



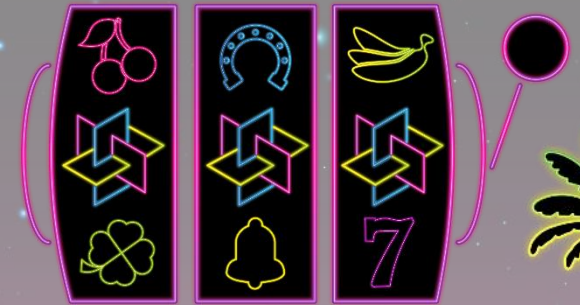
2026

DYNAMICS  
CON

Vegas

# D365 Licensing Therapy

Group Session for Confused Admins



# Speakers – Consultants



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# Speakers – Microsoft



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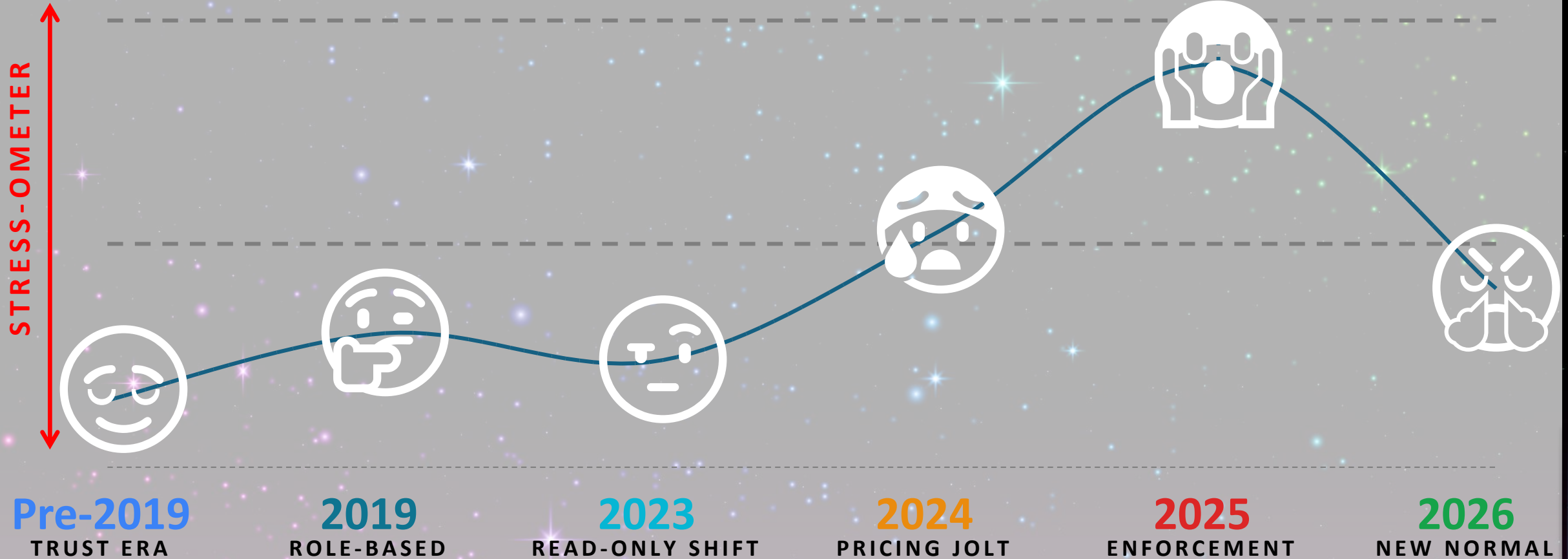
**Ian Ceicys**

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# The Evolution of D365 Licensing


*An Admin's stress curve – told in emoji*



# The dreaded banner....




## Finance and Operations

 You will lose access to Dynamics 365 Finance and Operations apps on November 1st 2025 without a valid license. Contact your admin to assign a license as soon as possible.

- Update to latest PQU for correct banner

## Finance and Operations

 Search for a page

 You will lose access to Dynamics 365 finance and operations apps due to a missing license. Please contact your admin to get one assigned immediately.

# License Validation Timeline

***New guidance (September 2025): Improved User License Validation by customer's anniversary or renewal date***

## **When and how will per-user license validation occur?**

Beginning January 15, 2026, per-user license validation will follow a staged rollout aligned to each customer's contract anniversary or renewal date. Users will receive in-app notification 30 days before the validation month to give customers time to review and assign the correct licenses.

We will follow a milestone-driven timeline:

- T-90 (90 days before anniversary or renewal date): Customers initiate anniversary preparation supported by seller / partner.
- T-30: In-app notifications will appear to alert users without assigned user licenses.
- T+15: License validation begins, giving customers a 15-day period to assign the correct user licenses.

## Timeline



- T-30 = latest. Experienced T-41
- Start license assignment ASAP
- When needed, acquire licenses

# Security Duplication Feature



**Security configuration**

Roles Duties Privileges Unpublished objects (2)

Undo Redo Create new Show all levels Delete **Duplicate** Copy View permissions Audit trail

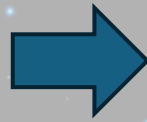
Roles

- (Preview) Supplier Communications Agent
- Account reconciliation agent
- Accountant**
- Accounting manager
- Accounting supervisor

**ACCOUNTANT**

Description

Documents accounting events and responds to accounting inquiries



Standard view ▾

Enter new role name for copy of 'Accountant'

Name:

Licensing SKU:

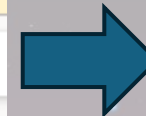
- None
- Human Resources Self Service
- Team Members
- Operations - Activity
- Human Resources
- Project Operations
- Commerce
- Finance
- Supply Chain Management
- Finance Premium
- Supply Chain Management Premium

**Finance and Operations**

⚠ Some references were excluded

Segregation of duties Data 🔍

**Security configuration**



**Message details**

Some references were excluded

- ⚠ 62 references with Operations - Activity entitlements could not be copied to AM Accountant as those are covered under other SKUs.
- ⚠ A report of the excluded references has been generated.  
[Download report](#)

# Use AI to help with license review



**Licensing**

**User License Consumption**

**Finance and Operations**

Customers must acquire and assign appropriate subscription licenses for its users per [Microsoft's product terms](#). Microsoft provides these reports to help customers monitor required licenses based on their users' configured access to Dynamics 365 finance and operations apps. User license reporting may vary based on user security role assignment and may be periodically enhanced to reflect Microsoft's current licensing requirements. [Learn more](#).

Total users requiring license <b>0</b> <a href="#">View details</a>	Unlicensed users <b>0</b> <a href="#">View details</a>	Under-licensed users <b>0</b> <a href="#">View details</a>	Over-licensed users <b>3</b> <a href="#">View details</a>	Users without a license requirement <b>0</b> <a href="#">View details</a>
---	--	--	---	---

[Manage licenses](#) [Export to CSV](#) [Summarize](#)

**User licenses across Finance and Operations applications**  
The report refreshes every 4-12 hours. Last refresh on: 1/1/1, 12:00:00 AM UTC.

**Dynamics 365 Supply Chain Management** **Dynamics 365 Finance** **Dynamics 365 Commerce**

```
Dynamics 365 Supply Chain Management
- Total users requiring Supply Chain Management license : 0
- Supply Chain Management base, purchased and assigned : 0
- Supply Chain Management attach, purchased and assigned : 0
- Supply Chain Management base, purchased but unassigned (Available to assign): 0
- Supply Chain Management attach, purchased but unassigned (Available to assign): 0

Dynamics 365 Finance
- Total users requiring Finance license : 0
- Finance base, purchased and assigned : 0
- Finance attach, purchased and assigned : 0
- Finance base, purchased but unassigned (Available to assign): 0
- Finance attach, purchased but unassigned (Available to assign): 0

Dynamics 365 Commerce
- Total users requiring Commerce license : 0
- Commerce base, purchased and assigned : 0
- Commerce attach, purchased and assigned : 0
- Commerce base, purchased but unassigned (Available to assign): 0
- Commerce attach, purchased but unassigned (Available to assign): 0

Dynamics 365 Project Operations
- Total users requiring Project Operations license : 0
- Project Operations base, purchased and assigned : 0
- Project Operations attach, purchased and assigned : 0
- Project Operations base, purchased but unassigned (Available to assign): 0
- Project Operations attach, purchased but unassigned (Available to assign): 0
```

# AI... continued



Finance and Operations > System administration > Security > Security governance > Licenses usage summary

Updates typically take 2 to 5 hours to appear in reports. Allow time for changes to be processed.

Standard view: [Options]

### Licenses usage summary

User Role Licenses	Role name	Role AOT name	Role description	SKU Name	Entitled	Not entitled	Not required
Role licenses	(Preview) Supplier Communications Agent	PURCHCOPILOTAUTONOMOUSPROCUREMENTAGENT	Commerce	Commerce	5	0	10
Duty licenses	AA Test	DE455915-881B-4DE2-8D7F-4D925A433598	Commerce	Commerce	29	0	0
Privilege licenses	Account reconciliation agent	RECONCILIATIONAUTOMATIONAGENTROLE	Gives user access to the account re...	Commerce	0	9	0
	Accountant	LEDGERACCOUNTANT	Documents accounting events and...	Commerce	3368	1571	0
	Accounting manager	LEDGERACCOUNTINGMANAGER	Reviews accounting, customer infor...	Commerce	4862	879	0
	Accounting supervisor	LEDGERACCOUNTINGSUPERVISOR	Reviews accounting process perfor...	Commerce	3045	1252	0
	Accounts payable centralized payments clerk	PAYMACCOUNTSPAYABLECENTRALPAYMCLERK	Documents accounts payable centri...	Commerce	684	7	0
	Accounts payable clerk	VENDINVOICEACCOUNTSPAYABLECLERK	Documents vendor invoice events...	Commerce	1641	359	0
	Accounts payable manager	VENDINVOICEACCOUNTSPAYABLEMANAGER	Reviews vendor invoice process pe...	Commerce	2205	408	0
	Accounts payable payments clerk	PAYMACCOUNTSPAYABLEPAYMENTSCLERK	Documents accounts payable paym...	Commerce	689	223	0
	Accounts payable positive payment clerk	PAYMPOSITIVERAYMENTSCLERK	Document accounts payable posit...	Commerce	66	0	0
	Accounts receivable centralized payments clerk	PAYMACCOUNTSRECEIVABLECENTRALPAYMCLERK	Documents accounts receivable ce...	Commerce	919	7	0
	Accounts receivable clerk	CUSTINVOICEACCOUNTSRECEIVABLECLERK	Documents customer invoice event...	Commerce	1669	431	0
	Accounts receivable manager	CUSTINVOICEACCOUNTSRECEIVABLEMANAGER	Reviews customer invoice process...	Commerce	2444	281	0
	Accounts receivable payments clerk	PAYMACCOUNTSRECEIVABLEPAYMENTSCLERK	Documents accounts receivable pa...	Commerce	937	241	0
	AMM Accountant	DBSC2A08-3F3C-4F9A-AD3F-4DD05558AC2E	Documents accounting events and...	Commerce	2944	0	0
	Andreas Lissner Test	32F5488A-380A-46E3-807E-DC39676A7483	Commerce	Commerce	1	0	0

#### Form information

**Control details**

Control: [Role description]

Form: [Licenses usage sum...]

**Security setup**

View permissions

Menu item type: [ ]

Menu item name: [ ]

**Manage**

**Administration**

**CONTROL INFORMATION**

Control name: [RoleSummary\_Secur...]

Control type: [ ]

Control role: [ ]

RoleSummary\_SecurityRole (SecurityRole)

RoleSummary\_Security...

Date field: [ ]

Description: [ ]

**FORM INFORMATION**

Form name: [UserSecGovLicense...]

Menu item name: [ ]

UserSecGovLicense...]

Menu item type: [ ]

Display: [ ]

SQLQuery1.s...Obd (1326)\*

```

1 select
2   sr [Name],
3   sr AotName,
4   rrvs [SkuName],
5   rrvs [Priority],
6   rrvs GroupName,
7   rrvs Entitled,
8   rrvs NotEntitled,
9   rrvs NotRequired
10 from
11 SecurityRole sr
12 join LicensingRoleRequirementsSummaryView rrvs
13   on rrvs.SecurityRole = sr.RecId
14 order by sr.[Name]

```

100% [No issues found]

Name	AotName	SkuName	Priority	GroupName	Entitled	NotEntitled	NotRequired
1 (Preview) Supplier Communications Agent	PURCHCOPILOTAUTONOMOUSPROCUREMENTAGENT	Project Operations	50	Base - Human Resources, Project Operations	5	0	10
2 (Preview) Supplier Communications Agent	PURCHCOPILOTAUTONOMOUSPROCUREMENTAGENT	Finance	70	Base - Commerce, Finance, Supply Chain Management	5	0	10
3 (Preview) Supplier Communications Agent	PURCHCOPILOTAUTONOMOUSPROCUREMENTAGENT	Commerce	60	Base - Commerce, Finance, Supply Chain Management	5	0	10
4 (Preview) Supplier Communications Agent	PURCHCOPILOTAUTONOMOUSPROCUREMENTAGENT	None	5		0	5	10
5 (Preview) Supplier Communications Agent	PURCHCOPILOTAUTONOMOUSPROCUREMENTAGENT	Supply Chain Management Premium	100	Base - Commerce, Finance, Supply Chain Management	5	0	10
6 (Preview) Supplier Communications Agent	PURCHCOPILOTAUTONOMOUSPROCUREMENTAGENT	Operations - Activity	30		5	0	10
7 (Preview) Supplier Communications Agent	PURCHCOPILOTAUTONOMOUSPROCUREMENTAGENT	Finance Premium	90	Base - Commerce, Finance, Supply Chain Management	5	0	10
8 (Preview) Supplier Communications Agent	PURCHCOPILOTAUTONOMOUSPROCUREMENTAGENT	Team Members	20		5	0	10
9 (Preview) Supplier Communications Agent	PURCHCOPILOTAUTONOMOUSPROCUREMENTAGENT	Human Resources	40	Base - Human Resources, Project Operations	5	0	10
10 (Preview) Supplier Communications Agent	PURCHCOPILOTAUTONOMOUSPROCUREMENTAGENT	Supply Chain Management	80	Base - Commerce, Finance, Supply Chain Management	5	0	10
11 (Preview) Supplier Communications Agent	PURCHCOPILOTAUTONOMOUSPROCUREMENTAGENT	Human Resources Self Service	10		0	5	10
12 AA Test	DE455915-881B-4DE2-8D7F-4D925A433598	Operations - Activity	30		29	0	0
13 AA Test	DE455915-881B-4DE2-8D7F-4D925A433598	Supply Chain Management	80	Base - Commerce, Finance, Supply Chain Management	29	0	0
14 AA Test	DE455915-881B-4DE2-8D7F-4D925A433598	Supply Chain Management Premium	100	Base - Commerce, Finance, Supply Chain Management	29	0	0
15 AA Test	DE455915-881B-4DE2-8D7F-4D925A433598	Finance	70	Base - Commerce, Finance, Supply Chain Management	29	0	0
16 AA Test	DE455915-881B-4DE2-8D7F-4D925A433598	Finance Premium	90	Base - Commerce, Finance, Supply Chain Management	29	0	0
17 AA Test	DE455915-881B-4DE2-8D7F-4D925A433598	Project Operations	50	Base - Human Resources, Project Operations	29	0	0
18 AA Test	DE455915-881B-4DE2-8D7F-4D925A433598	Human Resources	40	Base - Human Resources, Project Operations	29	0	0
19 AA Test	DE455915-881B-4DE2-8D7F-4D925A433598	None	5		0	29	0
20 AA Test	DE455915-881B-4DE2-8D7F-4D925A433598	Human Resources Self Service	10		1	28	0
21 AA Test	DE455915-881B-4DE2-8D7F-4D925A433598	Commerce	60	Base - Commerce, Finance, Supply Chain Management	29	0	0
22 AA Test	DE455915-881B-4DE2-8D7F-4D925A433598	Team Members	20		29	0	0
23 Account reconciliation agent	RECONCILIATIONAUTOMATIONAGENTROLE	Operations - Activity	30		0	9	0
24 Account reconciliation agent	RECONCILIATIONAUTOMATIONAGENTROLE	Supply Chain Management Premium	100	Base - Commerce, Finance, Supply Chain Management	0	9	0
25 Account reconciliation agent	RECONCILIATIONAUTOMATIONAGENTROLE	Project Operations	50	Base - Human Resources, Project Operations	0	9	0
26 Account reconciliation agent	RECONCILIATIONAUTOMATIONAGENTROLE	Human Resources Self Service	10		0	9	0
27 Account reconciliation agent	RECONCILIATIONAUTOMATIONAGENTROLE	Team Members	20		0	9	0
28 Account reconciliation agent	RECONCILIATIONAUTOMATIONAGENTROLE	Finance Premium	90	Base - Commerce, Finance, Supply Chain Management	9	0	0
29 Account reconciliation agent	RECONCILIATIONAUTOMATIONAGENTROLE	Human Resources	40	Base - Human Resources, Project Operations	0	9	0
30 Account reconciliation agent	RECONCILIATIONAUTOMATIONAGENTROLE	None	5		0	9	0
31 Account reconciliation agent	RECONCILIATIONAUTOMATIONAGENTROLE	Finance	70	Base - Commerce, Finance, Supply Chain Management	9	0	0
32 Account reconciliation agent	RECONCILIATIONAUTOMATIONAGENTROLE	Supply Chain Management	80	Base - Commerce, Finance, Supply Chain Management	0	9	0
33 Account reconciliation agent	RECONCILIATIONAUTOMATIONAGENTROLE	Commerce	60	Base - Commerce, Finance, Supply Chain Management	0	9	0
34 Accountant	LEDGERACCOUNTANT	Supply Chain Management	80	Base - Commerce, Finance, Supply Chain Management	3419	1520	0
35 Accountant	LEDGERACCOUNTANT	Human Resources Self Service	10		852	4087	0
36 Accountant	LEDGERACCOUNTANT	Commerce	60	Base - Commerce, Finance, Supply Chain Management	3368	1571	0
37 Accountant	LEDGERACCOUNTANT	Finance	70	Base - Commerce, Finance, Supply Chain Management	4939	0	0
38 Accountant	LEDGERACCOUNTANT	Operations - Activity	30		3356	1593	0
39 Accountant	LEDGERACCOUNTANT	Human Resources	40	Base - Human Resources, Project Operations	3373	1566	0
40 Accountant	LEDGERACCOUNTANT	Project Operations	50	Base - Human Resources, Project Operations	3388	1551	0
41 Accountant	LEDGERACCOUNTANT	Finance Premium	90	Base - Commerce, Finance, Supply Chain Management	4939	0	0
42 Accountant	LEDGERACCOUNTANT	Team Members	20		3045	1894	0
43 Accountant	LEDGERACCOUNTANT	None	5		852	4087	0
44 Accountant	LEDGERACCOUNTANT	Supply Chain Management Premium	100	Base - Commerce, Finance, Supply Chain Management	3419	1520	0

# AI... continued



Dynamics 365 license optimization and remediation strategy

Ran 3 commands, read a file >

Here's your remediation plan — let me walk you through what's inside and the key findings.

## What's in the File (5 tabs)

**Executive Summary** — KPI dashboard, wave summary table, and the full license hierarchy reference so you have it all in one place.

**Wave Remediation Plan** — The main deliverable. 56 roles with downgrade opportunities, color-coded by wave, sorted by wave then user count. Includes current license, target license, objects to remediate, and coverage % (green/amber/red coded).

**User Analytics** — Top 30 users by role count (your complexity risk list) and the 30 most-assigned roles sorted by user count (your ROI hit list).

**Role License Detail** — All 103 active roles with their minimum sufficient license, priority tier, and coverage breakdown. Great for ad-hoc analysis.

**Role Assignments** — Full flat list of all enabled user-role assignments with the minimum license each role requires.

## The TL;DR on What We Found

146 active users, 457 enabled role assignments, 56 roles with downgrade potential.

The wave breakdown:

- Wave 1 (Do it Monday):** 1 role, 1 user — *Cost Accounting Manager* needs exactly 1 object removed to drop from Supply Chain Management → Project Operations. Basically free money.
- Wave 2 (Sprint 1):** 3 roles, 5 users — 6–25 objects each. Customer Service Manager (3 users, 23 objects) is the best ROI here.
- Wave 3 (Sprint 2–3):** 16 roles, 28 users — 26–100 objects. Mix of Finance and SCM roles, most showing 85–97% coverage at the target license. A role redesign session + UAT cycle each.
- Wave 4 (Backlog):** 36 roles, 109 users — these are your heavy hitters. Accountant (9 users), Accounting Supervisor (7 users), and Sales Manager (10 users) are in here with 1,000+ objects to remediate each. Not quick wins, but massive long-term savings given the user counts.

One flag worth calling out: *RetailServiceAccount* (26 roles), *SARA* (20 roles), and *OSCAR* (18 roles) are your role-count outliers. Those users interact with a wide range of license tiers — if any of their roles get remediated, double-check that their overall required license level doesn't create a gap elsewhere. The *highest* license across all assigned roles is what drives the actual seat cost.

D365 license remediation plan  
Spreadsheet · XLSX

Open In Excel

---

Reply...

Sonnet 4.6

Claude is AI and can make mistakes. Please double-check responses.

D365 license remediation plan · XLSX

D365 F&SC License Remediation Plan — Executive Summary							
Identifies license downgrade opportunities ranked by remediation effort and user impact (ROI)							
REMEDATION OVERVIEW							
Active Users	Role Assignments	Unique Roles In Use	Upgrade Candidate	Wave 1 Roles	Wave 1 Users Impacted	Needing Base License	Needing HR/PO License
146	457	107	56	1	1	45	11
WAVE SUMMARY							
Wave	Description	Downgrade Path	Roles	Total Users Impacted	Avg Objects to Remediate	Avg Target Coverage %	Recommended Action
Wave 1 — Quick Win	Immediate — Remediate Now	Base/HR → Lower Group	1	1	1	99.4%	Remove/reassign the 1–5 flagged menu items or privileges
Wave 2 — Low Effort	Low Effort — Sprint 1	Base/HR → Lower Group	3	5	17	97.3%	Review flagged permissions with role owner; quick cleanup
Wave 3 — Moderate	Moderate — Sprint 2–3	Base/HR → Lower Group	16	28	60	87.6%	Role redesign session; test in UAT before prod
Wave 4 — Heavy Lift	Heavy Lift — Backlog	Base/HR → Lower Group	36	109	357	77.2%	Full role architecture review; consider role splitting
LICENSE HIERARCHY (Higher Number = Higher Cost/Priority)							
Priority	License Name	Group	Notes				
5	No License Required	None	Free — system/integration roles				
10	Human Resources Self Service	None (lowest)	Basic self-service only				
20	Team Members	None (lowest)	Light users, read-mostly				
30	Operations - Activity	None (lowest)	Task workers, no reporting				
40	Human Resources	HR/PO Group ↑	HR module access				
50	Project Operations	HR/PO Group	Project & resource mgmt				
60	Commerce	Base Group ↑	Retail & commerce				
70	Finance	Base Group	Core financials				
80	Supply Chain Management	Base Group	Manufacturing, warehouse				
90	Finance Premium	Base Group (Premium)	Advanced finance features				
100	Supply Chain Management Premium	Base Group (Premium)	Advanced SCM				

Executive Summary | Wave Remediation Plan | User Analytics | Role License Detail | Role Assignments

# Recommendations

✓ Things to Do	✗ Things to Avoid
Start license assessment as early as possible	Don't wait until the last minute to assess license needs
Use the PPAC reporting	Don't reduce licensing without reviewing impact to capacity limitations
Update D365 to the latest PQU	Don't wait until your users are receiving banner notifications
Provide feedback to Microsoft	
Plan ahead for purchase of licenses (if needed)	

# How to Optimize License Costs and Stay Compliant



# Resources to help you

- [Microsoft D365 Licensing Guide](#)
- [Microsoft Licensing FAQ](#)
- [D365FSC License Enforcement Overview – Alex Meyer](#)
- [Key Takeaways from the D365 Licensing Update Sept 2025 – Alex Meyer](#)
- [New Security Duplication Feature in D365FSC – Alex Meyer](#)
- [License Usage Summary Reports Overview – Alex Meyer](#)
- [Security topics – Dynamicspedia](#)
- [My First Look at User Security Governance - Dynamicspedia](#)
- [How to Read and Analyze the Dynamics 365 F&O License Usage Summary Report – A Real-Life Scenario | Fatih DEMIRCI](#)
- [Simplifying License Management for Dynamics 365](#)
- [Co-pilot licensing Guide](#)