



DYNAMICS 365 SALES LICENSING

Dynamics 365 Sales gives businesses the data they need to take their customer relationships to the next level.

Use Sales to help your clients engage with customers through their preferred channel and win more new business, streamline sales processes with AI, predict and manage pipeline, and improve customer calls with live insights.

Dynamics 365 Sales features three distinct licensing options; Professional, Enterprise and Premium.

Please note that Professional licences can't be used in the same environment as Premium or Enterprise licences.

Sales is licensed on a per user basis. Enterprise and Premium can also be licensed per device.

Sales Professional

Ideal for small to medium-sized businesses, Sales Professional makes winning and keeping customers quicker and easier, by automating all those time-consuming complicated sales processes.

Sales Enterprise

Sales Enterprise takes process automation up a gear, to meet the needs of more complex sales environments. As well as everything included in Professional, Sales Enterprise also offers extensibility, embedded intelligence, manual forecasting, contextual insights, and advanced customisation capabilities.

Sales Enterprise licences include 2,000 Customer Voice responses per tenant per month. Additional response packs (1,000 responses/tenant/month) can be purchased as needed.

Sales Enterprise also includes a few Sales Premium features, including assistant cards, email engagement, Outlook activity auto capture, and three new premium offerings - Conversation Intelligence, Sales Accelerator and Lead & Opportunity scoring.

These premium features use automation and AI to help sellers prioritise their worklists, get real-time analysis during calls, automate action notifications, and create quick meeting summaries.

Sales Enterprise licences include:

- Three hours of Conversation Intelligence usage per month
- 1500 Sales Accelerator records per environment per month
- 1500 Predictive Scoring Leads/Opportunity records scored per environment per month

If your customers need more capacity, simply upgrade their licenses to Sales Premium.

Sales Premium

Sales Premium builds on the capabilities of Sales Enterprise, with inbuilt, actionable insights. Use it to help your biggest customers make faster, better decisions, and take customer engagement to a whole new level with the most powerful AI technology that Dynamics 365 has to offer.

Sales Premium is licensed on a per user basis, and includes Sales Insights.

Sales Insights

Sales Insights is included as standard with Sales Premium licences, and is an optional extra on Sales Enterprise and Microsoft Relationship Sales Solution Plus licenses. It is not available with Sales Professional.

Full Sales Insights licenses include:

- Predictive Scoring
- Predictive Forecasting
- Business Card Reader
- Relationship Analytics
- Assistant Studio
- Sales Accelerator
- Pipeline Intelligence
- Notes Analysis
- Conversation Intelligence
- Connection Insights

Your customers will need to access the Sales Hub app in order to set up these features. So make sure they have this app in their tenant.

The capacity limit for Business Card Reader is 200/user/month. Conversation Intelligence's capacity is 10 hours/user/month. If your customers need additional Sales Insights capacity, licenses can be purchased to increase the pooled amount. Further Conversation Intelligence capacity can also be bought through the Conversation Intelligence add-on, in packs of 1000 hours, pooled at tenant level.

Customers must have either a Sales Insights or a Sales Premium license to purchase Conversation Intelligence add-on licenses.

Sales Premium customers who've added Sales Insights to the licence, can increase capacity by purchasing additional Sales Premium licenses.

SALES INSIGHTS CAPACITIES

APPLICATION	INCLUDED CAPACITY	ADD-ON CAPACITY
Sales insights included with Sales Enterprise		
Business Card Reader	10scans/user/month (pooled at tenant level)	Available with a purchase of Sales Insights or Sales Premium
Conversation Intelligence	Activated Conversation Intelligence users receive 3 hours/user/month	Available with a purchase of Sales Insights or Sales Premium
Sales Accelerator	1500 records connected to a sequence per environment per month	Available with a purchase of Sales Insights or Sales Premium
Lead & Opportunity Scoring	1500 records scored per environment per month	Available with a purchase of Sales Insights or Sales Premium
Sales Insights/Sales Premium Users		
Business Card Reader	200/user/month (pooled at tenant level)	Additional Sales Insights user purchase to increase 200/user/month (pooled at tenant level)
Conversation Intelligence	10 hours/user/month Included with Sales Premium or Sales Insights	Conversation Intelligence Add-On: 1000 hours/tenant/month (pooled at tenant level)
Sales Accelerator	Full Access	
Lead & Opportunity Scoring	Full Access	

SALES USE RIGHTS

USE RIGHTS	TEAM MEMBERS	SALES		
		PRO	ENT	PRE
Access				
Dynamics 365 for Outlook and Dynamics 365 App for Outlook	●	●	●	●
Dynamics 365 Mobile Client Application	●	●	●	●
Microsoft Dynamics 365 for iPad & Windows	●	●	●	●
Microsoft Dynamics 365 Web Application	●	●	●	●
Read				
All Dynamics 365 application data	●	●	●	●
Custom table data	●	●	●	●
Tables: Create, Update, Delete				
Accounts		●	●	●
Activities	●	●	●	●
Announcements	●	●	●	●
Calendar: Share	●	●	●	●
Cases for Sales: Create cases with limited edit capability. No case business process flow, SLAs, entitlements, or case routing. Users only licensed with Sales license cannot act as customer service agents and resolve cases		●	●	●
Competitors			●	●
Contacts	●	●	●	●
Custom tables	15 max	15 max	●	●
Embedded Intelligence			●	●
Forecasting			●	●
Invoices		●	●	●
Lead Management		●	●	●
Marketing Campaigns		●	●	●
Marketing Lists		●	●	●
Notes	●	●	●	●
Opportunities		●	●	●
Orders		●	●	●
Personal Views	●	●	●	●
Price Lists		●	●	●
Products		●	●	●
Product Bundles		●	●	●
Product Families/Hierarchies			●	●
Product Relationships			●	●
Quick Campaigns		●	●	●
Quotes		●	●	●
Sales Goals			●	●
Sales Literature			●	●
Saved Views	●	●	●	●
Territories			●	●
Tables: Actions				
Activity Feeds: Post & follow activity feeds	●	●	●	●
Activity: convert to an opportunity		●	●	●
Add or remove a connection (stakeholder, sales team) for an account or contact	●	●	●	●
Business Card Reader (10/user/month: pooled at tenant level)			●	●
Business units: define and configure			●	●
Chat with support team (as chat client for self-service, requires third-party solution)	●	●	●	●
Dialog: start dialog	●	●	●	●
Knowledge Base: create, update, publish, configure, search (basic)			●	●
Lead: qualify and convert to an opportunity		●	●	●
Mail merge: perform mail merge	●	●	●	●
Marketing list: associate a marketing list with an account or contact	●	●	●	●
Open project position: apply for open project position for Project Operations	●	●	●	●
Project tasks: update project task status for Project Operations	●	●	●	●
Queue: use a queue item	●	●	●	●
Resource competencies: update own resource competencies for Project Operations	●	●	●	●
Teams: define and configure			●	●
Yammer: use Yammer collaboration (requires the appropriate license, acquired separately)	●	●	●	●
General System Use: Actions				
Auditing: configure		●	●	●
Business Processes: customise		5 max	●	●
Create and update custom reports, charts, and dashboards		5 max	●	●
Customise and extend out of the box reports, charts, and dashboards			●	●
Dialogs: define and configure		●	●	●
Duplicate Detection: configure rules		●	●	●
Dynamics 365 Forms, Tables, and Fields: create		●	●	●
Email: create, update, and delete templates	●	●	●	●
Forms and Views: customise		2 max	●	●
Import Data in Bulk		●	●	●
Microsoft Excel: export data to Excel	●	●	●	●
Queue: define and configure		15 max	●	●
Records: use relationships and connections between records	●	●	●	●
Search and Advanced Find: use	●	●	●	●
Tables: define connections and relationships between tables		●	●	●
Word: create, update, and delete templates	●	●	●	●
Workflows: define and configure		●	●	●
Automation & AI Offerings (inc. Sales Premium Features)				
Email Engagement			●	●
Assistant Cards			●	●
Auto Capture			●	●
Conversation Intelligence			●	●
Sales Accelerator			●	●
Lead & Opportunity Scoring			●	●
Notes Analysis				●
Connection Insights (Inc: Who Knows Whom)				●
Pipeline Intelligence (Predictive forecasting)				●
Relationship Analytics				●
Additional Services and Software				
Dynamics 365 Customer Voice			●	●
Dynamics 365 Mobile Offline capabilities			●	●
Project Operations Team Members app	●	●	●	●

If you have any questions around licensing, please contact:

The Dynamics Team

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