

Customer Services and Support Policy Guide

Microsoft Dynamics



Customer Version
July 2015



The Enhancement Plan for Microsoft Dynamics® is a maintenance plan available to worldwide customers of Microsoft Dynamics AX, Microsoft Dynamics C5, Microsoft Dynamics CRM, Microsoft Dynamics GP, Microsoft Dynamics NAV, Microsoft Dynamics SL, Microsoft Dynamics POS, Microsoft Dynamics RMS, and Microsoft Dynamics Retail Realm Essentials™ powered by Microsoft Dynamics.

The Enhancement Plan helps customers maximize the ongoing value of their Microsoft Dynamics solution. It also helps protect their investment and equips them with tools and resources to add significant value and enhance employee productivity.

Note: When we use the term “your partner” in this document, we are referring to your Microsoft Dynamics certified reseller.

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General Information

1. Overview of the Enhancement Plan

What is the Enhancement Plan?

The Enhancement Plan is a maintenance plan for worldwide Microsoft Dynamics customers. The Enhancement Plan helps customers drive greater value as they plan, deploy, and use their Microsoft Dynamics solution.

Who can enroll in the Enhancement Plan?

The Enhancement Plan is available to new and existing customers with the following products:

- Microsoft Dynamics AX
- Microsoft Dynamics CRM
- Microsoft Dynamics GP
- Microsoft Dynamics NAV
- Microsoft Dynamics SL
- Microsoft Dynamics C5
- Microsoft Dynamics RMS
- Microsoft Dynamics POS
- Retail Realm Essentials™ powered by Microsoft Dynamics

Why should customers enroll in the Enhancement Plan?

The Enhancement Plan is essential to your ongoing success with your Microsoft Dynamics solutions, helping their business stay ahead of the competition.

- Take advantage of new version rights. By staying on the leading edge of technology, you have access to new features and capabilities that help keep your business flexible through growth and change.
- Help protect your investment with a 5+5-year Support Lifecycle, Transition Investment Credit, and critical updates. During Mainstream Support, these periodic updates include tax and regulatory releases to keep your organization compliant, along with the latest system updates to keep your solutions running at peak performance.
- Access key Enhancement Plan benefits—including self-support tools, unlimited access to online training courses, and the powerful resources of the Microsoft Dynamics Community—through your one-stop customer portal, CustomerSource,

available 24x7. You'll be able to solve issues quickly and cost-effectively, enable mutual learning, and connect with peers, partners, and other industry experts.

Enhancement Plan enrollment delivers the latest business software, along with empowerment for your users to unlock your solution's potential. Combine this with the strength of our partner ecosystem, and your Enhancement Plan is an essential key to your organization's success. Access [CustomerSource](#) today.

How is the Enhancement Plan related to other service offerings such as the Advantage Plan or Advantage Plus Plan?

The Enhancement Plan is the foundation for all other Microsoft Dynamics customer service plans. These additional support plans are not available in all regions. Please contact your partner for availability in your region or click [here](#).

2. Pricing and Policies

How much does it cost to enroll in the Enhancement Plan?

Contact your partner for a quote for enrollment on your Microsoft Dynamics solution.

How long does an Enhancement Plan contract last?

The standard contract length is a minimum of 365 days.

Can I purchase a multiyear contract?

We offer a three-year enrollment option. Consult your partner for more information.

What happens if I purchase new users or modules during the three-year contract?

If you pay for the three-year plan up front, you will need to pay for the additional users for the remaining time of the three-year Enhancement Plan enrollment contract. If you commit to a three-year enrollment with an annual payment, you will need to pay enhancement for the additional users for the time remaining in your current year. The subsequent annual payments will include the additional users in the calculation.

How can I enroll or re-enroll in an Enhancement Plan?

Please consult with your partner to enroll or renew your Enhancement Plan.

What if my organization is unable to renew our plan for the following year?

If you decide not to renew, please notify your partner of your decision within 90 days of the expiration of your current one-year or three-year Enhancement Plan.

Will I receive a service contract when I purchase the Enhancement Plan?

Yes. The service agreement will be delivered to you as part of the confirmation email upon enrollment. No signature will be required. Terms and conditions can be found on CustomerSource by clicking [here](#).

Is the first year of Enhancement Plan enrollment mandatory?

Yes. Microsoft Dynamics requires enrollment in an Enhancement Plan upon purchase of your license during your first year with your Microsoft Dynamics solution. For new customers, enrollment begins on the date Microsoft invoices your partner for the Enhancement Plan.

Microsoft Dynamics GP and Microsoft Dynamics SL customers in North America are required to purchase the Microsoft Dynamics Advantage Plan the first year.

If I am no longer on an Enhancement Plan, can I receive new version rights and updates, service packs, or hotfixes that were released when they were current on an Enhancement Plan?

Customers are entitled to the version released while they were active on a plan. Alapse in their Enhancement Plan enrollment means the customer is no longer entitled to receive Microsoft Dynamics releases from your partner or from Microsoft Corporation.

What is Embedded Maintenance?

Whereas the Microsoft Dynamics Enhancement Plan entitles your customers to new version rights of their Microsoft Dynamics product, Embedded Maintenance is the plan that gives your customers the option to upgrade to future versions of SQL Server Runtime unified with their then current Microsoft Dynamics product. The right to upgrade is limited to new SQL Server Runtime versions released during the Embedded Maintenance coverage period. Coverage must be renewed annually during the agreement's term without lapse or the right to upgrade is voided.

3. Re-enrollment Pricing and Policies

I have allowed my Enhancement Plan to lapse, and now I'd like to re-enroll. How much does it cost to re-enroll in the Enhancement Plan?

For a quote on your re-enrollment, please contact your partner.

When calculating my re-enrollment price, do I base my re-enrollment on the current list price of my Microsoft Dynamics product or on the Protected List Price (as defined in Section 7) from when I was enrolled in an Enhancement Plan?

Your re-enrollment will be based on the current recommended system list price or Protected List Price, whichever is higher at the time of re-enrollment. The Protected List Price is valid only as long as you remain current on the Enhancement Plan.

Benefits of the Enhancement Plan

4. Overview of the Benefits

What are the benefits of enrolling in the Enhancement Plan?

The key benefits of the Enhancement Plan are:

- Access to new version rights and updates
- Unlimited access to online training and certification information
- Access to the technical support KnowledgeBase and newsgroups
- CustomerSource
- Protected List Price
- Additional modules, licenses, systems, and Transition Investment Credit
- License Mobility
- Disaster Recovery Rights
- Unified Service Desk

How long are the benefits available to me?

The benefits of the Enhancement Plan are available for as long as you are enrolled and remain current on an Enhancement Plan.

5. Localizations, Translations, New Version Rights, and Updates

What localizations and/or translations does Microsoft provide for its Microsoft Dynamics solutions?

Microsoft extends the business process functionality of its Microsoft Dynamics enterprise resource planning applications by developing features to address certain language or nationwide financial regulatory requirements in countries where Microsoft makes these applications generally commercially available.

Because laws and regulations that affect companies are different in each country, the Microsoft Dynamics ERP products are not supported in terms of localizations, languages,

or technical support in all countries. For more information about the various countries and regions where Microsoft makes localizations and/or translations generally commercially available for Microsoft Dynamics applications, contact your partner.

Are partner-created localizations or translations of Microsoft Dynamics software included in the Enhancement Plan?

No. Partners may offer solutions that meet specific regulatory requirements that are unique to cities, states, provinces, or industries in a particular country. However, these partner-created localizations or translations are not included in the Enhancement Plan. Contact your partner for information about the localizations and/or translations they create for your licensed version of Microsoft Dynamics software.

Does Microsoft provide any warranties or guarantees for partner-created localizations or translations?

No. Microsoft does not provide any warranties (expressed, implied, statutory, or otherwise) that partner-created solutions comply with local business, tax and regulatory, legal, or other applicable requirements. Contact your partner for information about the localizations and/or translations they create for your licensed version of Microsoft Dynamics software.

How does Microsoft cover tax and regulatory updates?

Microsoft understands that local laws, market conditions, and support requirements differ around the world; therefore, Microsoft may offer tax updates beyond the description listed here. As a result, Microsoft provides tax and regulatory releases on an as-needed basis, at the support service pack level, for designated current and future versions of Microsoft Dynamics applications during the Mainstream Support phase of the Support Lifecycle for Microsoft Dynamics applications. In some instances, regulatory updates may require upgrading to the latest service pack of a supported version of the Microsoft Dynamics application. For more information on support versions of Microsoft Dynamics software, see [Microsoft Support Lifecycle information](#).

Note: Microsoft is not responsible for implementation costs related to new version rights, product updates, service packs, or hotfixes.

6. CustomerSource

What is CustomerSource?

CustomerSource is a password-protected learning and engagement center available to customers who have a current Enhancement Plan. The easy-to-access CustomerSource

self-support tools and resources help employees boost productivity, reduce risk, and unleash the functionality of Microsoft Dynamics business management solutions.

Do I have to be enrolled in the Enhancement Plan to get access to CustomerSource?

Yes. CustomerSource access is provided only to customers who remain current on a Microsoft Dynamics Enhancement Plan. To maximize your return on investment of your Microsoft Dynamics solution, click [here to access CustomerSource](#) for help and how-to resources, e-learning and much more.

Can I get started using my benefits right away?

Customers who enroll in the Enhancement Plan will receive a confirmation email outlining the benefits and how to access them. On receipt of this email, Customers will receive instructions on how to access CustomerSource and immediately can begin using their benefits.

How do customers access CustomerSource?

1. Ask your organization's CustomerSource administrator to grant you access to the site. If you don't know your CustomerSource administrator or if your organization does not have a CustomerSource administrator, contact your partner or email itmbssup@microsoft.com for assistance.
2. Log in options:
 - a. **Organizational account:** Sign in with the account provided by your employer. Contact your Organization account administrator to add you to your company's Organizational account.
 - a. **Microsoft account:** Sign in with the Microsoft account you use for OneDrive, Outlook.com, Hotmail or other Microsoft services. If you do not have a Microsoft account, one can be obtained by visiting the [Microsoft account](#) web site.
3. If you're a first-time CustomerSource user, link your CustomerSource profile with a Microsoft or Organizational account. After your CustomerSource administrator creates a CustomerSource user account, a system generated email will be sent to the user from the email address of itmbssup@microsoft.com. The user must open the email and click on the link to associate the user's Microsoft/Organizational Account to the user's CustomerSource account.
4. Sign into [CustomerSource](#)

How can I add or modify user information on CustomerSource?

1. Sign in to [CustomerSource](#).
2. Navigate to and click on the User Menu (commonly containing the name of CustomerSource User) found in the upper right-hand side of the page.
3. Select [Our CustomerSource Accounts](#) from the User dropdown menu
4. Click the Add New Professionals button.
5. Enter the required profile information.
6. Check the box at the bottom of the form to send invitation e-mail to this CustomerSource user to associate their Microsoft Account to this profile.
7. Click Save.

7. Protected List Price

What is Protected List Price?

Protected List Price is established by recording the system list price at the time of your Microsoft Dynamics license purchase. This list price becomes the “protected” basis upon which your Enhancement Plan renewals are calculated, provided that you remain current on the Enhancement Plan.

What benefits does Protected List Price offer?

Protected List Price allows you to budget more predictably for your renewal year after year. Protected List Price will only change if you conduct an activity outlined in the policies (such as purchase of additional users or modules), so the renewal amount can be predicted based on your actions. A customer’s Protected List Price is affected if the customer or Microsoft conducts an activity that falls within one of these Protected List Price policies.

What happens when a customer’s Enhancement Plan expires?

Customers who do not renew their Enhancement Plan by their plan expiration date lose the Protected List Price benefit. If a customer chooses to re-enroll in an Enhancement Plan at a later date, customers will base their Enhancement Plan re-enrollment on the higher of the current list price or Protected List Price, and they will pay a re-enrollment fee that reflects the amount of time they have been lapsed. A lapsed customer may have module adjustments when renewing, which may impact the overall price to get back on plan.

What is system list price?

System list price represents how functionality is currently priced and licensed.

What happens when customers add software or user licenses to their system?

The value of any additional licenses acquired after the customer's initial software acquisition will be added to the customer's Protected List Price. The customer's Protected List Price is increased by the Microsoft Dynamics suggested list price of the additional licenses acquired (additional licenses acquired at a discounted price will increase the customer's Protected List Price by the suggested list price amount, not the discounted amount). This new total then becomes the customer's new Protected List Price for the calculation of future renewals. All customers are required to be enrolled in the Enhancement Plan in order to acquire additional licenses.

What happens when customers deactivate software or user licenses?

Customers who deactivate users keep the Protected List Price benefit for their remaining users if they remain current on an Enhancement Plan. This policy also applies to the deactivation of count-based licenses—modules/granules that are based on users, employees, or lanes.

For deactivated users or count-based products, the amount of the Protected List Price will be reduced by taking the protected value of all users or count-based products and dividing by the total number of users or count-based products to come up with an average user/product price. That per-user/product price is multiplied by the remaining users/product. If the prorated amount results in a figure ending in a fraction, the system will round to the nearest whole number.

When customers deactivate non-count-based modules/granules such as Receivables Management, Payables Management, Sales Order Processing, or Inventory, their Protected List Price is reduced by the suggested list price of that license at the time the license was acquired.

Customers who want to reactivate modules/granules or users later are subject to reactivation fees, plus a prorated Enhancement Plan on those licenses.

What happens when a customer migrates to a new product?

Protected List Price only applies within the same Microsoft Dynamics product line.

A customer who moves to a new product will have their Protected List Price reset and have their new Enhancement Plan calculated on the license list price of the new product.

Protected List Price would no longer apply in the following migration example:

- When a customer makes a horizontal move from one Microsoft Dynamics product to another: For example, a customer moves from Microsoft Dynamics NAV to Microsoft Dynamics GP.

What happens when Microsoft discontinues support of a product?

If Microsoft discontinues support of a module/granule, existing customer accounts will continue to list the module/functionality but the value will no longer be reflected in their Protected List Price. This is applicable when support for all versions of a product are discontinued, not a particular version as outlined in the Support Lifecycle Policy.

What happens when Microsoft acquires or adds a product?

When Microsoft acquires or adds functionality the impact to customers' Protected List Price may vary depending on the situation. For example, Microsoft may acquire a module or functionality from an independent software vendor. A number of Microsoft customers may already license that software, so Microsoft may opt to add the product registration information to a customer's account at no charge. In that case, the current list price of the software may be added to that customer's Protected List Price, and future Enhancement Plan renewals will be based on the new Protected List Price. If the former company's historical list prices are made available with the acquisition, that value may be used instead of current list prices.

In another example, Microsoft may add functionality to its suite of modules and give the license for that software to customers at no charge, either proactively or at the customer's request. That additional license will affect the customer's Protected List Price by the current list price of the software. There may be cases where Microsoft does not increase the customer's Protected List Price. Microsoft has the ability to establish different values based on the date the license was obtained for a given product.

Customers are typically notified in these situations if their renewal amounts will change as a result of Microsoft acquiring or adding a product.

What happens when Microsoft reconfigures software functionality?

A customer's Protected List Price benefit will remain intact if Microsoft makes any changes to how software modules or granules are configured. For example, if Microsoft changes the configuration of a currently shipping product by splitting one module/granule into multiple modules/granules or by consolidating multiple modules/granules into a single module/granule, a customer's Protected List Price will not be affected.

If a module/granule is reconfigured, Microsoft will adjust a customer's license information listed on CustomerSource.

What happens when Microsoft changes the pricing currency for my region?

The currency will be converted from the old to new currency at the time of the renewal. Going forward the customer will have the new currency as their Protected List Price for future years.

8. Additional Modules, Licenses, and Systems

What happens to my price if I add a module or user to my solution?

If you are enrolled in the Enhancement Plan and purchase additional functionality or use licenses, the coverage for these additional modules/users will be prorated to the day to match the anniversary date of your current contract.

Do I have to be enrolled in the Enhancement Plan to purchase additional modules or system user licenses?

Yes, enrollment is required to purchase additional modules or system user licenses for all Microsoft Dynamics products.

Note: This excludes database expansion for Microsoft Dynamics C5 customers.

Can I purchase additional functionality or user licenses for unsupported products?

Customers enrolled in the Enhancement Plan may choose to purchase licenses for unsupported products that we make available for purchase at our sole discretion. However, by definition, Microsoft will not support these licenses. For a list of Microsoft Dynamics products that are currently supported, go to the Support Lifecycle [website](#).

Is enrollment in the Enhancement Plan required for customers to have rights to hotfixes and service packs?

Yes, enrollment in the Enhancement Plan is required for customers to receive non-security hotfixes, tax and regulatory releases, and services packs.

What is Transition Investment Credit and how do I benefit from it?

Transition Investment Credit gives you the flexibility and security in your Microsoft Dynamics solution choice; should your needs change, you have access to any of the other Microsoft Dynamics solutions that will best fit your new requirements. Contact your partner for additional details.

Customers may make any of the following types of transitions:

- **Product Line Transition:** Any move from one ERP product line code base to a different ERP product line code base.
- **Edition Transition:** Any edition change within the same product line and licensing model.
- **License Model Transitions:** Any move from Module Based Licensing model to the Business Ready Licensing model, remaining within the same product line.

Do customers need to enroll in the Enhancement Plan after transition?

Yes. Regardless of the type of transition, an additional year of enrollment in Enhancement Plan after the transition is required.

Can customers use the balance to purchase additional functionality?

Yes. If the credit amount customers receive from the current license exceeds the entire cost of the transition, they may use the balance toward more functionality and/or users at the time of transition. However, the balance cannot be:

- Refunded.
- Reserved for future license purchases.
- Used for the Enhancement Plan, support, training, or any other service offering.

How often can customers make a transition?

Customers are allowed to make one transition, as long as they are current on the Enhancement Plan, every 12 months.

9. License Mobility

What is License Mobility for Microsoft Dynamics?

You may reassign your ERP Solution Licenses, for which you are under a current Enhancement Plan, to (i) any servers running physical or virtual OSEs dedicated to you and located within the same Server Farm as often as needed, or (ii) from one Server Farm to another, but not on a short-term basis (i.e., not within 90 days of the last assignment).

10. Disaster Recovery Rights

What Disaster Recovery Rights for Microsoft Dynamics? If you are under a current Enhancement Plan, for each instance of eligible server software you run in a physical or virtual OSE on a licensed server, you may temporarily run a backup instance in a physical or virtual OSE on a server dedicated to disaster recovery. The license terms for the

software and the limitations contained in the Software License Terms (SLT) apply to your use of software on a disaster recovery server.

11. Unified Service Desk

What Rights do I have with Unified Service Desk for Microsoft Dynamics CRM? Each Microsoft Dynamics CRM Professional Use Additive CAL with an active Enhancement Plan provides you the right to install and use Unified Service Desk (USD). The right to use USD is limited to the user or device to whom the qualifying CAL is assigned. You may not access or use USD after your Enhancement Plan contract expires.

12. Support Lifecycle Policy

What is the Support Lifecycle Policy for Microsoft Dynamics?

Support Lifecycle Policy provides you with clear and predictable support information for all Microsoft products including your Microsoft Dynamics solution. With this policy, you can plan more effectively for your future software requirements based on long-term awareness of the support cycle for Microsoft products. Generally, the Mainstream Support period for Microsoft Dynamics products is five years. During the Mainstream Support period, customers on the Enhancement Plan will have access to the following benefits:

- Request to change product design and features
- Online product information and KnowledgeBase
- Security updates
- Ability to request non-security hotfixes including tax and regulatory releases.

For information regarding a specific product, service pack support policies, Extended Support phase, and end-of-support timelines, visit the [Microsoft Support Lifecycle website](#).

13. Direct Communications to Customers

Does Microsoft send email communications directly to customers?

Yes. The Enhancement Plan email strategy is intended to bring additional awareness of a customer's Enhancement Plan benefits and renewal date by sending welcome and reminder emails to the partner and the customer. This helps ensure that the customer understands their benefits and renews on time, receiving uninterrupted access to their Enhancement Plan benefits and avoiding any re-enrollment fees.

Who will receive the emails?

The individuals at your organization who are listed as the support contact role or the billing contact role will receive the emails from Microsoft.

When are the welcome and renewal emails delivered to customers?

- Customers receive a welcome email upon purchase of the Enhancement Plan.
- Customers receive a renewal reminder email 60 days before the end of the customer's Enhancement Plan term.
- Customers that do not renew will receive an email 35 and 180 days after expiration of their Enhancement Plan term.

Contact Information

Where can I send my questions about the Enhancement Plan?

Please contact your partner with questions and concerns about your Microsoft Dynamics solution.