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Licensing Guide for Microsoft Dynamics 365

v.2017/2018.2, Feb 2018

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

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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.

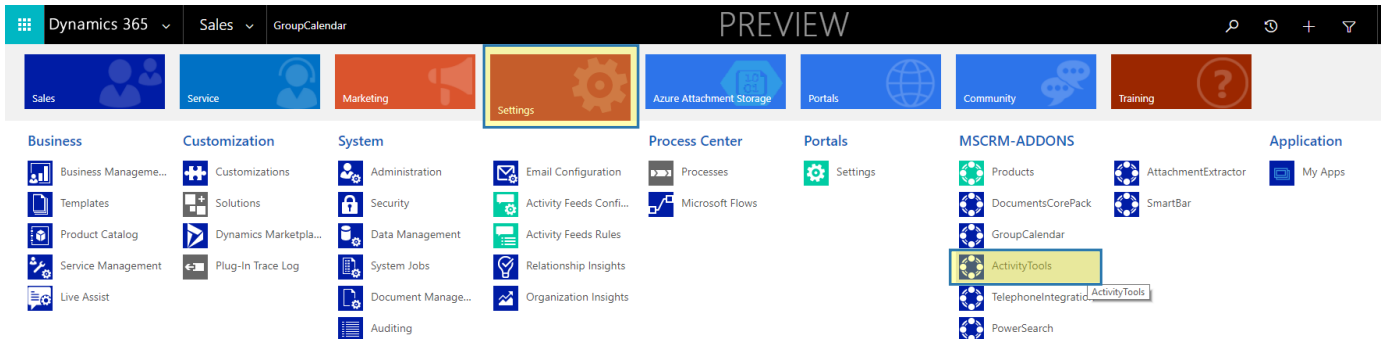


Figure 1: Dynamics 365 Settings – MSCRM-ADDONS – ActivityTools

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).

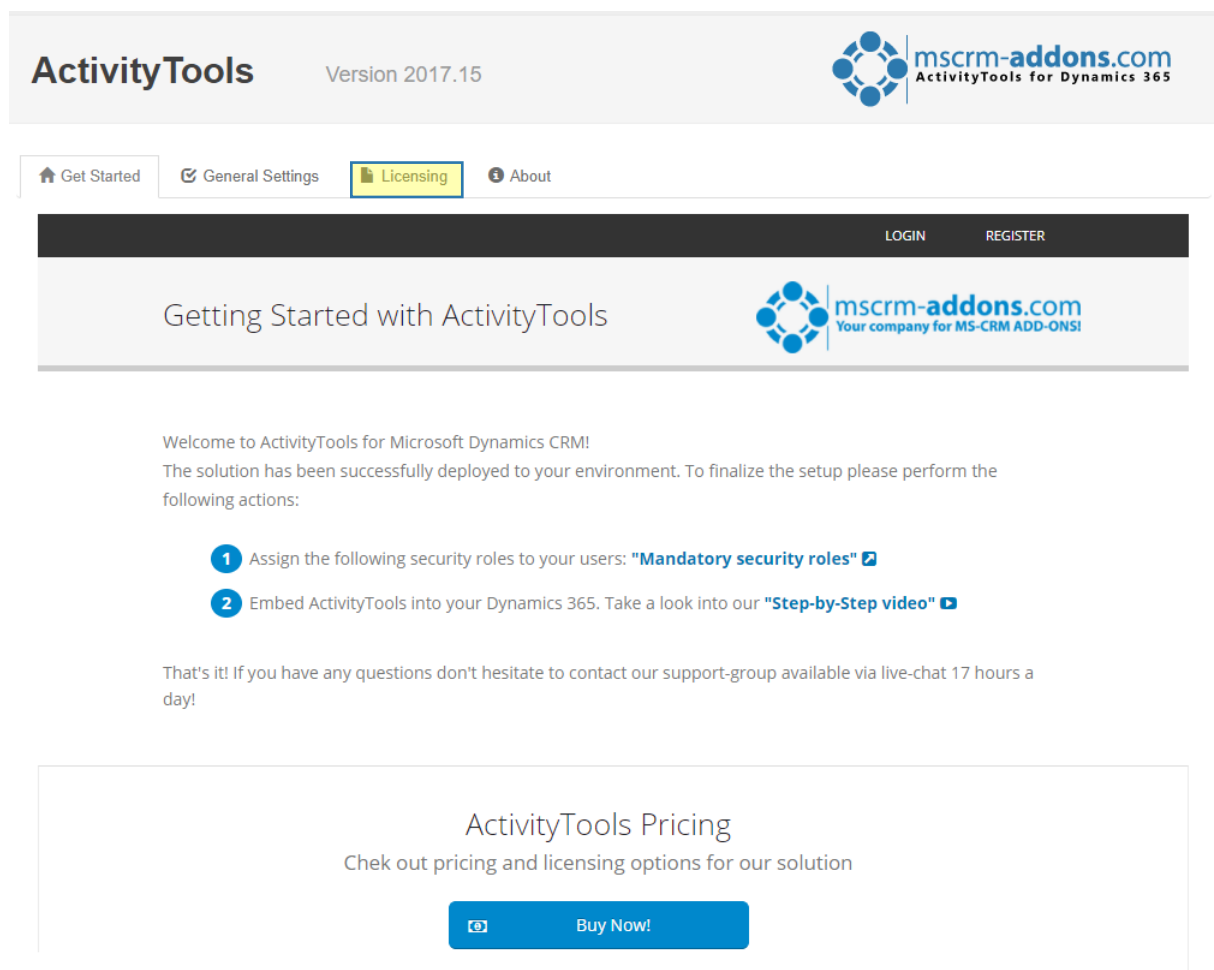
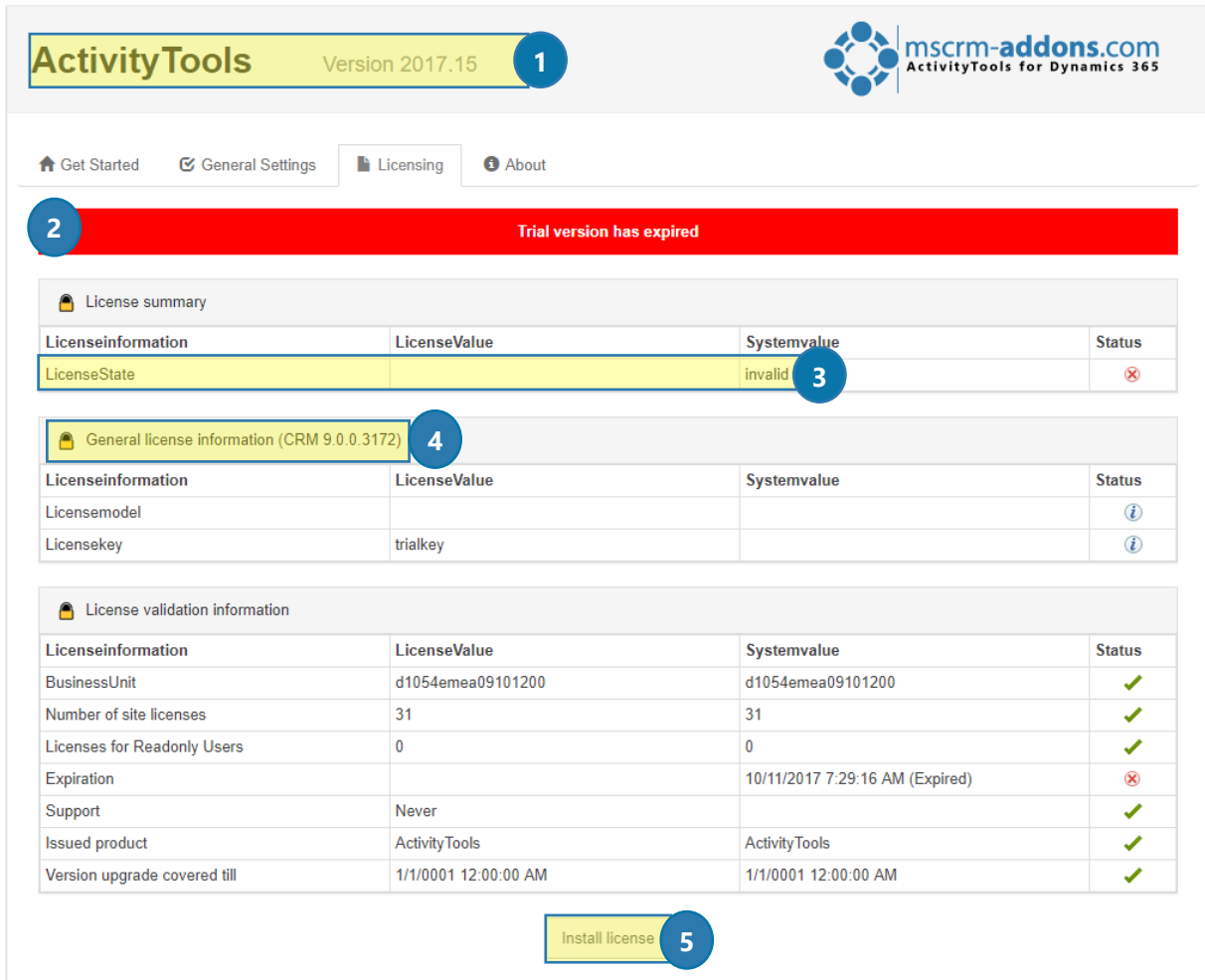


Figure 2: ActivityTools - Licensing

1.1 Web License Manager Overview

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



The screenshot shows the ActivityTools Web License Manager interface. At the top, the product name 'ActivityTools' and version '2017.15' are displayed. A navigation menu includes 'Get Started', 'General Settings', 'Licensing', and 'About'. A prominent red banner indicates 'Trial version has expired'. Below this, there are three main sections:

- License summary:** A table showing license details. The 'LicenseState' is 'invalid', and the 'Status' is marked with a red 'X'.
- General license information (CRM 9.0.0.3172):** A table showing details like 'Licensekey' (trialkey) and 'Systemvalue'.
- License validation information:** A table showing validation details such as 'BusinessUnit', 'Number of site licenses', 'Expiration', and 'Support'.

An 'Install license' button is located at the bottom right of the interface.

Licenseinformation	LicenseValue	Systemvalue	Status
LicenseState		invalid	⊗

Licenseinformation	LicenseValue	Systemvalue	Status
Licensemodel			i
Licensekey	trialkey		i

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	✓

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).

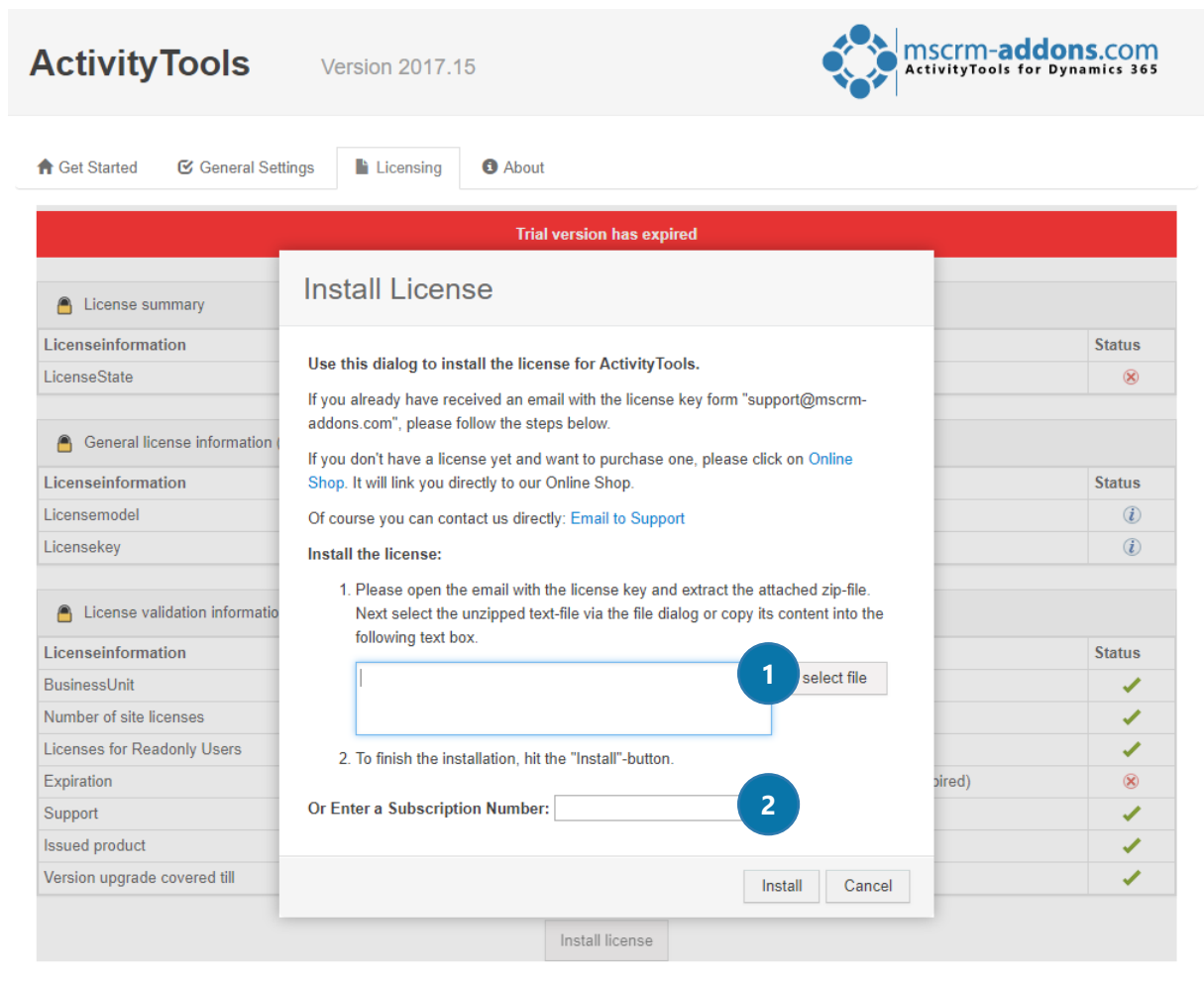


Figure 4: Install license window

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, you will receive a Subscription Number 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

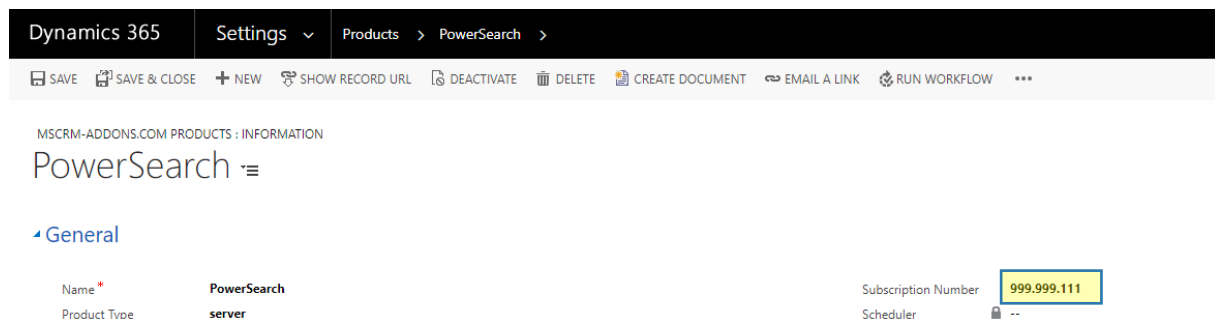
Following steps are necessary to activate the subscription license:

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

Figure 5: Subscription Number

After receiving this email, please go to Dynamics 365 > Settings > PowerSearch (in this example) and type in the Subscription Number (highlighted in yellow below).



Dynamics 365 Settings > Products > PowerSearch >

SAVE SAVE & CLOSE + NEW SHOW RECORD URL DEACTIVATE DELETE CREATE DOCUMENT EMAIL A LINK RUN WORKFLOW ...

MSCRM-ADDONS.COM PRODUCTS : INFORMATION

PowerSearch

General

Name * PowerSearch
Product Type server

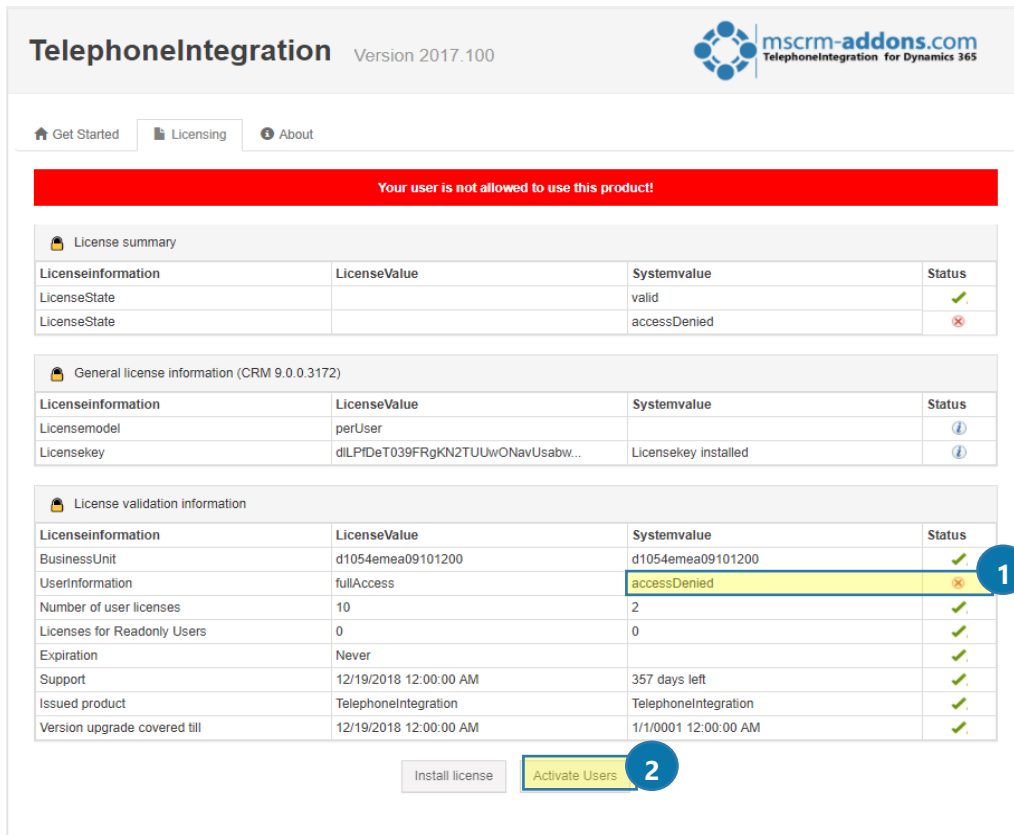
Subscription Number 999.999.111
Scheduler --

Figure 6: 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:



TelephoneIntegration Version 2017.100

mscrm-addons.com
TelephoneIntegration for Dynamics 365

Get Started | Licensing | About

Your user is not allowed to use this product!

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	?

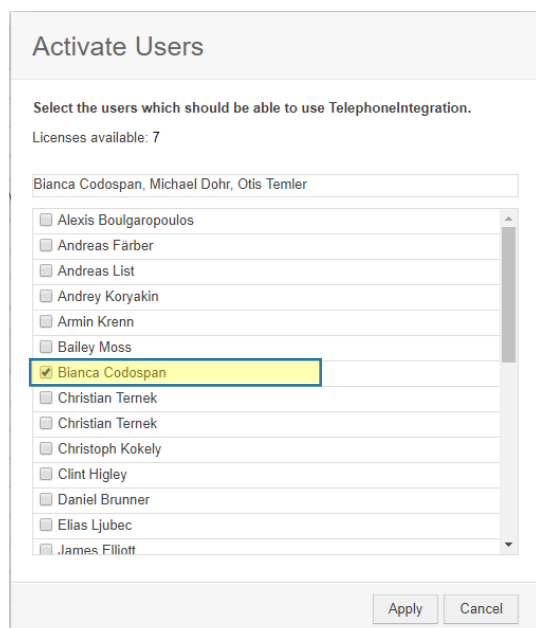
License validation information

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	✓

Install license | **Activate Users**

Figure 7: 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



Activate Users

Select the users which should be able to use TelephoneIntegration.

Licenses available: 7

Bianca Codospian, Michael Dohr, Otis Temler

- 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


Apply | Cancel

Figure 8: 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

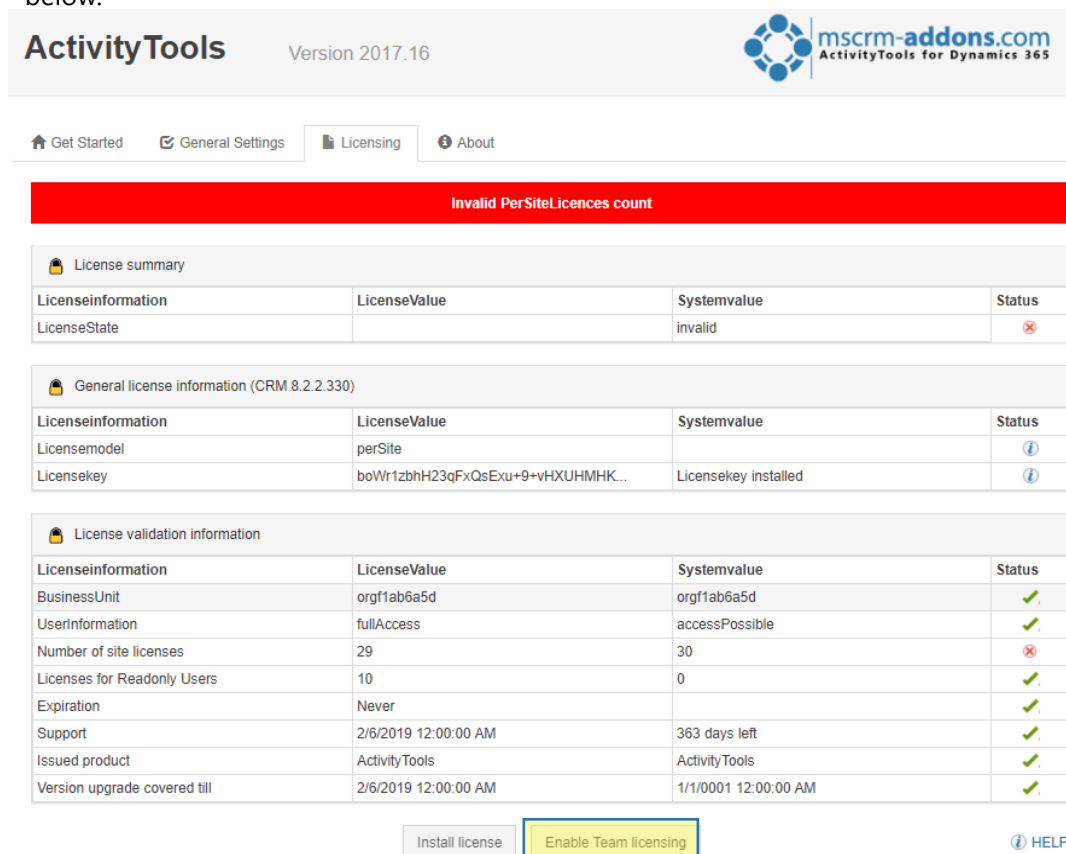
Activate Users

Figure 9: Valid license

1.4 How to activate AAD TeamMember Licensing

The following step-by-step instruction shows how you can enable the TeamMember licensing for the current add-on. This makes sense for Dynamics 365 Online organizations which use „Microsoft Dynamics 365 Team Member“ licenses. This activation process has to be done for each add-on separately.

Open your Dynamics 365 Settings, navigate to MSCRM-ADDONS-section and select ActivityTools. In the main configuration window select Licensing. The default Web License Manager looks like in the figure below:



ActivityTools Version 2017.16

mscrm-addons.com
ActivityTools for Dynamics 365

Get Started General Settings **Licensing** About

Invalid PerSiteLicences count

License summary

Licenseinformation	LicenseValue	Systemvalue	Status
LicenseState		invalid	✘

General license information (CRM 8.2.2.330)

Licenseinformation	LicenseValue	Systemvalue	Status
Licensemodel	perSite		?
Licensekey	boWr1zbhH23qFxQsExu+9+vHXUHMHK...	Licensekey installed	?

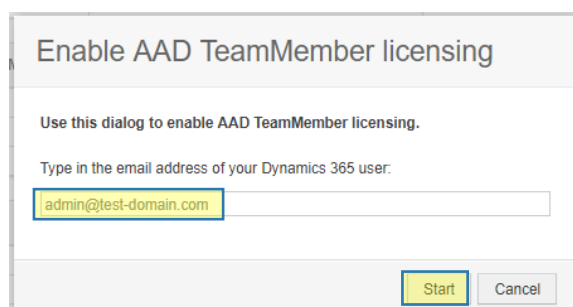
License validation information

Licenseinformation	LicenseValue	Systemvalue	Status
BusinessUnit	orgf1ab6a5d	orgf1ab6a5d	✔
UserInformation	fullAccess	accessPossible	✔
Number of site licenses	29	30	✘
Licenses for Readonly Users	10	0	✔
Expiration	Never		✔
Support	2/6/2019 12:00:00 AM	363 days left	✔
Issued product	ActivityTools	ActivityTools	✔
Version upgrade covered till	2/6/2019 12:00:00 AM	1/1/0001 12:00:00 AM	✔

Install license **Enable Team licensing** HELP

Figure 10: Team Licensing

- 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 user name of a Dynamics 365 administrator like you can see below. Then select the **[Start]**-button.



Enable AAD TeamMember licensing

Use this dialog to enable AAD TeamMember licensing.

Type in the email address of your Dynamics 365 user:

admin@test-domain.com

Start Cancel

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.

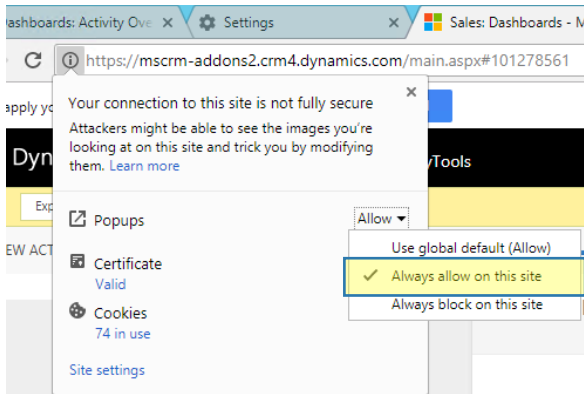


Figure 12: Disable popup blocker in Chrome

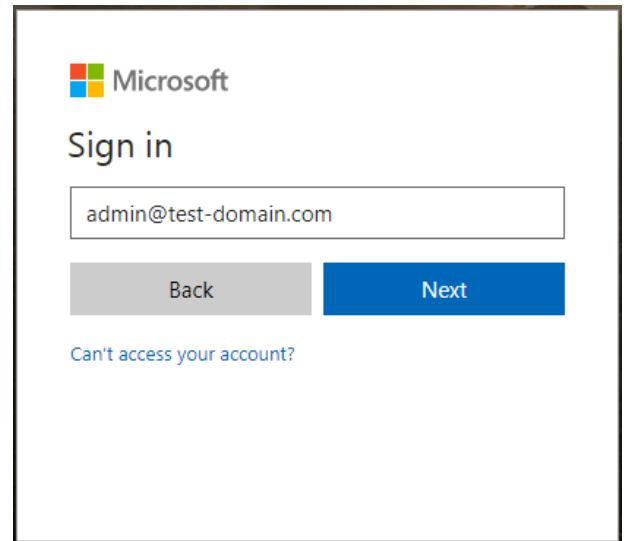


Figure 13: Microsoft Login

- 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.

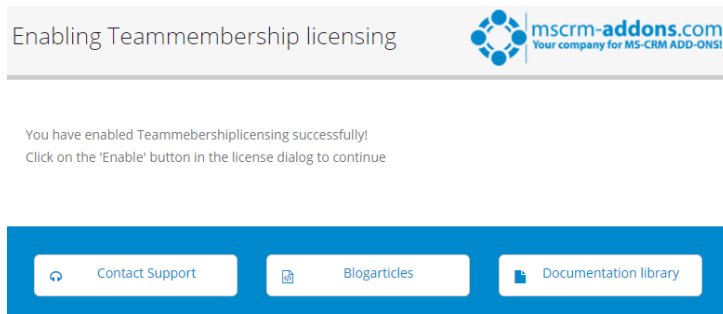


Figure 15: Enabling TeamMember licensing information

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

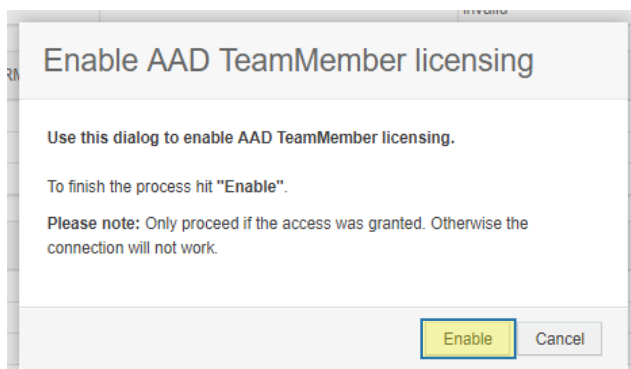


Figure 16: Enable AAD TeamMember Licensing

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

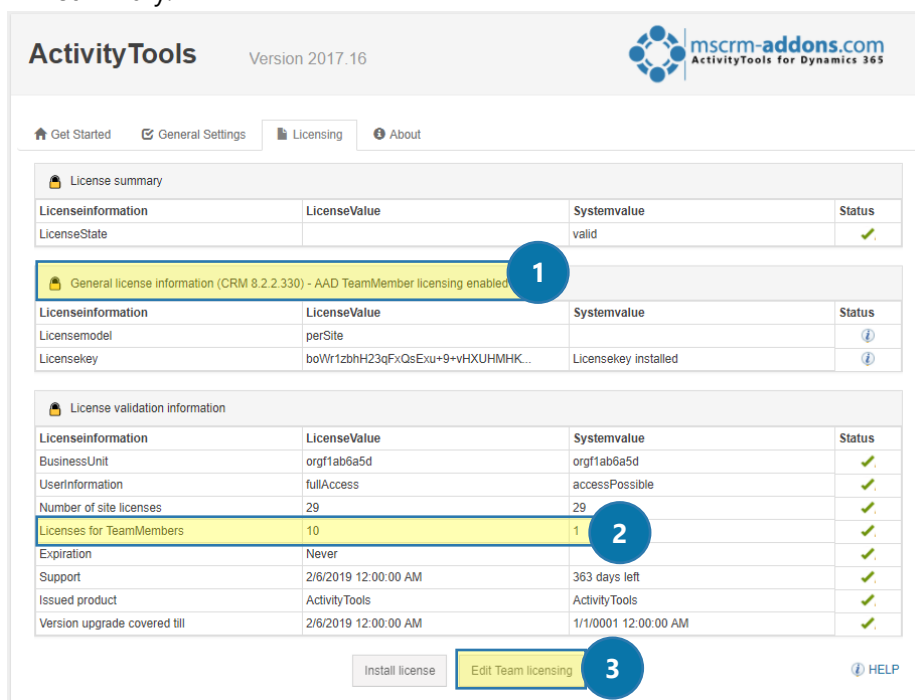


Figure 17: License summary

- 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.

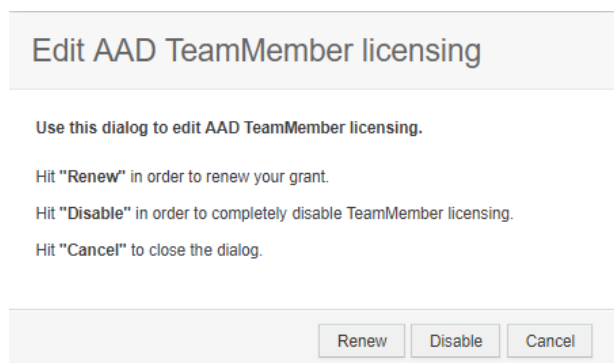


Figure 18: Edit AAD TeamMember licensing

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.

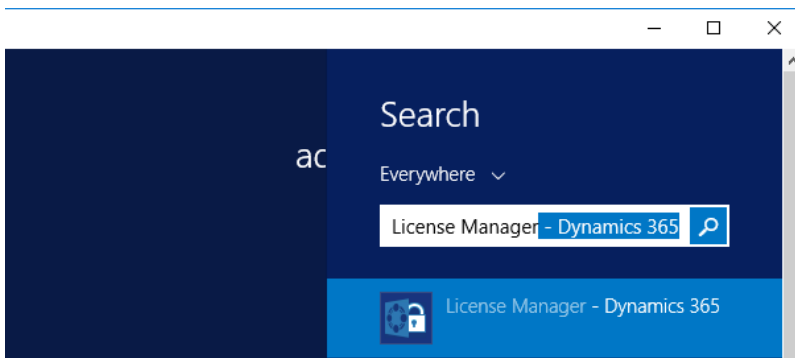


Figure 19: Start Pane – Search for License Manager

OR

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

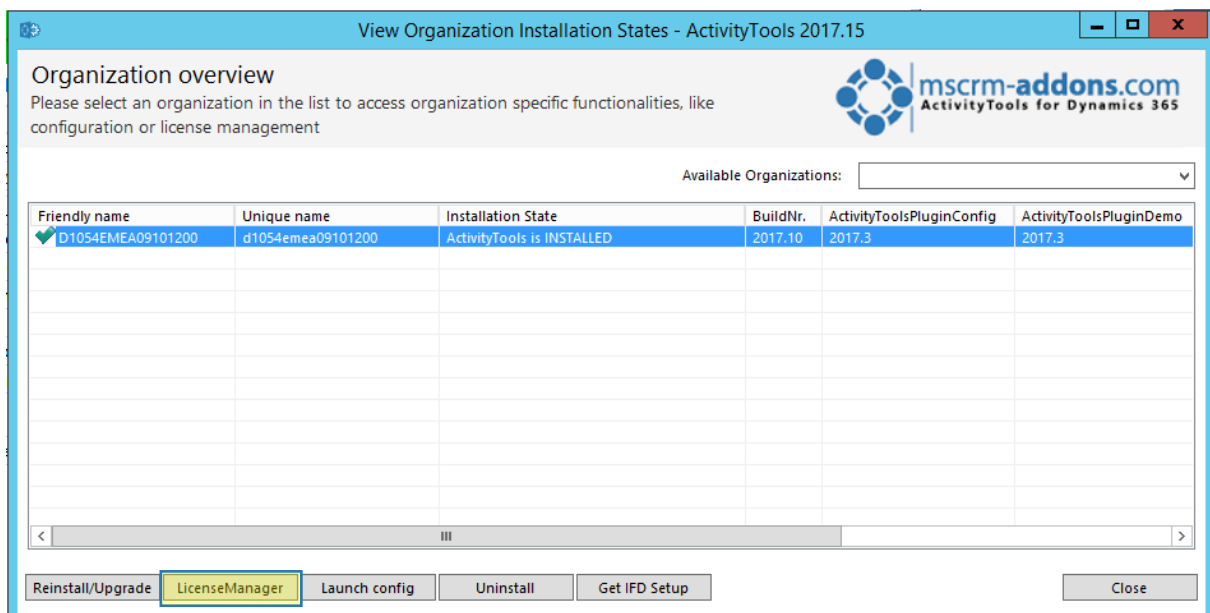


Figure 20: Organization overview

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

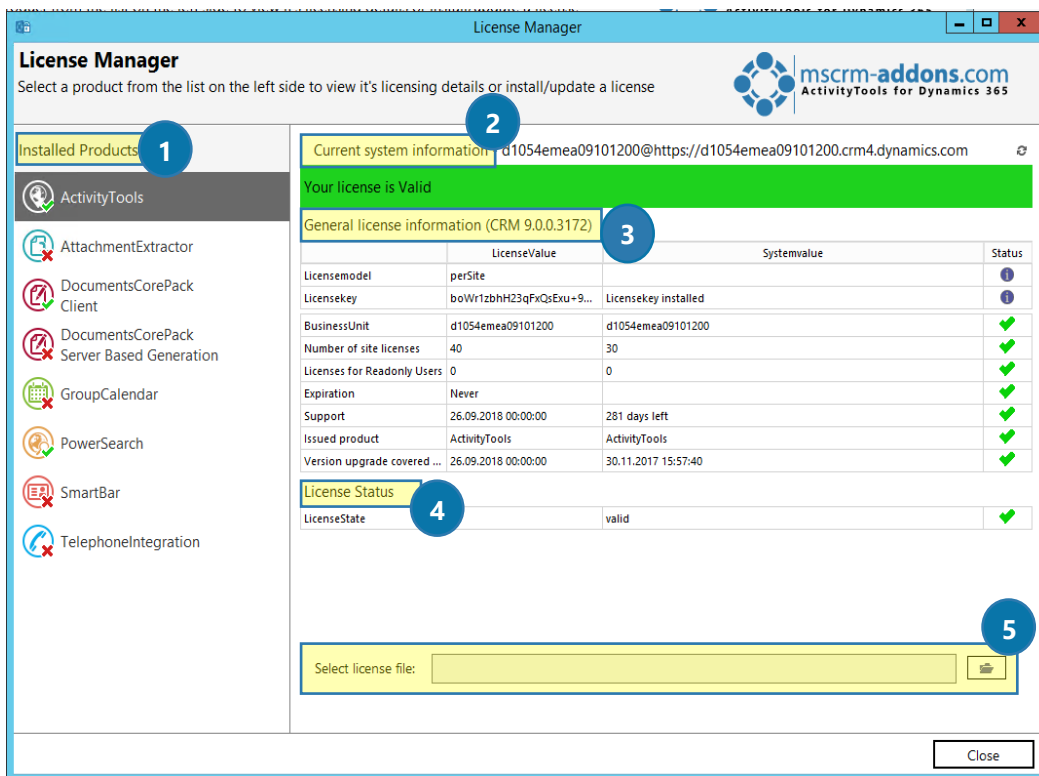


Figure 21: License Manager Overview

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.

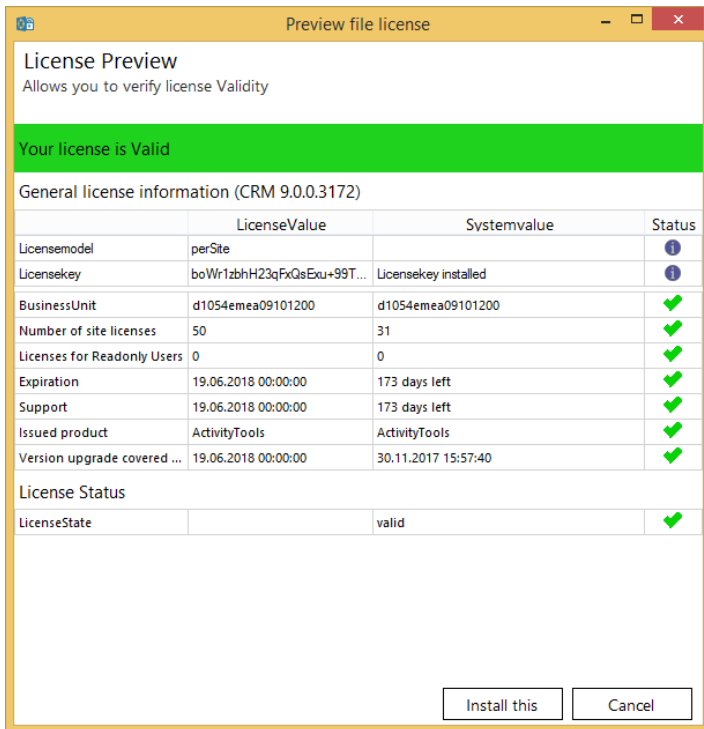


Figure 22: License Preview



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 5 CONTACT)

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5 Contact

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

For sales and licensing questions please contact office@mscrm-addons.com or the corresponding contact information below.



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