handling				
	1:1 Mentoring				
	Onsite Services				

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Notes:

- Premium Support offerings will be available for purchase only for customers enrolled in MOSP, EA, EAS, and EES licensing programs.

- Customer can only choose one (1) Premium Support offering. Mixing and match of support offerings is not allowed.
- Enhanced or Professional Direct require each user licensed with Microsoft Dynamics CRM Online USL (or equivalent service) must also be licensed for that support option.
 - Example: Customer purchases 3 Essential, 2 Basic and 5 Professional USLs for Microsoft Dynamics CRM Online for a total of 10 seats of CRM Online. The customer's needs best fit the Enhanced Support plan. The purchase must include 10 seats of Enhanced Support.
 - Example: Customer purchases 55 Professional and 5 Essential USLs for a total of 60 seats of CRM Online. The customer's needs best fit the Professional Direct Support plan. The customer will be automatically charged for 100 seats of Professional Direct support when purchasing via MOSP, to meet the minimum threshold for the support offering. When purchasing through Volume Licensing, ensure the minimum threshold is entered when placing the order.
- Premium Support offerings are available with the following configurations:
 - Stand-alone for Parature, from Microsoft, Microsoft Dynamics Marketing, Microsoft Social Listening or Microsoft CRM Online
 - Sold with Microsoft Dynamics CRM Online Enterprise, which also unlocks capabilities for Microsoft Dynamics Marketing, Microsoft Social Listening and Parature, from Microsoft
 - Sold with Microsoft Dynamics CRM Online Professional, which also includes support for Microsoft Social Listening (if customer has greater than 10 CRM Online Professional USL's)
 - Example: Customer purchases 15 Professional USLs for Microsoft Dynamics CRM Online and receives an equivalent amount of Microsoft Social Listening USLs. Customer purchases Enhanced Support for CRM Online. Customer will receive the Enhanced Support benefits across all both services.

Stepping-up to a Higher Level Support Plan

Volume Licensing customers can step-up from a lower level plan to higher level plan using step-up licenses. The following step-up licenses are available through the applicable Volume Licensing programs:

- Microsoft Dynamics CRM Online Step-Up from Enhanced Support for Microsoft Dynamics CRM Online to Professional Direct Support for Microsoft Dynamics CRM Online
- Microsoft Dynamics Marketing Step-Up from Enhanced Support for Microsoft Dynamics Marketing to Professional Direct Support for Microsoft Dynamics Marketing
- Microsoft Social Listening Step-Up from Enhanced Support for Microsoft Dynamics Social Listening to Professional Direct Support for Microsoft Social Listening
- Parature, from Microsoft Step-Up from Enhanced Support for Microsoft Dynamics Social Listening to Professional Direct Support for Parature, from Microsoft

Pricing and Availability

International Pricelist

Country availability and MOSP pricing for Dynamics CRM Online is available here:

<http://www.microsoft.com/en-us/dynamics/pricing-list.aspx>

Notes:

- Enhanced support offering is available in all countries where Microsoft Dynamics CRM Online, Microsoft Social Listening, Microsoft Dynamics Marketing or Parature, from Microsoft service is currently available.
- Professional Direct service is currently available in Canada, United States, and EMEA regions only.

Availability by Language

Localized/translated versions of Microsoft Dynamics CRM Online are available for the following languages (alphabetic listing):

- | | | | |
|-----------------------|-------------|--------------------|-------------------|
| • Arabic | • English | • Italian | • Romanian |
| • Basque | • Estonian | • Japanese | • Russian |
| • Bulgarian | • Finnish | • Kazakh | • Serbian (Latin) |
| • Chinese (Hong Kong) | • French | • Korean | • Slovak |
| • Chinese (PRC) | • Galician | • Latvian | • Slovenian |
| • Chinese (Taiwan) | • German | • Lithuanian | • Spanish |
| • Catalan | • Greek | • Norwegian | • Swedish |
| • Croatian | • Hebrew | • Polish | • Thai |
| • Czech | • Hindi | • Portuguese (Br) | • Turkish |
| • Danish | • Hungarian | • Portuguese (Ptg) | • Ukrainian |
| • Dutch | | | |

Licensing Programs

Microsoft Dynamics CRM Online is licensed through the Microsoft Volume Licensing and Microsoft Online Services Program channels.

Microsoft Volume Licensing

WHAT IS VOLUME LICENSING?

Microsoft Volume Licensing is the most cost-effective, flexible, and manageable way to license Microsoft software and cloud services. Simply stated, volume licensing makes it easier and more affordable to use software and online services across an organization.

Licensing online services through your Volume Licensing agreement allows you to:

- Transition to cloud services at your own pace
- Match and adjust online service plans to meet users' needs

Microsoft offers several Volume Licensing programs, each tailored to the needs of different sizes of businesses and types of organizations. To find the right program for your organization, you'll first need to determine the type and size of your organization, the software that you want to license, and how you will

use it. [Learn more about how Volume Licensing works.](#)

Participating in a Volume Licensing program typically involves signing an agreement and/or enrollment, meeting a minimum purchase requirement, and ordering licenses through a Microsoft Reseller. Visit the [Microsoft Volume Licensing website](#) to learn more about how to buy through Volume Licensing, find a reseller partner, and more.

Eligible Volume Licensing Programs

Microsoft Dynamics CRM Online is available through the following Volume Licensing programs:

- **Enterprise Agreement** – The Microsoft Enterprise Agreement (EA) is the best licensing program for commercial and government organizations that want to standardize IT across the enterprise yet retain the flexibility to choose from on-premises and cloud services. The EA includes attractive volume pricing, the flexibility to transition to cloud services at your own pace, and simplified license management through a single company-wide agreement. [Learn more.](#)
- **Enterprise Subscription Agreement** – An option under the Enterprise Agreement that provides lower initial cost based on a three-year subscription, the ability to increase or decrease subscription counts on an annual basis, and non-perpetual licenses that end with your subscription term. [Learn more.](#)
- **Enrollment for Education Solutions (under the Campus and School Agreement)** – The Enrollment for Education Solutions (EES) is a subscription licensing offering available to both primary/secondary and higher education institutions and offers the simplicity of counting people instead of PCs/devices and the flexibility to add additional products in any quantity as needed. [Learn more.](#)
- **Microsoft Products and Services Agreement (MPSA)** - The new Microsoft Products and Services Agreement (MPSA) is a single agreement for your Online Services, software, and Software Assurance purchases across your organization. It can save time and money by combining purchase points for the best price level and reducing the administrative overhead associated with managing multiple agreements. [Learn more.](#)

Microsoft Online Services Program

Customers not purchasing through one of the Volume Licensing programs listed above can purchase Microsoft Dynamics CRM Online directly through the [Microsoft Online Services Program](#).

MINIMUM LICENSE PURCHASE REQUIREMENT FOR MICROSOFT ONLINE SERVICES PROGRAM

- New customers enrolling in Microsoft Dynamics CRM Online subscription must purchase a minimum of 5 Professional and/or Enterprise user licenses to activate the paid subscription. Upon meeting this requirement, customers can add any number of Basic and Essential user licenses to the online service subscription.
- The 5-minimum Professional license requirement does not apply to existing customers who have previously enrolled in Microsoft Dynamics CRM Online subscription on or before September 30, 2013.

CANCELLATION POLICY FOR MICROSOFT ONLINE SERVICES PROGRAM

- The term of a CRM Online subscription is twelve months. Extra users or capacity added mid-term renew at the end of the original subscription term.
- Cancellation fees plus applicable taxes per user will be applicable after the first month of a new CRM Online

subscription. Local pricing and currency varies by geography.

- Microsoft will not charge a cancellation fee if the cancellation occurs during the first and last month of the purchased subscription. This also applies to new subscriptions which occur as a result of a renewal.
- Microsoft will not charge a cancellation fee when a customer migrates from a 12-month subscription plan to an on premises version of Microsoft Dynamics CRM.
- There is no fee for customers who cancel the trial subscription before the end of the 30 day trial period.
- When customers cancel their subscription they are given a 30 day grace period and a 90 day data retention period.
 - The grace period allows additional time for customers to reactivate their subscription should they decide to continue with CRM Online.
 - The 90 day data retention period also provides the customer a window in which they can export their data.
 - If a customer reactivates their subscription within the 30 day grace period any cancellation fees which were charged will be refunded.
- Cancellation fees applies to all paid Microsoft Dynamics CRM Online subscriptions
- No cancellation fees charged if subscription is cancelled in the last month of a commitment term.

USER REDUCTION POLICY FOR MICROSOFT ONLINE SERVICES PROGRAM

- Cancellation fees plus applicable taxes per user will be applicable after the first month of a new CRM Online subscription. Local pricing and currency varies by geography.
- No fees charged if the customer reduces users within the first month of the subscription.
- Cancellation fees apply to all paid Microsoft Dynamics CRM Online subscriptions.

Adding Access to Microsoft Dynamics CRM Online for Microsoft Dynamics CRM On-Premises Users via the USL for Software Assurance

If you have Microsoft Dynamics CRM CALs covered by active Software Assurance (SA), you can add access to Microsoft Dynamics CRM Online by acquiring the USL for SA licenses, thus protecting your on-premises investments in Microsoft licensing, and permitting you to maintain non-perpetual rights to online service for the duration of your service agreement.

USLs for SA are available for purchase through the Microsoft Volume Licensing Enterprise Agreement, Enterprise Subscription Agreement, and Enrollment for Education Solutions (under a Campus and School Agreement).

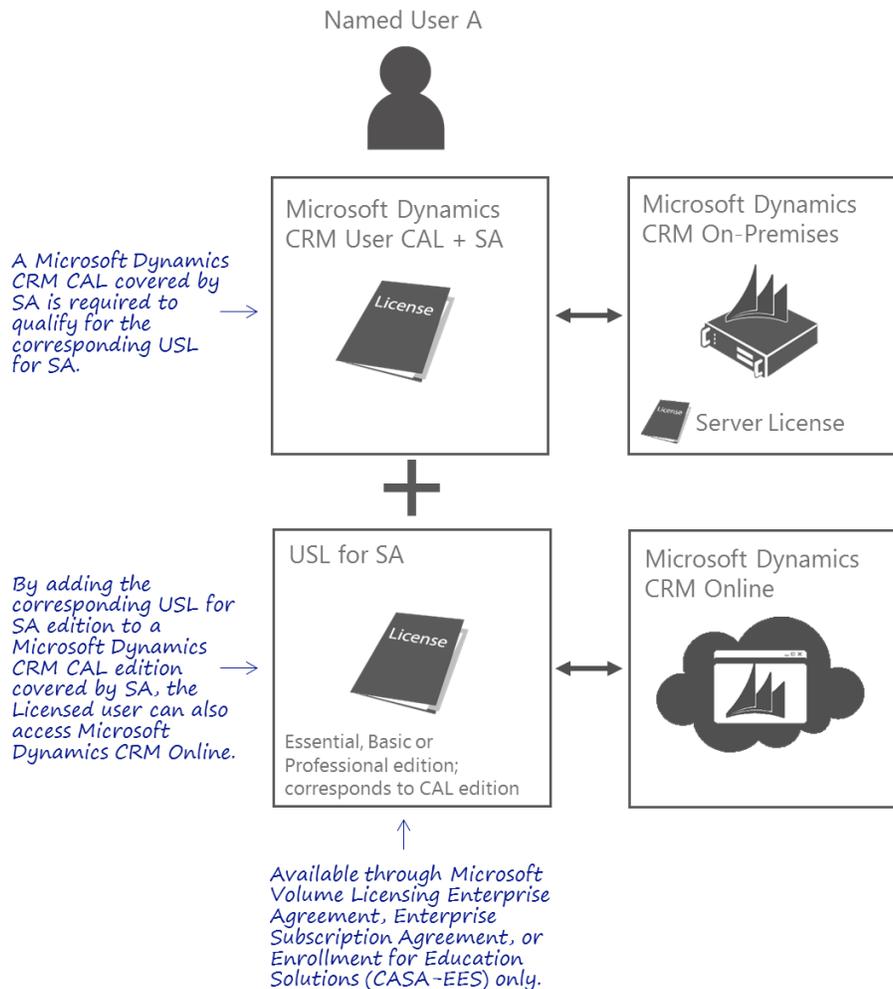
For each User CAL or Device CAL to which you assign a USL for SA, you will receive a CRM Online USL. Pricing for the USL for SA is set to provide credit for you SA investment.

Notes:

- The USL must be used for the same user of the User CAL. The USL cannot subsequently be transferred to another user unless the corresponding CAL is also transferred to the new user.

- The USL level will correspond to the CAL level. For instance, a Professional CAL with USL for SA will be granted the Professional USL use rights.
- Device CALs that you have purchased as part of an Enterprise Agreement or Enrollment qualify USL for SA on a 1:1 basis: One Device CAL qualifies for one USL for SA.

Figure 13: USL for Software Assurance



The USL for SA model includes two parallel agreements:

1. A new or existing Software Assurance agreement that the customer will continue to maintain and renew, and
2. An additional USL for SA License Agreement that provides rights to the Microsoft Dynamics CRM Online service.

The following Microsoft Dynamics CRM Online USL for SA licenses are available for Microsoft Dynamics CALs active on Software Assurance:

Qualifying License:	Qualifies for:
Professional CAL with SA	Enterprise USL for SA Professional USL for SA Social Listening Add-on for SA
Basic CAL with SA	Basic USL for SA
Essential CAL with SA	Essential USL for SA

Transitioning from Microsoft Dynamics CRM CALs to USLs under the Enterprise Agreement

Microsoft Enterprise Agreement offers a seamless way for you to license both on-premises software and cloud services in the same agreement. This can help you license software and cloud services for different user types and optimize your technology spend to fit your IT and user needs.

If you have an Enterprise Enrollment (sometimes called a Desktop EA or Platform EA), you can maintain your Enterprise-wide coverage and related discounted price levels, with a mix of Enterprise Products and/or equivalent Enterprise Online Services. You can also purchase Enterprise Online Services with a 250 order minimum and with no companywide commitment required.

This new flexibility of choice requires new license types and terminology to both enable and describe what licensing coverage is required should you move workers and workloads to the cloud. The following describes the presence and purpose of new terms found in the 2011 EA.

Updated EA Terms for Cloud Services

As you consider moving to the cloud, you can do so gradually or quickly, as suits your organization. As an example, you might move workers to cloud services in one division or one department at a time. To support this move, Transitions have been established to help you move users to Microsoft Dynamics CRM Online, Office 365, and Windows Intune services, and not pay twice for similar capabilities.

- The main benefit of this is to allow you to move to cloud services, at your own pace, and not face a perceived double payment for both on-premises and online services licenses. When this transition period ends on your next agreement anniversary date, it is then that you begin to pay full subscription license costs for Microsoft Dynamics CRM Online, Office 365 (Plan E1-E4), and/or Windows Intune services, and no longer pay for the on-premises licenses and Software Assurance (SA) coverage from which you transitioned.
- The notion of online services equivalents also helps preserve your volume pricing levels for Enterprise Products, as both Enterprise Products [e.g. Office Professional Plus, Windows operating system upgrades and Client Access License (CAL) Suites] and their equivalent Enterprise Online Services (Office 365 Plans E2-E4), and Microsoft Dynamics CRM Online and Windows Intune are considered when complying with companywide licensing commitments.

Taking advantage of Transitions does not require you to forego use rights to perpetual licenses you have at time of transition, even if you have not yet deployed said licenses. This supports your ability to “transition back” from cloud services using your perpetual (on-premises) licenses, should your IT landscape change.

Minimum orders for Enterprise Online Services have been established to help you license cloud services for new users with no companywide commitment. This option may be especially attractive to customers who have not yet chosen an EA because of its companywide licensing requirement for Office Professional Plus, Windows desktop operating system upgrade, and CAL Suites.

Online Services Step-Up Licenses now exist which allow you to move up to greater value licenses of Microsoft Dynamics CRM Online [e.g. from a Basic license to a Professional license] with the price reflected as a delta between lower- and higher- level service.

License Reservations make Microsoft Dynamics CRM Online, Office 365, and Windows Intune available to you for use without requiring a purchase order up front. This process is unique to the EA and enables you to equip users with online services as needed, and account for these subscription licenses at your next agreement anniversary via new True-up provisions. This aligns with the True-up process for on-premises software.

Online Services Extended Terms now exist to help ensure continuity of your business-critical online services in cases of an unforeseen delay in renewal or no renewal.

The impact of these updated terms is that the 2011 EA now gives you:

- ✓ A way to transition to cloud services when it makes sense for your organization.
- ✓ The flexibility to move your users between on-premises and cloud services as business requirements and expectations change.
- ✓ The ability to match workloads of different types of users and fully use the capabilities of Microsoft cloud services.
- ✓ The opportunity to adjust volume and mix of cloud services annually to meet fluctuations in workforce, including a way to scale up or down the number of licenses for temporary workers.
- ✓ A no-cost grace period when you are moving your users onto cloud services, during the agreement year in which you transition.

License Transition Eligibility

The following license are eligible to transition to/from under the 2011 updated Enterprise Agreement.

From:	To:
Microsoft Dynamics CRM Professional User CAL	Microsoft Dynamics CRM Online Enterprise USL*
Microsoft Dynamics CRM Professional Device CAL	Microsoft Dynamics CRM Online Enterprise USL*
Microsoft Dynamics CRM Professional User CAL	Microsoft Dynamics CRM Online Professional USL
Microsoft Dynamics CRM Professional Device CAL	Microsoft Dynamics CRM Online Professional USL
Microsoft Dynamics CRM Basic User CAL	Microsoft Dynamics CRM Online Basic USL
Microsoft Dynamics CRM Basic Device CAL	Microsoft Dynamics CRM Online Basic USL
Microsoft Dynamics CRM Essential User CAL	Microsoft Dynamics CRM Online Essential USL
Microsoft Dynamics CRM Essential Device CAL	Microsoft Dynamics CRM Online Essential USL

* Non-equivalent transitions require payment for additional value provided during transition year

Free Trial

You can sign-up for a free 30-day trial of Microsoft Dynamics CRM Online for up to 25 users through Microsoft Online Services. At any time during your trial you can activate your subscription and keep your

data and customizations. Get details at <http://www.microsoft.com/en-us/dynamics/crm-free-trial-overview.aspx>.

Note: Support included for Trial is the same as what customers receive when purchasing Microsoft Dynamics CRM Online Services. Premium level support options are not available for purchase during the trial period.

Links for Additional Information

Microsoft Dynamics CRM	crm.dynamics.com
CRM Connection Blog	https://community.dynamics.com/crm/b/crmconnection/default.aspx
Microsoft Volume Licensing	www.microsoft.com/licensing
Software Assurance	http://www.microsoft.com/licensing/software-assurance/default.aspx
Activate Software Assurance benefits	http://www.microsoft.com/licensing/sa/activate.msp
Microsoft License Advisor	http://www.microsoft.com/licensing/mla/default.aspx
Contact a Licensing Specialist	www.microsoft.com/licensing/contact/default.msp
Microsoft Dynamics Premium Support	http://www.microsoft.com/en-us/dynamics/dynamics-online-support.aspx
CustomerSource	https://mbs.microsoft.com/customersource/
Microsoft Downloads Center	http://www.microsoft.com/downloads
Pricing and Country Availability	http://go.microsoft.com/fwlink/p/?LinkId=396679

Appendix A: Use Rights by Microsoft Dynamics CRM Online USL

The following table lists the use rights corresponding to the Client Access Licenses (CALs) that are available in Microsoft Dynamics CRM 2013 and User Subscription Licenses (USLs) available in Microsoft Dynamics CRM Online.

Use Right	Professional & Enterprise	Basic	Essential
View Announcements	✓	✓	✓
Manage saved views	✓	✓	✓
Use relationships between records	✓	✓*	✓*
Create personal views	✓	✓	✓*
Advanced Find search	✓	✓	✓*
Search	✓	✓	✓*
Use a queue item	✓	✓*	✓*
Export data to Microsoft Excel	✓	✓	✓
Perform Mail Merge	✓	✓	✓
Start dialog	✓	✓*	✓*
Run as an On-demand process	✓	✓*	✓*
Run an automated workflow	✓	✓*	✓*
Read articles	✓	✓	✓
Notes	✓	✓	✓
Activity management	✓	✓	✓
Yammer collaboration**	✓	✓	✓
Post activity feeds	✓	✓	✓
Follow activity feeds	✓	✓	✓
Shared calendar	✓	✓	✓
Write custom entity records	✓	✓***	✓***
Read custom application data	✓	✓	✓
Microsoft Dynamics CRM Mobile Express	✓	✓	✓
Microsoft Dynamics CRM for iPad & Windows 8	✓	✓	✓
Microsoft Dynamics CRM for Outlook	✓	✓	✓
Microsoft Dynamics CRM Web application	✓	✓	✓
Manage user reports, user charts, and user dashboards	✓	✓	
Run reports	✓	✓	
Create, update, and customize Reports	✓	✓	
Create and update announcements	✓	✓	
Read Dynamics CRM application data	✓	✓	
User dashboards	✓	✓	
User charts	✓	✓	
User Interface Integration for Microsoft Dynamics CRM	✓	✓	
Convert an activity to a case	✓	✓	
Case management	✓	✓	
SLAs	✓	✓	
Add or remove a customer relationship for a contact	✓	✓	
Associate an opportunity with a contact	✓	✓	

Use Right	Professional & Enterprise	Basic	Essential
Qualify and convert a lead to a contact	✓	✓	
Contacts	✓	✓	
Lead scoring, routing, assignment	✓	✓	
Lead capture	✓	✓	
Add or remove a customer relationship for an account	✓	✓	
Associate an opportunity with an account	✓	✓	
Qualify and convert a lead to an account	✓	✓	
Accounts	✓	✓	
Import data in bulk	✓		
Configure auditing	✓		
Configure duplicate-detection rules	✓		
Define relationships between entities	✓		
Define and configure queues	✓		
Define and configure dialogs	✓		
Define and configure workflows	✓		
System reports, system charts, and system dashboards	✓		
Customize forms and views	✓		
Create Microsoft Dynamics CRM forms, entities, and fields	✓		
Administer CRM	✓		
Article templates	✓		
Create and publish articles	✓		
Goal management	✓		
Contract templates	✓		
Contract management	✓		
Territory management	✓		
Sales literature	✓		
Quote management	✓		
Configure SLA policies	✓		
Price lists	✓		
Product tracking	✓		
Order management	✓		
Invoice management	✓		
Competitor tracking	✓		
Qualify and convert a lead to an opportunity	✓		
Convert an activity to an opportunity	✓		
Opportunity tracking	✓		
Marketing lists	✓		
Quick campaigns	✓		
Marketing campaigns	✓		
Facility/Equipment management	✓		
Define and configure business units	✓		
Define and configure teams	✓		
Define and configure services, resources, and work hours	✓		

*Actions can be performed only against records corresponding to entities included in the use rights

**Use of Yammer within the Dynamics CRM application requires a Yammer Enterprise license (acquired separately)

*** Custom entities (either based on entities included in CRM or created by a customer or partner) may require a higher CAL or USL, depending on the required access. Customizations can only be performed against entities included in the use rights

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