

User Guide

Microsoft Dynamics 365 Finance and Operations

Security & Licensing true up

Prepare for 2025 Enforcement

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1. Purpose of this guide

To help customers understand how to participate in and benefit from our free Dynamics 365 Finance and Operations license and role assessment — including steps to get started, what data to provide, and how to interpret results.

2. Who Should Use This Guide

- IT Admins managing Dynamics 365 Finance and Operations security and roles
- Licensing and compliance officers
- Finance/Procurement teams responsible for Microsoft subscriptions

3. What You'll Need

- System updated to 10.0.44 version
- System Admin rights in Dynamics 365 Finance and Operations
- Access to the Licensing usage summary (preview) report
- Ability to extract security role assignments by user


4. Steps to Participate

4.1. Register for the Free Assessment

Contact our team at D365RDLicensetrueup@realdynamics.com and express interest. We'll set up a kickoff call.

4.2. Share System Information

We will request export of certain reports from the system from User Security Governance (USG) module. Here is a snapshot of example reports that we will need:

Standard view 

Licenses usage summary (preview)

User licenses	<input type="radio"/> Role name	<input type="radio"/> Role AOT name	Role description	SKU Name	<input type="radio"/> Entitled	<input type="radio"/> Not entitled	<input type="radio"/> Not required
User Role Licenses	<input type="radio"/> Accountant	LEDGERACCOUNTANT	Documents accounting events a...	Commerce	739	1506	2574
Role licenses	Accounting manager	LEDGERACCOUNTINGMANAGER	Reviews accounting, customer i...	Commerce	915	896	3638
Duty licenses	Accounting supervisor	LEDGERACCOUNTINGSUPERVIS...	Reviews accounting process per...	Commerce	835	1232	2165
Privilege licenses	Accounts payable centralized pa...	PAYMACCOUNTSPAYABLECENT...	Documents accounts payable ce...	Commerce	61	7	614
	Accounts payable clerk	VENDINVOICEACCOUNTSPAYAB...	Documents vendor invoice even...	Commerce	405	492	1184
	Accounts payable manager	VENDINVOICEACCOUNTSPAYAB...	Reviews vendor invoice process ...	Commerce	509	461	1614
	Accounts payable payments clerk	PAYMACCOUNTSPAYABLEPAYM...	Documents accounts payable p...	Commerce	76	219	607
	Accounts payable positive paym...	PAYMPOSITIVEPAYMENTCLERK	Document accounts payable po...	Commerce	0	0	66
	Accounts receivable centralized ...	PAYMACCOUNTSRECEIVABLECE...	Documents accounts receivable ...	Commerce	44	7	859
	Accounts receivable clerk	CUSTINVOICEACCOUNTSRECEIV...	Documents customer invoice ev...	Commerce	305	453	1316

<input type="radio"/> Securable type	<input type="radio"/> AOT Name	AOT child name	AccessLevel	<input type="radio"/> Entitled	<input type="radio"/> Not entitled	<input type="radio"/> Not required
<input type="radio"/> Menu item display	ABATEMENTCERTIFICATE_IN		Write	✓		
Menu item display	ACCOUNTANT_BR		Write		✓	
Menu item display	ACCOUNTANTELECTRONICADD...		Write		✓	
Menu item display	ACCOUNTANTELECTRONICADD...		Write		✓	
Menu item display	ACCOUNTANTPOSTALADDRESS...		Write		✓	
Menu item display	ACCOUNTANTPOSTALADDRESS...		Write		✓	

4.3. Analysis by Our Team

We analyze:

- Users with “Entitled”, “Not Entitled” or “Not Required” license status
- Role mappings vs. license tier expectations
- Gaps, overlaps, and risks under the new enforcement model

4.4. Review & Discussion

We walk you through:

- A report of key findings
- Cost exposure estimate
- Personalized action roadmap
- Optimization suggestions: redesign roles, reallocate users, adjust license types

Here is a snapshot of the assessment report that we will share:

Types of Licenses & Pricing (as of 2024)		New from July 2025			Existing/proposed		Existing/proposed	
License Type	Functionality	List Price (USD/user/month)	Discount %	Effective price (USD/user/month)	User role count	Current/estimated amount Monthly	Nov12025 onwards user type count	Current/estimated amount Monthly
Full User	Full functionality	\$210-\$240	10	189	39	\$7,371	70	\$13,230
Team Member	Limited functionality	\$8	10	7.2	108	\$778	76	\$547
Operations Activity	Transactional tasks	\$50	10	45	19	\$855	20	\$900
Operations Device	Shared device access	\$75	10	67.5	4	\$270	4	\$270
					170	\$9,274	170	\$14,947
Ways to optimize price:					extra monthly cost			
1) Get EA when license count is more					True Up Change			
2) Get multi year commitment with Microsoft					61% \$5,674			

Starting Nov 2025, Microsoft is no more allowing trust based licensing which means every named user must be assigned role upfront which is counted towards licenses

5. What Happens After the Free Assessment?

You can either:

- Use our report to make internal changes yourself
- OR opt for our paid service where we help you implement our recommendations to stay compliant.