WebSan Solutions Inc.

Dynamics 365 Team Member License Guide

WebSan Solutions Inc.

www.websan.com

What is a Team Member license?

The Microsoft Dynamics 365 for Team Members subscription is a named user subscription designed for users who are not tied to a particular function, but who require basic Dynamics 365 functionality.

This license includes read access as well as some write access for select light tasks across all Dynamics 365 applications for a given tenant. As a result, as more Dynamics 365 applications are adopted across an organization, any user previously licensed with Dynamics 365 for Team Members subscription would be licensed already to access those additional applications.

The Team Members user may access Dynamics 365 data from Dynamics 365 Customer Engagement Plan Applications.

Note, at least one full user must be assigned to the tenant to administer and configure the service. A Plan subscription is the most cost-effective option to provide ultimate flexibility for a user to administer and configure more than one Dynamics 365 application.

Team Member Licensing Information

Honor Based Licensing

Dynamics 365 Team Member license is trust-based. As a customer, you are obligated to follow the rules that Microsoft has put in place.

Technically, a Team Member license can consume all information within Dynamics 365. Microsoft has created restrictions and boundaries that must be followed based on Microsoft's licensing agreement. We strongly recommend that you adhere to the restrictions. WebSan is not liable for any changes you make after our initial setup of the system, which would be in compliance with Microsoft licensing guidelines.

How can I avoid breaching my license agreement?

The system administrator is responsible for creating security roles for your Team Member license using Microsoft's guidelines. As part of our implementation services, WebSan will help you create the appropriate security roles for your team members. For more assistance, you can contact us at support@websan.com.

What does the Team Member have access to?

On the next page, we have listed the Team Member permissions. Team Member Subscription with maximum allowable permissions turned on has full access to Accounts and Contacts, meaning that they can create, read, update or delete (CRUD) all Accounts and Contacts. They have the same full and complete access to all custom entities.

As the system administrator, you can still modify the Team Member security role. For example, you can remove the 'delete' permission altogether. That way, you won't have to worry about a user deleting anything from the system.

Team Member Permission List

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.

- Accounts and Contacts (CRUD)
- Associate a Marketing List with an Account or Contact
- Activities and Notes (CRUD)
- 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 (Actions can be performed only against records corresponding to entities included in the use rights) +
- Use relationships and connections between records
- Write custom entity records (Custom entities may require a higher CAL depending on the required access. Customizations can only be performed against entities included in the use rights) ^
- 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: Create & Update Opportunities
- Add or remove a Connection (stakeholder, sales team) for an Account or Contact
- Create or update announcements
- 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 Applications
- Read user reports, charts, and dashboards
- Create, update, customize, and run Reports
- Microsoft Project Online Essentials
- Interactive Service Hub
- Create, Publish, Configure Knowledgebase
- Dynamics 365 – Gamification Fan & Spectator
- Embedded PowerApps (Includes Flow)
- User Interface integration for Microsoft Dynamics 365

+ Per instance, not cumulative

^ This does not include hierarchies and SLAs available with Dynamics 365 for Customer Service application