

Microsoft Dynamics 365 for Financials Accounting FAQ

Updated: Nov 9, 2016

General

What is Microsoft Dynamics 365 and how does it benefit customers?

Dynamics 365 takes a new approach to business applications. It brings together the best of our CRM and ERP cloud offerings into one cloud service with specific, purpose built, apps for each of your key business processes. Dynamics 365 provides customers a modern and familiar experience with built-in insights, intelligence and workflow. Customers also use a common data model and consistent application platform to ensure consistency, interoperability, and extensibility.

How does Dynamics 365 for Financials relate to Microsoft Dynamics 365?

Microsoft Dynamics 365 for Financials is an app in the **Dynamics 365, Business edition**. Additional apps within the Business edition (Dynamics 365 for Sales, Dynamics 365 for Marketing, Dynamics 365 for Customer Service) are currently planned to be available in CY2017. When additional apps become available, the Dynamics 365, Business edition "Plan" will also become available. See additional details about the Plan in the [Dynamics 365, Business edition licensing guide](#).

Dynamics 365 for Financials is based on **Project "Madeira"** which was in public preview in the US and Canada since April 2016. Dynamics 365 for Financials launched on November 1, 2016 in the United States and Canada, and intends to expand to additional countries in CY2017. Dynamics 365 for Sales, Dynamics 365 for Marketing, and Dynamics 365 for Customer Service within the Business edition will also be optimized for SMB customers.

How does Dynamics 365 for Financials relate to the other Dynamics products (AX, NAV, GP, SL, CRM)?

Microsoft Dynamics NAV, **Microsoft Dynamics GP**, and **Microsoft Dynamics SL** continue to be enhanced, supported, and licensed to new customers (roadmap info [here](#)). New versions of our Microsoft Dynamics **AX** and Microsoft Dynamics **CRM** offerings have come together to create the Dynamics 365, Enterprise edition

Accounting specific

How does an accountant get access to a client's Dynamics 365 for Financials instance?

An accountant will receive an invite from a client sent via Dynamics 365 for Financials with setup instructions. The client should talk to their partner about adding an external accountant.

What is Dynamics 365 and what is the benefit for an accountant?

Dynamics 365 for Financials helps you securely connect with your clients in the cloud to deliver richer accounting services, manage your workloads easier and grow your practice faster.

Does an accountant get free use of Dynamics 365 for Financials with any client installation?

Yes. A client can invite an accountant to collaborate using Dynamics 365 for Financials at no cost.

Can more than one accountant at the same firm provide services for the client using Dynamics 365 for Financials?

Yes. There is no limit to the number of accountants that can access one client instance.

Is there a limit on how many clients can invite an accountant to connect using Dynamics 365 for Financials?

No. There is no limit on how many client tenants one accountant can be invited to access.

Does an accountant need to install any software?

No. Dynamics 365 for Financials services are all cloud-based.

How can an accountant help migrate client legacy data to Dynamics 365?

Please talk to the partner of the client. Tools are available to help with this process.

What is Microsoft AppSource and how can it help expand service offerings to clients?

[Microsoft AppSource](#) is a new app store for clients to purchase apps for their services. A client can find apps ranging from industry apps to Microsoft Office to Power BI. As an accountant, there is a possibility of extending the current service offering by building services on new areas of business.

Can an accountant sell Dynamics 365 for Financials?

Yes. Accountants should work with a Cloud Solution Provider (CSP) reseller. Please email d365-smb@microsoft.com to find a CSP reseller to work with.

How can an accountant learn more about growing their practice using Dynamics 365 for Financials?

Accountants should join the Microsoft Dynamics accounting community on LinkedIn at <https://www.linkedin.com/groups/8582175> for USA and <https://www.linkedin.com/groups/8582166> for Canada - to learn best practices for delivering services and growing their business.

Accountants can also sign up to become part of the Microsoft Partner Network (MPN) and gain access to Microsoft partner training including Help videos and other comprehensive learning materials to help grow skills and expertise. To join MPN, please follow these steps:

Go to <https://partner.microsoft.com>

Scroll to bottom of page

Select "Enroll"

Select "Enroll an organization"

Fill out the fields and submit.

Associate your Microsoft account to your new Partner ID

This will give you access to Microsoft partner learning paths page [here](#).

Can an accountant earn Continuing Professional Education (CPE) credits for Dynamics 365 for Financials training courses?

We are developing two courses for learning Dynamics 365 for Financials and an accountant will earn CPE credit upon successful completion of each course. More information to follow soon.

My organization doesn't have Dynamics experience but we're interested in offering Dynamics 365 for Financials to our Office 365 customers. Where can I find a list of partners to engage with?

Partners who offer packaged Dynamics 365 for Financials service offerings can be found by going to <http://appsource.microsoft.com> → Partners → filter on Dynamics 365 for Financials. Additionally, you can speak to your local Microsoft representative for details.

Product

What are the capabilities of Dynamics 365 for Financials?

Dynamics 365 for Financials capabilities span financials management, reporting, fixed assets, supply chain and inventory management, contact/opportunity management, and project management. It also offers multi-company and multi-currency capabilities. Please see the [Microsoft Dynamics 365 for Financials Capabilities Guide](#) for details.

What is the difference between Dynamics NAV and Dynamics 365 for Financials?

Dynamics NAV is **software**, available via perpetual, subscription, and/or SPLA licensing, that can be deployed on-premises or in the cloud and extended using Dynamics NAV customizations or extensions.

Dynamics 365 for Financials is a new SaaS (cloud-only) **service**, available only via CSP, that can be extended via apps (validated extensions) in [Microsoft AppSource](#).

Is Dynamics 365 for Financials available on mobile devices?

Yes, a Dynamics 365 for Financials mobile app is available. Financials users can get the app during the "Getting Started" tour that launches when a user logs into Financials the first time or they could search for it in their mobile app store (Windows Store, Apple Appstore, or Google Play)

Is Dynamics 365 for Financials built on Microsoft Dynamics NAV/GP/SL?

Microsoft Dynamics 365 for Financials is based on the Microsoft Dynamics NAV platform and several other Microsoft technologies.

Will customers buy Dynamics 365 for Financials directly from Microsoft?

No. Dynamics 365 for Financials is part of the Dynamics 365, Business edition. As such, the only way to currently purchase Dynamics 365 for Financials is via partners who participate in the Cloud Solution Provider (CSP) program. Visit <http://aka.ms/csp> to learn more.

Is Dynamics 365 for Financials designed to compete with QuickBooks?

No. Dynamics 365 for Financials is specifically targeted at SMBs that have outgrown basic accounting/financial tools (e.g. Intuit QuickBooks).

Is a Dynamics 365 for Financials trial available, and how long is the trial?

Yes. Prospects can sign up for a free trial from the Dynamics 365 for Financials landing page or by going [here](#). Prospects who sign up for the trial are allowed to use the demo Company (with demo data) for as long as they'd like (no expiration). However, if the prospect chooses to set up a new Company within the trial tenant (to view their own data in the system, for example), they will only be able to access the new Company for 30 days. However, they will be able to continue to use the demo Company (with demo data) for as long as they'd like (no expiration).

Where can partners and customer find Dynamics 365 for Financials Help documentation?

Help documentation can be accessed in a variety of ways. For example, users can click a field label to get a tool tip explaining the purpose of the field, from within Dynamics 365 for Financials. If there is more information available, then "Learn more" will be displayed in the tool tip to get more information. Additionally, Help will be displayed on the Financials [website](#).

Is it possible to get in-person training on Dynamics 365 for Financials?

If you are interested in selling Dynamics 365 for Financials in the US or Canada, contact d365-smb@microsoft.com to learn about local readiness options. .

How do customers get support for Dynamics 365 for Financials?

Dynamics 365 for Financials can be purchased through a CSP partner. CSP partners are responsible for providing end-customer support. However, CSP partners can use Microsoft support to address undocumented questions or service issues. Click [here](#) to see partner support options offered by Microsoft.

Is it possible to customize Dynamics 365 for Financials?

It is possible to extend Dynamics 365 for Financials with apps available in [Microsoft AppSource](#).

If you have experience with Microsoft Dynamics NAV, you can find additional documentation on how to build apps for AppSource here: <http://aka.ms/AppsForFinancials>.

If you do not have experience with Microsoft Dynamics NAV, visit [Microsoft AppSource](#) → "Submit an app" and you will be contacted by a Microsoft representative to discuss your app idea and available guidance/programs.

Who can install / uninstall Dynamics 365 for Financials apps from Microsoft AppSource?

When using the Dynamics 365 for Financials trial, all users can install/uninstall apps by default. However, when a customer has a paid subscription, only the CSP partner (delegated admin) can install/uninstall apps – customer users are not allowed to do this themselves.

What thru-partner marketing materials are available for Dynamics 365 for Financials?

Dynamics 365 for Financials marketing materials can be found on the [MPN Marketing site \(RTG\)](#) in early November. Additionally, we have plans to make additional tools and videos in the coming weeks/months.

Pricing & Licensing

How does a customer purchase Dynamics 365 for Financials?

Dynamics 365 for Financials is part of the Dynamics 365, Business edition. As such, the only way to purchase Dynamics 365 for Financials is via partners who participate in the Cloud Solution Provider (CSP) Program. Visit <http://aka.ms/csp> to learn more.

Can a customer's external accountant access Dynamics 365 for Financials?

Yes. Customers who have external accountants who wish to connect to the Financials Application can purchase one External Accountant license per tenant at no additional cost. External Accountant Licenses contain all the same use rights as Dynamics 365 for Financials full user license with the exception of the following: Access to user set up or admin tasks and CRM.

Is Microsoft Office 365 included in Dynamics 365?

No. Office 365 is not included or required. However, to seamlessly experience Dynamics 365 for Financials from within Office 365, customers must have an Office 365 subscription that includes Exchange Online.

What are the options for existing Dynamics customers who want to transition to Dynamics 365 for Financials?

Discounted Dynamics 365 for Financials pricing is available to qualifying existing Dynamics customers for a limited amount of time. The client should talk to their partner about further details.

How do I convert a trial customer to a paid subscription? Will it require a data migration?

Converting a Dynamics 365 for Financials trial customer to a paid subscription will not require a data migration. Partners can find step-by-step instructions on how to do this in the Dynamics 365, Business edition [learning path](#) in early November.