

Microsoft Dynamics 365,  
Enterprise edition

Existing Customer  
License Transition Guide



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# Overview

Microsoft Dynamics 365 evolves Microsoft's current CRM and ERP cloud solutions into one cloud service with new purpose-built applications to help manage specific business functions. Dynamics 365 applications are designed to be easily and independently deployed allowing customers to start small and grow into additional capabilities. Dynamics 365 empowers customers to adapt and innovate in real time with nimble, adaptable applications with ease.

Microsoft provides help to existing Microsoft Dynamics customers to transition from their current product, edition, and license model to a new product, edition, or license model. Use this guide to understand how to transition your existing Microsoft Dynamics customers to Microsoft Dynamics 365.

## Microsoft Dynamics Transition Policy

There are several transition options available to existing Microsoft Dynamics customers; this document is intended to clarify each option available. Special pricing is available for our Microsoft Dynamics customers interested in reinventing their company in a cloud based, intelligent business application world, as well as our customers who want to stay on-premises but are required to move to the new Dynamics 365 on-premises SKU structure.

## Eligibility

Existing customers as of October 31, 2016, with either an active online subscription or enrolled in the Enhancement Plan or Software Assurance, may transition a license from a Microsoft Dynamics Product Line to Microsoft Dynamics 365. The License Transition Policy applies to the following products:

- Microsoft Dynamics CRM
- Microsoft Dynamics AX
- Microsoft Dynamics GP
- Microsoft Dynamics NAV
- Microsoft Dynamics SL
- Microsoft Dynamics AX7
- Microsoft Dynamics CRM Online
- Microsoft Dynamics RMS

The License Transition Policy does not apply to:

- Microsoft Dynamics POS
- Microsoft Dynamics C5
- Any other product other than those listed above

## Channel Availability

Please refer to the Licensing [Guides](#) for details on channel availability.

# License Transition Policy

## Licensing Transition

A set of licensing transition rules shown in the pertaining customer scenario below maps what the Dynamics 365 customers will receive upon exchange in their current Microsoft Dynamics product configuration.

By choosing to transition their licensing, the customer acknowledges that there will be material changes impacting the functionality deployed in their solution prior to the transition. Prior to any transition, please review the Dynamics 365 Licensing Guides for detailed information about use rights changes and modifications.

## Existing Customer Options

Customer Type	Online Customers	On Premises Customers		
Licensing Model	Stay on Subscription	Stay with Perpetual	Perpetual + Cloud Add-On	Move to Subscription Only
Option	Transition options to new SKUs	Continue to pay SA or Enhancement	Continue to pay SA or Enhancement + Cloud Add-on SKU	Stop paying SA or Enhancement + purchase From SA SKU
Timing	Anniversary or Renewal	Renewal	Anytime	Anniversary (EAS only) or renewal

### Online Customers

Effective November 1, 2016, all existing Microsoft Dynamics CRM Online and Microsoft Dynamics AX7 SKUs were removed from the price list. Existing customers may continue to add additional seats for SKUs for which they already have a subscription on their agreement or account, with locked pricing until the end of their agreement (except in Open License and MPSA).

### Channel specific scenarios

1. Open License/Open Value/Open Value Subscription – Dynamics CRM Online customers must renew at the end of their current 12-month CRM Online subscription in an alternate channel (Direct, CSP, MPSA, or EA) at renewal. The Online Subscription terms are non-coterminous with the Agreement 36-month term. If the customer chooses to renew in CSP, their partner must already be in the CSP program, or they must engage directly with a CSP partner. Guidance on moving from Open to the CSP program is available for Partners here: <http://aka.ms/prepaidtocspguidance>.
  - a. The Dynamics CRM Online SKUs were removed from the price list effective November 1, 2016. If a customer in Open License requires additional seats or add-ons, they must purchase in an alternate channel. Customer will be eligible for transition pricing for any new seats added, per the terms below.
  - b. Customers who have purchased in Open Value or Open Value Subscription may add additional licenses during the term of the current CRM Online 12-month subscription through the term of the agreement. These orders must be placed manually with the Regional Operations Center.
2. Web-Direct (MOSP) Channel – At renewal, customers in MOSP must renew to Dynamics 365 SKUs. Customers with renewals after February 1, 2017, will need to transact the Dynamics 365 SKUs at transition pricing.
  - a. Details on how to transact in MOSP with promo codes to enable transition pricing is available here; <https://go.microsoft.com/fwlink/?linkid=831667>.
  - c. Details on additional licensing guidance on selecting the right subscription is available here: <https://go.microsoft.com/fwlink/p/?linkid=831668>.

- d. If Advisor partners want to move their customers from Web-Direct to CSP, there is guidance available on how to do that here: <http://aka.ms/advisortocsptransitionguidance>
3. Cloud Solution Provider Program (CSP) – CRM Online customers in CSP must renew using the Dynamics 365 SKUs. Customers with renewals after February 1, 2017, will need to transact the Dynamics 365 SKUs at transition pricing.
  - a. Details for Partners on how to select the new Dynamics 365 SKUs can be found here - <https://msdn.microsoft.com/en-us/library/partnercenter/mt773997.aspx>.
4. MPSA – CRM Online customers in MPSA must renew using the Dynamics 365 SKUs at renewal.
  - a. The CRM Online SKUs were removed from the price list effective November 1, 2016. If a customer in MPSA requires additional seats or add-ons, they must purchase Dynamics 365 SKUs.
5. Enterprise Agreement (EA)/Enterprise Agreement Subscription – CRM Online customers in EA must renew Dynamics 365 SKUs at renewal.

An existing online customer may move their licenses to Dynamics 365 SKUs any time (per the channel agreement terms), but at renewal must transition using the transition Dynamics 365 SKUs. This offer applies at renewal and will be available on the price list for the next 3 years until November 1, 2019.

## **Detailed use rights information for Dynamics CRM Online customers moving to Dynamics 365**

Dynamics CRM Online Customers may opt to upgrade their Dynamics CRM Online Instance to the latest version, Dynamics 365, through the Customer Driven Upgrade process, and benefit from enhancements of the new version.

Customers may elect to retain their Dynamics CRM Online licensing after the technical upgrade to Dynamics 365 or may elect to move some or all of their licenses to Dynamics 365 according to the rules of the licensing program. Both Dynamics 365 and Dynamics CRM Online license can exist on the same tenant. At renewal, customers will need to move all Dynamics CRM Online licenses to Dynamics 365 licenses.

### **Licensing Entitlements**

The rights of a Dynamics CRM Online license are explained in the Dynamics CRM Online Licensing Guide. The rights of the Dynamics 365 license are explained in the corresponding Dynamics 365 licensing guide.

### **Dynamics 365 benefits on CRM Online Licensing**

The Dynamics CRM Online subscriptions will continue to see enhancements in value with each product release, for the functionality to which they are already entitled. Additionally, Dynamics CRM Online licenses will receive certain benefits related to a particular Dynamics 365, Enterprise edition license, as defined below. For example, a Dynamics CRM Online Professional license would always receive the enhancements related to their use of Opportunities, Leads, Cases, as well as the underlying platform. The table below defines what additional use rights Dynamics CRM Online licenses will receive from Dynamics 365 licenses, subject to limitations as defined in the third column.

CRM Online License	Additional Dynamics 365 entitlement granted per CRM Online license	Dynamics 365 use rights excluded from CRM Online licenses
CRM Online Enterprise	Dynamics 365 Enterprise Customer Engagement Plan	Dynamics 365 for Operations Rights Microsoft Project Online Premium
CRM Online Professional	Dynamics 365 for Sales or Dynamics 365 for Customer Service	Dynamics 365 for Operations Rights Microsoft Project Online Essential Microsoft Social Engagement Enterprise
CRM Online Basic*	Dynamics 365 for Team Members + enhancements related to Case or Lead Management	Dynamics 365 for Operations Rights Microsoft Project Online Essential
CRM Online Essential	Dynamics 365 for Team Members	Dynamics 365 for Operations Rights Microsoft Project Online Essential
Dynamics Employee Self Service	Does not automatically inherit any additional use rights from Dynamics 365	
CRM Online Field Service Add-On	Dynamics 365 for Field Service	Dynamics 365 for Operations Rights Microsoft Project Online Essential
CRM Online Project Service Automation Add-On	Dynamics 365 for Project Service Automation	Dynamics 365 for Operations Rights Microsoft Project Online Premium Microsoft Project Online Essential

\***Note:** The majority of Dynamics CRM Online functionality associated with Dynamics CRM Online Basic has moved to Dynamics 365 for Team Members.

In summary:

Highlight of rights from Dynamics 365 which will be granted to Dynamics CRM Online licenses, as appropriate

- Microsoft PowerApps (same rights as embedded with Dynamics 365 licenses)
- Full Voice of Customer and Gamification for CRM Online Professional

Rights from Dynamics 365 which will not be granted to CRM Online licenses

- Entitlements to Microsoft Project Online
- Entitlements to Dynamics 365 for Operations for direct access
- Changes to entitlements to Microsoft Social Engagement for CRM Online Professional users

## Dynamics 365 Infrastructure Policy in Mixed Deployments

Dynamics 365 and Dynamics CRM Online have distinct and different rules for included capacities of Instances, Storage, and Portals. However, a tenant may have both Dynamics 365 and Dynamics CRM Online licenses on one tenant. If at least one instance in the tenant is on v8.2, the following rules apply:

- **Seat Minimums.** Purchase or other seat minimums defined for CRM Online will continue to apply to CRM Online licenses, such as the 10-seat minimum for CRM Online Professional users to use Social Engagement in certain programs.
- **Default Minimum Storage.** Default included storage will move to that of Dynamics 365, 10 GB, once the following conditions are met:
  - At least one instance, production or non-production, is running the latest Dynamics 365 code
  - There is 1 Dynamics 365 User Subscription license on the tenant, Dynamics 365 for Team Members, Enterprise edition, or higher
- **Additional Free Storage.** Each license will accrue storage based on the governing licensing.
  - 2.5 GB of additional storage for every 20 CRM Online Professional or higher licenses, subject to a storage cap of 50 GB
  - 5 GB of additional storage for every 20 Full Dynamics 365 licenses, with no storage cap. See the Dynamics 365, Enterprise edition Licensing Guide for details on Full user licenses.
- **Production Instance.** Dynamics 365 and Dynamics CRM Online both come with 1 default production instance, per tenant. As the tenant and instances are shared, there are no changes to Production Instances.
- **Non-Production Instance.** Dynamics CRM Online requires at least 25 or more CRM Online Professional or higher licenses to qualify for up to 1 free non-production instance. All Dynamics 365 tenants include 1 free non-production purchase. CRM Online tenants which did not qualify for the

free non-production instance will be provisioned one once 1 Dynamics 365 User Subscription License is added to the tenant.

- **Portal.** Portal is an add-on for Dynamics CRM Online, however 1 Portal per tenant is included with your Dynamics 365 subscription. CRM Online tenants which add 1 Dynamics 365 User Subscription License will be entitled 1 included portal.

## Existing Online Customer Scenarios

### 1. Dynamics CRM Online Customers

Eligibility criteria for qualified transition SKUs:

- Qualified transition SKUs apply to Dynamics CRM Online customers licensed prior to October 31, 2016.
- For Professional Users – all users purchased before and after October 31, 2016 but limited to the total count at renewal.
- For Basic Users – only for users purchased prior to October 31, 2016
- Qualified transition SKUs are available under the following licensing programs: Enterprise Agreement (EA), Microsoft Products and Services Agreement (MPSA), Cloud Solution Provider Program (CSP) and Microsoft Online Subscription Program (MOSP/Direct)
- Use of qualified offer transition SKUs applies to the total number of users needed to qualify for tiered pricing. Existing customers must choose which Microsoft Dynamics 365 licenses meet the needs of their organization. Simply transitioning existing licenses to the Dynamics 365 equivalent may not always be the best course of action. Review the use rights in the licensing guide to determine the mix of user subscriptions that are suitable for your organization’s needs. Based on the use rights changes with the launch of Dynamics 365, this may be different than what you have today. Review the following information for assistance on how to make your best license choices.
- Transitional pricing is available for existing customers as noted below. Please note that transition pricing is only available for select SKUs and is not applicable for new seat adds

Existing Dynamics CRM Online User	Application Transition	Plan Transition	Applicable Terms
Professional USL	Dynamics 365 for Sales or Customer Service	Dynamics 365 Enterprise Customer Engagement Plan	For customers, as of November 1, 2016, this offer applies to all on-premises users purchased before and after November 1, 2016.
Professional USL Add-on to O365	Dynamics 365 for Sales or Customer Service	Dynamics 365 Enterprise Customer Engagement Plan	
Basic USL + Field Service or Project Service Automation Add-on	Dynamics 365 for Field Service or Project Service	Not Available	
Basic USL	Dynamics 365 for Sales or Customer Service	Dynamics 365 Enterprise Customer Engagement Plan	Only applies for existing users as of November 1, 2016

#### g. Additional details

It was determined that the transition to Dynamics 365, and the flattening of the user tiers to only Full and Light Users, would unfairly penalize Basic Users needing limited functionality from a Full user license (write/edit access for Cases or Leads) and therefore need to make a large step-up to a Full license rather than moving to Team Members.

Thus, for this transition period they have access to the Full User licenses at a lower price point than Professional users, who would be using more of the Plan functionality. The intent is not to penalize full users, but rather to be generous to Basic Users who might be otherwise unfairly penalized in the instances when they need to move up.

Note: Basic transition prices are strictly limited to the total number of basic users on the account as of November 1, 2016 – additional users added later are not eligible.

2. Microsoft Social Engagement Customers

- a. Microsoft Social Engagement will no longer be available on the price list effective November 1, 2016. Microsoft Social Engagement functionality will now be included in the Microsoft Dynamics 365, Enterprise Customer Engagement Plan, Microsoft Dynamics 365 for Sales, Microsoft Dynamics 365 for Customer Service, Microsoft Dynamics 365 for Field Service, and Microsoft Dynamics 365 for Project Service Automation SKUs.
- b. Existing Social Engagement customers will need to transition to Dynamics 365 SKUs at renewal. Customers who have renewal dates prior to February 1, 2017 can auto-renew their existing CRM Online subscriptions. Customers with renewals after February 1, 2017, will need to transact the Dynamics 365 SKUs at transition pricing, as noted above to continue the existing functionality they use today.

3. Microsoft Dynamics Marketing

- a. Microsoft Dynamics Marketing end of life is May 15, 2018. Existing customers may continue to renew until May 15, 2018.
  - i. Customers who purchased via Web-Direct channel can continue to auto-renew until the date noted above.
  - ii. Customers who purchased via MPSA can continue to renew until the date noted above.
  - iii. Customers who purchased via EA must transact the lead status SKU until the date noted above.
- b. If customer acquired Microsoft Dynamics Marketing via the Dynamics CRM Online Enterprise SKU, the customer must transition to Dynamics 365 SKUs at renewal and purchase MDM stand-alone via Direct or EA lead status SKU. Microsoft’s Transition Team will contact current customers who need to transition to MDM stand-alone to ensure they get the appropriate offer.
- c. Microsoft Dynamics Marketing SKUs are reduced to zero October 1, 2017.
  - i. Prepaying customer will receive prorated credit for monthly fees after October 1, 2017.

4. Parature, from Microsoft

- a. Parature end of life is May 15, 2018. Existing customers may continue to renew Parature until May 15, 2018.
  - i. Customers who purchased via Direct channel can continue to auto-renew existing subscription and purchase additional seats.
  - ii. Customers who purchased via MPSA can continue to renew existing subscription and purchase additional seats.
  - iii. Customers who purchased via EA must transact the lead status SKU via the Business desk.
- b. Parature SKUs are reduced to zero October 1, 2017.
  - i. Prepaying customer will receive prorated credit for monthly fees after October 1, 2017.

5. Microsoft Dynamics AX7 Customers transitioning to Dynamics 365

- a. AX functionality mapping to Dynamics 365

Existing Dynamics AX Online	New Dynamics 365 License
Enterprise USL	Enterprise edition Dynamics 365 Plan
Enterprise USL	Enterprise edition 365 Unified Operations
Enterprise USL	Dynamics 365 for Finance and Operations
Task USL	Dynamics 365 for Operations Activity
Task or Self Serve USL	Dynamics 365 for Team Members
Task Device USL	Dynamics 365 for Operations Device



- b. Renew Dynamics 365 SKUs at renewal in appropriate channel (CSP, EA)
- c. Details on how to renew in CSP located here <https://msdn.microsoft.com/partner-center/manual-subscription-migration>

## On-premises Customers

### Existing on-premises Customer Options

- Stay on-premises
  - Continue to pay Enhancement or Software Assurance
  - Transition to Dynamics 365 SKUs
- Transition to Dynamics 365 (online)
  - Use the "From SA" or Cloud Add-on SKUs to transition to **Dynamics 365**

## Transition to Dynamics 365 (online)

### Cloud Add-on Options

Cloud Add-ons are optimal for new cloud customers who want to maintain their Software Assurance (SA) or Enhancement/Advantage Plans. The Cloud Add-on SKU is a flexible, easy, and low-cost option for customers to add Dynamics 365 at any time while maintaining their current SA or Enhancement benefits. Cloud Add-ons do not require a change to the existing agreement but allow customers to continue to get new version rights as long as they remain active on a plan. Cloud Add-ons are perfect for the mid-term customers who want to take advantage of the From SA transaction at their anniversary or renewal. Customer may choose to keep paying their SA/Enhancement as long as they wish to have cloud rights. If at any time the customer decides they no longer want cloud access they may drop the Cloud Add-on SKU at anniversary and maintain their on-premises rights by their continued SA or Enhancement payments.

Cloud Add-ons are a standard Microsoft option, however for our existing customers, distinct 'transition' add-ons are available for select SKUs at special pricing.

### From SA Options

From SA SKUs acknowledge existing customer investments in Dynamics. 'From SA' SKUs are subscriptions available at anniversary/renewal for customers for fully-paid perpetual licenses. Customers that choose to license Dynamics 365 via this process would relinquish their Enhancement or SA and add the corresponding From SA subscriptions. The customer retains the L of their on-premises software and moves forward on a subscription basis. Only fully paid licenses are eligible for the discounted Dynamics 365 offer. This means a customer with active SA can buy a Dynamics 365 subscription at a discounted rate, however any net new licenses will not be eligible for this offer until the Perpetual License is paid in full.

The From SA SKUs are available only at anniversary (EAS only) or renewal for customers with fully-paid perpetual licenses. At renewal customers have the option to drop their SA/Enhancement and Cloud Add-on SKUs and transition to the From SA SKU.

From SA SKUs are a standard Microsoft option, however for our existing customers, distinct 'transition' From SA SKUs are available for select SKUs at special pricing.

To help our existing Microsoft Dynamics customers with the transition to the cloud, we have an offering to showcase your investment in your on-premises products by providing at least 40% off the price of Microsoft Dynamics 365 through November 1, 2019. Any Microsoft Dynamics customer prior to October 31, 2016 qualifies for this offer. Transition pricing is not available for new seat adds.

New customers after November 1, 2016 will qualify for a 15% discount to take advantage of Dynamics 365 (Available in EA only)

## Existing on-premises customers transitioning to Dynamics 365 (online)

1. CRM on-premises Customers in DPL/VL transitioning to Dynamics 365 (online)
  - a. Qualified offers apply to existing Dynamics CRM on-premises customers as of October 31, 2016.
  - b. The Cloud-add SKU must be ordered in conjunction with Enhancement Plan (EP) or Software Assurance and can be used mid-term. To utilize the From SA/EP SKU a customer would drop EP/SA and simply move to the cloud via the From SA SKU at renewal.
  - c. Customers must be active on Enhancement Plan or Software Assurance.
  - d. Customers on EA-Subscription qualify for transition pricing on From SA SKU if active on Subscription for at least 3 years.
  - e. The discount will be applied to the Cloud add-on and From SA SKUs when they transition to Microsoft Dynamics 365, Enterprise edition.
  - f. The transition SKUs will be available in EA, MPSA and CSP.

Existing Dynamics CRM On-premises	New Dynamics 365 License
Professional User CAL	Dynamics 365 Enterprise Customer Engagement Plan
Basic User CAL	Dynamics 365 Enterprise Customer Engagement Plan
Basic User CAL	Dynamics 365 for Sales
Basic User CAL	Dynamics 365 for Customer Service
Essential User CAL	Dynamics 365 for Team Members

2. AX on-premises Customers in DPL/VL transitioning to Dynamics 365
  - a. Qualified transition SKUs apply to existing Dynamics AX on-premises customers as of October 31, 2016. The 40% discount will be applied to the Cloud add-on and From SA SKUs when you transition to Microsoft Dynamics 365 Plan or the Unified Operations Plan.
  - b. If on AX 2009, customers can transition directly to Dynamics 365 by selecting the number of named users they require at transition pricing. The customer will be eligible to use the Cloud Add-on up to the number of users licensed to access their current AX 2009 solutions at the time of transition. Each concurrent user license equals 1 named user and must be active on Enhancement. Upon full transition to Dynamics 365, the customer will be eligible to use the From SA qualified offer greater than the total number of AX 2009 concurrent users when using the From SA SKU.
  - c. If customers want to use Reattach Program to go back to on-premises maintenance only, they may have access to a supported version of AX 2009 equal to the number of licenses they had prior to the cloud transition.
  - d. If customer was using dual use rights through Dyn365 full cloud (for example: Dynamics 365 cloud SKUs other than Cloud Add-on with AX 2012), the dual use rights for on-premises are relinquished when canceling the Dynamics 365 cloud licenses.
  - e. The Cloud-add SKU must be ordered in conjunction with Enhancement Plan (EP) or Software Assurance and can be used mid-term. To utilize the From SA SKU a customer would drop EP/SA and simply move to the cloud via the From SA SKU at renewal.
  - f. Transition SKUs will be available in EA, MPSA and CSP.
  - g. The transition SKU applies upon renewal and will be available on the price list for 3 years (until November 1, 2019) and pricing will apply for the duration of the agreement term. Transition pricing is not applicable for net new seat adds.

\*Note that transition pricing does not apply to the Dynamics 365 Applications. Transition qualified offers are only for the Microsoft Dynamics 365 Plan and Unified Operations Plan.

Existing Dynamics AX On-premises	New Dynamics 365 License
Enterprise or Functional CAL	Dynamics 365 Plan
Enterprise or Functional CAL	Unified Operations Plan
Functional or Task CAL	Dynamics 365 for Operations Activity
Task or Self Serve CAL	Dynamics 365 for Team Members
Task Device CAL	Dynamics 365 for Operations Device

3. Existing Microsoft Dynamics RMS on-premises transitioning to Dynamics 365 for Retail

Existing Dynamics RMS on-premises customers active on Enhancement qualify for transition pricing to Dynamics 365 for Retail.

- a. Qualified transition SKUs apply to existing Dynamics RMS on-premises customers. The 40% discount will be applied to the From SA SKUs when you transition to Microsoft Dynamics 365 for Retail.
- b. Upon transition, customers will need to decide the quantity of named users they require. All users at the time of transition will receive the transition pricing. Any users purchased after transition will be at full price.
- c. If customer was using dual use rights through Dynamics 365 full, the dual use rights for on-premises are relinquished when canceling the Dynamics 365 cloud licenses.
- d. To utilize the From SA SKU a customer would drop EP/SA and simply move to the cloud via the From SA SKU at renewal. The cloud add-on will not be available for this transition scenario.
- e. Transition SKUs will be available in EA, MPSA and CSP.
- f. The transition SKU applies upon renewal and will be available on the price list for 3 years (until November 1, 2019) and pricing will apply for the duration of the agreement term. Transition pricing is not applicable for net new seat adds.

Existing Dynamics RMS On-premises	New Dynamics 365 License
Headquarter Base Pack	Enterprise edition Dynamics 365 Plan
Headquarter Base Pack	Enterprise edition Unified Operations
Headquarter Base Pack	Dynamics 365 for Retail
Headquarter Additional Store	Dynamics 365 for Retail
Store Lanes (device)	Dynamics 365 for Operations Device

4. Existing Microsoft Dynamics GP, Microsoft Dynamics NAV, and Microsoft Dynamics SL on-premises transition to Dynamics 365 (online)

Existing Dynamics NAV, Dynamics GP, and Dynamics SL on-premises customers active on Enhancement qualify for transition pricing to Dynamics 365.

- a. Qualified offers apply to existing Dynamics NAV, Dynamics GP and Dynamics SL on-premises customers who have licensed prior to October 31, 2016.
- b. This offer applies to all users purchased before and after October 31, 2016.
- c. The offer is available to customers on Subscription who have at least 3 years of active Subscription licensing.
- d. Upon transition, customers will need to decide the quantity of named users they require. All users at the time of transition will receive the transition pricing. Any users purchased after transition will be at full price.
- e. The discount will apply to Cloud Add-on and From SA SKUs when these qualified customers transition to the Dynamics 365, Business edition within three years (but no later than November 1, 2019) and pricing will apply for the duration of the agreement term.

- f. The Cloud-add SKU must be ordered in conjunction with Enhancement Plan (EP) and can be used mid-term. To utilize the From SA/EP SKU a customer would drop EP and simply move to the cloud via the From SA SKU at renewal.
- g. This offer is available under the Cloud Solution Provider Program (CSP).
- h. Must be active on Enhancement Plan.

Existing Dynamics On-premises	New Dynamics 365 License
Dynamics NAV Full CAL	Dynamics 365 for Financials
Dynamics NAV Limited CAL	Dynamics 365 for Financials
Dynamics GP Full User CAL	Dynamics 365 for Financials
Dynamics GP Limited User CAL	Dynamics 365 for Team Members
Dynamics SL Pro User CAL	Dynamics 365 for Financials
Dynamics SL AM/BE or Standard User CALs	Dynamics 365 for Financials
Dynamics SL Light User CAL	Dynamics 365 for Team Members

Note: If an existing Dynamics GP, Dynamics NAV or Dynamics SL customer wants to move to Dynamics 365 for Operations, they can do a Product Line Transition to Microsoft Dynamics AX, then utilize the transition mapping from Dynamics AX to Plan to qualify for the discounted transition price point. Customer does not have to transition to Microsoft Dynamics AX prior to October 31, 2016 to qualify.

### Existing on-premises customers staying on-premises

1. Microsoft Dynamics CRM on-premises customers staying on-premises (Dynamics 365 on-premises) Effective December 1, 2016, all existing Dynamics CRM on-premises SKUs in EA, MP/SA, Open, and Select will be removed from the price list and be replaced with Dynamics 365 (On-premises) licenses. Dynamics CRM On-premises customers with an existing agreement can continue to add additional seats under their current contract terms (EA only). When customer's agreements come up for renewal they must transition to the new Dynamics 365 (On-premises) SKUs. Existing customers as of December 1, 2016, will qualify for transition pricing when they renew to Dynamics 365 on-premises SKUs. For further clarification please refer to the Existing On-premises Customer Renewal [FAQ](#).
  - a. Customers must have purchased Professional or Basic license by end of agreement term in order to leverage the corresponding SA Only offers.
  - b. Customers with paid Professional or Basic licenses will not need to repurchase Sales and, Customer Service or Team Members (applies to Basic Users only), licenses, but may move directly to the appropriate Software Assurance payment(s). Customers will need to purchase both Sales and Customer Service or Team Members but can only be assigned one. However, they are still entitled to use both Sales and Customer Service as long as both licenses are kept for that user.
  - c. Customers with paid Essential licenses will not need to repurchase Team Members licenses but may move directly to the appropriate Software Assurance payment.
  - d. This offer applies upon renewal and will be available on the price list for 3 years (until November 1, 2019) and pricing will apply for the duration of the agreement term.

Note: Effective October 1<sup>st</sup> 2016, Dynamics CRM On-premises is no longer sold via the Dynamics Price List for new customers. Existing customers can continue to transact additional licenses.

Existing Dynamics CRM On-premises	New Dynamics 365 License
Professional User CAL	Dynamics 365 for Sales
Professional User CAL	Dynamics 365 for Customer Service
Basic User CAL	Dynamics 365 for Sales
Basic User CAL	Dynamics 365 for Customer Service
Basic User CAL	Dynamics 365 for Team Members
Essential User CAL	Dynamics 365 for Team Members

2. Dynamics CRM on-premises customers on SPLA transitioning to Dynamics 365

Effective February 1, 2016 all existing Dynamics CRM on-premises SKUs in SPLA and ISV-R will be replaced with Dynamics 365 (on-premises) licenses.

- a. Transition pricing is not available to SPLA customers to move to Dynamics 365 (online). The customer will need to drop their SPLA subscription and move directly to Dynamics 365.

3. Dynamics AX on-premises staying on-premises (Dynamics 365 on-premises)

Effective July 1, 2017, all existing Dynamics AX on-premises SKUs in EA were removed from the price list and replaced with Dynamics 365 for Operations (on-premises) licenses. Please refer to the Microsoft Dynamics 365 for operations on-premises, Enterprise edition Upgrade Policy for more information.

4. Dynamics RMS on-premises transitioning to Dynamics 365 for Operations on-premises

Please refer to the Microsoft Dynamics 365 for operations on-premises, Enterprise edition Upgrade Policy for more information.

## License Credit

There will be no credits or refunds for remaining licenses, or unused months of service or support plans for existing on-premises customers because of their transition to Dynamics 365.

## Enhancement Plan Revenue Recapture Rate Impacts

Enhancement Plan Revenue Recapture Rate (EPRRR) will not be negatively impacted when you transition to Dynamics 365 (online). Dynamics 365 revenue for customers with an existing Enhancement Plan will be applied to SPA/CSA revenue. Customer records will be automatically adjusted to remove the customer’s transitioned product from the Partner’s EPRRR calculation.

## Use and Service Plan Benefits of the Old Product Line

On-premises customers who transition to Microsoft Dynamics 365 will continue to have access to their prior Microsoft Dynamics Product keys after the transition is completed. In addition, customers active on an Enhancement Plan will be able to use their Customer Service Plan and associated benefits for their former version for 180 days’ post transition to Dynamics 365.

## Reattach Program

Customers who have fully transitioned to the cloud and wish to return to their on-premises software and Software Assurance (SA) or Enhancement can do so during any anniversary or renewal period without penalty, protecting their price per year.

## Customer Requirements

If an EA with SA or DPL with Enhancement customer has fully transitioned to the cloud, and wishes to return to on-premises with SA or Enhancement, they can do so at any time without penalty assuming the customer has:

1. Maintained continuity of service with Microsoft
2. Fully transitioned to the cloud before beginning to reattach
3. Reattach the same number of licenses they had SA on their original EA or on-premises license

## Process Summary

Enterprise Agreement customers who transitioned to an Online Service or who purchased a From SA subscription License in lieu of renewing SA may reattach SA to a License at anniversary or renewal without purchasing a new License. SA must be ordered for that License for the remainder of the enrollment term. SA coverage may not exceed the quantity of perpetual Licenses for which SA was current at the time of any prior transition or renewal and may not be reattached to transferred Licenses.

Dynamics Price List customers who have transitioned to an Online Service in lieu of renewing the Enhanced Plan may reattach EP at renewal without purchasing a new license.

1. Protected List Price (PLP) will be reinstated for DPL
2. Lapsed fees will be waived

## Reattach Process

If a Customer has fully transitioned to Full USL and decided to transition back to EA or DPL, they will need to complete the following steps:

Software Assurance	Enhancement Plan
Engage with their Microsoft Representative The Licensing Sales Specialist will manage the transition back to EA On-Premise with their Business Desk (BD)	Engage with your Regional Operations Center (ROC)
Receive Customer Price Sheet Customer will transition at Anniversary via Revised Customer Price Sheet (CPS)	Purchase Enhancement Plan Transition to the latest version of their prior on-premises Dynamics product
LSS manages transition	The ROC manages transition

## Appendix A: Transition Summary

Current Product	Transition Guidance
CRM Online in Open	At renewal, transition to Dynamics 365 SKUs into an alternate licensing channel that support the sales of Dynamics 365 (CSP, Direct, EA, or MPSA).
CRM Online in CSP/Direct/EA/MPSA	At renewal, transition to Dynamics 365 SKUs with transition pricing in the existing licensing channel
CRM Online Sales Productivity Offer	At renewal, transition to Dynamics 365 SKUs with transition pricing into a licensing channel that supports the sales of Dynamics 365 (CSP, Direct, EA, or MPSA)
AX7 in CSP/EA	At renewal, transition to Dynamics 365 SKUs. Transition pricing is not applicable
CRM on-premises in Volume Licensing	At renewal, transition to Dynamics 365 SKUs with transition pricing in the existing licensing channel (VL)
CRM SPLA	Existing CRM SPLA customers will need to transition to the Dynamics 365 SKUs in SPLA at renewal. There is not transition pricing for moving SPLA customers to Dynamics 365 (online).
AX on-premises	At renewal, transition to Dynamics 365 SKUs (VL). Customers in DPL, transition to Dynamics 365 SKUs when ready to upgrade
On-premises AX, CRM, GP, NAV, SL	Transition to Dynamics 365 (online) with favorable transition pricing when the customer is ready to make the transition to the cloud

## Appendix B: Online Transition Eligibility by Product

From	To Microsoft Dynamics 365
Microsoft Dynamics CRM	Microsoft Dynamics 365 Enterprise edition Customer Engagement Plan Microsoft Dynamics 365 for Sales Microsoft Dynamics 365 for Service
Microsoft Dynamics RMS	Microsoft Dynamics 365 for Retail
Microsoft Dynamics AX Business Essentials Microsoft Dynamics AX Advanced Management Microsoft Dynamics AX Professional Microsoft Dynamics AX Enterprise Microsoft Dynamics RMS	Microsoft Dynamics 365 Enterprise edition Plan Dynamics 365 for Operations
Microsoft Dynamics GP Business Essentials Microsoft Dynamics GP Advanced Management Microsoft Dynamics GP Standard Microsoft Dynamics GP Professional Microsoft Dynamics GP Perpetual	Dynamics 365 for Financials
Microsoft Dynamics GP Subscription	Dynamics 365 for Financials
Microsoft Dynamics NAV Business Essentials Microsoft Dynamics NAV Advanced Management Microsoft Dynamics NAV Standard Microsoft Dynamics NAV Professional Microsoft Dynamics NAV User Based Pricing Microsoft Dynamics NAV Perpetual	Dynamics 365 for Financials
Microsoft Dynamics NAV Subscription	Dynamics 365 for Financials
Microsoft Dynamics SL Business Essentials Microsoft Dynamics SL Advanced Management Microsoft Dynamics SL Standard Microsoft Dynamics SL Professional	Dynamics 365 for Financials

Note: Microsoft Dynamics GP, Microsoft Dynamics NAV or Microsoft Dynamics SL customers can do a Product Line Transition to Microsoft Dynamics AX if they desire moving to Microsoft Dynamics 365 for Operations.



# Appendix C: Change Log

Page	Topic	Change	Action	Date
8 & 9	Ax On-premises	Clarified	Plan names and which SKUs get the 40% discount	September, 2017
9, 11, & 14	Dynamics RMS	Added	Transition path	September, 2017
4	Dynamics CRM Pro	Corrected	Dynamics 365 for Sales or Dynamics 365 for Customer Service	September, 2017
6	MDM & Parature	Updated	End of Life statement	September, 2017
9	2.b	Clarified	The customer will be eligible to use the Cloud Add-on up to the number of users licensed to access their current AX 2009 solutions at the time of transition. Each concurrent user license equals 1 named user and must be active on Enhancement. Upon full transition to Dynamics 365, the customer will be eligible to use the From SA qualified offer greater than the total number of AX 2009 concurrent users when using the From SA SKU.	July, 2017
11	Figure 3	Corrected	Add "Prior 10 April 1" for Task Device to Operations Device and removed Commerce Server	July, 2017
All	New Name	Updated	New naming	July, 2017

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