



WESTCOAST CLOUD



# DYNAMICS 365 FINANCE LICENSING

**Dynamics 365 Finance gives your customers the power to monitor their financial performance in real time, and see what's around the corner.**

By integrating data insights across Dynamics, Office, and partner applications, Finance creates a time-saving, centralised source of information across an organisation, enabling more data-driven decisions and faster growth.

Finance is licensed per user with a minimum purchase requirement.

Licences comes with 100 electronic invoice transactions/tenant/month, and 20,000 AI Builder credits/tenant/month.



## FINANCE SECURITY ROLES

ROLE	SECURITY ROLE DESCRIPTION	TEAM MEMBERS	OPS-ACTIVITY	FINANCE
<b>C-Suite</b>				
Chief executive officer	Reviews the financial and operational performance		●	●
Chief financial officer	Reviews the financial performance		●	●
<b>Budgeting</b>				
Budget contributor	Creates, updates and approves departmental budget plans	●	●	●
Budget clerk	Documents budget events and responds to budget enquiries		●	●
Budget manager	Reviews budget process performance and enables the budget process			●
<b>Financials and Accounting</b>				
Accounts payable positive payment clerk	Documents accounts payable positive pay events	●	●	●
Accountant	Documents accounting events and responds to accounting enquiries			●
Accounting manager	Reviews accounting, customer invoice, vendor invoice, and payment process performance and enables those processes			●
Accounting supervisor	Reviews accounting process performance and enables the accounting process			●
Accounts payable centralised payments clerk	Documents accounts payable centralised payment events and responds to centralised payment enquiries			●
Accounts payable clerk	Documents vendor invoice events and responds to vendor enquiries			●
Accounts payable manager	Reviews vendor invoice process performance and enables the vendor invoice process			●
Accounts payable payments clerk	Documents accounts payable payment events and responds to payment enquiries			●
Accounts receivable centralised payments clerk	Documents accounts receivable centralised payment events and responds to centralised payment enquiries			●
Accounts receivable clerk	Documents customer invoice events and responds to customer enquiries			●
Accounts receivable manager	Reviews customer invoice process performance and enables the customer invoice process			●
Accounts receivable payments clerk	Documents accounts receivable payment events and responds to payment enquiries			●
Auditor	This role is designed for in-house or external auditors. It provides read-only access to a majority of the system. It is also used for audit policy management			●
Collections agent	Documents collections events and responds to collections enquiries			●
Collections manager	Reviews collections process performance and enables the collections process			●
Financial controller	Reviews all accounting process performance and enables those processes			●
Tax accountant	Documents fiscal events and responds to fiscal enquiries			●
Tax engine developer	Creates and manages taxable document model mappings			●
Tax engine functional consultant	Creates and manages generic tax engine components (taxable document and tax document)			●
Treasurer	Documents treasury events and responds to treasury enquiries			●

If you have any questions around licensing, please contact:

**The Dynamics Team**

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