Appendix B: Customer Engagement 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 Customer Engagement Applications.

Use Rights	Team Members	Sales		Customer Service		Field Service	PSA	Marketing
		Pro	Ent	Pro	Ent			
Access								
Dynamics 365 Mobile Client Application	●	●	●	●	●	●	●	●
Microsoft Dynamics 365 for iPad & Windows	●	●	●	●	●	●	●	●
Dynamics 365 for Outlook and Dynamics 365 App for Outlook[1]	●	●	●	●	●	●	●	●
Microsoft Dynamics 365 Web application	●	●	●	●	●	●	●	●
Read								
All Dynamics 365 application data	●	●	●	●	●	●	●	●
Custom Entity data	●	●	●	●	●	●	●	●
Approve								
Finance functionality: Time, Expense and Invoices	●	●	●			●	●	
Access via Customer Service app module for Team Members, Portal[2] or API: Create, Read, Update, Delete								
Employee self-serve: Cases	●	●	●	●	●	●	●	
Non-Employees Only: Work Orders			●		●	●	●	
Non-Employees Only: Opportunities			●		●	●	●	
Entities: Create, Update, Delete								
Activities	●	●	●	●	●	●	●	●
Announcements	●	●	●	●	●	●	●	●
Calendar: share	●	●	●	●	●	●	●	●
Contacts	●	●	●	●	●	●	●	●
Custom Entities (see Appendix D)	15 max[3]	15 max	●	15 max	●	●	●	●
Notes	●	●	●	●	●	●	●	●
Personal Views	●	●	●	●	●	●	●	●
Saved Views	●	●	●	●	●	●	●	●
Quality Control (applies to non-Customer Engagement Applications)	●							
Requisitions (applies to non-Customer Engagement Applications)	●							
Service Orders (applies to non-Customer Engagement Applications)	●							
Time and Expense (applies to non-Customer Engagement Applications)	●							

[1]Dynamics 365 App for Outlook can be customized, however usage must comply with use rights for users' corresponding license and pre-approved application scenarios in Appendix A.

[2]When provisioning capacity-based portals, using Common Data Service capacity, portal licensing use rights apply.

[3]Team Members application module may be customized with maximum 15 additional entities (custom entities or standard Common Data Service entities) available to the Team Members license per pre-approved application scenarios in Appendix A.

Use Rights	Team Members	Sales		Customer Service		Field Service	PSA	Marketing
		Pro	Ent	Pro	Ent			
Accounts		●	●	●	●	●	●	●
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			●					
Embedded Intelligence			●		●			
Forecasting			●					
Invoices		●	●			●		
Lead Management		●	●					●
Marketing Campaigns		●	●					●
Marketing List		●	●					●
Opportunities		●	●					
Orders		●	●					
Price lists		●	●					
Product		●	●					
Product Bundles		●	●					
Product Families			●					
Product Hierarchies		●	●					
Product Relationships		●	●					
Product Taxonomy		●	●					
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						●		
Project Contracts							●	
Project Estimates							●	
Project Expenses							●	
Project Invoices							●	

Use Rights	Team Members	Sales		Customer Service		Field Service	PSA	Marketing
		Pro	Ent	Pro	Ent			
Project Management							●	
Project Price Lists							●	
Project Transaction Approval							●	
Resource Availability View							●	
Resource Schedule Management							●	
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 card scanning (10/user/month: pooled at tenant level)			●					
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								●
Dialog: start dialog	●	●	●	●	●	●	●	●
Field Service Mobile Application						●		
Field Service Mobile Application Offline Sync: use						●		
Knowledgebase: create, update, publish, configure, search (basic)			●	●	●	●	●	
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	●	●	●	●	●	●	●	●
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)						●		

Use Rights	Team Members	Sales		Customer Service		Field Service	PSA	Marketing
		Pro	Ent	Pro	Ent			
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	●						●	
Human Resources: manage direct reports and candidates	●							
Human Resources: manage personal info	●							
Finance 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)	●	●	●	●	●	●	●	●
General System Use: Actions								
Auditing: configure		●	●	●	●	●	●	●
Business Processes: customize		5 max	●	5 max	●	●	●	●
Dialogs: define and configure		●	●	●	●	●	●	●
Duplicate Detection: configure rules		●	●	●	●	●	●	●
Dynamics 365 Forms, Entities, and Fields: create		●	●	●	●	●	●	●
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	●	●	●	●	●	●	●	●

Use Rights	Team Members	Sales		Customer Service		Field Service	PSA	Marketing
		Pro	Ent	Pro	Ent			
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		5 max	●	5 max	●	●	●	●
System reports, charts, and dashboards: customize			●		●	●	●	
Word: create, update and delete templates	●	●	●	●	●	●	●	
Workflows: define and configure		●	●	●	●	●	●	●
Additional Services and Software								
Dynamics 365 - Gamification Fan & Spectator	●	●	●	●	●	●		
Dynamics 365 - Gamification Player & Admin			●		●	●		
Dynamics 365 Customer Voice***			●		●	●		● (standalone)
Microsoft PowerApps			●		●	●	●	
Project Desktop Client*							●	
Project Web App**							●	
Timesheet management via Project Web App**	●	●	●	●	●	●		
Unified Service Desk					●			

*Project Online Desktop Client (PODC) is the fully installed, up-to-date subscription version of the Project desktop application.
**Project Web App (PWA) is an online collaborative project, timesheet, and portfolio management solution (includes Timesheet Management), based on the SharePoint platform.
***Dynamics 365 Customer Voice is included in the Dynamics 365 Marketing standalone application, but not included in Marketing Attach.