

Appendix A: Key Team Members Features

Below are the details around the Team Members license. Note that there is only one Dynamics 365 for Team Members, Enterprise edition license which provides access to both Dynamics 365 Enterprise Plan 1 Business Application and Dynamics 365 for Operations, Enterprise edition features. The table calls out which Application to which a given feature applies. Additional details on Plan 1 Business Application functionality for Team Members is also shown in Appendix B.

Access Rights	Description	Plan 1 Business Apps	Operations App
Access	Access Anywhere: Web App, Mobile App, Tablet App, via Outlook	●	
General System Use	Use Relationship and Connections between records	●	
	Run as an On-demand process*, Run an Automated Workflow*	●	
	Saved views, personal views	●	
	Search, Advanced Find Search	●	
	Export data to Microsoft Excel, Perform Mail Merge	●	
Read	Full Read across all Dynamics 365 Applications	●	●
Edit/Actions	Accounts & Contacts, Activities & Notes, Shared Calendar, Announcements	●	
	Knowledge Management, Interactive Service Hub for KM, User Dashboards/Reports	●	
	Time & Expense, Apply for Project	●	
	Collaboration experience: Activity Feeds & Yammer Integration	●	
	Use a Queue Item, start dialog*	●	
	Custom Entities*	●	
	Record time and Expenses (including for projects)	●	●
	Manage personal info	●	●
	Create requisitions		●
	Create and edit quality control		●
Approval	Time, Expense and Invoices		●
Special Portal Only Items	Employee Self Service: Via Web Only: Start Personal Support Chat & Cases	●	
	Respond to Voice of the Customer Surveys	●	
	Non-Employee, Non-Outsourced users: Create & Update Opportunities, update work orders	●	
Platform	PowerApps for Team Members	●	●

*Actions can be performed only against records corresponding to entities included in the use rights

Appendix B: Plan 1 Applications

The following tables lists the use rights corresponding to the User Subscription Licenses (User SLs) and applicable Device Subscription Licenses available in Microsoft Dynamics 365 Plan 1 Business Applications.

Please note a full user license (Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, Dynamics 365 for Project Service Automation) is required to enable much of the functionality of Team Members due to the need to configure and administer the services.

Bullets indicate full create, read, update, delete access unless otherwise indicated.

Use Right	Team Members	Sales	Customer Service	Field Service	Project Service Automation
<i>Dynamics 365 for Operations functionality: Record Time & Expense; create requisitions; manage budgets; approval of Operations time, expense & invoices; edit & respond to inquiries for: quality control, service orders</i>	●	●	●	●	●
Accounts and Contacts	●	●	●	●	●
Associate a Marketing List with an Account or Contact	●	●	●	●	●
Activities and Notes	●	●	●	●	●
Post & follow activity feeds	●	●	●	●	●
Yammer collaboration*	●	●	●	●	●
Use a queue item	●**	●**	●**	●**	●**
Start dialog	●**	●**	●**	●**	●**
Shared Calendar	●	●	●	●	●
View Announcements	●	●	●	●	●
Run as an on-demand process	●**	●**	●**	●**	●**
Run an automated workflow	●**	●**	●**	●**	●**
Use relationships and connections between records	●**	●**	●**	●**	●**
Write custom entity records	●***	●***	●***	●***	●***
Read custom entity data	●	●	●	●	●
Personal views; Saved Views	●	●	●	●**	●
Search & Advanced find search	●	●	●	●**	●
Export data to Microsoft Excel	●	●	●	●	●
Perform mail merge	●	●	●	●	●
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	●	●	●	●	●
Portal or API access Only: Employee Self Service: Submit cases and update Cases user has submitted (as a support client/customer)	●	●	●	●	●
Chat with support team (as chat client for self-service, requires 3rd party solution)	●	●	●	●	●
Portal or API access Only/Non-Employees Only: Update Work Orders	●	●	●	●	●
Portal or API access Only/ Non-Employees Only: Create & Update Opportunities	●	●	●	●	●
Add or remove a Connection (stakeholder, sales team) for an Account or Contact	●	●	●	●	●
Create and update announcements	●	●	●	●	●

Use Right	Team Members	Sales	Customer Service	Field Service	Project Service Automation
Submit Time & Expense for Project Service Automation	●	●	●	●	●
Update Project Tasks for Project Service Automation	●	●	●	●	●
Update Own Resource Competencies for Project Service Automation	●	●	●	●	●
Apply for Open Project Position for Project Service	●	●	●	●	●
Project Finder Mobile Application	●	●	●	●	●
User reports, charts, and dashboards	●	●	●	●	●
Create, update, customize, and run Reports	●	●	●	●	●
Microsoft Project Online Essentials****	●	●	●	●	●
Interactive Service Hub	●	●	●	●	●
Create, Publish, Configure Knowledgebase	●	●	●	●	●
Gamification Fan & Spectator	●	●	●	●	●
Embedded PowerApps (Includes Flow)	●	●	●	●	●
User Interface integration for Microsoft Dynamics 365	●	●	●	●	●
Import data in bulk		For App	For App	For App	For App
Configure auditing		For App	For App	For App	For App
Configure duplicate-detection rules		For App	For App	For App	For App
Define connections and relationships between entities		For App	For App	For App	For App
Define and configure queues		For App	For App	For App	For App
Define and configure dialogs		For App	For App	For App	For App
Define and configure workflows		For App	For App	For App	For App
System reports, charts, and dashboards		For App	For App	For App	For App
Customize forms and views		For App	For App	For App	For App
Create Dynamics 365 forms, entities, and fields		For App	For App	For App	For App
Administer Dynamics 365		For App	For App	For App	For App
Gamification Player & Admin		●	●	●	●
Microsoft Social Engagement		●	●	●	●
Voice of Customer		●	●	●	●
Full Mobile Offline sync		●	●	●	●
Email and Word Templates		●	●	●	●
Lead Management		●			
Opportunities		●			
Qualify and convert a Lead to an Opportunity		●			
Convert an activity to an Opportunity		●			
Competitors		●			
Products		●			
Price Lists		●			
Quotes		●			
Orders		●			
Invoices		●			
Goals		●			
Territories		●			
Sales literature		●			
Marketing Lists		●			

Use Right	Team Members	Sales	Customer Service	Field Service	Project Service Automation
Quick campaigns		●			
Marketing campaigns		●			
Define and configure business units		●			
Define and configure teams		●			
Unified Service Desk		●	●		
Case management			●		
Convert an Activity to a Case			●		
Contract templates			●		
Contracts			●		
Configure SLA policies			●		
Entitlements			●		
Facilities/Equipment			●		
Define and configure services, resources, and work hours			●		
Work Orders				●	
Schedule & Dispatch capabilities: use Scheduling Assistant, Drag & Drop Assignment, update resource bookings				●	
Configure and View Schedule Board				●	
Service Agreements				●	
Purchase Orders				●	
Invoices				●	
Customer Assets				●	
Inventory Management				●	
Create and manage Repairs and Returns (RMA/RTV)				●	
Manage Resource Schedule Optimization				●	
Manage Resources (facilities, equipment, people), territories and work hours				●	
Field Service Mobile Application				●	
Projects					●
Project Expenses and Project Estimates					●
Resource Availability View and Resource Schedule Management					●
Project Price Lists					●
Project Contracts					●
Project Invoices					●
Approve Project Transactions					●
Manage Services, Resources, Work Hours, and Competencies					●
Microsoft Project Online Premium****					●

*Use of Yammer within the Microsoft Dynamics 365 requires a Yammer Enterprise license (acquired separately).

**Actions can be performed only against records corresponding to entities included in the use rights.

*** Custom entities (either based on entities included in Microsoft Dynamics 365 or created by a customer or partner) may require a higher CAL or User SL, depending on the required access. Customizations can only be performed against entities included in the use rights.

****Microsoft Project Online use rights governed by Microsoft Project Online licensing. <https://products.office.com/en-us/project/compare-microsoft-project-management-software>

'For App' means that the use right in question is applicable only for the licensed application and not other applications.