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# Licensing Guide for Microsoft Dynamics 365

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Licensing User Guide  
(How to use the License Manager for Microsoft Dynamics 365)

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## CONTENT

1	Web License Manager.....	4
1.1	Web License Manager Overview.....	5
1.2	How to install a license.....	6
1.2.1	Paid license.....	6
1.2.2	Subscription license.....	7
1.3	How to activate per User Licensing.....	8
1.4	How to activate AAD TeamMember Licensing.....	10
2	The Local License Manager.....	14
2.1	Local License Manager Overview.....	15
2.2	How to install a license.....	15
3	Possible license states.....	17
3.1	Valid.....	17
3.2	Expired.....	17
3.3	The license could not be decrypted.....	17
3.4	Your Dynamics 365 version does not support this license.....	17
3.5	Upgrading your license.....	17
4	How licenses are counted?.....	18
4.1	Normal licenses.....	18
4.2	TeamMember licenses.....	19
5	List of figures.....	20
6	Contact.....	21

## Preamble

This documentation is intended to guide you through the usage of the License Manager for Microsoft Dynamics 365. The License Manager allows you to manage your existing licenses and is part of the MSCRM-ADDONS installation.

There are two ways to get the License information:

1. [THE WEB LICENSE MANAGER](#)

The web license manager has been designed to facilitate the installation of license keys within Dynamics 365.

2. [THE LOCAL LICENSE MANAGER](#)

The local license manager is accessible as a standalone application or from the main configuration tool of the addon.

## Target Audience

This guide is intended for users working with our solutions.

- Basic Microsoft Dynamics 365 Knowledge
- Maintaining and configuring a Microsoft 365 Organization

## Supported Web Browsers and versions

Supported Web Browsers:

- Internet Explorer 10 and higher
- Chrome
- Edge
- Firefox

One of the following versions of Microsoft Dynamics 365 must be available:

- Microsoft Dynamics 365

# 1 Web License Manager

Open your Dynamics 365 Settings, navigate to MSCRM-ADDONS-section and click for example on ActivityTools, like you can see in the figure below. If you want to see or manage the license e. g. for DocumentsCorePack hit on DCP.

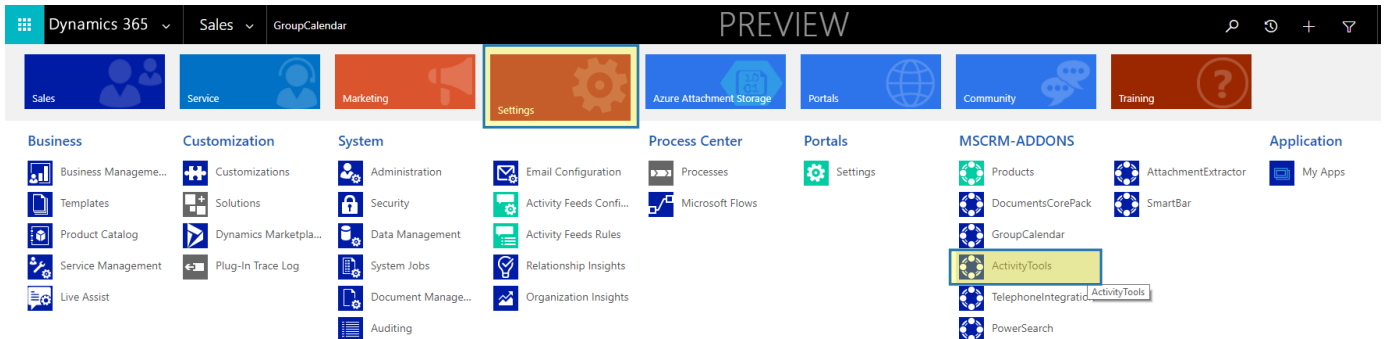


Figure 1: Dynamics 365 Settings – MSCRM-ADDONS – ActivityTools

In the ActivityTools main configuration window, you will be provided with a few tabs that allow you to configure ActivityTools in general. As per default, the Getting Started-tab is displayed, please navigate to the Licensing-tab (highlighted in yellow below).

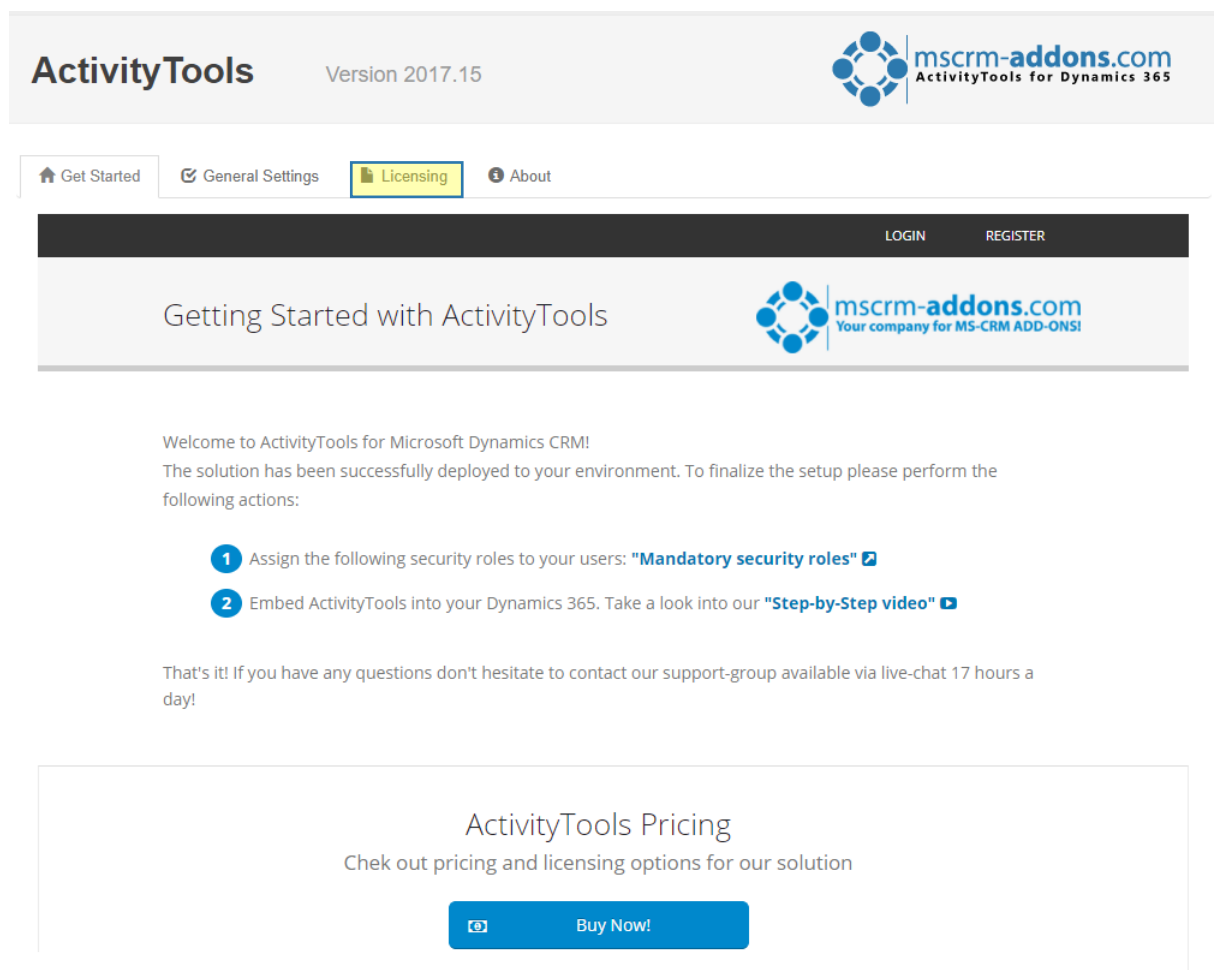
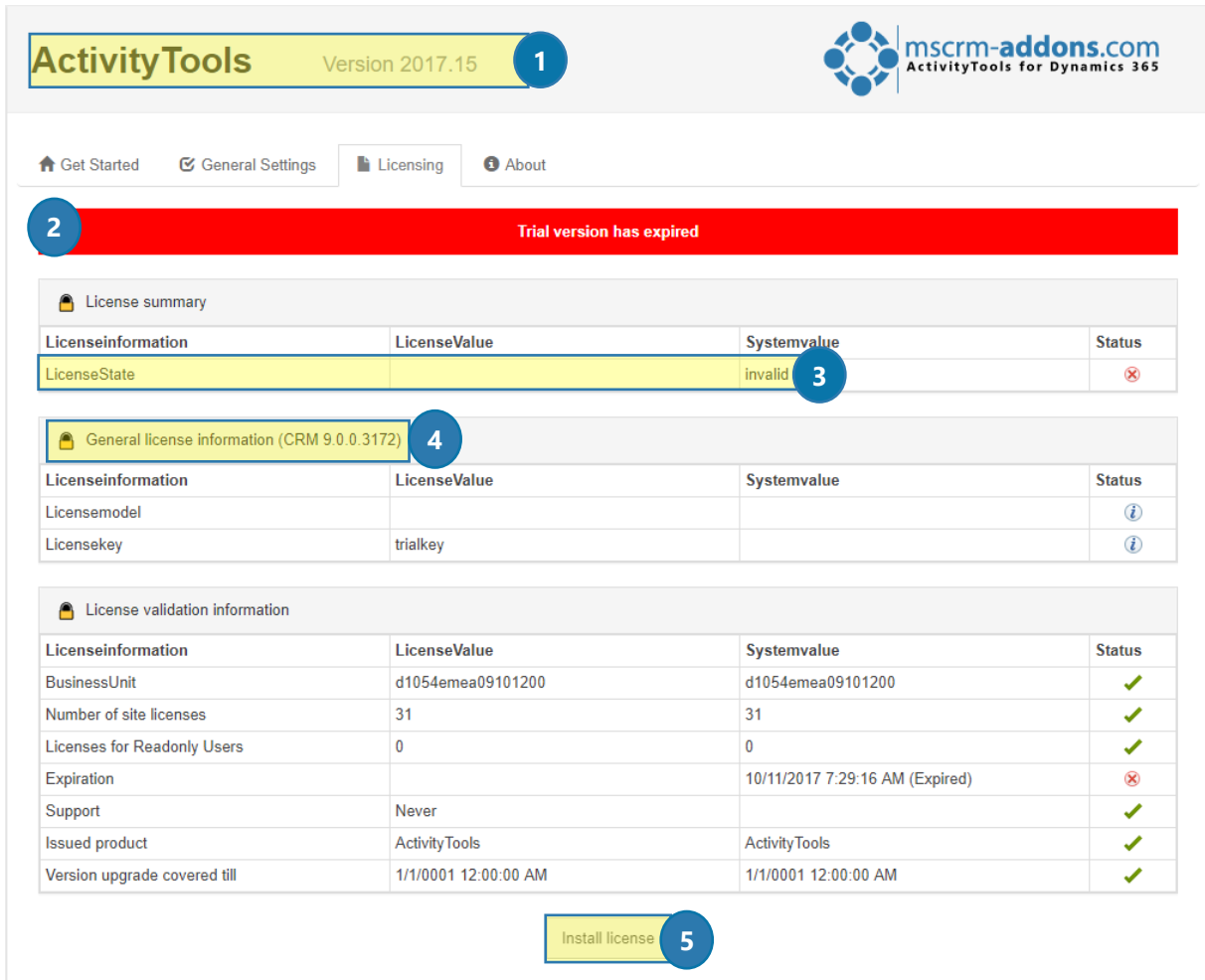


Figure 2: ActivityTools - Licensing

## 1.1 Web License Manager Overview

In the so opened AT Web License Manager, you are provided with information regarding your license.



**ActivityTools** Version 2017.15

mscrm-addons.com  
ActivityTools for Dynamics 365

Get Started General Settings **Licensing** About

**2** Trial version has expired

**3** License summary

Licenseinformation	LicenseValue	Systemvalue	Status
LicenseState		invalid	⊗

**4** General license information (CRM 9.0.0.3172)

Licenseinformation	LicenseValue	Systemvalue	Status
Licensemodel			i
Licensekey	trialkey		i

**5** License validation information

Licenseinformation	LicenseValue	Systemvalue	Status
BusinessUnit	d1054emea09101200	d1054emea09101200	✓
Number of site licenses	31	31	✓
Licenses for Readonly Users	0	0	✓
Expiration		10/11/2017 7:29:16 AM (Expired)	⊗
Support	Never		✓
Issued product	ActivityTools	ActivityTools	✓
Version upgrade covered till	1/1/0001 12:00:00 AM	1/1/0001 12:00:00 AM	✓

Install license

Figure 3: ActivityTools – Expired version

### 1 PRODUCT INFORMATION:

Here you can see the product you selected, in this case, ActivityTools with the current version number. Below you will find the license details for this product.

### 2 CURRENT SYSTEM INFORMATION:

Summary of your current license state. See chapter 3 POSSIBLE LICENSE STATES for more detailed information. The red background indicates an issue with your license. In this example, your license has expired. In this case please buy a new license directly from our [Online Shop](#) or contact our support, as this issue requires a new license to be resolved.

### 3 LICENSE STATUS:

The field provides you with a deeper insight into your license status. In this case, it is invalid because your license has expired.

### 4 GENERAL LICENSE INFORMATION:

Displays details about the expiration date, version and user count.

## 5 INSTALL LICENSE:

To install a new license, you must click the **[Install license]**-button.

### 1.2 How to install a license

After clicking on the **[Install license]**-button, you are provided with the Install license dialog, like you can see below. Use this dialog to install the license for ActivityTools. Follow the instructions carefully and insert your license key in the provided text box. The license key can be found in the email you have received from our support team. If you have not received an email yet, please contact our support team ([support@mscrm-addons.com](mailto:support@mscrm-addons.com)).

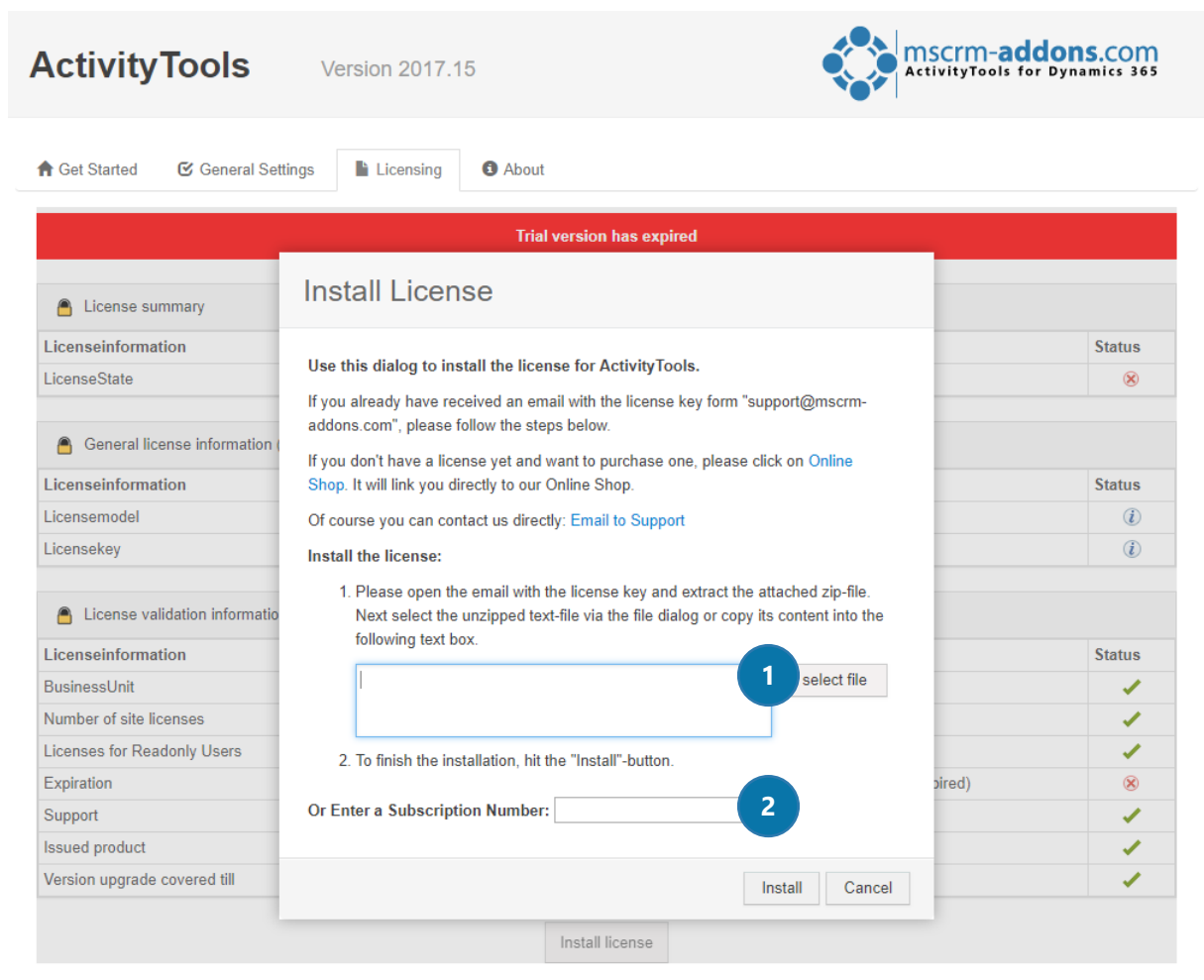


Figure 4: Install license window

#### 1.2.1 Paid license

- 1 For the "Paid license" there are two different ways to retrieve the license-key:
  - a) Open the email you received from our support team and extract the attached .zip-file. Click on the **[Select file]**-button in the install license dialog and select the unzipped .txt-file.
  - OR
  - b) Open the email and extract the attached .zip-file. Open the .txt-file and copy its content into the text box in the Install License dialog.

## 1.2.2 Subscription license

② If you decided to take a subscription license, please type in the Subscription Number (highlighted in yellow below) you received from our support team.



Subscription licenses can only be installed online with the Web License Manager!

### License Information



Hello Patrick Ofner,

Thank you for choosing our products. This email contains detailed information on how to install subscription licenses for our addons.

Product	CRM Version	License Type	Users	Read-only Users	Organization Unit	Subscription ID
PowerSearch	2017	Normal	50	0	d1054emea09101200	999999111

Subscription licensing for AttachmentExtractor, GroupCalendar and DocumentsCorePack Server Based

We will install these licenses for you. This is an automatic process and can take some time.

Subscription licensing for the remaining addons

Following steps are necessary to activate the subscription license:

1. In your CRM-System, please go to Settings → choose "MSCRM-ADDONS.com Products" in the Extensions
2. Choose the product for which you want to activate the subscription license and open with a double click
3. In the "Subscription Number"-field, type in the subscription number, sent by our support team
4. Click on [Save & Close]

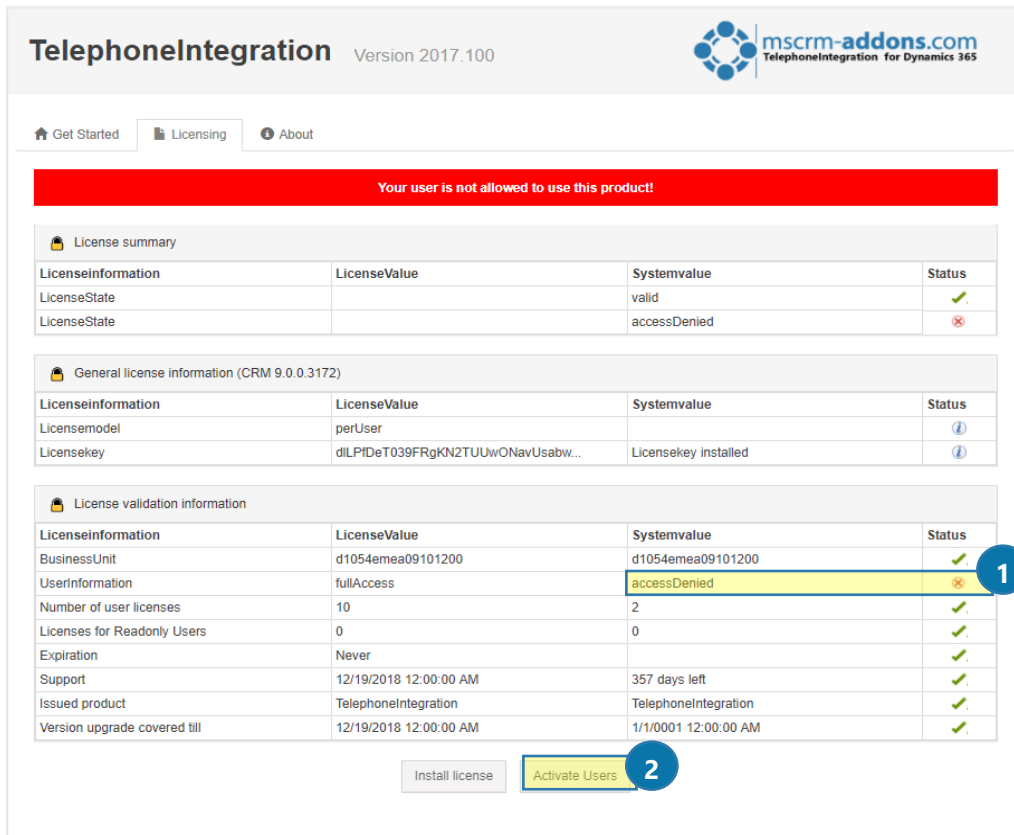
If you have any questions please contact [support@mscrm-addons.com](mailto:support@mscrm-addons.com)

*Figure 5: Subscription Number*

To finish the installation simply click on the **[Install]**-button.

### 1.3 How to activate per User Licensing

When using “per User” licensing, it is mandatory to enable all users that should be licensed within Dynamics 365. It often occurs, that after installing the license via the License Manager a window appears that looks like in the figure below:



The screenshot shows the 'TelephoneIntegration' license manager interface. At the top, there is a red banner with the message: "Your user is not allowed to use this product!". Below this, there are three sections of license information:

- License summary:**

Licenseinformation	LicenseValue	Systemvalue	Status
LicenseState		valid	✓
LicenseState		accessDenied	✗
- General license information (CRM 9.0.0.3172):**

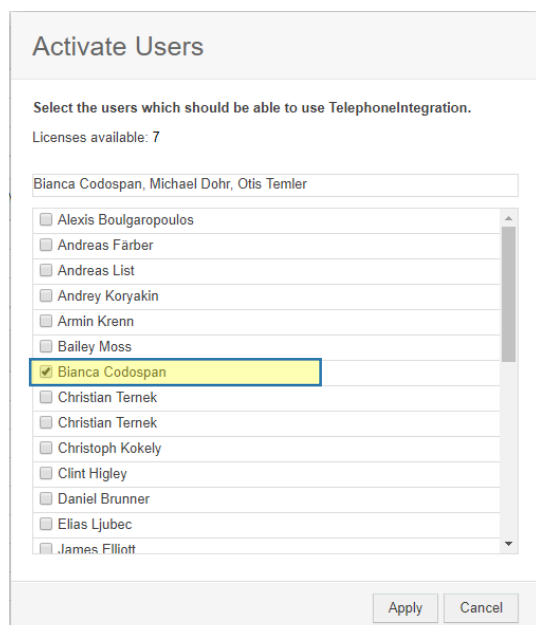
Licenseinformation	LicenseValue	Systemvalue	Status
Licensemodel	perUser		?
Licensekey	dILPDeT039FRgKN2TUUwONavUsabw...	Licensekey installed	?
- License validation information:**

Licenseinformation	LicenseValue	Systemvalue	Status
BusinessUnit	d1054emea09101200	d1054emea09101200	✓
UserInformation	fullAccess	accessDenied	✗
Number of user licenses	10	2	✓
Licenses for Readonly Users	0	0	✓
Expiration	Never		✓
Support	12/19/2018 12:00:00 AM	357 days left	✓
Issued product	TelephoneIntegration	TelephoneIntegration	✓
Version upgrade covered till	12/19/2018 12:00:00 AM	1/1/0001 12:00:00 AM	✓

At the bottom, there are two buttons: "Install license" and "Activate Users". The "Activate Users" button is highlighted with a blue circle and the number 2. The "accessDenied" status in the validation table is highlighted with a yellow background and a blue circle and the number 1.

Figure 6: Activate per User license

After installing the new license, the ① access is denied. This is due to the fact, that the user, that is running the license manager (usually an admin) itself is not a licensed user at this point. Click on the ② **[Activate Users]**-button to enable specific users. In the window below, you can select the users, that should be licensed within Dynamics 365.



The screenshot shows the "Activate Users" dialog box. It contains the following text and elements:

- Title: "Activate Users"
- Instruction: "Select the users which should be able to use TelephoneIntegration."
- Text: "Licenses available: 7"
- Search bar: "Bianca Codospian, Michael Dohr, Otis Temler"
- List of users with checkboxes:
  - Alexis Boulgaropoulos
  - Andreas Färber
  - Andreas List
  - Andrey Koryakin
  - Armin Krenn
  - Bailey Moss
  - Bianca Codospian
  - Christian Ternek
  - Christian Ternek
  - Christoph Kokely
  - Clint Higley
  - Daniel Brunner
  - Elias Ljubec
  - James Elliott
- Buttons: "Apply" and "Cancel"


Figure 7: Select the users you want to activate



After enabling users to use our addon, the red cross is gone, and the user-account has changed due to the number of activated users. As you can see below, there are three of ten users enabled to use TelephoneIntegration.

## TelephoneIntegration

Version 2017.100


**mscrm-addons.com**  
 TelephoneIntegration for Dynamics 365

[Get Started](#) | 
 [Licensing](#) | 
 [About](#)

**License summary**

Licenseinformation	LicenseValue	Systemvalue	Status
LicenseState		valid	✔
LicenseState		accessPossible	✔

**General license information (CRM 9.0.0.3172)**

Licenseinformation	LicenseValue	Systemvalue	Status
Licensemodel	perUser		?
Licensekey	dILPFDt039FRgKN2TUUwONavUsabw...	Licensekey installed	?

**License validation information**

Licenseinformation	LicenseValue	Systemvalue	Status
BusinessUnit	d1054emea09101200	d1054emea09101200	✔
UserInformation	fullAccess	accessPossible	✔
Number of user licenses	10	3	✔
Licenses for Readonly Users	0	0	✔
Expiration	Never		✔
Support	12/19/2018 12:00:00 AM	357 days left	✔
Issued product	TelephoneIntegration	TelephoneIntegration	✔
Version upgrade covered till	12/19/2018 12:00:00 AM	1/1/0001 12:00:00 AM	✔

Install license

Activate Users

Figure 8: Valid license

## 1.4 How to activate AAD TeamMember Licensing

The following step-by-step instruction shows you how to enable the TeamMember licensing for our add-ons. This makes sense for Dynamics 365 Online organizations which use „Microsoft Dynamics 365 Team Member“ licenses.

Open your Dynamics 365 Settings, navigate to MSCRM-ADDONS-section (highlighted in yellow) and select the add-on you want to activate the TeamMember Licensing for. This activation process has to be done for each add-on separately. Depending on which of our solutions you choose, the main configuration window will provide you with different tabs.

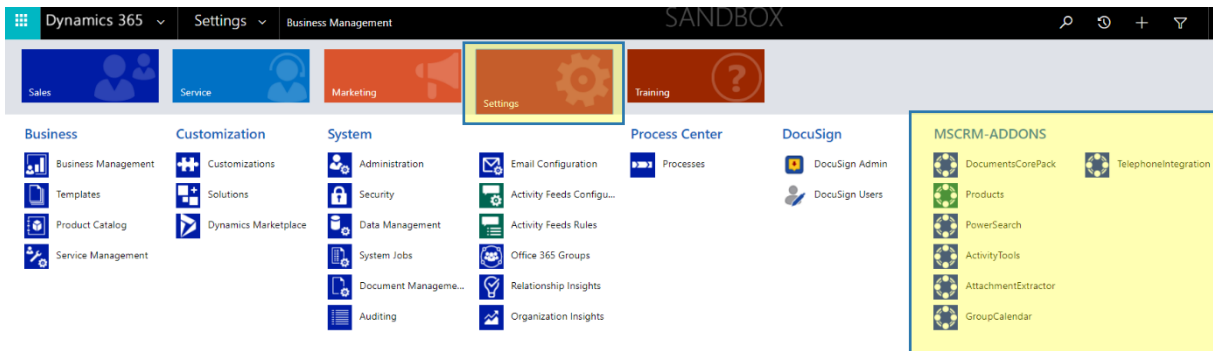


Figure 9: Dynamics 365 Settings – MSCRM-ADDONS

For example, if you choose DocumentsCorePack, the main configuration window looks like in the figure below. To activate the TeamMember Licensing for DCP, please navigate to the *License Server-tab*.

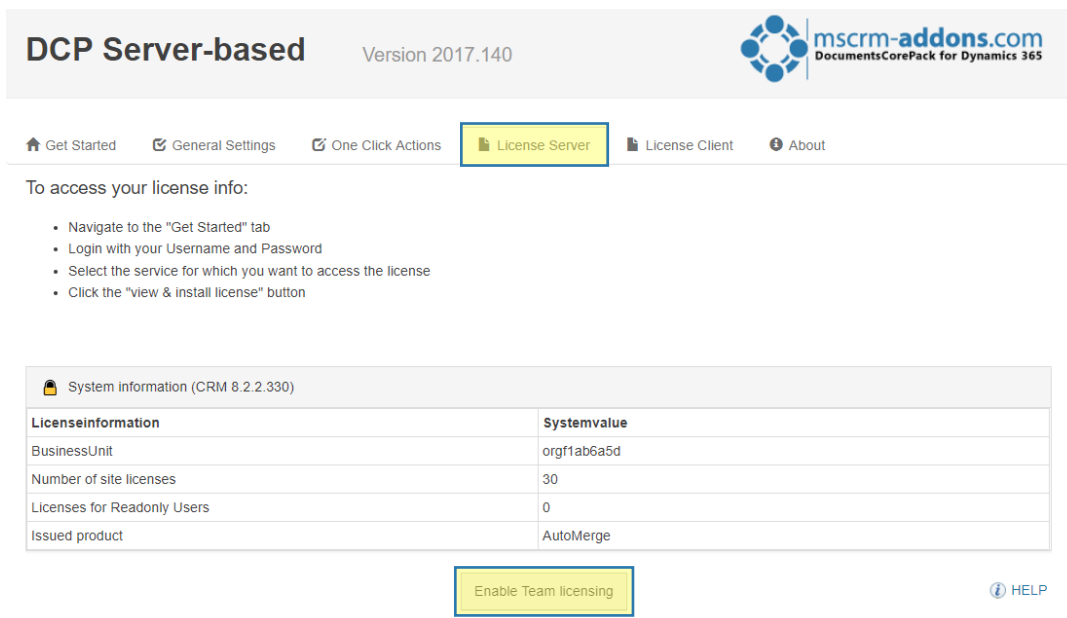


Figure 10: TeamMember Licensing for DocumentsCorePack

- 1) You first have to click on the **[Enable Team licensing]**-button, like you can see in the figure above.

- 2) Next, this window pops up where you have to type in the username of a Dynamics 365 administrator like you can see below. Then hit the **[Start]**-button.

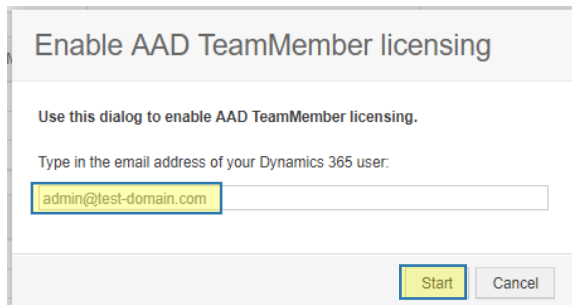


Figure 11: Dialog for enabling AAD TeamMember licensing

- 3) A new window will open, where you have to sign in with an Office 365 admin account. Please note, that it could be possible that you first must disable your popup blocker for that. Then sign in and click the **[Next]**-button.

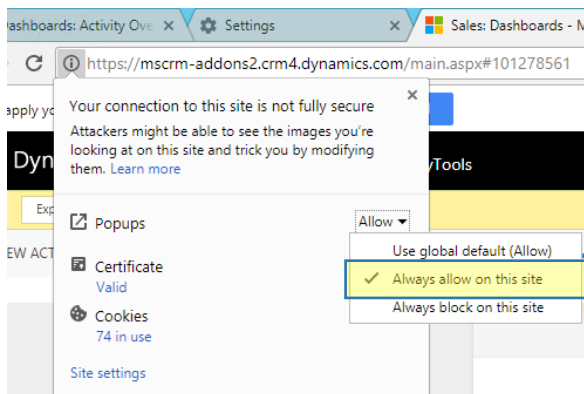


Figure 12: Disable popup blocker in Chrome

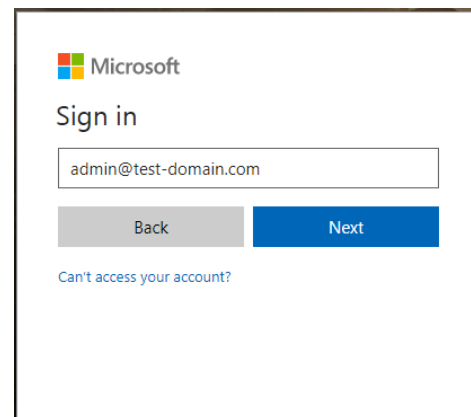


Figure 13: Microsoft Login

- 4) After login, you will be provided with the window below. Please click on the **[Accept]**-button to continue.

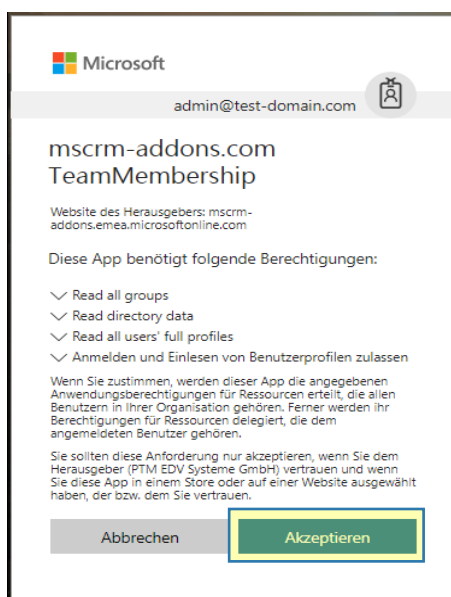
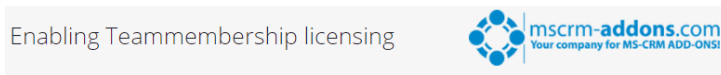


Figure 14: Accept TeamMember licensing

5) If the process was successful you will be linked to our website showing the information below.



You have enabled Teammembership licensing successfully!  
Click on the 'Enable' button in the license dialog to continue



Figure 15: Enabling TeamMember licensing information

6) After enabling successfully the TeamMember licensing, please go back to the license dialog and click on the **[Enable]**-button to finish the process.

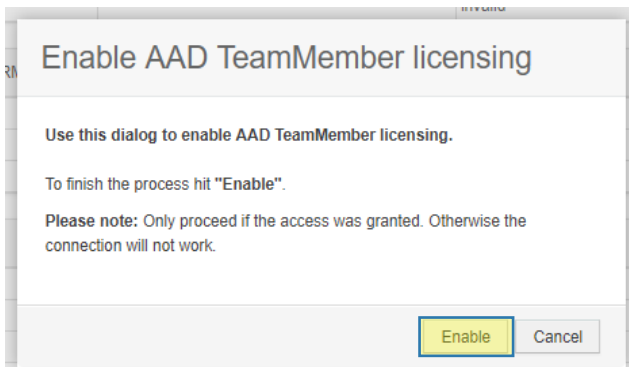


Figure 16: Enable AAD TeamMember Licensing

7) After activating, you will be provided with the window below, which shows you a license summary.

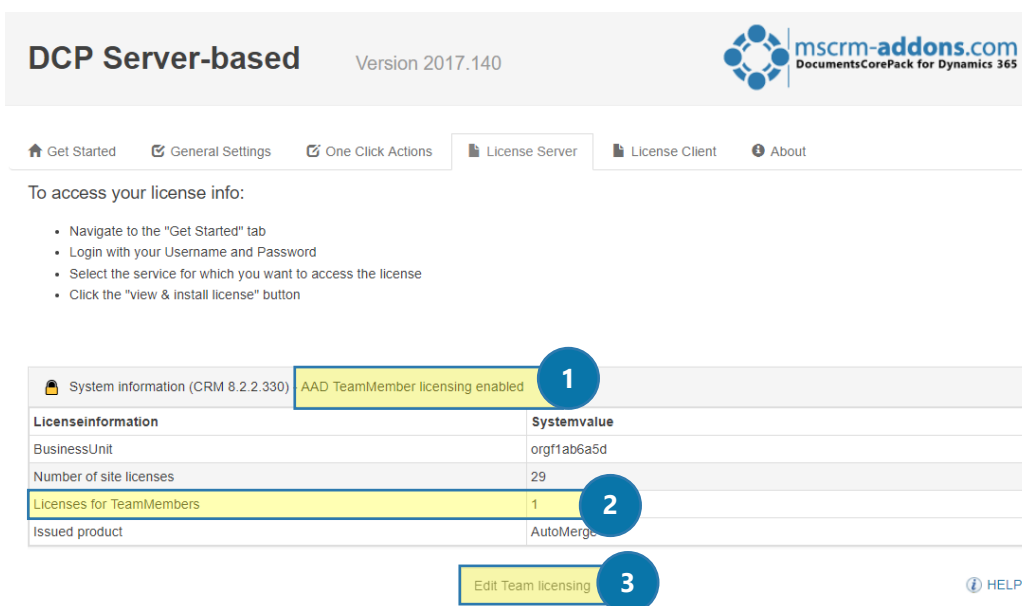


Figure 17: License summary

1 The General license information shows you that your AAD TeamMember licensing is enabled.

2 Licenses for TeamMembers shows the amount of Dynamics 365 TeamMember users and the Number of site licenses above shows you the amount of normal Dynamics 365 licenses reduced by the TeamMember users.

3 Here you can edit your TeamMember licensing. By clicking this you will be provided with the window below, where you can **Renew** or **Disable** your TeamMember licensing.

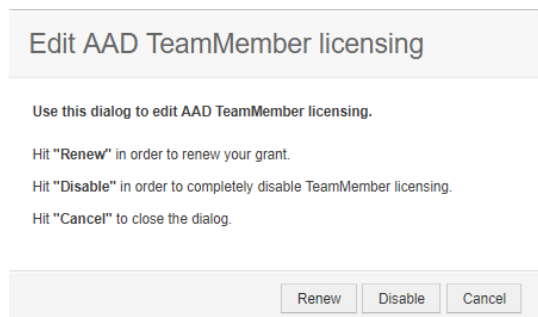


Figure 18: Edit AAD TeamMember licensing

For all other products you can find the **[Enable Team licensing]**-button under the *Licensing-tab* like you can see below using ActivityTools as example. The process is the same as for DocumentsCorePack shown before.

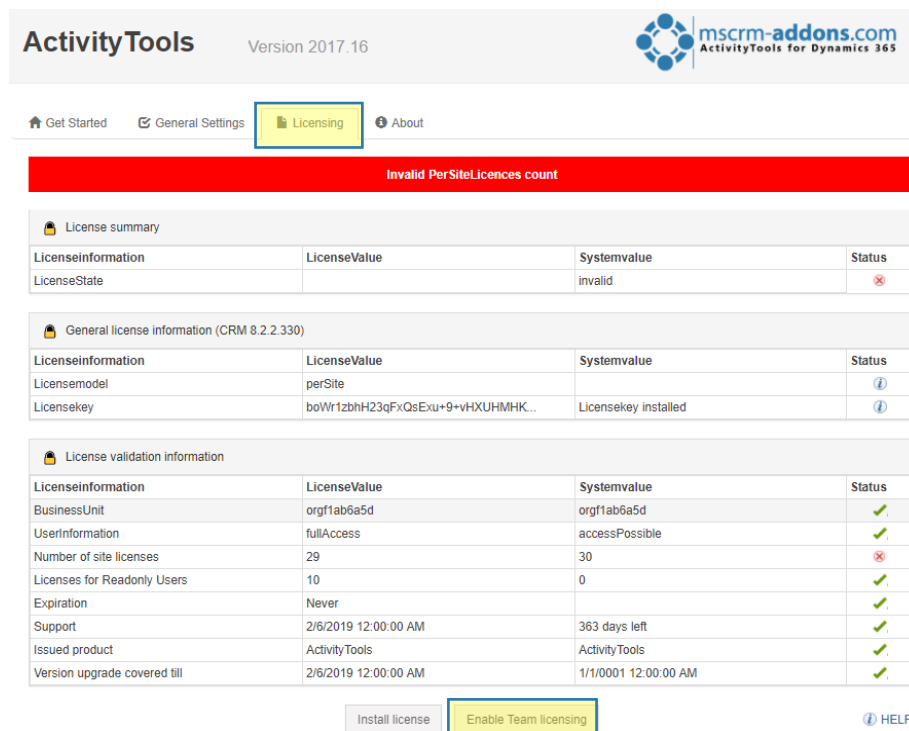


Figure 19: Team Licensing for ActivityTools

## 2 The Local License Manager

The local license manager is accessible as a standalone application (1) or from the main configuration tool of the add-on (2).

There are two ways to open the License Manager:

- 1) Search for "License Manager – Dynamics 365" in the start pane and press [Enter] to start the program – as you can see in the figure below. Next, connect to your Dynamics 365 organization.

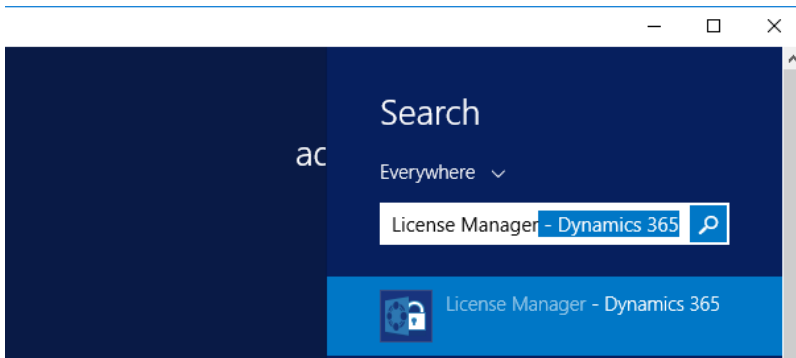


Figure 20: Start Pane – Search for License Manager

OR

- 2) Open the **Organization overview**, select an organization and click on **License Manager** (highlighted in yellow):

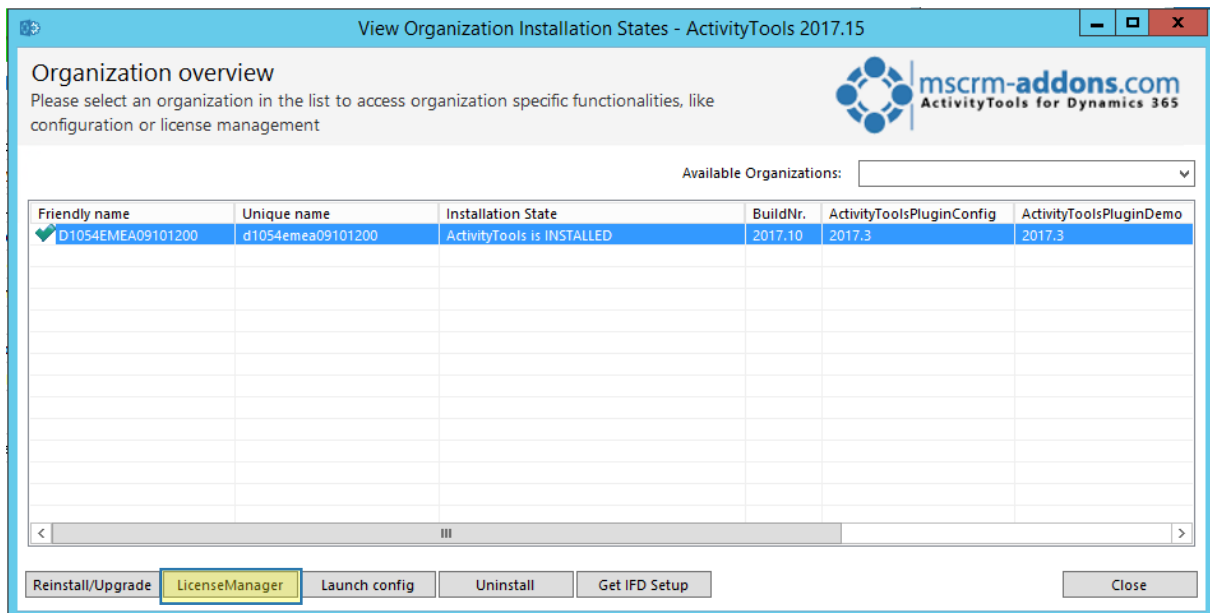


Figure 21: Organization overview

Anyway, after the starting process, the window (see screenshot below) pops up:

For more information regarding the Connection Dialog, have a look at this [article](#).

## 2.1 Local License Manager Overview

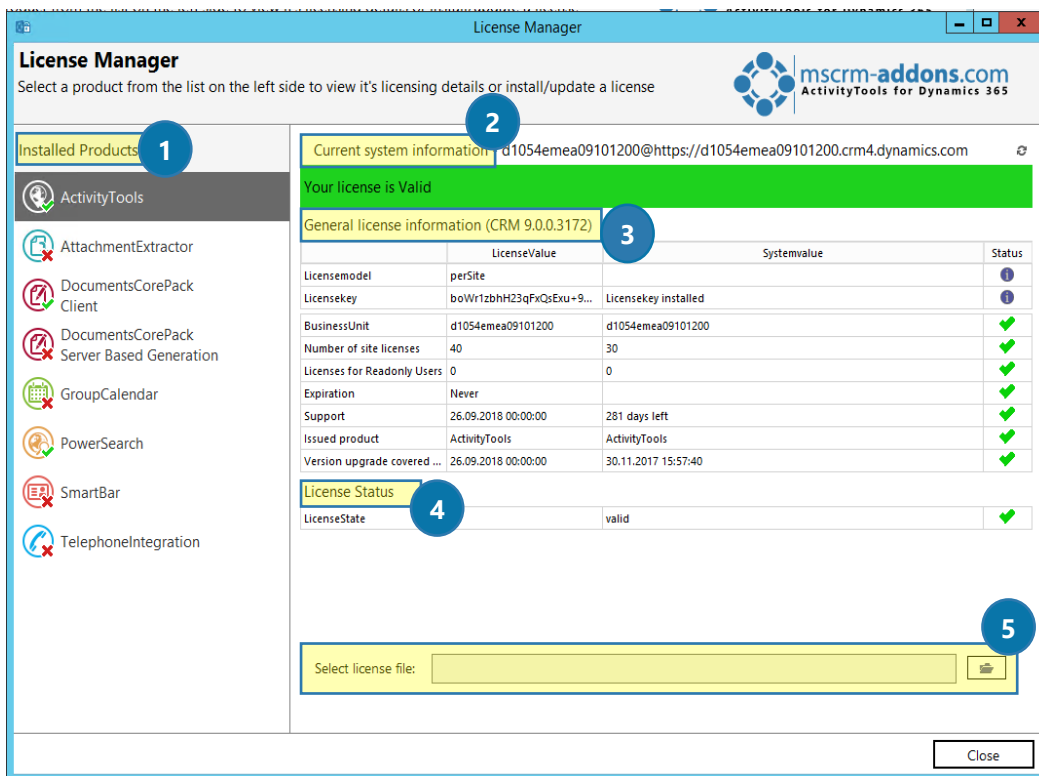


Figure 22: License Manager Overview

### 1 INSTALLED PRODUCTS:

This list provides you with an overview of all the MSCRM-ADDONS products you have installed. Selecting a product in this overview will bring up the according to license details on the right side (section (3)). A green check, next to an add-on icon, means that its license is valid. A cross symbolizes an invalid license.

### 2 CURRENT SYSTEM INFORMATION:

Summary of your current license state. See chapter 3 POSSIBLE LICENSE STATES for more detailed information. A green background indicates a valid license and a red background indicates an issue with your license. Please check the highlighted rows in the overview for details.

### 3 GENERAL LICENSE INFORMATION:

Displays details about expiration date, version and user count.

### 4 LICENSE STATUS:

The field provides you with a deeper insight into your license status.

## 2.2 How to install a license

### 5 SELECT LICENSE FILE:

On click, a file dialog will open which allows you selecting a license file. After selecting a file, the License Manager will analyze the license and show its information in a new dialog, like you can see below. To finish the installation, click on the **[Install this]**-button.

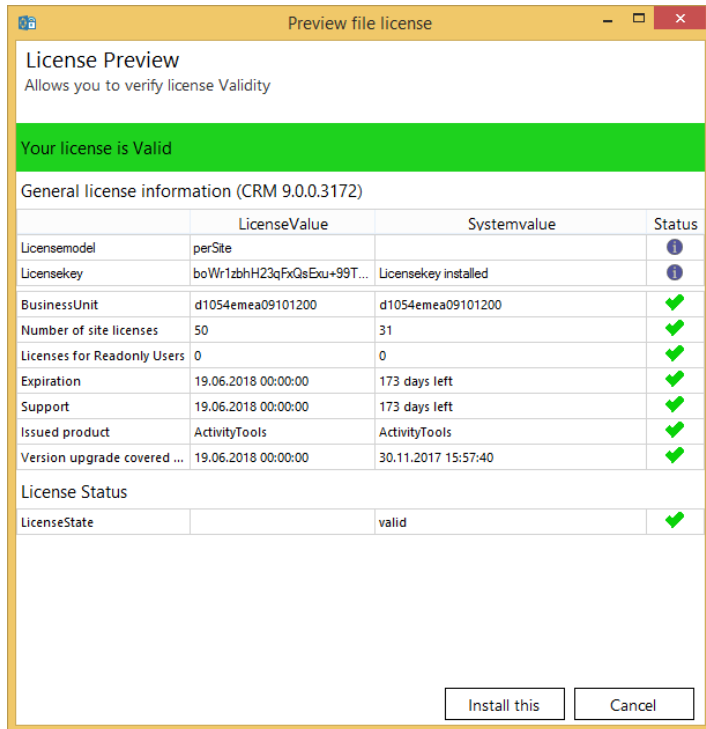


Figure 23: License Preview



You do not have to extract the received license! The Local License Manager can handle zip-files as well. If it contains licenses for multiple products it will install each license key for the corresponding product.



## 3 Possible license states

This chapter describes you the different license states, your license can have and how to handle problems with your license.

### 3.1 Valid

Your product is licensed correctly.

Your license is Valid

### 3.2 Expired

If your license has expired, the license manager will display a red bar, like you can see below. Additionally, the license state is set to invalid. In this case, you must update your license.

Your license has expired

### 3.3 The license could not be decrypted

This means, that your license has been issued for a newer version of the product. Please **contact our support**, as this issue requires a new license to be resolved.

Your license could not be decrypted

### 3.4 Your Dynamics 365 version does not support this license

This means, that your license has been issued for an older version of the product. Please **contact our support**, as this issue requires a new license to be resolved.

Crm Version 9.0.0.3172 is not supported by this license (Dynamics 365 v8)

### 3.5 Upgrading your license

To update or upgrade your license, you have two options:

1) **Purchase a new license or an upgrade license** directly in our online shop:  
<http://www.mscrm-addons.com/OnlineShop/tabid/80/language/de-DE/Default.aspx>

OR

2) **Contact our support** (please have a look at chapter 6 CONTACT)

## 4 How licenses are counted?

This chapter describes you how licenses are counted in our system. The counting mechanism varies depending on the type of license being used. We differentiate here between two types of licenses – the Normal licenses and the TeamMember licenses. Below are the two different license types and a description of how the count works for each:

### 4.1 Normal licenses

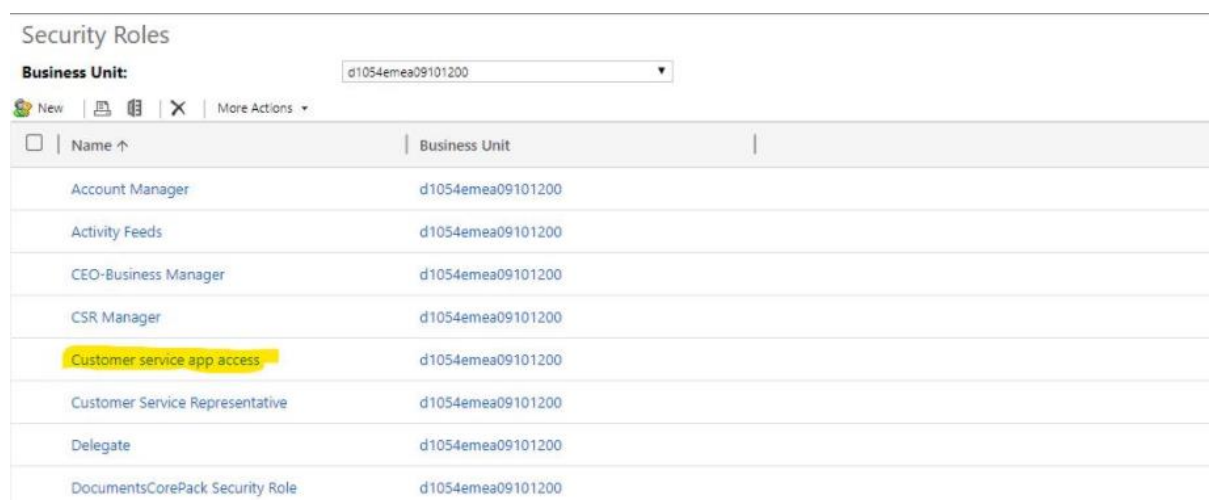
For the required licenses, all users that are activated and have as Access Mode “Read-Write” in Dynamics 365, are counted. Users with “Administrative” as Access Mode are not counted.

There is the possibility to count only users with a security role for licensing. To activate this feature the only thing you need to do is to create a new settingsKey for AutoMerge called “CountUsersWithSecurityRolesOnly” with value “true” as you can see in the figure below. More information about how to create settingsKeys can be found [here](#).



Figure 24: New SettingsKey – CountUsersWithSecurityRolesOnly

Additionally there are users who have app access security roles as you can see highlighted in the figure below. App access security roles are predefined roles by Microsoft and are automatically assigned to users. These security roles will not be counted by DCP until you modify them.



Security Roles

Business Unit: d1054emea09101200

Name	Business Unit
Account Manager	d1054emea09101200
Activity Feeds	d1054emea09101200
CEO-Business Manager	d1054emea09101200
CSR Manager	d1054emea09101200
Customer service app access	d1054emea09101200
Customer Service Representative	d1054emea09101200
Delegate	d1054emea09101200
DocumentsCorePack Security Role	d1054emea09101200

Figure 25: App access security roles

## 4.2 TeamMember licenses

If you have TeamMember licenses, please notice that these are counted different. TeamMember are assigned to specific license groups in Azure Active Directory and only two types are counted – the "DYN365\_ENTERPRISE\_TEAM\_MEMBERS" and the "DYN365\_TEAM\_MEMBERS".

Find more information on how to activate TeamMember licenses [here](#).

## 5 List of figures

Figure 1: Dynamics 365 Settings – MSCRM-ADDONS – ActivityTools.....	4
Figure 2: ActivityTools - Licensing.....	4
Figure 3: ActivityTools – Expired version.....	5
Figure 4: Install license window.....	6
Figure 5: Subscription Number .....	7
Figure 6: Activate per User license .....	8
Figure 7: Select the users you want to activate.....	8
Figure 8: Valid license.....	9
Figure 9: Dynamics 365 Settings – MSCRM-ADDONS .....	10
Figure 10: TeamMember Licensing for DocumentsCorePack .....	10
Figure 11: Dialog for enabling AAD TeamMember licensing .....	11
Figure 12: Disable popup blocker in Chrome.....	11
Figure 13: Microsoft Login.....	11
Figure 14: Accept TeamMember licensing .....	11
Figure 15: Enabling TeamMember licensing information.....	12
Figure 16: Enable AAD TeamMember Licensing.....	12
Figure 17: License summary .....	12
Figure 18: Edit AAD TeamMember licensing .....	13
Figure 19: Team Licensing for ActivityTools.....	13
Figure 20: Start Pane – Search for License Manager.....	14
Figure 21: Organization overview.....	14
Figure 22: License Manager Overview .....	15
Figure 23: License Preview .....	16
Figure 24: New SettingsKey – CountUsersWithSecurityRolesOnly .....	18
Figure 25: App access security roles.....	18

## 6 Contact

For further technical questions, please visit our blog <http://blogs.mscrm-addons.com> or contact [support@mscrm-addons.com](mailto:support@mscrm-addons.com).

For sales and licensing questions please contact [office@mscrm-addons.com](mailto:office@mscrm-addons.com) or the corresponding contact information below.



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[www.mscrm-addons.com](http://www.mscrm-addons.com)