

# Microsoft Dynamics CRM 3.0

## **License Migration from Microsoft CRM 1.2 Professional Edition**

Published: December 2006

## Availability

Microsoft Dynamics CRM 3.0 will be available and orderable on pricelists beginning December 1, 2005 in English, followed by language availability according to the table below.

Language	General Availability **
English	12/1/2005
French	1/1/2006
German	1/1/2006
Russian	1/1/2006
Dutch	1/1/2006
Spanish	2/1/2006
Danish	2/1/2006
Brazilian Portuguese	2/1/2006
Italian	2/1/2006
Polish	3/1/2006
Swedish	3/1/2006
Hungarian	3/1/2006
Czech	3/1/2006
Turkish	3/1/2006
Norwegian	3/1/2006
Greek	4/1/2006
Finnish	4/1/2006
Portuguese (Iberian)	4/1/2006
Japanese	7/1/2006
Chinese Traditional	5/1/2006
Chinese Simplified	5/1/2006

\*\* General Availability dates for localized software versions are based on current RTM projections and are subject to change.

## Licensing Structure

Microsoft Dynamics CRM 3.0 will be available in 2 editions:

- Microsoft Dynamics CRM 3.0 - Professional Edition
- Microsoft Dynamics CRM 3.0 – Small Business Edition

For each edition there is a:

- Server License
- Client Access License (CAL)

In addition to server and client licenses mentioned above there will be:

- Microsoft Dynamics CRM 3.0 – External Connector (for Professional Edition only)
- Upgrade of Microsoft Dynamics CRM 3.0 – Small Business Edition to Microsoft Dynamics CRM 3.0 – Professional Edition

Please refer to separate documentation on technical requirements for running Microsoft Dynamics CRM 3.0. Licenses for Microsoft Dynamics CRM 3.0 do not include licenses for those products.

### **Microsoft Dynamics CRM 3.0 – Professional Edition**

This edition includes all CRM features with no scalability limits on licensing.

### **Microsoft Dynamics CRM 3.0 – Small Business Edition**

This edition includes all CRM features and requires Microsoft Small Business Server – Premium Edition and can only be installed on this server.

The scalability limits for licensing follows that of Microsoft Small Business Server – Premium Edition, meaning that it can run on 1 server with a maximum of 75 Client Access Licenses. Special features related to the Microsoft Small Business Server – Premium Edition included with this edition are:

- Wizard Driven Install with less than 10 clicks
- Configuration “Consultant in-a-box”
- Data Migration from Microsoft Office Business Contact Manager
- Integration to Management Tools in Microsoft Small Business Server
- Integration to Fax Service in Microsoft Small Business Server

### ***Mix of editions not allowed***

Microsoft Dynamics CRM 3.0 – Professional Edition installations cannot be mixed with installations of Microsoft Dynamics CRM 3.0 – Small Business Edition.

### ***Microsoft Dynamics CRM 3.0 – External Connector***

This is a new license type, available for Microsoft Dynamics CRM 3.0 – Professional Edition only. It is a license only, and does not include any physical software components. Microsoft Dynamics CRM 3.0 – External Connector can be used to provide access to Microsoft Dynamics CRM 3.0 data to customers, partners and suppliers through any application/graphical user interface (GUI). External users should not be using the Microsoft Dynamics CRM 3.0 applications & GUIs directly. External Connector license is a per-server license, and hence must be purchased for each server that hosts an application that provides external access to Microsoft Dynamics CRM 3.0 data.

The license type cannot be used for providing access to Microsoft Dynamics CRM 3.0 data to internal employees, external users acting in an internal capacity, external users using the Microsoft Dynamics CRM 3.0 Outlook or Web Client. All such employees must have a Microsoft Dynamics CRM 3.0 – Professional Edition CAL or a Microsoft Dynamics CRM 3.0 – Small Business Edition CAL in order to access/interact with Microsoft Dynamics CRM 3.0 data.

The Microsoft Dynamics CRM 3.0 – External Connector does not include licensing for any other Microsoft products. If external scenarios integrate with Microsoft SQL Server, Microsoft Office SharePoint or any other product license rights for these must be established separately.

Microsoft Dynamics CRM 3.0 – External Connector enables deployments and solutions to be build and implemented in ways that was not possible with Microsoft CRM 1.2. We continue to encourage our partners and customers to help ensure that customer implementations and installs are in line with applicable license terms.

### ***Server Licenses***

Every server that runs Microsoft Dynamics CRM 3.0 requires a Server License

### ***Client Access License (CAL)***

Every internal user accessing Microsoft Dynamics CRM 3.0 requires a CAL. There is no concept of “light” user or “read only” user.

## **Product Registration**

Microsoft Dynamics CRM 3.0 will change from the Microsoft CRM 1.2 specific registration keys to using standard Microsoft Product Keys as found in Microsoft Windows, Microsoft Office and other Microsoft products.

Upon installation of software, customers are required to register the product on-line (Internet Access is required) within 30 days. If the product is not registered within 30 days it will be disabled for any further use. However, product can be re-enabled for use upon registration any time if disabled due to the 30 day expiration. Additional CALs added to the installation after initial purchase does not require additional registration. Certain programs – such as SPLA and ISV Royalty Program, does not require registration.

As part of the one time registration process, customers are encouraged to provide information on partner involved in the purchase process. This is a change from Microsoft CRM 1.2 where customers had to connect to a separate web site to provide information on partner involvement. For more information on the CRM Software Advisor process see separate section on that.

## Upgrading to Microsoft Dynamics CRM 3.0 from Microsoft CRM 1.2 – Professional Edition

We offer Microsoft CRM 1.2 Professional Edition customers who are current on Software Assurance plan to upgrade to Microsoft Dynamics CRM 3.0 according to their respective licensing model.

**Enterprise Agreement (EA) and/or Select Customers** will automatically receive CDs with Microsoft Dynamics CRM 3.0 – Professional Edition upon General Availability.

**Open and Open Value Customers**, with Microsoft CRM 1.2 Professional Edition has a choice between upgrading to Microsoft Dynamics CRM 3.0 – Small Business Edition or Microsoft Dynamics CRM 3.0 – Professional Edition!  
(It is necessary to have authorization and enrollment numbers available when ordering the chosen version and media from their channel partner – a nominal fee may apply.)

**FPP Customers** with Microsoft CRM 1.2 Professional Edition has a choice between upgrading to Microsoft Dynamics CRM 3.0 – Small Business Edition or Microsoft Dynamics CRM 3.0 – Professional Edition!  
(Customers will be contacted individually to make arrangements for delivery of correct media based on choice.)

### Summary

1. **Ensure that Software Assurance is current**
2. **Obtain Microsoft Dynamics CRM 3.0 media per above directions**
3. **Register product upon installation as described earlier (Please refer to technical documentation for actual installation and software upgrade.)**

**Software Assurance Renewals** occurring after General Availability of Microsoft Dynamics CRM 3.0 in relevant language version will be calculated based on the price of the relevant Microsoft Dynamics CRM 3.0 part number.

**Customers with expired Software Assurance** will need to buy Microsoft Dynamics CRM 3.0 at normal price and license as other new customers.

## Additional Information

Microsoft Dynamics CRM	<a href="http://www.microsoft.com/crm">www.microsoft.com/crm</a>
Licensing	<a href="http://www.microsoft.com/licensing">www.microsoft.com/licensing</a>
Contact a Licensing Specialist	<a href="http://www.microsoft.com/licensing/contact/default.aspx">www.microsoft.com/licensing/contact/default.aspx</a>
Information on Software Assurance and links to data sheets	<a href="http://www.microsoft.com/BusinessSolutions/support_options.aspx">http://www.microsoft.com/BusinessSolutions/support_options.aspx</a> <a href="http://www.microsoft.com/businesssolutions/crm/support/microsoft_crm_support.aspx">http://www.microsoft.com/businesssolutions/crm/support/microsoft_crm_support.aspx</a>
Information on how to access CRM benefits	<a href="https://mbs.microsoft.com/downloads/customer/services/mscrm_services_guidebook.pdf">https://mbs.microsoft.com/downloads/customer/services/mscrm_services_guidebook.pdf</a>
CustomerSource	<a href="https://mbs.microsoft.com/customersource/productsservices/productoverview_crm.htm">https://mbs.microsoft.com/customersource/productsservices/productoverview_crm.htm</a>