

Use Rights	Team Members	Sales		Customer Service		Field Service	Project Service Automation	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								
Time, Expense and Invoices (applies to non-Customer Engagement Applications)	●							
Access via Portal or API: Create, Read, Update, Delete								
Employee Self Service: 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	15 max	●	15 max	●	●	●	●
Notes	●	●	●	●	●	●	●	●
Personal Views	●	●	●	●	●	●	●	●
Saved Views	●	●	●	●	●	●	●	●
Quality Control (applies to non-Customer Engagement applications)	●							

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Requisitions (applies to non-Customer	●							
Service Orders (applies to non-Customer Engagement applications)	●							
Time and Expense (applies to non-Customer Engagement applications)	●							
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			●					
Quick Campaigns			●					●
Quotes		●	●					
Sales Goals			●					
Sales Hub			●					

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Sales Literature			●					●
Territories			●			●		
Customer Service Hub				●	●			
Entitlements				●	●			
Facilities/Equipment					●			
Leads (create with limited edit capabilities)				●	●			
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							●	
Project Management							●	
Project Price Lists							●	
Project Transaction Approval							●	
Resource Availability View							●	
Resource Schedule Management							●	
Campaign Management (customer journeys, marketing pages, etc.): multichannel								●
Email Marketing								Max 10x contacts

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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							●	
Talent: manage direct reports and candidates	●							
Talent: manage personal info	●							
Finance functionality: manage budgets	●							

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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 (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)			•		•	•	•	

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Word: create, update and delete templates	•	•	•	•	•	•	•	
Workflows: define and configure		•	•	•	•	•	•	•
Additional Services and Software								
Dynamics 365 - Gamification Fan & Spectator	•	•	•	•	•	•		
Dynamics 365 - Gamification Player & Admin			•		•	•		
Microsoft Forms Pro			•		•	•		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.