

Use Right	Professional	Basic	Essential
View Announcements	✓	✓	✓
Manage saved views	✓	✓	✓
Use relationships between records	✓	✓*	✓*
Create personal views	✓	✓	✓*
Advanced Find search	✓	✓	✓*
Search	✓	✓	✓*
Use a queue item	✓	✓*	✓*
Export data to Microsoft Excel	✓	✓	✓
Perform Mail Merge	✓	✓	✓
Start dialog	✓	✓*	✓*
Run as an On-demand process	✓	✓*	✓*
Run an automated workflow	✓	✓*	✓*
Read articles	✓	✓	✓
Notes	✓	✓	✓
Activity management	✓	✓	✓
Yammer collaboration**	✓	✓	✓
Post activity feeds	✓	✓	✓
Follow activity feeds	✓	✓	✓
Shared calendar	✓	✓	✓
Write custom entity records	✓	✓	✓
Read custom application data	✓	✓	✓
Microsoft Dynamics CRM Mobile Express	✓	✓	✓
Microsoft Dynamics CRM for iPad & Windows 8	✓	✓	✓
Microsoft Dynamics CRM for Outlook	✓	✓	✓
Microsoft Dynamics CRM Web application	✓	✓	✓
Manage user reports, user charts, and user dashboards	✓	✓	
Run reports	✓	✓	
Create, update, and customize Reports	✓	✓	
Create and update announcements	✓	✓	
Read Dynamics CRM application data	✓	✓	
User dashboards	✓	✓	
User charts	✓	✓	
User Interface Integration for Microsoft Dynamics CRM	✓	✓	
Convert an activity to a case	✓	✓	
Case management	✓	✓	
Marketing campaigns	✓		
Facility/Equipment management	✓		
Define and configure business units	✓		
Define and configure teams	✓		

Add or remove a customer relationship for a contact	✓	✓
Associate an opportunity with a contact	✓	✓
Qualify and convert a lead to a contact	✓	✓
Contacts	✓	✓
Lead scoring, routing, assignment	✓	✓
Lead capture	✓	✓
Add or remove a customer relationship for an account	✓	✓
Associate an opportunity with an account	✓	✓
Qualify and convert a lead to an account	✓	✓
Accounts	✓	✓
Import data in bulk	✓	
Configure auditing	✓	
Configure duplicate-detection rules	✓	
Define relationships between entities	✓	
Define and configure queues	✓	
Define and configure dialogs	✓	
Define and configure workflows	✓	
System reports, system charts, and system dashboards	✓	
Customize forms and views	✓	
Create Microsoft Dynamics CRM forms, entities, and fields	✓	
Administer CRM	✓	
Article templates	✓	
Create and publish articles	✓	
Goal management	✓	
Contract templates	✓	
Contract management	✓	
Territory management	✓	
Sales literature	✓	
Quote management	✓	
Price lists	✓	
Product tracking	✓	
Order management	✓	
Invoice management	✓	
Competitor tracking	✓	
Qualify and convert a lead to an opportunity	✓	
Convert an activity to an opportunity	✓	
Opportunity tracking	✓	
Marketing lists	✓	
Quick campaigns	✓	

*Actions can be performed only against records corresponding to entities included in the user rights