

Customer Engagement Plan Applications

Use Rights

The following tables lists the use rights corresponding to the User Subscription Licenses (User SLs) and applicable Device Subscription Licenses available in Dynamics 365 Customer Engagement Plan Applications.

To configure and administer Dynamics 365 services a full enterprise user license is required (Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, Dynamics 365 for Project Service Automation).

Use Rights	Team Members	Sales		Customer Service		Field Service	Project Serv Auto	Marketing
		Pro	Ent	Pro	Ent			
Access								
Dynamics 365 Mobile Client Application	•	•	•	•	•	•	•	•
Microsoft Dynamics 365 for iPad & Windows	•	•	•	•	•	•	•	•
Microsoft Dynamics 365 for Outlook	•	•	•	•	•	•	•	•
Microsoft Dynamics 365 Web application	•	•	•	•	•	•	•	•
Read								
All Dynamics 365 application data	•	•	•	•	•	•	•	•
Custom Entity data	•	•	•	•	•	•	•	•
Approve								
Unified Operations Plan functionality: Time, Expense and Invoices	•	•	•	•	•	•	•	
Access via Portal or API: Create, Read, Update, Delete								
Employee Self Service: Cases	•	•	•	•	•	•	•	
Non-Employees Only: Work Orders			•		•	•	•	
Non-Employees Only: Opportunities			•		•	•	•	
Use Rights	Team Members	Sales		Customer Service		Field Service	Project Serv Auto	Marketing
		Pro	Ent	Pro	Ent			
Entities: Create, Update, Delete								
Activities	•	•	•	•	•	•	•	•
Announcements	•	•	•	•	•	•	•	•
Calendar: share	•	•	•	•	•	•	•	•
Contacts	•	•	•	•	•	•	•	•
Custom Entities (see Appendix D)	15 max	15 max	•	15 max	•	•	•	•
Notes	•	•	•	•	•	•	•	•
Personal Views	•	•	•	•	•	•	•	•
Saved Views	•	•	•	•	•	•	•	•
Unified Operations functionality: Quality Control	•	•	•	•	•	•	•	
Unified Operations functionality: Requisitions	•	•	•	•	•	•	•	
Unified Operations functionality: Service Orders	•	•	•	•	•	•	•	
Unified Operations functionality: Time and Expense	•	•	•	•	•	•	•	

Use Rights	Team Members	Sales		Customer Service		Field Service	Project Serv Auto	Marketing
		Pro	Ent	Pro	Ent			
Accounts		•	•	•	•	•	•	•
Cases for Sales		•	•					
Competitors			•					
Embedded Intelligence			•		•			
Forecasting			•					
Invoices		•	•			•		
Lead Management		•	•					•
Marketing Campaigns			•					•
Marketing List			•					•
Opportunities		•	•					
Orders		•	•					
Price lists		•	•					
Product		•	•					
Product Bundles		•	•					
Product Families			•					
Product Hierarchies			•					
Product Relationships			•					
Quick Campaigns			•					•
Quotes		•	•					
Sales Goals			•					
Sales Hub			•					
Sales Literature			•					•
Territories			•			•		
Customer Service Hub				•	•			
Entitlements				•	•			
Facilities/Equipment					•			
Leads (create only)				•	•			
Resources				•	•	•		
Service (Service Scheduling)					•			
Work Hours				•	•	•		
Customer Assets						•		
Dispatch						•		
Inventory Management						•		
Purchase Orders						•		
Repairs and Returns Management						•		
Routing Capabilities						•		
Schedule						•		
Service Agreements						•		
Work Order Management						•		

Use Rights	Team Members	Sales		Customer Service		Field Service	Project Serv Auto	Marketing
		Pro	Ent	Pro	Ent			
Project Contracts							•	
Project Estimates							•	
Project Expenses							•	
Project Invoices							•	
Project Management							•	
Project Price Lists							•	
Project Transaction Approval							•	
Resource Availability View							•	
Resource Schedule Management							•	
Active Segments								Max 100
Campaign Management (customer journeys, marketing pages, etc.): multi channel								•
Email Marketing								Max 10x contacts
Event Management								•
Lead Scoring								•
Entities: Actions								
Activity Feeds: post & follow activity feeds	•	•	•	•	•	•	•	•
Activity: convert to a case				•	•			
Activity: convert to an opportunity		•	•					
Add or remove a Connection (stakeholder, sales team) for an Account or Contact	•	•	•	•	•	•	•	
Business Units: define and configure			•		•	•	•	•
Case Management: reassign, add to queue, route & resolve cases				•	•			
Chat with support team (as chat client for self-service, requires 3rd party solution)	•	•	•	•	•	•	•	
Connector for LinkedIn Lead Gen Forms								•
Contract Templates: create, update and delete					•			
Dialog: start dialog	•	•	•	•	•	•	•	•
Field Service Mobile Application						•		
Field Service Mobile Application Offline Sync: use						•		
Knowledgebase: create, update, publish, configure, search (basic)			•	•	•	•	•	
Knowledgebase: relevance search					•	•	•	
Lead: qualify and convert to an opportunity			•					
Mail merge: perform mail merge	•	•	•	•	•	•	•	•
Manage Services, Resources, Work Hours, and Competencies							•	
Marketing List: associate a Marketing List with an Account or Contact	•	•	•	•	•	•	•	•

Use Rights	Team Members	Sales		Customer Service		Field Service	Project Serv Auto	Marketing
		Pro	Ent	Pro	Ent			
Open Project Position: apply for Open Project Position for Project Service	•	•	•	•	•	•	•	
Project Tasks: update Project Tasks status for Project Service Automation	•	•	•	•	•	•	•	
Project Transactions: approve							•	
Queue: use a queue item	•	•	•	•	•	•	•	•
Repairs: create and manage (RMA)						•		
Resource Competencies: update own Resource Competencies for Project Service Automation	•	•	•	•	•	•	•	
Resource Schedule Optimization: manage						•	•	
Resources (facilities, equipment, people): manage					•	•	•	
Resources: define & configure						•		
Returns: create and manage Returns (RTV)						•		
Schedule & Dispatch Capabilities: use scheduling assistant, drag & drop assignment, update resource bookings					•	•	•	
Schedule Board: configure and View						•	•	
Services: define & configure						•	•	
SLA Policies: configure				•	•			
Teams: define and configure			•		•	•	•	•
Territories: manage					•	•	•	
Time & Expense: submit Time & Expense for Project Service Automation	•	•	•	•	•	•	•	
Unified Operations Plan functionality: manage direct reports and candidates	•	•	•	•	•	•	•	
Unified Operations Plan functionality: manage personal info	•	•	•	•	•	•	•	
Unified Operations Plan functionality: manage budgets	•	•	•	•	•	•	•	
Use Resource Availability View and Resource Schedule Management							•	
Work Hours: define & configure						•		
Work Hours: manage					•	•	•	
Yammer: use Yammer collaboration requires the appropriate license (acquired separately)	•	•	•	•	•	•	•	•

Use Rights	Team Members	Sales		Customer Service		Field Service	Project Serv Auto	Marketing
		Pro	Ent	Pro	Ent			
General System Use: Actions								
Auditing: configure		•	•	•	•	•	•	•
Business Processes: customize (see Appendix D)		5 max	•	5 max	•	•	•	•
Dialogs: define and configure		•	•	•	•	•	•	•
Duplicate Detection: configure rules		•	•	•	•	•	•	•
Dynamics 365 Forms, Entities, and Fields: create		•	•	•	•	•	•	•
Dynamics 365: administer		•	•	•	•	•	•	•
Email: create, update and delete templates	•	•	•	•	•	•	•	
Entities: define connections and relationships between entities		•	•	•	•	•	•	•
Forms and Views: customize (see Appendix D)		2 max	•	2 max	•	•	•	•
Import data in bulk		•	•	•	•	•	•	•
Microsoft Excel: export data to Excel	•	•	•	•	•	•	•	•
Queue: define and configure (see Appendix D)		15 max	•	15 max	•	•	•	•
Records: use relationships & connections between records	•	•	•	•	•	•	•	•
Search and advanced find: use	•	•	•	•	•	•	•	•
System reports, charts, and dashboards: create and update (see Appendix D)		5 max	•	5 max	•	•	•	•
System reports, charts, and dashboards: customize (see Appendix D)			•		•	•	•	
Word: create, update and delete templates	•	•	•	•	•	•	•	
Workflows: define and configure		•	•	•	•	•	•	•
Additional Services and Software								
Dynamics 365 - Gamification Fan & Spectator	•	•	•	•	•	•		
Dynamics 365 - Gamification Player & Admin			•		•	•		
Interactive Service Hub			•		•	•	•	
Microsoft PowerApps Plan 2			•		•	•	•	
Project Desktop Client**							•	
Project Web App*							•	
Timesheet management via Project Web App*	•	•	•	•	•	•		
Unified Service Desk			•		•			
Voice of Customer			•		•	•		standalone

*Project Web App (PWA) is an online collaborative project, timesheet, and portfolio management solution, based on the SharePoint platform

**Project Online Desktop Client (PODC) is the fully installed, up-to-date subscription version of the Project desktop application