

# eAgreements user guide

Microsoft Volume Licensing  
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# The eAgreements smart client and web tool

This guide is intended to show Microsoft partners how to use eAgreements to electronically create different types of contract packages (agreements) and send them to customers to review and sign.

By automating the complexities of setting up and signing an agreement, eAgreements can help reduce data input errors and processing times, improving the experience for both partners and customers.

With the eAgreements tool, you can create contract packages for the following Microsoft licensing programs:

- Campus/Enrollment for Education Solutions (EES)
- Service Provider License Agreements (SPLA)
- Open Value
- Open Value Subscription
- Enterprise Agreement
  - Enterprise Enrollment
  - Enterprise Subscription Enrollment
  - Enterprise Server and Cloud Enrollment (SCE)
- Select Plus



# Variations between programs

There are some minor differences in how you create contract packages for different types of Microsoft licensing programs. For notes about these variations, see the following sections about each program:

- [SPLA](#)
- [Open Value](#)
- [Open Value Subscription](#)
- [Enterprise Agreement](#)
- [Enterprise SCE](#)
- [Select Plus Agreements](#)
- [EES](#)



# Create a new agreement

This section explains the common steps for how to create a new agreement (contract package) for customers in all types of Microsoft licensing programs.

## Sign in to eAgreements

Microsoft partners [sign in to the eAgreements application](#) using their work or school account (WSA) or their Microsoft account (MSA), depending on their role.

Once you sign in, the **Organization Search** page, which is the start screen in eAgreements, will open.

Support Resources

eAgreements allows you to view and create your current in-progress agreements. What would you like to do?

- View a Tutorial
- Get Help Getting Started
- Contact Support

Links

- [Explore.ms](#)
- [LicenseWise](#)
- [Partner Portal](#)
- [Word Viewer](#)

Contract Packages

Your current in-progress document packages. Click the Contract ID to view

My Packages

Contract ID	Actions	Organization Name
PKG08946782	<a href="#">View</a>	Contoso France Ltd
PKG06837245	<a href="#">View</a>	test
PKG00626832	<a href="#">View</a>	Contoso France Ltd
	<a href="#">View</a>	

fo begin creating a contract package...

Actions

Renew

Agreement Number

Enter the organization for which you wish to view, manage, or create a contract package.

Organization Name

City

Locale

Choose...

State/Province

Public Customer Number (PCN)

Start



## Find or create a customer

In the **To begin creating a contract package** pane, search for an existing customer or create a new one.

**NOTE:** If you're renewing an existing agreement, fill in the agreement number in the field after **Renewal Agreement**. For instructions, see [Renew an agreement](#).

- To find an existing customer, do one of the following:
  - Complete the fields for **Organization Name**, **City**, **Locale**, and **State/Province** (U.S. and Canada only).
  - Enter your customer's Public Customer Number (PCN).
- Select **Start**.
  - The search results appear in a table in the right pane, listed under **Organization Name**.

The screenshot shows a web interface for creating a contract package. On the left, there are input fields for 'Organization Name\*', 'City\*', 'Locale\*', 'State/Province', and 'Public Customer Number (PCN)'. A 'Start' button is at the bottom of this section. On the right, a table titled 'Is the organization listed below?' displays search results. The table has two columns: 'Organization Name' and 'Localized Organization Name'. The results list several organizations, including 'Microsoft' and 'Community Health Plan of Washington'. Below the table are buttons for 'View Organization Detail' and 'Add Program'. At the bottom of the right pane, there are buttons for 'Create New Organization' and 'Cancel'.

- If the customer you're looking for is on the results list, select the customer's name and then select **Add Program**. If the customer isn't on the results list, double check your search criteria, and if you're still unable to locate the customer, select **Create New Organization**, fill in the organization information, save your changes, and continue to create a new agreement.



Is the organization listed below?

If so, choose the organization and click View Organization Detail to edit organization details. To create an agree

Organization Name	Localized Organization Name	Address	City	State	Zip
Contoso	Contoso	123 Main Street	Las Vegas	Nevada	89101

View Organization Detail   Add Program

If the organization is not listed, click Create New Organization.

Create New Organization   Cancel

### Create New Organization

Enter information for organization and click Save.

Organization PCN:

Locale \* United States   Language \* English

---

Organization Name \* Contoso

Organization Type \* CORPORATE

Address \* Road 123

City \*

State/Province \* Nevada

Zip/Postal Code \* 33309

Tax/Vat ID 1

Tax/Vat ID 2

---

Primary Phone \* 425 99999   Fax

Save   Cancel

## Choose Program

The Choose Program page opens.

1. Enter a **Reference Name** and **Reference Number** of your choice (optional).
  - ▶ The **Reference Name** and **Reference Number** are identifiers used as eAgreements tracking reference numbers for the partner. Partners can use these numbers to search for an agreement package within eAgreements.



- Under **Program**, choose the program the customer has, for example, Open Value, Enterprise, or SPLA.

### Choose Program

Choose the program attributes from the drop-downs below.

You may optionally enter Reference Name and Reference Number values. This information will only be available in the eAgreements tool.

Note: Once selected, the program attributes cannot be changed for this contract package. To change the program choices for this package after choosing to create on this page, you will need to delete the package and start a new package.

Reference Name  Reference Number

Program  Program Type  Version  Partner Type  Agreement Language

- Select the **Program Type**. To create a new contract for this organization, select **Create a new contract** from the dropdown menu.
  - ▶ Selecting the **Program Type** automatically populates the **Partner Type** and **Agreement Language** fields. Countries with more than one partner type for a program must choose these fields.
- Select the required **Version** of this agreement program.
- Verify the **Partner Type**.
- Verify the **Agreement Language**.
- Select the most appropriate statement that describes what you want to do.

Program  Program Type  Version  Partner Type  Agreement Language

Please choose the most appropriate statement that describes what you want to do.

I would like to register an Additional Affiliate.

I would like to create a new Agreement and Affiliate registration, MBSA does not apply.



**NOTE:** If you select **I would like to create an Enrollment only**, you must provide a valid Master Agreement number. If you select **I would like to create a Master Agreement and an Enrollment under an existing MBSA**, you must provide a valid Microsoft Business Service Agreement (MBSA) number.

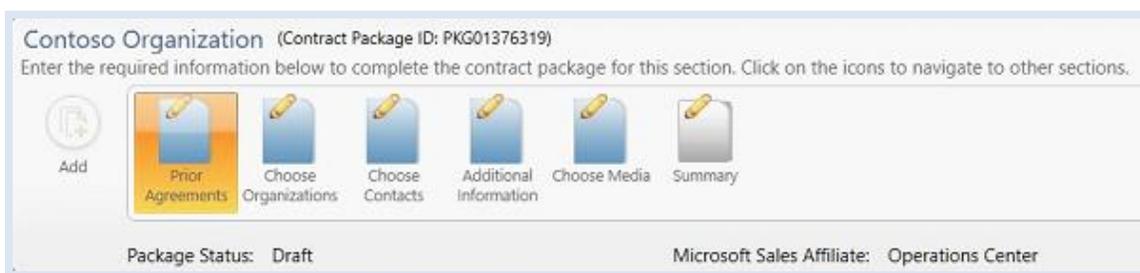
8. Select **Next**.

## Navigate through eAgreements

After you select an organization and program for your contract package, you'll finish the package by navigating through the different sections of eAgreements using the buttons on the top menu bar.

Customers with these two types of agreements will have six sections to navigate:

- Service Provider License Agreements (SPLA)
- Enterprise and Enterprise Subscriptions (corporate or state/local government)



Customers with these types of agreements will have an additional section called **Choose Offerings**:

- Open Value
- Open Value Subscription
- Enterprise Server Cloud Enrollment (SCE)
- Enterprise SCG



- Enrollment for Education Solutions (EES)
- Select Plus

Symbols on the buttons indicate the status of each section in your package:

- A green check on the button means that the section is complete.
- A pencil graphic on the button means that no information has been entered yet in this section.
- An exclamation mark on the button means that some information is missing, and the section isn't complete.

Below the six buttons are two fields that show the **Package Status** and the **Microsoft Sales Affiliate** for the contract.

## Microsoft Sales Affiliate

Sales packages are managed by either a Microsoft Regional Operations Center (ROC) or the Microsoft subsidiary for a specific country. The Microsoft Sales Affiliate for this package is listed here.

If you have any questions about this contract package, contact either the ROC or the Microsoft subsidiary for your customer's country, depending on which is listed.



## Create an agreement (contract package)

After you've selected the organization and program for your contract package, you can begin creating the agreement (contract package). You don't need to enter any information about your partner again, since eAgreements will prepopulate your partner information.

### Save a draft

At any stage in the process of creating a contract package, you can select the **Save** button on the upper right of the menu bar to save your draft contract package. Then you can return to complete it later.



### Prior agreements

The first step in creating an agreement is to designate whether this agreement is part of a Software Assurance (SA) renewal.

1. Select the **Prior Agreements** button.
2. Select **Yes** or **No** to confirm whether the new agreement you're creating is part of an SA renewal.



## Choose organizations

1. Select the **Choose Organizations** button.
2. Select **Search/New** to add details of the partner associated with this contract package.

Participant	Organization	Address		
MS Business Agreement - Customer *			Search/New...	Edit...
Master Agreement - Customer *			Search/New...	Edit...
Standard Enrollment - Customer *			Search/New...	Edit...
Standard Enrollment - Software Advisor *			Search/New...	Edit...

3. Enter the Software Advisor's or Distributor's **Organization Name** or **Public Customer Number**.
4. Select **Search**.



5. Select the appropriate organization.

6. Under **Define Customer/Enrolled Affiliate's Enterprise**, choose one of the options to define the customer's enterprise and affiliates.

Options for the customer's enterprise include:

- Customer/Enrolled Affiliate Only
- Customer/Enrolled Affiliate and all Affiliates
- **Customer/Enrolled Affiliate and the following Affiliate(s):** If you select this, you'll be asked to choose each affiliate to include.
- **Customer/Enrolled Affiliate and all Affiliate(s), with the following Affiliates excluded:** If you select this, you'll be asked to choose each affiliate to exclude.

An affiliate is a company whose parent company owns more than 50 percent of the company. In the **Manage Affiliates** table, the first two options either include or



exclude affiliates based on their current and future status. The third option allows you to include the customer and only the affiliates you want to include in this agreement.

**NOTE:** If your customer's organization has acquired any new affiliates since the start of their agreement, you should determine whether to include them.

## Choose contacts

- To assign **Participant Roles** as **Agreement Contacts**, select the **Choose Contacts** button.
- Select the customer organization from the **Organization** dropdown menu to view the available contacts for that organization. Use the **Contact** dropdown menu to choose the appropriate contacts within the organization.
  - To add contacts, select **Search/New** next to the **Contact** dropdown menu.
  - To add details for an existing contact, select **Edit** next to the **Contact** dropdown menu.

- Select any or all the roles in the **Available Participant Roles** box.



- A red asterisk after a participant role indicates that you must assign someone to this required role.
- The **Customer – Electronic Signatory** is now a mandatory role.

**NOTE:** When the customer organization is selected in the **Organization** dropdown menu, the **Reseller Primary Contact** and **Distributor Primary Contact** roles are grayed out in the **Available Participant Roles** box, so you can't attach them to the customer contact.

4. Select **Assign** to move the participant roles that you selected to the **Assigned Contacts** field. This assigns the participant to those roles in the contract. Repeat this step until all required roles are assigned.
  - If you want to have this contract package signed electronically, you must assign an electronic signer.

**Choose Contacts**

After choosing the correct Organization and Contact, assign relevant participant role(s).

**Organization**  
 BVT Partner Company Search/New Edit

**Contact**  
 Distributor Contact, Test Search/New Edit  
 someone1@example.com  
 English (United States) (Language)

5. Select the distributor **Organization** and **Contact** from the corresponding dropdown menus.
6. Choose the roles associated with the distributor contact from the **Available Participant Roles** field and select **Assign**.

**Available Participant Roles**

MS Business Agreement  
 Customer - Additional Notices Contact  
 Master Agreement  
 Customer - Additional Notices Contact  
 Standard Enrollment  
 Customer - Additional Notices Contact  
 Customer - Customer Support Manager  
 Customer - Electronic Signatory 2  
 Customer - Online Services Manager  
 Customer - Software Assurance Manager  
 Customer - Subscriptions Manager

Assign >>  
 << Remove

**Assigned Contacts**

MS Business Agreement  
 Customer - Notices Contact and Online Administrator  
 Customer - Primary Contact  
 Master Agreement  
 Customer - Notices Contact and Online Administrator  
 Customer - Primary Contact  
 Standard Enrollment  
 Customer - Billing Contact  
 Customer - Electronic Signatory  
 Customer - Media Delivery Contact  
 Customer - Notices Contact and Online Administrator  
 Customer - Primary Contact  
 Allen Consulting Group Pty Limited - Administrator, IT (mb@al...  
 Standard Enrollment  
 Software Advisor - Primary Contact



## Verify roles and contacts

Before completing the **Additional Information** section, confirm that all the roles have been assigned. Also, verify that the **Contact** field shows the contact desired.

If any roles need to be removed and assigned to another contact, do so now. To remove a role:

1. Select the **role** to remove.
2. Select **Remove**.

Choose Contacts

Organization  
Test Reseller Account Search/New Edit

Contact  
Reseller Contact, Test Search/New Edit

someone2@example.com  
English (United States) (Language)

Available Participant Roles

Agreement  
Reseller - Primary Contact\*

Assign >>  
<< Remove

Assigned Contacts

- ^ BVT Partner Company - Distributor Contact, Test (someone1@...)  
Agreement  
Distributor - Primary Contact
- ^ Contoso Ltd - Jeff, Hay (someone@example.com)  
Agreement  
Customer - Additional Electronic Notices Contact  
Customer - Customer Support Manager  
Customer - Electronic Signatory  
Customer - Media Delivery Contact  
Customer - Notices Contact and Online Administrator  
Customer - Online Services Manager  
Customer - Primary Contact  
Customer - Software Assurance Manager  
Customer - Subscriptions Manager

## Provide additional information

On the **Additional Information** page, you can add information to the contract package. All this information is optional unless the field is marked with an asterisk (\*).

The following example is the **Additional Information** page a user would see during the creation of an Open Value agreement.

1. On the navigation menu, select **Additional Information**.
2. Under **Microsoft Contact**, type a contact name if one isn't already listed. The default Microsoft Contact Role is **Account Manager**.



3. If you typed a Microsoft contact name, you must also provide a Microsoft contact email address in the **Microsoft Contact Email Address** field.
4. If the customer wants **Microsoft Financing**, then complete this section.
5. Complete these other optional fields, if desired:
  - Purchase Order Number
  - Additional Reference Information
  - Microsoft Opportunity ID

The screenshot displays the 'Additional Information' section of the eAgreements user interface. At the top, there is a navigation bar with icons for 'Add', 'Prior Agreements', 'Choose Organizations', 'Choose Contacts', 'Additional Information' (highlighted in orange), 'Choose Media', and 'Summary'. Below this, the 'Package Status' is 'Draft' and the package is identified as 'Microsoft'. The 'Additional Information' section is expanded, showing several collapsible sections:

- Microsoft Contact**: A collapsed section.
- Microsoft Financing**: A collapsed section.
- Purchase Order Number**: Expanded section with the question 'Do you want to enter Partner/Customer Purchase Order Number?' and radio buttons for 'Yes' and 'No, I do not have a Purchase Order Number' (selected).
- Additional Reference Information**: Expanded section with the instruction 'Please enter the Proposal ID exactly as it appears'. It contains input fields for 'Proposal ID' (with a 'Validate' button), 'Credit Check Request Number\*' (containing '121212'), 'Reference Name', and 'Reference Number'.
- Microsoft Opportunity ID**: A collapsed section.



## Choose offerings

In the **Choose Offerings** section, you can select from various purchasing options and determine the customer price level.

Only customers with these types of agreements will see the **Choose Offerings** button:

- Open Value
- Open Value Subscription
- SCE
- Enterprise SLG
- EES
- Select Plus



Here's how to complete the **Choose Offerings** section:

1. Select the **Choose Offerings** button.
2. Select the appropriate **Purchasing Options** and **Customer Price Level** options.

The screenshot shows a web interface for creating a contract package. At the top, it says "To begin creating a contract package..." and "Contoso Ltd (Contract Package ID: PKG04138155)". Below this, there are several icons representing different steps: "Add", "Prior Agreements", "Choose Organizations", "Choose Contacts", "Additional Information", "Choose Offerings" (which is highlighted in orange), "Choose Media", and "Summary".

The "Choose Offerings" section is expanded, showing two main categories:

- Purchasing Options**
  - Non Organization-wide
  - Organization-wide

To qualify for platform discount, check all the three Product categories.

  - Select All
  - Office Options
  - Operating System Options
  - CAL options
- Customer Price Level**
  - Check if customer is purchasing 250 or more desktops in their first order

**NOTE:** The purchasing options and customer price level options might differ slightly from the screenshot, depending on whether you're creating a contract package for the Open Value or Open Value Subscription program.



## Choose media

Digital by Choice is Microsoft's simplified and environmentally conscious digital fulfilment initiative for your Microsoft Volume Licensing agreement. By default, the software you purchase for your customers is available for download, but no longer on physical media (discs), except by special request.

On the navigation menu, select **Choose Media**. The **Download** option is preselected. No other action is required; you can now go to the **Summary** section.

Enter the required information below to complete the contract package for this section. Click on the icons to navigate to other sections.

Navigation icons: Add, Prior Agreements, Choose Organizations, Choose Contacts, Additional Information, **Choose Media**, Summary

Package Status: Draft      Microsoft Sales Affiliate: Subsidiary

### Choose Media

#### Digital by Choice

What is Digital by Choice? This is Microsoft's simplified and environmentally-conscious digital fulfilment initiative for your Microsoft Volume Licensing Agreement.

#### Media Delivery Method

Download

If physical media is required, Distributors and Large Account Resellers can access the Media Election Form from <https://www.explore.ms> and then submit the request via Call Logging Tool (CLT). All other requests, please coordinate through your Distributor.

## View the summary

The **Summary** section provides a single page on which to view all the agreements contents.

Select a header on the left to view a specific area of the summary. You can revisit an area by selecting the links on the right.



The areas are:

- Header Details
- Prior Agreement
- Organization
- Contacts
- Additional Info
- Offering (applies only to some licensing programs)
- Media Form

To begin creating a contract package...

(Contract Package ID: PKG03957673)

Enter the required information below to complete the contract package for this section. Click on the icons to navigate to other sections.

Save Close

Add

Prior Agreements

Choose Organizations

Choose Contacts

Additional Information

Choose Media

Summary

Package Status: Draft

Microsoft Sales Affiliate: Subsidiary

Previous Next

Summary

Header Details

Package Number	Package Created Date	Program Name	Program Version	Package Content	Package Status	Channel Model	Contract Type	Agreement Language
	2016-9-29	Enterprise 6	20171	Enrollment, Master and MBSA	Draft	Direct to Customer	Corporate	English

Agreement Type	Agreement Number	Customer PCN	Customer Name	Localized Customer Name	Customer Country
MS Business Agreement					Australia
Master Agreement					Australia
Standard Enrollment					Australia

Prior Agreement [View Prior Agreement Details](#)  
 Organization [View Organization](#)  
 Contacts [View Contacts](#)  
 Additional Info [View Additional Info](#)  
 Offering  
 Media Form [View Media Form](#)

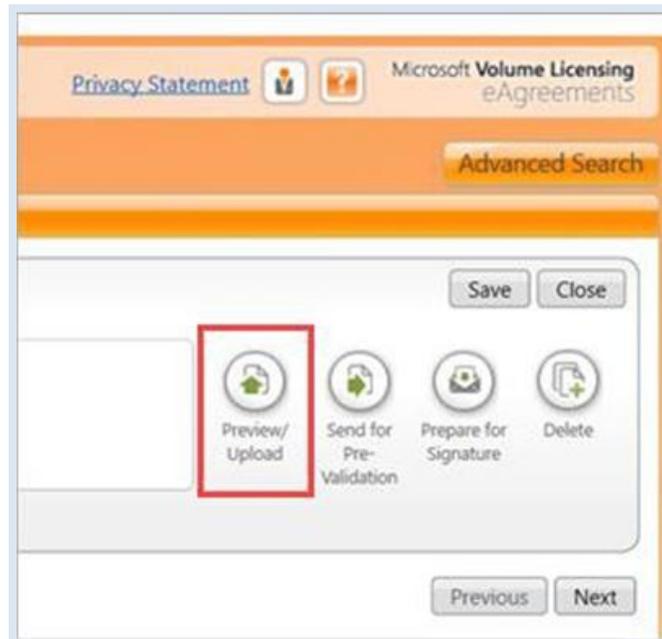
Expand section

## Preview/upload and prepare for signature

You can view a contract package before submitting it to your customer for signing. You can also attach additional documents, if required.



1. On the navigation menu, select **Preview/Upload**.



2. The **Preview/Upload Documents** screen opens. Under **Document Name**, select any file that you want to review or print. These are **draft** documents in PDF format.

The screenshot shows the 'Preview/Upload Documents' screen. It has a title bar with a document icon and a question mark icon. The main content is divided into two sections: 'Upload Documents' and 'Draft Package Documents'.

**Upload Documents**

Use this feature to attach additional documents to this contract package. Check the "Visible to Customer" box if this file should be shown to the customer, otherwise leave it unchecked.

Type\*

Title\*

Location\*

Visible to Customer

**Draft Package Documents**

View or print a draft version of the following documents in your contract package.

Document Name	Document Number
Open Value Agreement	20015
Commercial Signature Form – No Microsoft Signature	20033

**Uploaded Documents**

Document Name	Viewable to Customer	Include in Signature Form	Virus Scan



3. To attach any additional documents, select the **Type** from the dropdown menu, and then enter a **Title** for the document.
4. Select **Browse** to locate the document that you'll be attaching (SPLA customers can attach an SPLA Affiliate form here).
5. In the **Select file to upload** dialog box (not shown), select **Open**.
6. Select **Upload**, and then select **OK**. The file will appear under **Uploaded Documents** once the virus scan is complete.
7. Check the **Visible to Customer** box if you want this new document to be visible to the customer when they sign. If for any reason the customer shouldn't see the document, do **not** select this choice.

In the case of **Open Value** or **Open Value Subscription** programs, partners might choose to attach additional documentation (such as sales or marketing information) that they would like to send to the customer. These will *not* be considered by the ROC processing team.

8. The uploaded file must be saved as one of the following file types:
  - PDF: Adobe Fill & Sign supports most PDFs. However, the following two types of PDFs aren't supported:
    - Secured PDFs—When uploading a secure PDF, you'll see an error message conveying that the PDF contains editing restrictions and isn't supported.
    - Some LiveCycle Designer forms—For dynamic XFA PDFs created by LiveCycle, you'll see an error message conveying that Dynamic XFA isn't supported.
  - Microsoft Office files: DOC, DOCX, XLS, XLSx, PPT, PPTX
  - Image files: JPG, PNG, GIF, TIF
  - Text files: TXT, RTF, ODT



Preview/Upload Documents

**Upload Documents**

Use this feature to attach additional documents to this contract package. Check the "Visible to Customer" box if this file should be shown to the customer, otherwise leave it unchecked.

Type\*

Title\*

Location\*

---

**Draft Package Documents**

<input type="checkbox"/>	Document Name	Document Number
<input type="checkbox"/>	Microsoft Business and Services Agreement	X20-10006
<input type="checkbox"/>	Enterprise Agreement	X20-10109
<input type="checkbox"/>	Enterprise Enrollment	X20-10383
<input type="checkbox"/>	Purchase Agreement	X20-10103
<input type="checkbox"/>	Signature Form	X20-12802

---

**Uploaded Documents**

<input type="checkbox"/>	Document Name	Viewable to Customer	Include in Signature Form	Virus Scan	
<input type="checkbox"/>	Customer Price Sheet-cps	✓	✓	Clean	<input type="button" value="Remove"/>
<input type="checkbox"/>	Product Selection Form-psf	✓	✓	Clean	<input type="button" value="Remove"/>
<input type="checkbox"/>	Amendment-amd	✓	✓	Clean	<input type="button" value="Remove"/>

**NOTE:** You can remove any documents uploaded in error. To do this, select the document under **Uploaded Documents** and then select **Remove**. However, once a document has been signed by the customer or partner, it can't be removed from the package.

## Prepare for signature (updated)

This section describes the updated process for both electronic and physical signatures with Adobe Sign integration into eAgreements, or Volume Licensing Contract Manager (VLCM).



## Electronic signature

There are three types of electronic signatures:

- Simple signature – Also known as a standard signature, this is the most common type of electronic signature. Authentication is achieved via a unique link sent to the email address of the signer, and the signer's email address is considered evidence they have been identified. This is also the most common signature type at Microsoft.
- Digital signature – Also referred to as an advanced signature, authentication is achieved via the digital certificate to complete the signing ceremony. The process begins via email, but the signer must use a certificate to complete the process.
- Qualified signatures – These are digital signatures that deserve special treatment. Again, you need a certificate to sign, but to get a certificate, you must prove who you are. Qualified certificates used to complete a qualified signature can only be obtained from a trusted services provider (TSP). Because the certificate can only be provided to someone who has proved who they are, they have the same legal effect as a handwritten signature.

With the new Adobe Sign integration, VLCM meets all three electronic signature types, shown as two options:

1. Adobe Electronic (Simple) Signature
2. Adobe Digital/Qualified Signature (combined as a single option)

Speak with your customer if they require a digital or qualified signature. The following scenarios demonstrate the updated process for both partners and customers, from preparing the package for signature to signing the package:

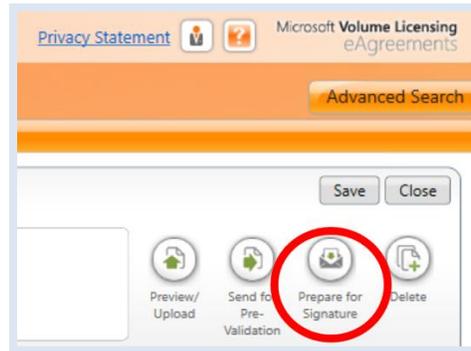
- [Simple electronic signature for direct/indirect Enterprise Agreements \(EAs\)](#) – VLCM
- [Digital/qualified signature for direct EAs](#) – VLCM
- [Simple electronic signature for channel price sheet \(CPS\) for indirect EAs](#) – VLCM/Adobe Sign
- [Simple electronic signature for Open Value](#)
- [Simple electronic signature for Campus](#)



## Simple electronic signature for direct/indirect EAs

### Partner steps

1. On the navigation menu, select the **Prepare for Signature** option.



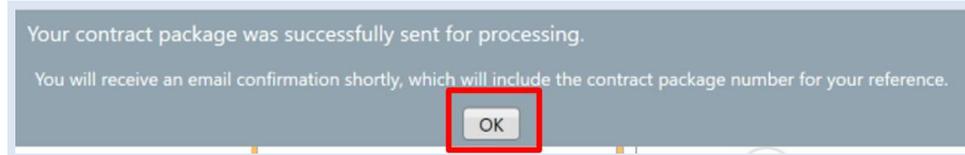
2. The **Prepare for Signature** dialog box opens. Select the **Adobe Simple electronic signature** button, and verify the contact listed as the electronic signatory. Provide any **CC** email addresses for those who need to view a copy of the notification email.

The screenshot shows the 'Prepare for Signature' dialog box. At the top, there is a header with a question mark icon and the text 'Prepare for Signature'. Below this is a green message: 'Your contract package is now ready to be sent for processing.' The main content area is enclosed in a red border and contains the following text: 'Choose one of the following signature options:'. There are two radio button options: 'Adobe Electronic (Simple) Signature' (selected) and 'Adobe Digital/Qualified Signature'. Below this is a blue text block: 'This is the most commonly accepted electronic signature solution, facilitated via Adobe Sign. This is also known as a standard signature. Unless the customer has a requirement to sign with a digital or qualified certificate, select this option. If you are unsure of which option to choose, select this option.' Below this is a section for 'Electronic Signatory' with the name 'Pujari, Maneesha (manpujari@microsoft.com)' and a 'Change' link. Below that is a section for 'Optional Email Recipients' with a text box containing 'CC: annen@microsoft.com'. At the bottom, there is a red footer message: 'Sending this contract package electronically for signature confirms that the information is correct.' and two buttons: 'Submit' and 'Cancel'.



**NOTE:** You'll see a warning message now if you didn't include an electronic signer when you prepared your agreement package contacts. You must return to the **Choose Contacts** section and assign an electronic signatory. You can also assign signatories here by selecting the **Assign** link.

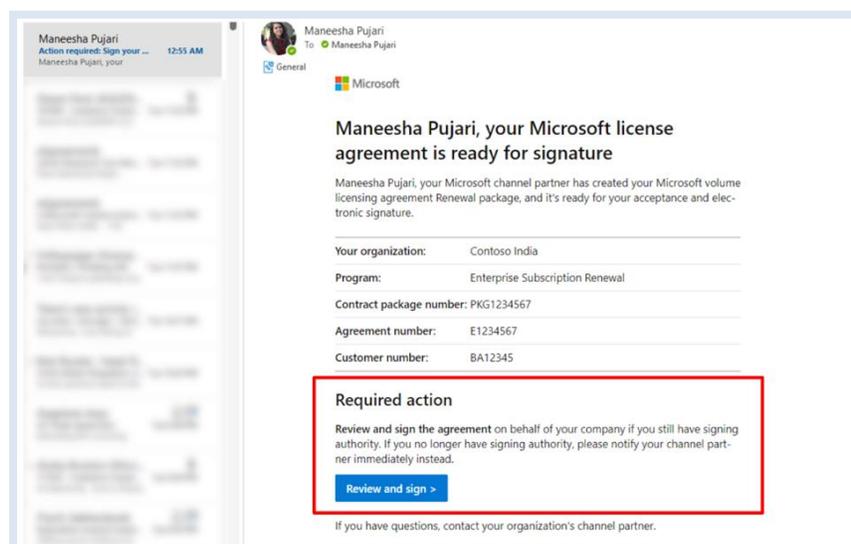
3. Select **Submit**. This will send an email message to the signer that you specified, requesting their simple signature. The distributor and reseller contacts listed during the package creation will receive a copy of the invitation email by default.
4. When the confirmation dialog box appears, select **OK**. The customer will receive a notification to sign the package electronically.



## Customer steps

These steps show the process of customers accepting and signing the agreement.

1. Once your customer receives the notification to sign the package electronically, they should select **Review and sign**.





- This will take them to the Adobe Sign portal, where they will sign on the signature placeholders, namely the **Signature** and **Printed Title** fields. The **Printed Name** and **Signature Date** fields are automatically populated.

- The customer should select **Click to Sign** to complete the process.
- After signing, your customer will receive an on-screen confirmation of signing completion.

- You will receive a notification from eAgreements (VLCM) to confirm the status of the agreement. If signatories wish to obtain copies of the signed agreements, they can do so via the Adobe Sign portal.



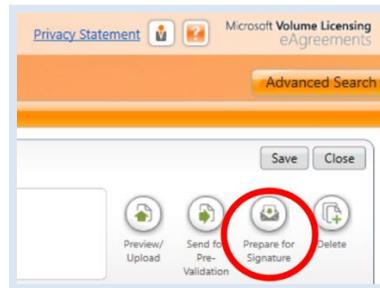
Take note of the following:

- The maximum number of customer signatures that can be configured for any package is two.
- External users (including customers) can't delegate signing to other potential signers.
- A signature envelope will automatically expire and move to a stale state in 90 days.

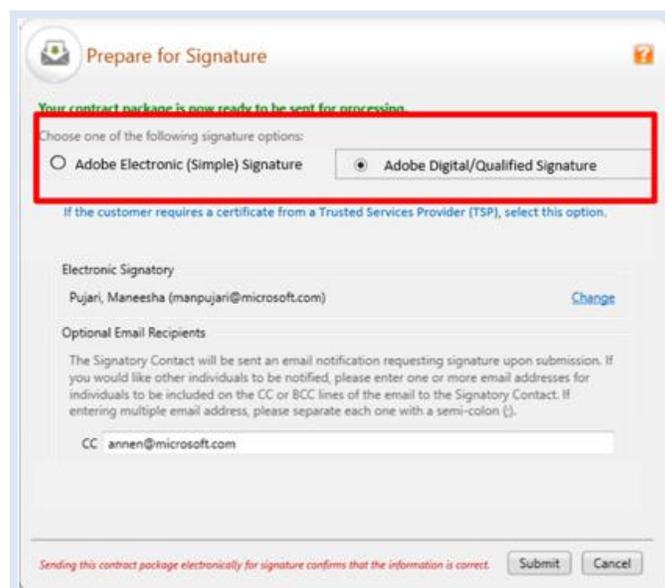
## Digital/qualified signature for direct EAs

### Partner steps

1. On the navigation menu, select **Prepare for Signature**.



2. The **Prepare for Signature** dialog box opens. Select the **Adobe Digital/Qualified electronic signature** button, and verify the contact listed as the electronic signatory. Provide any **CC** email addresses for those who need to view a copy of the notification.



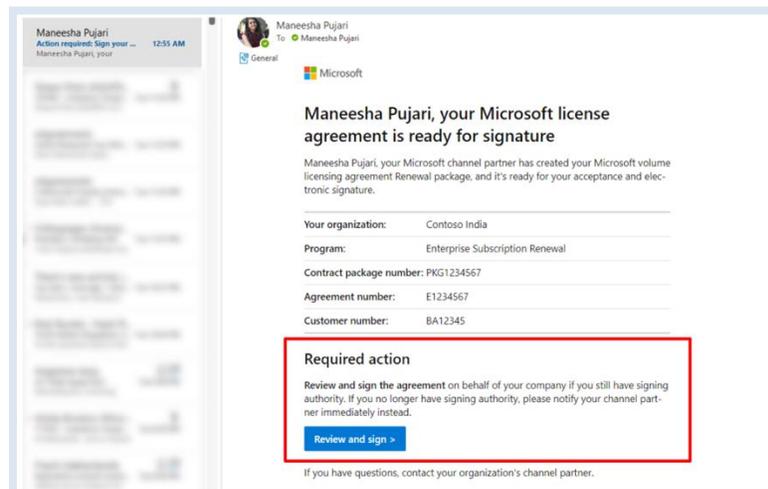


**NOTE:** You'll see a warning message if you didn't include an electronic signer when you prepared your agreement package contacts. You must return to the **Choose Contacts** section and assign an electronic signatory. You can also assign signatories here by selecting the **Assign link**.

3. Select **Submit**. This will send an email message to the signer that you specified, requesting their digital/qualified signature. The distributor and reseller contacts listed during the package creation will receive a copy of the invitation email by default.
4. When the confirmation dialog box appears, select **OK**.

### Customer steps

1. Once your customer receives the notification to sign the package electronically, they should select **Review and sign**.





- This will take them to the Adobe Sign portal, where they will sign on the signature placeholders. Customers can digitally sign the contract by selecting the digital signature block.

The screenshot shows the Microsoft Adobe Sign portal. At the top left is the Microsoft logo and "POWERED BY Adobe Sign". The page title is "ProgramSignForm(MSSign)(SUB)(Asia)AUS(ENG)(Jan2022)(IU)". Below this is a "Signature Date" field with a placeholder "(date Microsoft Affiliate countersigns)". A "Next" button is visible on the left side of the form.

**To Accept All Contracts**  
By signing this signature form, the Customer attests it has received copies of the contract document(s) listed in the tables above and agrees to be bound by the terms of those contract(s) and documents. Customer represents and warrants that (1) Customer has read and understands the terms thereof, including all documents it incorporates by reference and any amendments to those document(s) and (2) agrees to be bound by those terms.

**Customer**

Name of Entity (must be legal entity name)\* |  
Signature\* Click to digitally sign  
Printed First and Last Name\* Enter your full name  
Printed Title\* Enter your job title  
Signature Date\* | Mar 15, 2022  
Tax ID |

\*indicates required field

- A dialog box will open, and they should select **Cloud Signature**, then select **Next**.

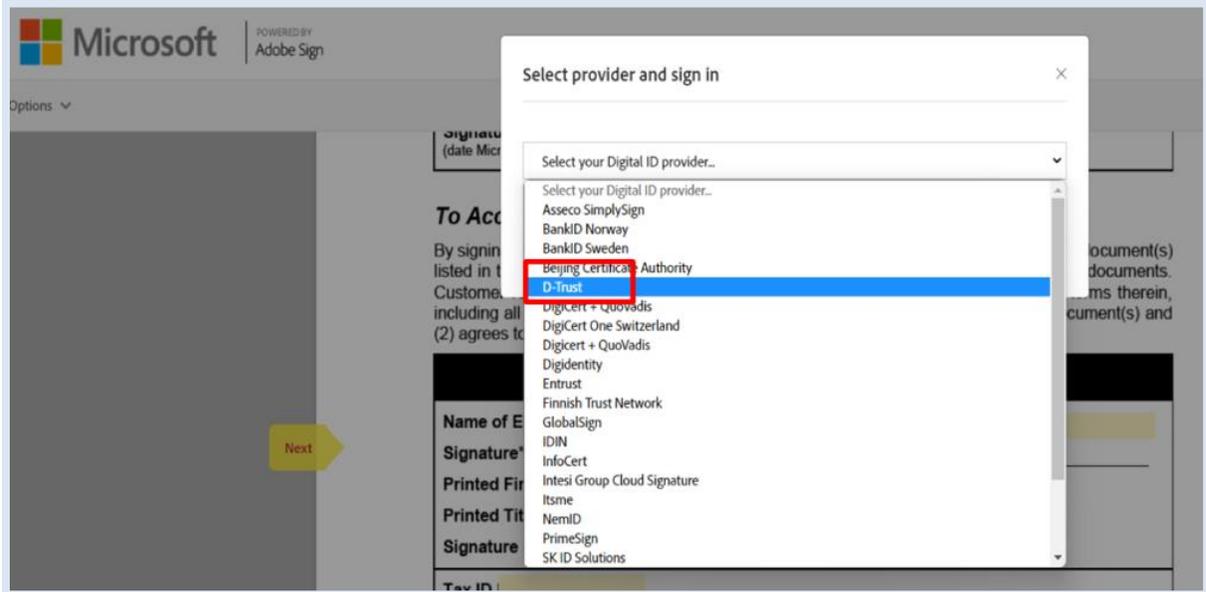
The screenshot shows the Microsoft Adobe Sign portal with a dialog box open. The dialog box is titled "Choose how to apply the digital signature" and has a close button (X) in the top right corner. It contains two options:

- Cloud Signature**  
Sign online with a Digital ID hosted by a Trust Service Provider.
- Download and Sign With Acrobat**  
Sign locally with Acrobat using a smart card, USB token or file-based Digital ID.

At the bottom of the dialog box are "Cancel" and "Next" buttons. The "Next" button is highlighted with a red box. The background shows the same signature form as in the previous screenshot, with a "Next" button on the left side.



- The customer should then select the appropriate digital ID provider based on the company requirements. They can provide the certificate by signing into the digital ID provider's website and completing the signature.



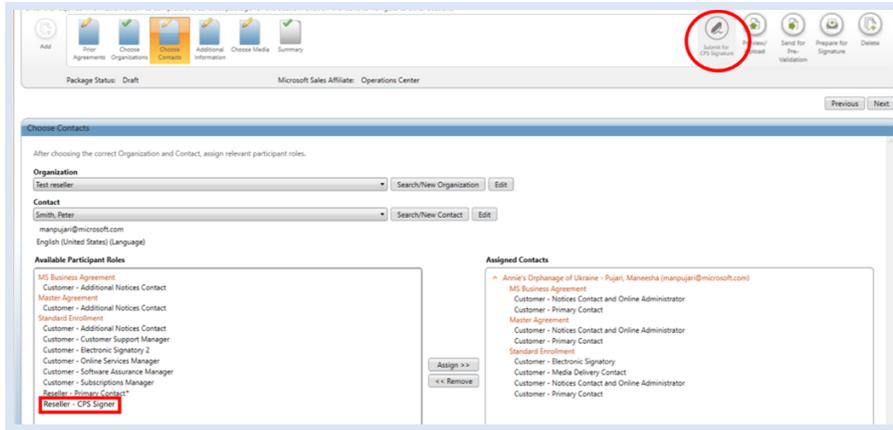
Take note that when a package is submitted for digital signature, the customer must give a valid certificate and can't proceed with a simple signature. Also note, Microsoft will countersign via the Electronic (Simple) Signature method.

### Simple electronic signature of Channel Price Sheet (CPS) for indirect EAs

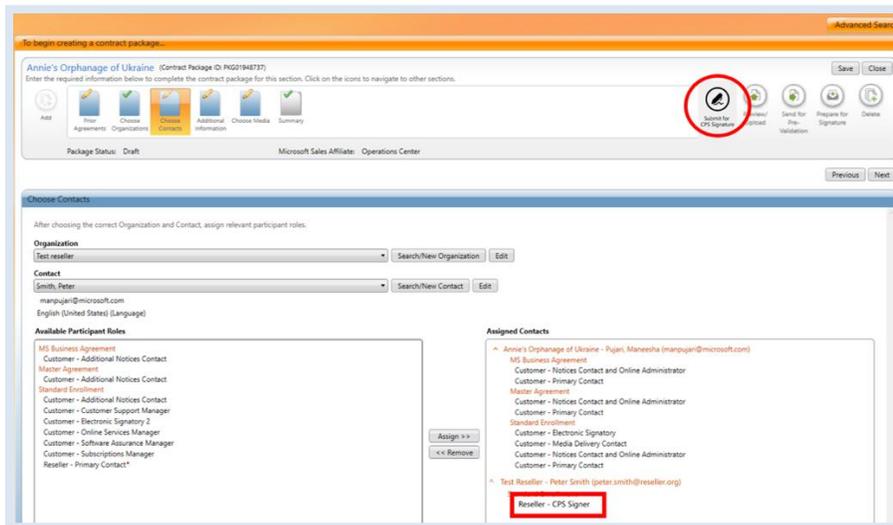
For indirect EAs, Adobe Sign helps in facilitating the signing of the CPS.

#### Partner steps

- Prior to signing the CPS, partners should map the **Reseller – CPS Signer** contact role [during contact selection](#). The **Reseller – CPS Signer** contact role should first be mapped to a contact in the partner organization. Take note that the reseller signer should have signing authority within the partner organization. The **Submit for CPS Signature** button will be disabled if the contact isn't selected or if the document hasn't been uploaded.



- The partner should upload the *unsigned* CPS into the agreement package via the [Preview/Upload](#) option.



- Once the contact has been selected and the *unsigned* CPS has been uploaded, the **Submit for CPS Signature** button will be enabled.



4. Select the **Submit for CPS Signature** button. In the dialog box, you can include additional recipients who wish to view the notification.

**Submit for CPS Signature**

**Recipient Type:** Reseller: CPS Signer

**Email Address of the Recipient:** peter.smith@tstreseller.org

**Additional Recipients:**

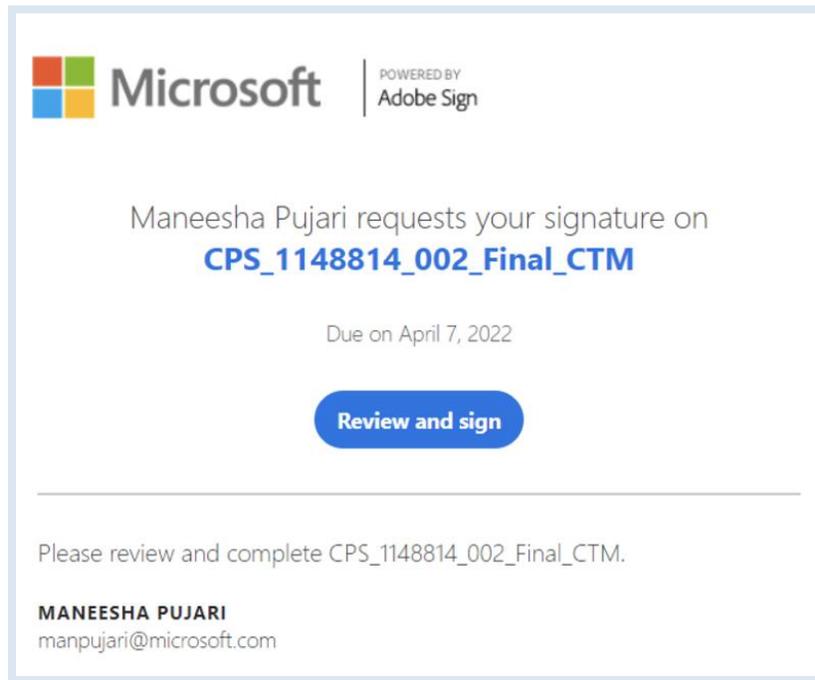
**Comments:**

5. Select **Send**. This will send an email message to the signer that you specified, requesting their signature, and this process will be facilitated via Adobe Sign.
6. Once the CPS has been signed, proceed with the process to prepare the package for customer signature, via [simple signature](#) or [digital/qualified signature](#). Note: once the CPS has been signed through this process, it can't be modified.

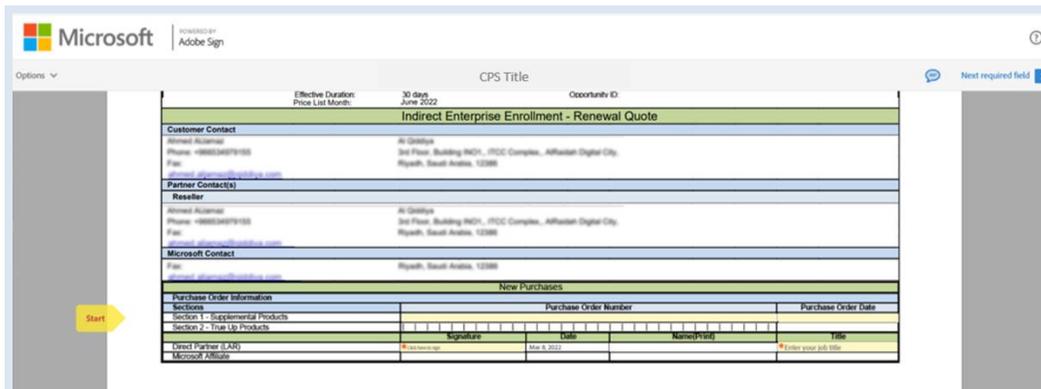


## CPS signer steps

1. The CPS signer will receive a notification to sign the CPS.



2. The CPS signer should follow the Adobe prompts to populate the applicable fields.





- The CPS signer can add the purchase order (PO) number details, PO date, signature, and title.

Indirect Enterprise Enrollment - Renewal Quote				
<b>Customer Contact</b>				
Ahmed Alwanad Phone: +966334079155 Fax: ahmed.alwanad@msa.gov.sa		Al Qadaya 3rd Floor, Building N01, ITDC Complex, Adhrafah Digital City, Riyadh, Saudi Arabia, 12286		
<b>Partner Contact(s)</b>				
<b>Reseller</b>				
Ahmed Alwanad Phone: +966334079155 Fax: ahmed.alwanad@msa.gov.sa		Al Qadaya 3rd Floor, Building N01, ITDC Complex, Adhrafah Digital City, Riyadh, Saudi Arabia, 12286		
<b>Microsoft Contact</b>				
Fax: ahmed.alwanad@msa.gov.sa		Riyadh, Saudi Arabia, 12286		
<b>Purchase Order Information</b>				
<b>Sections</b>				
Section 1 - Supplemental Products	123456789		Purchase Order Date	
Section 2 - True Up Products			Mar 8, 2022	
<b>NEW PURCHASES</b>				
	Signature	Date	Name(Print)	Title
Direct Partner (LAR)	Ahmed Alwanad	Mar 8, 2022	Mervaha Pagan	Program Manager
Microsoft Affiliate				

- Take note of the following regarding the PO field:
  - The PO number field separators have been removed.
  - While the PO number isn't mandatory during this step, this is the only time it can be entered on the paperwork before the contract package is locked and signed. Subsequent additions/changes will need to be submitted via Call Logging Tool (CLT) and won't be reflected on the CPS document itself.
  - The PO date format is *mmm dd, yyyy*.
- After signing the CPS, you can select the **Prepare for Signature** button to send it to your customer for signature.

The screenshot shows the Microsoft Volume Licensing eAgreements interface. At the top, there are links for 'Privacy Statement' and 'Microsoft Volume Licensing eAgreements'. Below that, there's a section titled 'To begin creating a contract package...' with a sub-header 'Annie's Orphanage of Ukraine (Contract Package ID: PKG09239045)'. A message says 'Enter the required information below to complete the contract package for this section. Click on the icons to navigate to other sections.' There are several icons for 'Add', 'Prior Agreements', 'Choose Organizations', 'Choose Contacts', 'Additional Information', 'Choose Offerings', and 'Choose Media'. A 'Summary' icon is highlighted. On the right, there are icons for 'Save for CPS Signature', 'Preview/Upload', 'Send for Pre-Validation', and 'Prepare for Signature', which is circled in red. At the bottom, there are 'Previous' and 'Next' buttons. The package status is 'Draft' and the Microsoft Sales Affiliate is 'Operations Center'.

- Continue with the process to send the package to the customer for signature, as detailed in the scenario for [simple electronic signatures for direct/indirect EAs](#).



## Simple electronic signature via Adobe Sign for Open Value subscriptions

### Partner steps

1. After adding all the information, in the navigation menu, select **Prepare for Signature**.

To begin creating a contract package...

Bre's Bakery (Contract Package ID: PKG08079771)

Enter the required information below to complete the contract package for this section. Click on the icons to navigate to other sections.

Navigation icons: Add, Prior Agreements, Choose Organizations, Choose Contacts, Additional Information, Choose Offerings, Choose Media, Summary (highlighted), Previous/Upload, Prepare for Signature (circled in red), Delete.

Package Status: Draft      Microsoft Sales Affiliate: Operations Center

Summary

Header Details

Package Number	Package Created Date	Program Name	Program Version	Package Content	Package Status	Channel Model	Contract Type	Agreement Language
PKG08079771	2022-7-21	Open Value Subscription	2015	Agreement	Draft	Two Tier	Corporate	English

Agreement Type Agreement Number Customer PCN Customer Name Localized Customer Name Customer Country

Agreement	V9629597	AC85E29C	Bre's Bakery	Bre's Bakery	United States
-----------	----------	----------	--------------	--------------	---------------

Prior Agreement [View Prior Agreement Details](#)

Organization [View Organization](#)

2. The **Prepare for Signature** dialog box opens. Select the **Adobe Simple electronic signature** button, and verify the contact listed as the electronic signatory. Provide any CC email addresses for people that you want to view the notification.

**Prepare for Signature**

Your contract package is now ready to be sent for processing.

Choose one of the following signature options:

Adobe Electronic (Simple) Signature       Adobe Digital/Qualified Signature

This is the most commonly accepted electronic signature solution, facilitated via Adobe Sign. This is also known as a standard signature. Unless the customer has a requirement to sign with a digital or qualified certificate, select this option. If you are unsure of which option to choose, select this option.

Electronic Signatory

Pujari, Maneesha (manpujari@microsoft.com) [Change](#)

Optional Email Recipients

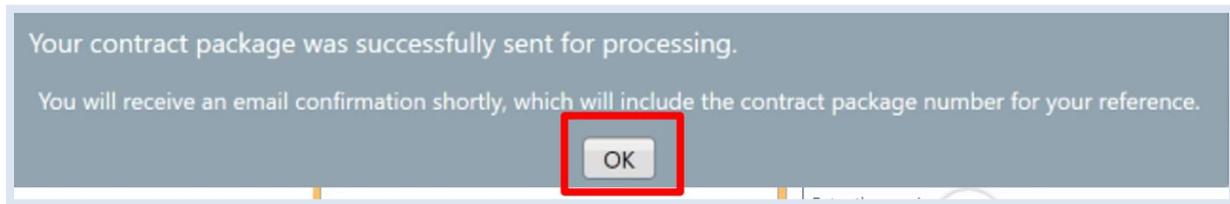
The Signatory Contact will be sent an email notification requesting signature upon submission. If you would like other individuals to be notified, please enter one or more email addresses for individuals to be included on the CC or BCC lines of the email to the Signatory Contact. If entering multiple email address, please separate each one with a semi-colon (;).

CC

*Sending this contract package electronically for signature confirms that the information is correct.* [Submit](#) [Cancel](#)

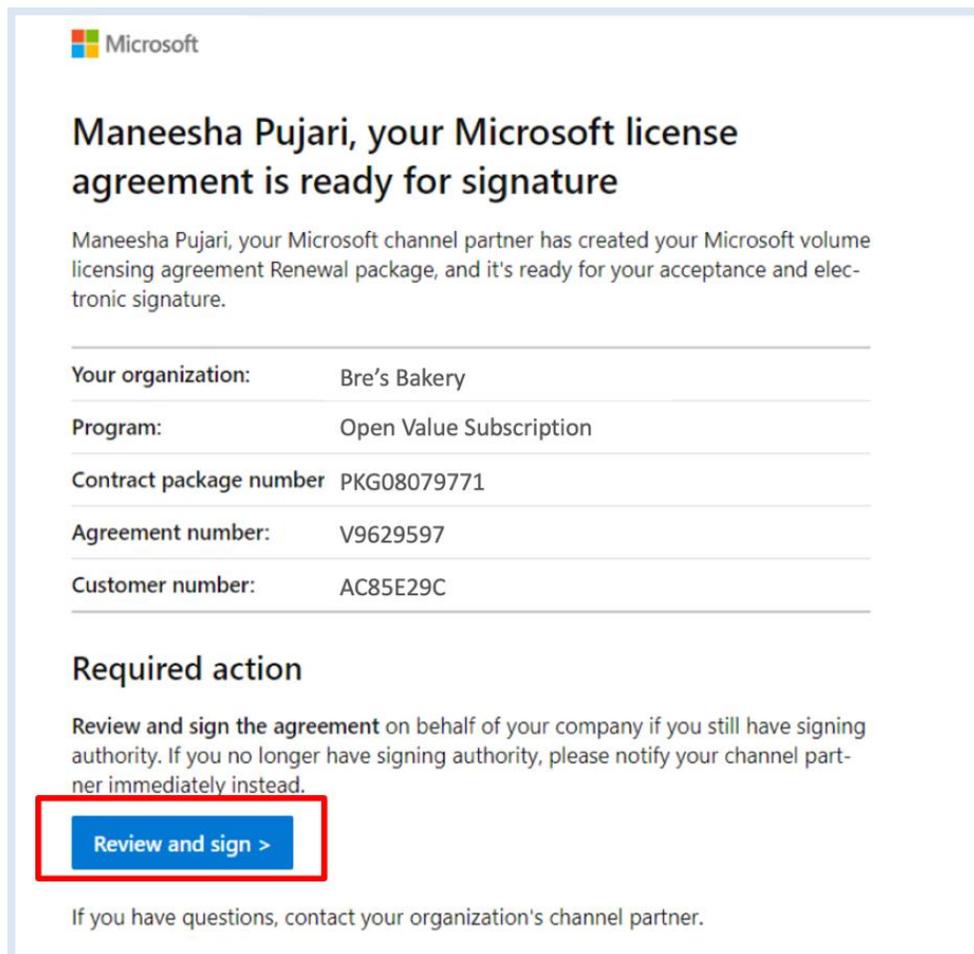


3. VLCM will submit the package for processing. When the submission process is complete, a confirmation dialog box appears. Select **OK**.



## Customer steps

1. Once your customer receives the notification to sign the package electronically, they should select **Review and sign**.



2. This will take them to the Adobe Sign portal, where they will sign on the signature placeholders, namely the **Signature** and **Printed Title** fields. The **Printed Name** and



Signature Date fields are automatically populated.

PKG1234567 Contoso Org EA Renewal


Volume Licensing

## Program Signature Form

Agreement number  Note: Enter the applicable active numbers associated with the documents below. Microsoft requires the associated active number be indicated here, or listed below as new.

For the purposes of this form, "Customer" can mean the signing entity, Enrolled Affiliate, Government Partner, Institution, or other party entering into a volume licensing program agreement.

This signature form and all contract documents identified in the table below are entered into between the Customer and the Microsoft Affiliate signing, as of the effective date identified below.

3. The customer should select **Click to Sign** to complete the process.

**Printed Title\*** IT Manager - Acting  
**Signature Date\*** 6/19/2020  
**Tax ID**

\* indicates required field

**Optional 2<sup>nd</sup> Customer signature or Outsourcer signature (if applicable)**

**Customer**

**Name of Entity (must be legal entity name)\*** Contoso  
**Signature\***   
**Printed First and Last Name\*** Maneesha Pujari  
**Printed Title** Partner CE  
**Signature Date\*** Mar 8, 2022

\* indicates required field

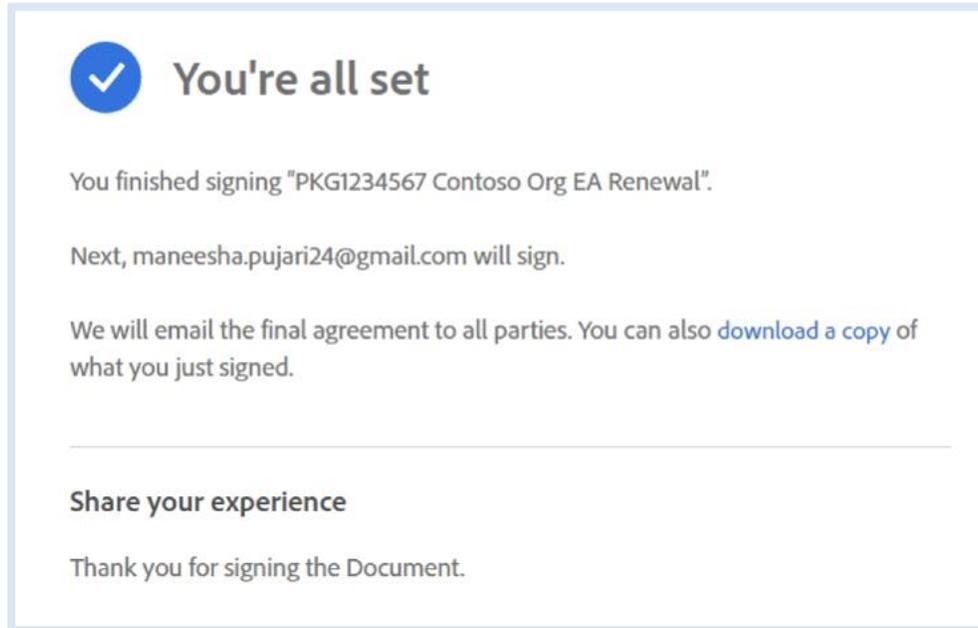
ProgramSignForm(MSSign)(SUB)(EU-EFTA)UK(ENG)(Oct2019) Page 2 of 3  
Document X20-12871

By signing, I agree to both this agreement and the [Consumer Disclosure](#).

Click to Sign



- After signing, your customer will receive an on-screen confirmation of signing completion.



## Simple electronic signature via Adobe Sign for Campus Education subscriptions

### Partner steps

- After adding all the information, in the navigation menu, select **Prepare for Signature**.

Microsoft Volume Licensing eAgreements

Advanced Search

To begin creating a contract package...

Bre's Bakery (Contract Package ID: PKG08159326)

Enter the required information below to complete the contract package for this section. Click on the icons to navigate to other sections.

Package Status: Draft      Microsoft Sales Affiliate: Operations Center

Summary

Header Details								
Package Number	Package Created Date	Program Name	Program Version	Package Content	Package Status	Channel Model	Contract Type	Agreement Language
PKG08159326	2022-7-20	Campus 3	20181	Master and Enrollment NO MBSA	Draft	Single Tier	Education Solutions	English
Agreement Type	Agreement Number	Customer PCN	Customer Name	Localized Customer Name	Customer Country			
Master Agreement	51480505	AC85E29C	Bre's Bakery	Bre's Bakery	United States			
Standard Enrollment	79281058	AC85E29C	Bre's Bakery	Bre's Bakery	United States			

View Prior Agreement Details



- The **Prepare for Signature** dialog box opens. Select the **Adobe Simple electronic signature** button, and verify the contact listed as the electronic signatory. Provide any **CC** email addresses for people that you want to view the notification.

**Prepare for Signature**

Your contract package is now ready to be sent for processing.

Choose one of the following signature options:

Adobe Electronic (Simple) Signature     Adobe Digital/Qualified Signature

This is the most commonly accepted electronic signature solution, facilitated via Adobe Sign. This is also known as a standard signature. Unless the customer has a requirement to sign with a digital or qualified certificate, select this option. If you are unsure of which option to choose, select this option.

Electronic Signatory

Pujari, Maneesha (manpujari@microsoft.com) [Change](#)

Optional Email Recipients

The Signatory Contact will be sent an email notification requesting signature upon submission. If you would like other individuals to be notified, please enter one or more email addresses for individuals to be included on the CC or BCC lines of the email to the Signatory Contact. If entering multiple email address, please separate each one with a semi-colon (;).

CC

Sending this contract package electronically for signature confirms that the information is correct.

- VLCM will submit the package for processing. When the submission process is complete, a confirmation dialog box appears. Select **OK**.

Your contract package was successfully sent for processing.

You will receive an email confirmation shortly, which will include the contract package number for your reference.



## Customer steps

1. Once your customer receives the notification to sign the package electronically, they should select **Review and sign**.

### Maneesha Pujari, your Microsoft license agreement is ready for signature

Maneesha Pujari, your Microsoft channel partner has created your Microsoft volume licensing agreement Renewal package, and it's ready for your acceptance and electronic signature.

Your organization:	Bre's Bakery
Program:	Campus
Contract package number	PKG08159326
Agreement number:	79281058
Customer number:	AC85E29C

#### Required action

**Review and sign the agreement** on behalf of your company if you still have signing authority. If you no longer have signing authority, please notify your channel partner immediately instead.

[Review and sign >](#)

If you have questions, contact your organization's channel partner.



- This will take them to the Adobe Sign portal, where they will sign on the signature placeholders, namely the **Signature** and **Printed Title** fields. The **Printed Name** and **Signature Date** fields are automatically populated.

PKGI234567 Contoso Org EA Renewal

Microsoft Volume Licensing

### Program Signature Form

Agreement number  **Note:** Enter the applicable active numbers associated with the documents below. Microsoft requires the associated active number be indicated here, or listed below as new.

For the purposes of this form, "Customer" can mean the signing entity, Enrolled Affiliate, Government Partner, Institution, or other party entering into a volume licensing program agreement.

This signature form and all contract documents identified in the table below are entered into between the Customer and the Microsoft Affiliate signing, as of the effective date identified below.

- The customer should select **Click to Sign** to complete the process.

Printed Title\* IT Manager - Acting  
Signature Date\* 6/19/2020

Tax ID

\* indicates required field

Optional 2<sup>nd</sup> Customer signature or Outsourcer signature (if applicable)

**Customer**

Name of Entity (must be legal entity name)\* Contoso  
Signature\*   
Printed First and Last Name\* Maneesha Pujari  
Printed Title Partner CE  
Signature Date\* Mar 8, 2022  
\* indicates required field

ProgramSignForm(MSSign)(SUB)(EU-EFTA)UK(ENG)(Oct2019)

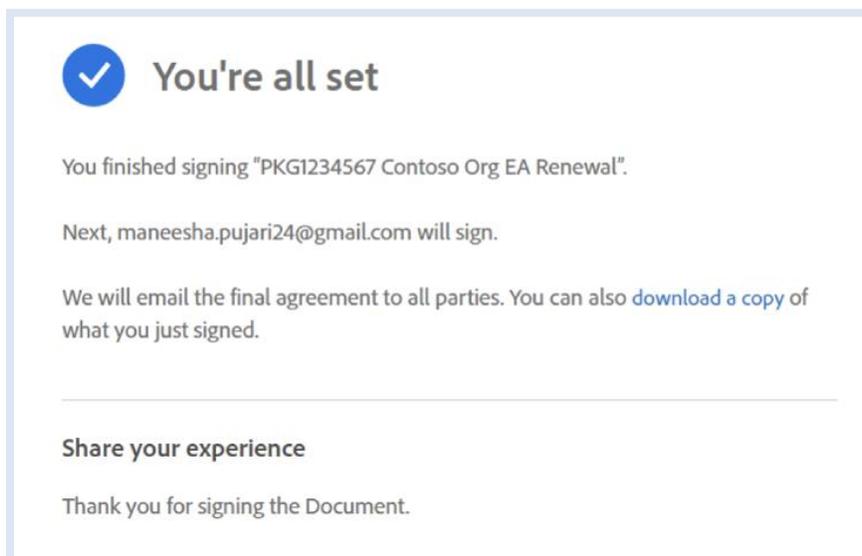
Page 2 of 3  
Document X20-12871

By signing, I agree to both this agreement and the [Consumer Disclosure](#).

**Click to Sign**



4. After signing, your customer will receive an on-screen confirmation of signing completion.



## Physical “wet” signature via Adobe Sign

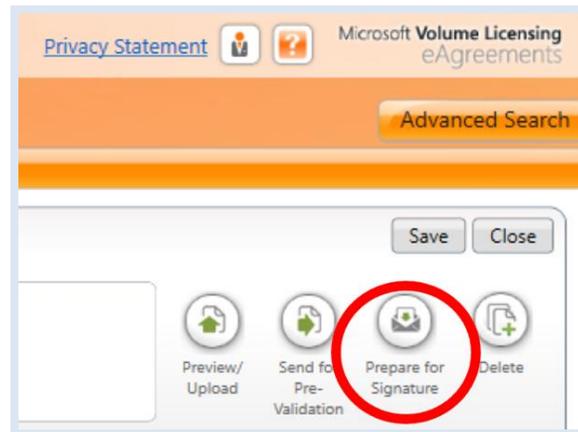
Due to the Adobe Sign integration into VLCM, changes have been made to this process, where customers will print, sign, and upload the package via the Adobe Sign portal.

**NOTE:** Because Microsoft is a digital company, the default Regional Operations Center (ROC) countersignature type will be Adobe Sign. If the customer requires a physical “wet” countersignature from Microsoft, upload (as a miscellaneous document) an image of the customer email indicating this requirement to alert the processing agent and signatory. This must be uploaded into eAgreements **prior** to sending the contract to the customer for signature.



## Partner steps

1. After adding all the information, in the navigation menu, select **Prepare for Signature**.

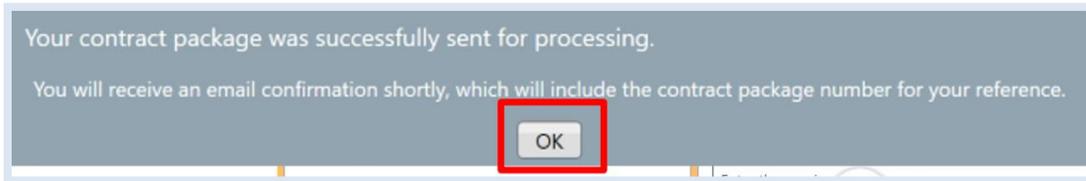


2. The **Prepare for Signature** dialog box opens. Select the **Adobe Electronic (Simple) Signature** button, and verify the contact listed as the electronic signatory. Provide any CC email addresses for people that you want to receive the notification.

The screenshot shows the 'Prepare for Signature' dialog box. At the top, there is a title bar with a question mark icon and the text 'Prepare for Signature'. Below the title bar, there is a green message: 'Your contract package is now ready to be sent for processing.' Below this message, there is a section titled 'Choose one of the following signature options:' with two radio buttons: 'Adobe Electronic (Simple) Signature' (selected) and 'Adobe Digital/Qualified Signature'. Below the radio buttons, there is a blue text block: 'This is the most commonly accepted electronic signature solution, facilitated via Adobe Sign. This is also known as a standard signature. Unless the customer has a requirement to sign with a digital or qualified certificate, select this option. If you are unsure of which option to choose, select this option.' Below the text block, there is a section titled 'Electronic Signatory' with a text input field containing 'Pujari, Maneesha (manpujari@microsoft.com)' and a 'Change' button. Below the 'Electronic Signatory' section, there is a section titled 'Optional Email Recipients' with a text input field containing 'annem@microsoft.com' and a 'BCC' label. At the bottom of the dialog box, there is a red text block: 'Sending this contract package electronically for signature confirms that the information is correct.' and two buttons: 'Submit' and 'Cancel'.

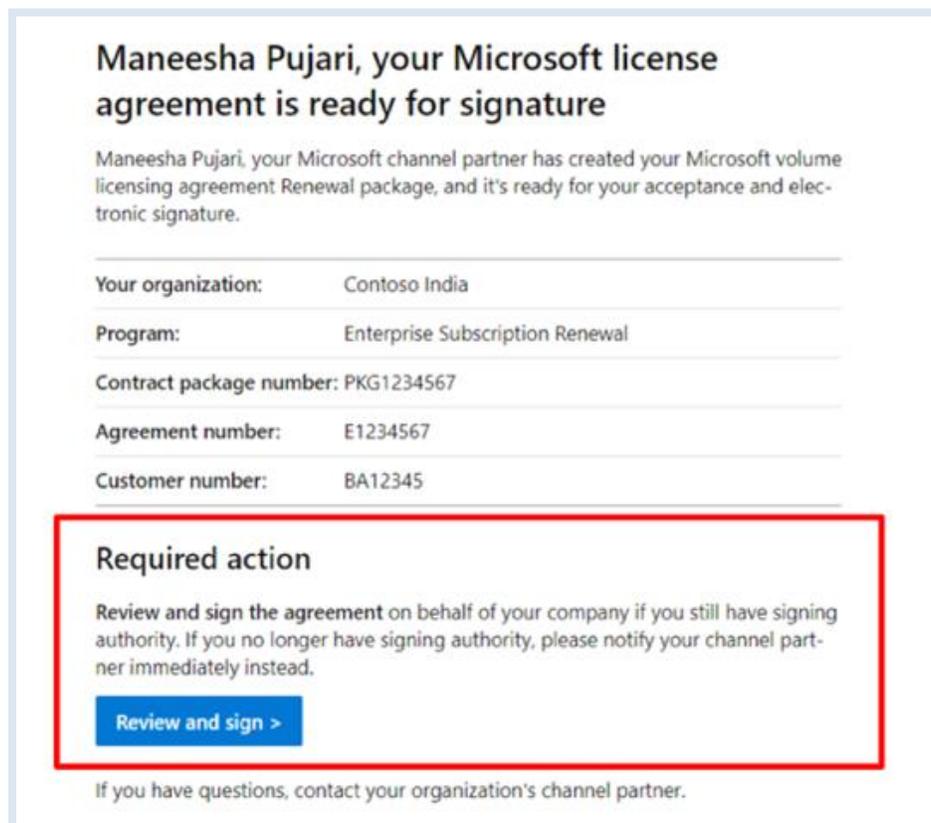


3. VLCM will submit the package for processing. When the submission process is complete, a confirmation dialog box appears. Select **OK**.



## Customer steps

1. Once your customer receives the notification to sign the package electronically, they should select **Review and sign**.





2. In the Adobe Sign portal, to physically sign the document, the customer should select **Print, sign and upload** under the **Options** dropdown menu.

Options ▾

- Read agreement
- Delegate signing to another
- Decline to sign
- Print, sign and upload**
- Clear document data
- View history
- Download PDF

Annie's Orphanage Enterprise Agreement 59504744 (May 2020)(CR)

Microsoft Volume Licensing

### Program Signature Form

For use with agreements associated with a Purchase Agreement

MBA/MBSA number [RD28] [RD6]

Agreement number [RD29]

**Note:** Enter the applicable active numbers associated with the documents below. Microsoft requires the associated active number be indicated here, or listed below as new.

For the purposes of this form, "Customer" can mean the signing entity, Enrolled Affiliate, Government Partner, Institution, or other party entering into a volume licensing program agreement.

This signature form sets out the documents entered into under this signature form and together along with the terms and conditions contained therein are part of the contract(s) identified above. This program signature form and all attachments identified are entered into between the Customer and the relevant Microsoft Affiliates signing, as of the effective date identified below.

Next

3. The customer should select the **Continue** button to proceed with the physical download process.

Print, sign and upload ×

By Selecting Print, Sign and Upload, you will need to print this agreement, and then sign and initial it where required. You will then need to scan the signed agreement and upload it back to this web page. Would you like to proceed?

Cancel Continue



4. They should first read through the **Consumer Disclosure** document before selecting **Next** to proceed.

3 Simple Steps to Complete Signing This Agreement

Step 1: Review & Fill → Step 2: Download to sign → Step 3: Upload to submit

### Program Signature Form

For use with agreements associated with a Purchase Agreement

MBA/MSA number [RD28] [RD6]

Agreement number [RD29]

**Note:** Enter the applicable active numbers associated with the documents below. Microsoft requires the associated active number be indicated here, or listed below as new.

For the purposes of this form, "Customer" can mean the signing entity, Enrolled Affiliate, Government Partner, Institution, or other party entering into a volume licensing program agreement.

This signature form sets out the documents entered into under this signature form and together along with the terms and conditions contained therein are part of the contract(s) identified above. This program signature form and all attachments identified are entered into between the Customer and the relevant Microsoft Affiliates signing as of the effective date identified below.

By signing, I agree to this agreement, the [Consumer Disclosure](#) and to do business electronically with Contoso. Next

5. In the dialog box, they should select the **Download** button to proceed.

### Download, Print, and Sign

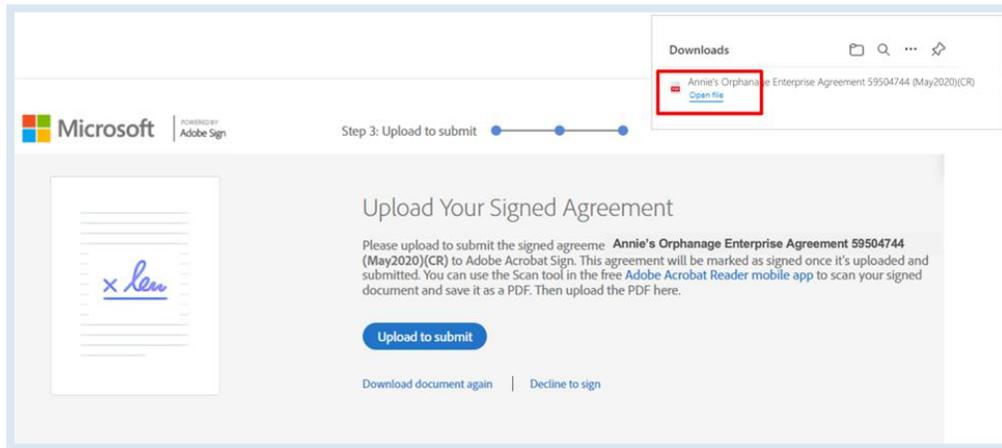
Step 2: Download to sign

Download, print and grab a pen to sign this agreement. Come back to this web page when you are ready to upload the signed agreement. **Note, if any form field data was entered electronically, you will not be able to edit them after downloading this agreement.** If you'd like to make any changes to the information you provided click "Cancel".

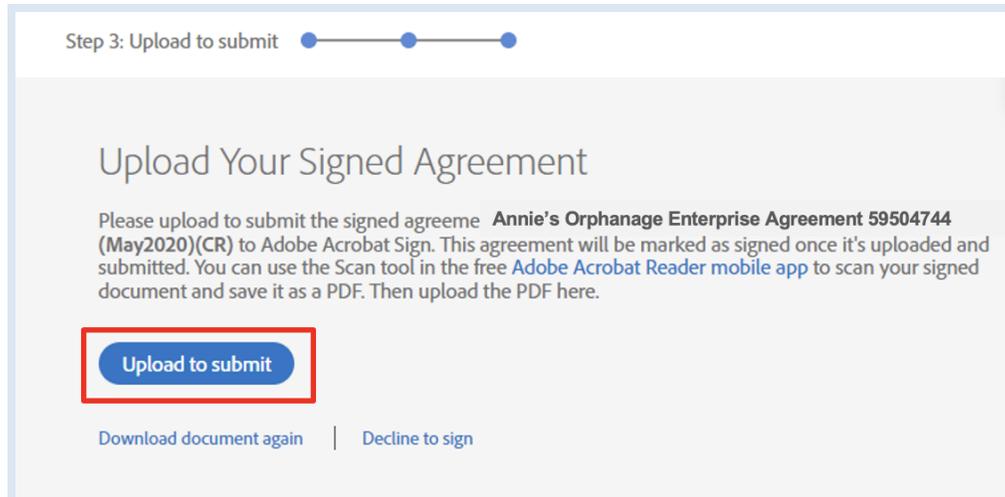
Cancel Download



- Once the file has been downloaded, the customer should go to the **Downloads** folder to open, print, and sign the document. Once the document signed, they should scan and upload it to their computer.



- After scanning the document, the customer should locate the signed agreement, highlight it, and double-click it for upload. To upload it to the Adobe Sign portal, the customer should select the **Upload to submit** button.

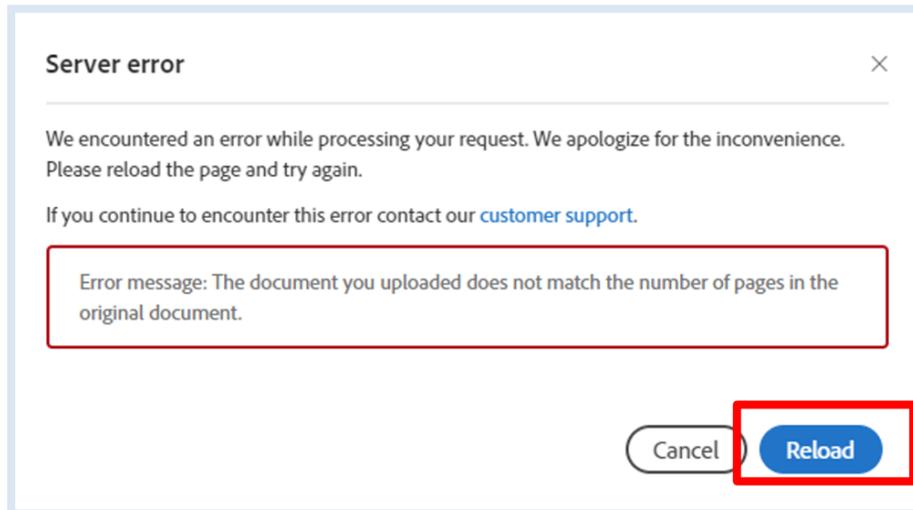


To make sure that the upload goes smoothly, the customer must take note of the following:

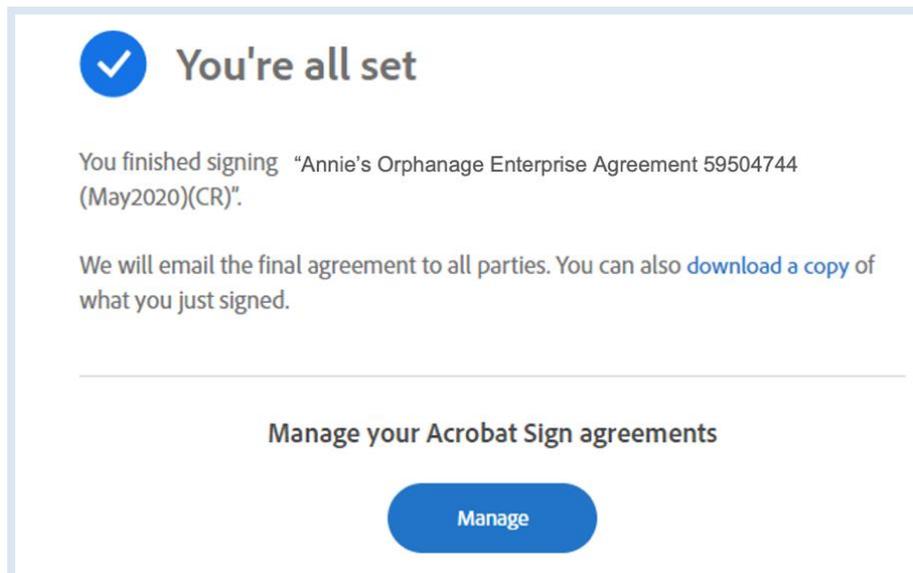
- The document package downloaded from and uploaded to the Adobe Sign portal must match. If there's a discrepancy, the Adobe Sign portal will display an error.



8. If an error occurs, the customer must resolve the issue; once it's resolved, they should reload the document.



9. Once the document has been successfully uploaded, the customer will receive a notification. The contract package will automatically be submitted to the ROC for processing and countersignature, and the default countersignature type will be via Adobe Sign. The customer can access the uploaded document from the Adobe Sign portal.





## Withdraw a submission

After the customer reviews their electronic agreement, they might want changes. Additionally, you might want to alter the agreement. If the customer has not signed the agreement, it's possible to withdraw the submission. The customer can reject the agreement by declining to sign through Adobe Sign, or you can withdraw it without the customer's rejection, provided the customer has not yet signed the agreement.

1. In the Adobe Sign portal, the customer can decline to sign the agreement by selecting **Decline to sign** from the **Options** menu.

The screenshot shows the Adobe Sign portal interface for a document titled "Annie's Orphanage Enterprise Agreement 59504744 (May 2020)(CR)". The document is a "Program Signature Form" for Microsoft Volume Licensing. The form includes fields for "MBAMBSA number" (with value [RD28]) and "Agreement number" (with value [RD29]). A "Next" button is visible at the bottom right. The "Options" menu is open, and the "Decline to sign" option is highlighted with a red box and a red arrow pointing to it.

When you submit a contract package, the **Delete** button on the navigation bar changes to **Withdraw**.

The screenshot shows the navigation bar of the Adobe Sign portal. It includes a "Save" button and a "Close" button. Below these are four icons representing different actions: "Preview/Upload", "Send for Pre-Validation", "Prepare for Signature", and "Withdraw". The "Withdraw" button is highlighted with a red box.



2. Select **Withdraw** to withdraw the agreement. Once withdrawn, the previous version of a contract is void.
3. Select **Yes** to confirm the withdrawal.
  - The **Withdraw** button reverts to the **Delete** button.

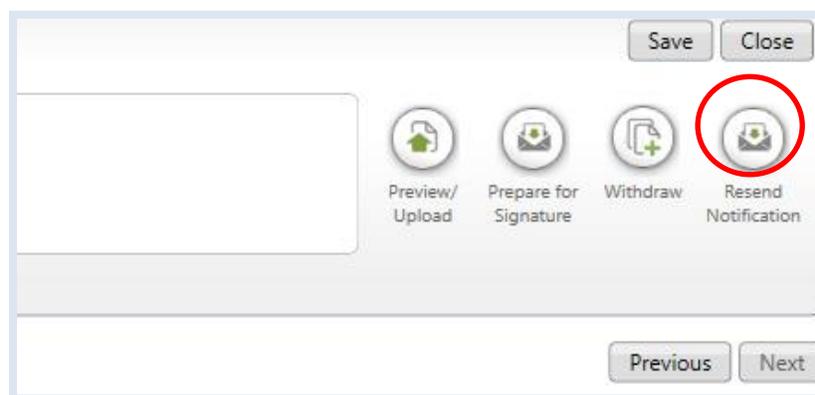


- The status changes from **Pending Customer Signature** to **Draft**.

## Resend the email notification

It's possible to resend submission notification emails from eAgreements. You might want to do this if the designated signer for your customer tells you that they never received the email invitation to electronically sign their contract package or can't find it in their inbox.

1. Select **Resend Notification**.



The **Resend Email Notification** dialog box opens. You can resend to the electronic signer that you originally sent the notification to and add recipients.

2. Enter the email address of any **Additional Recipients** that you want to add (optional).
3. Enter any necessary comments.
4. Select **Send**.



Resend Email Notification

Recipient Type: Electronic Signatory

Email Address of the Recipient:

Additional Recipients:

Comments:

## Extend an agreement

You have the option of extending an existing agreement to extend your customer's licensing coverage without having to create a new agreement. This applies to all types of agreements in the eAgreements tool.

You can do this anytime up to 60 days before an agreement expires or up to 30 days after it expires.

### Partner steps

1. Go to the **Organization Search** page.
2. In the dropdown menu under **Actions**, select **Renew**. Enter the agreement number of the agreement you want to extend and select the option to extend the existing agreement.

Actions  

Renew

Enter the organization for which you wish to view, manage, or create a contract package.

Organization Name

  
City   
Locale 

Choose...

State/Province 

Public Customer Number (PCN)

The following agreement is currently eligible for a renewal.

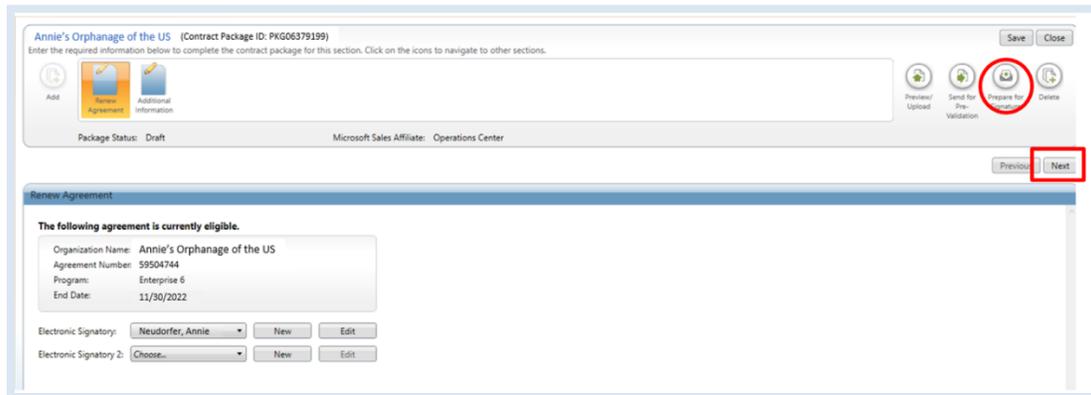
Organization Name: Annie's Orphanage of the US  
Agreement Number: 59504744  
Program: Enterprise 6  
Start Date: 10/1/2019  
End Date: 11/30/2022

Renew into a new agreement  
 Extend existing agreement  
Language 

English

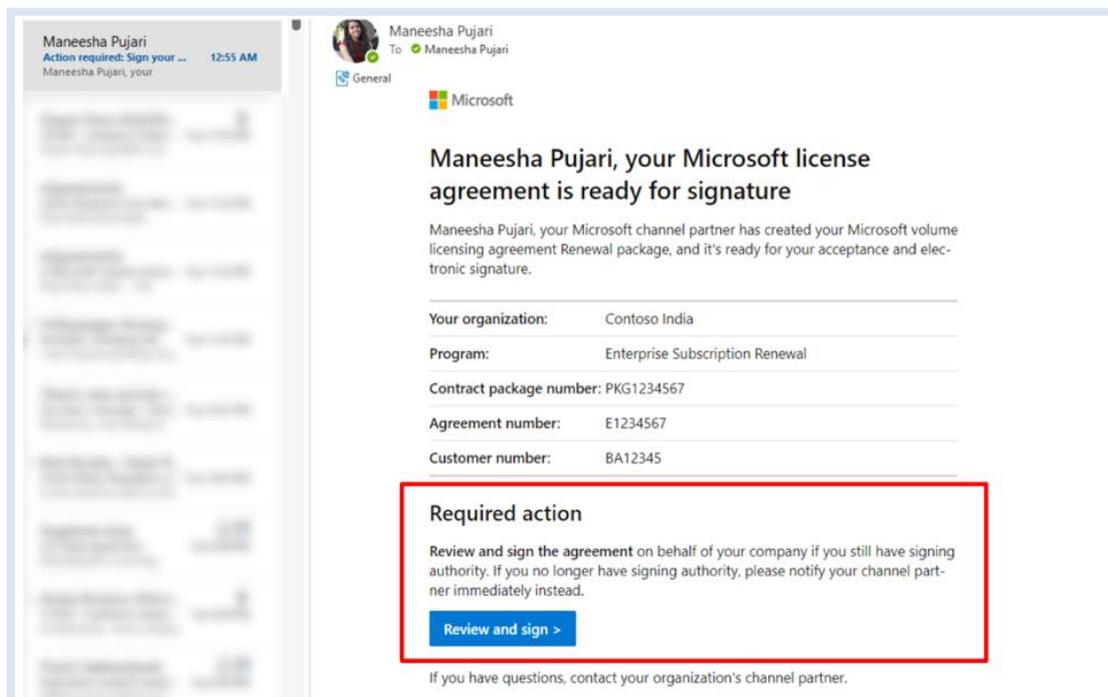


- After validating that the information on the organization is correct, select the **Prepare for Signature** option.



## Customer steps

- Once your customer receives the notification to sign the package electronically, they should select **Review and sign**.





- This will take them to the Adobe Sign portal, where they will sign on the signature placeholders, namely the **Signature** and **Printed Title** fields. The **Printed Name** and **Signature Date** fields are automatically populated.

Microsoft | POWERED BY Adobe Sign

Options ▾

PKG1234567 Contoso Org EA Renewal

Printed First and Last Name\* *Devenida Lai Silvestre*

Printed Title\* IT Manager - Acting

Signature Date\* 6/19/2020

Tax ID

\* indicates required field

Optional 2<sup>nd</sup> Customer signature or Outsourcer signature (if applicable)

**Customer**

Name of Entity (must be legal entity name)\* Contoso

Signature\* *[Signature]*

Printed First and Last Name\* *Maneesha Pujari*

Printed Title *Partner CE*

Signature Date\* *Mar 8, 2022*

\* indicates required field

ProgramSignForm(MSSign)(SUB)(EU-EFTA)UK(ENG)(Oct2019)

Page 2 of 3  
Document X20-12871

By signing, I agree to both this agreement and the [Consumer Disclosure](#).

**Click to Sign**

- The customer should select **Click to Sign** to complete the process.
- After signing, your customer will receive an on-screen confirmation of signing completion.

**✓ You're all set**

You finished signing "PKG1234567 Contoso Org EA Renewal".

Next, maneesha.pujari24@gmail.com will sign.

We will email the final agreement to all parties. You can also [download a copy](#) of what you just signed.

---

**Share your experience**

Thank you for signing the Document.



## Renew an agreement

Customers can renew an existing agreement up to 60 days **before** it expires and 30 days **after** it expires. Multi-tenant lead enrollments aren't available for renewal in the tool (although the tool initially will say the option is available, the renewal won't be processed).

ROCs can approve exceptions up to 120 days after the renewal date.

After 120 days, contact your subsidiary to request approval, which they can grant as a "special deal." If your request is approved, include the special deal number in the Call Logging Tool (CLT) log, ask to have the new agreement set up as a renewal, and backdate the renewal to ensure that there is no gap in coverage.

## Partner steps

To renew (extend) an agreement within the normal time limit (up to 60 days **before** it expires and 30 days **after** it expires):

1. Go to the **Organization Search** page.
2. In the dropdown menu under **Actions**, select **Renew**. Enter the agreement number of the agreement you want to extend and select the option to extend the existing agreement.

The screenshot shows the 'Organization Search' page with the 'Actions' dropdown menu set to 'Renew'. The 'Agreement Number' field contains '59504744'. Below this, there are fields for 'Organization Name', 'City', 'Locale', 'State/Province', and 'Public Customer Number (PCN)'. A 'Start' button is at the bottom left. A modal window is open on the right, titled 'The following agreement is currently eligible for a renewal.' It displays the following details:

Organization Name:	Annie's Orphanage of the US
Agreement Number:	59504744
Program:	Enterprise 6
Start Date:	10/1/2019
End Date:	11/30/2022

At the bottom of the modal, there are two radio button options: 'Renew into a new agreement' (which is selected) and 'Extend existing agreement'. 'Cancel' and 'Continue' buttons are at the bottom right of the modal.



- Verify that the information on the organization is correct and then select **Add Program**.

To begin creating a contract package...

**Actions**  
 Renew  
 Agreement Number: 6488667

Enter the organization for which you wish to view, manage, or create a contract package.

Organization Name  
 City  
 Locale: Choose...  
 State/Province  
 Public Customer Number (PCN)

Start

Is the organization listed below?  
 If so, choose the organization and click View Organization Detail to edit organization details. To create an agreement, choose the organization and click Add Program.

Organization Name	Localized Organization Name	Address	City	State	Zip
Annie's Orphanage of the U.S.	Annie's Orphanage of the U.S.	123 Main St.	Reno	NV	89521

View Organization Detail Add Program

If the organization is not listed, click Create New Organization.

Create New Organization Cancel

- Add the new program information for the renewal agreement.

Choose Program

Choose the program attributes from the drop-downs below.

You may optionally enter Reference Name and Reference Number values. This information will only be available in the eAgreements tool.

Note: Once selected, the program attributes cannot be changed for this contract package. To change the program choices for this package after choosing to create on this page, you will need to delete the package and start a new package.

Reference Name Reference Number

Program Program Type Version Partner Type Agreement Language

Choose... Choose... Choose... Choose... Choose...

Next Cancel



5. The **Prepare for Signature** dialog box opens. Select the **Adobe Simple electronic signature** button, and verify the contact listed as the electronic signatory. Provide any **CC** email addresses for people that you want to receive the notification.

**Prepare for Signature**

Your contract package is now ready to be sent for processing.

Choose one of the following signature options:

Adobe Electronic (Simple) Signature     Adobe Digital/Qualified Signature

This is the most commonly accepted electronic signature solution, facilitated via Adobe Sign. This is also known as a standard signature. Unless the customer has a requirement to sign with a digital or qualified certificate, select this option. If you are unsure of which option to choose, select this option.

Electronic Signatory  
Pujari, Maneesha (manpujari@microsoft.com) [Change](#)

Optional Email Recipients

The Signatory Contact will be sent an email notification requesting signature upon submission. If you would like other individuals to be notified, please enter one or more email addresses for individuals to be included on the CC or BCC lines of the email to the Signatory Contact. If entering multiple email address, please separate each one with a semi-colon (;).

CC annen@microsoft.com

*Sending this contract package electronically for signature confirms that the information is correct.*       

6. VLCM will submit the package for processing. When the submission process is complete, a confirmation dialog box appears. Select **OK**. Take note that for Limited Risk Distributor (LRD) countries, the subsidiary signature will be automatically applied from this point of the process.

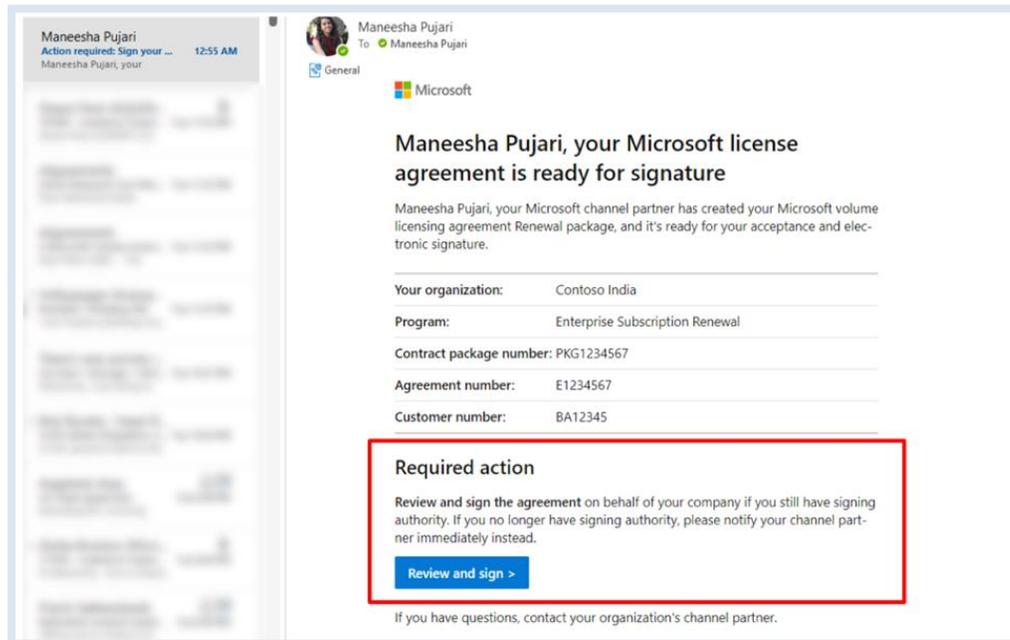
Your contract package was successfully sent for processing.

You will receive an email confirmation shortly, which will include the contract package number for your reference.

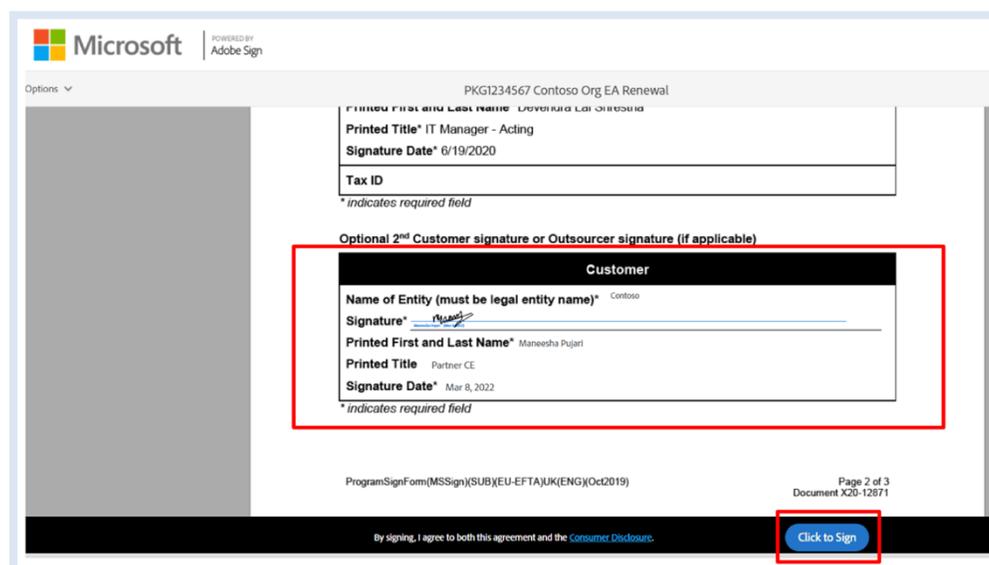


## Customer steps

1. Once your customer receives the notification to sign the package electronically, they should select **Review and sign**.

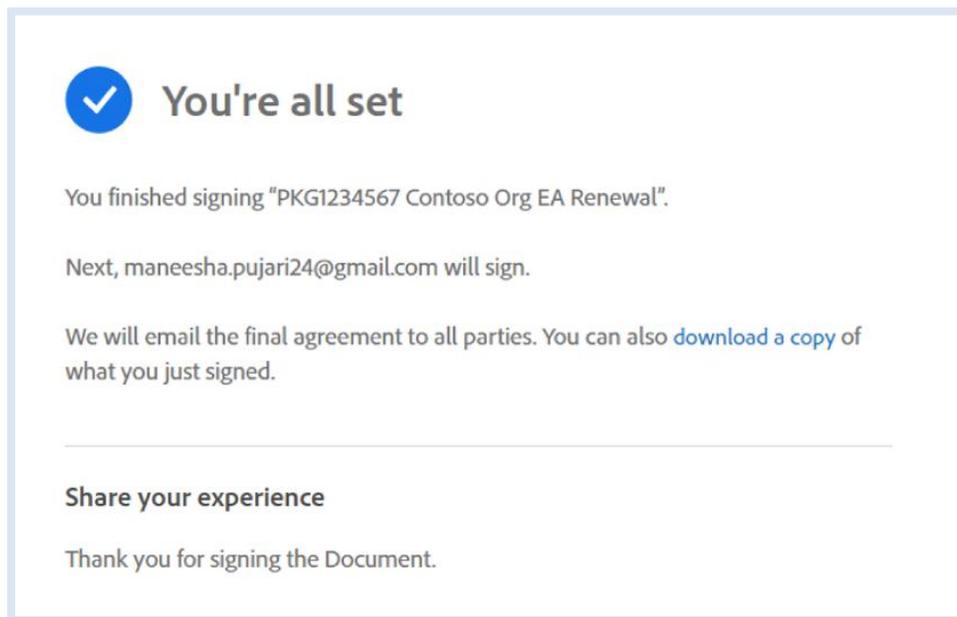


2. This will take them to the Adobe Sign portal, where they will sign on the signature placeholders, namely the **Signature** and **Printed Title** fields. The **Printed Name** and **Signature Date** fields are automatically populated.





3. The customer should select **Click to Sign** to complete the process.
4. After signing, your customer will receive an on-screen confirmation of signing completion.



## Next steps

To finish renewing an agreement, follow the rest of the steps listed in the top section of this guide:

- [Choose organizations](#)
- [Choose contacts](#)
- [Provide additional information](#)
- [Choose media](#)
- [Preview/upload and prepare for signature](#)
- [Prepare for signature](#)
- [Electronic signature](#)
- [Physical signature](#)
- [Withdraw a submission](#)
- [Resend the email notification](#)



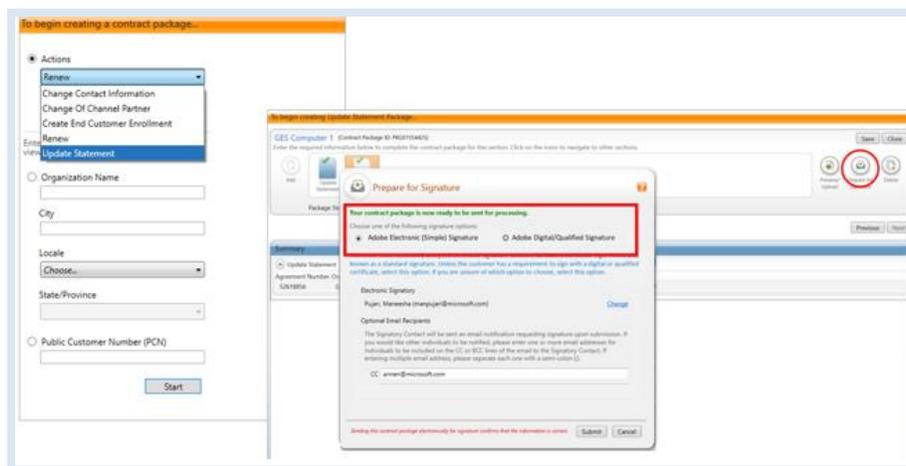
## Creating an Update Statement

Partners can submit an update statement (zero usage) using the simple electronic signature through Adobe Sign.

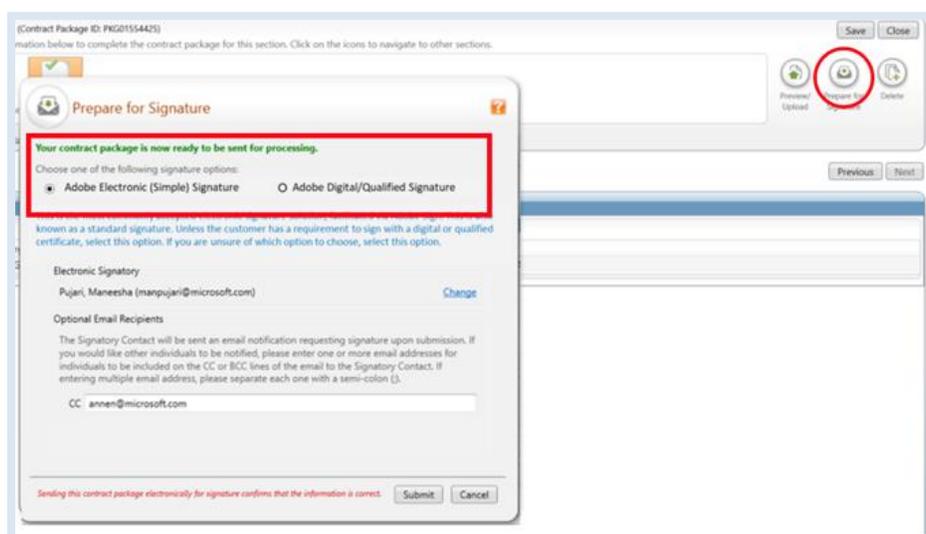
### Partner steps

Partners can create the update statement using simple electronic signature through Adobe Sign.

1. Go to the **Organization Search** page. In the dropdown menu under **Actions**, select **Update Statement**.



2. Select **Prepare for Signature** and then select the signature type.





## Customer steps

1. Once your customer receives the notification to sign the package electronically, they should select **Review and sign**.

Microsoft

### Maneesha Pujari, your Microsoft license agreement is ready for signature

Maneesha Pujari, your Microsoft channel partner has created your Microsoft volume licensing agreement Renewal package, and it's ready for your acceptance and electronic signature.

Your organization: Contoso India

Program: Update Statement

Contract package number: PKG1234567

Agreement number: E1234567

Customer number: BA12345

#### Required action

Review and sign the agreement on behalf of your company if you still have signing authority. If you no longer have signing authority, please notify your channel partner immediately instead.

[Review and sign >](#)

If you have questions, contact your organization's channel partner.

2. Then they should follow the Adobe Sign prompts to sign the Enterprise Update Statement document.

Microsoft | Powered by Adobe Acrobat Sign

Update Statement PKG1234567

There has been no increase in required license quantities as described above.

In checking this box, entity confirms that under the above referenced Enrollment, there has been no increase in the number of required Licenses not already ordered in a prior placed True Up Orders. Entity understands that it is the responsibility of the entity to ensure that all licenses installed are used according to the Enterprise Agreement and Enrollment referenced above.

Select applicable year for this Update statement: 1

**Customer/Government Partner (as applicable)**

<b>Name of Entity*</b>	GES Computer 1
<b>Signature*</b>	<small>* Indicates required fields</small>
<b>Printed Name*</b>	Maneesha Pujari
<b>Printed Title*</b>	<small>* Enter your job title</small>
<b>Signature Date*</b>	Jul 20, 2022

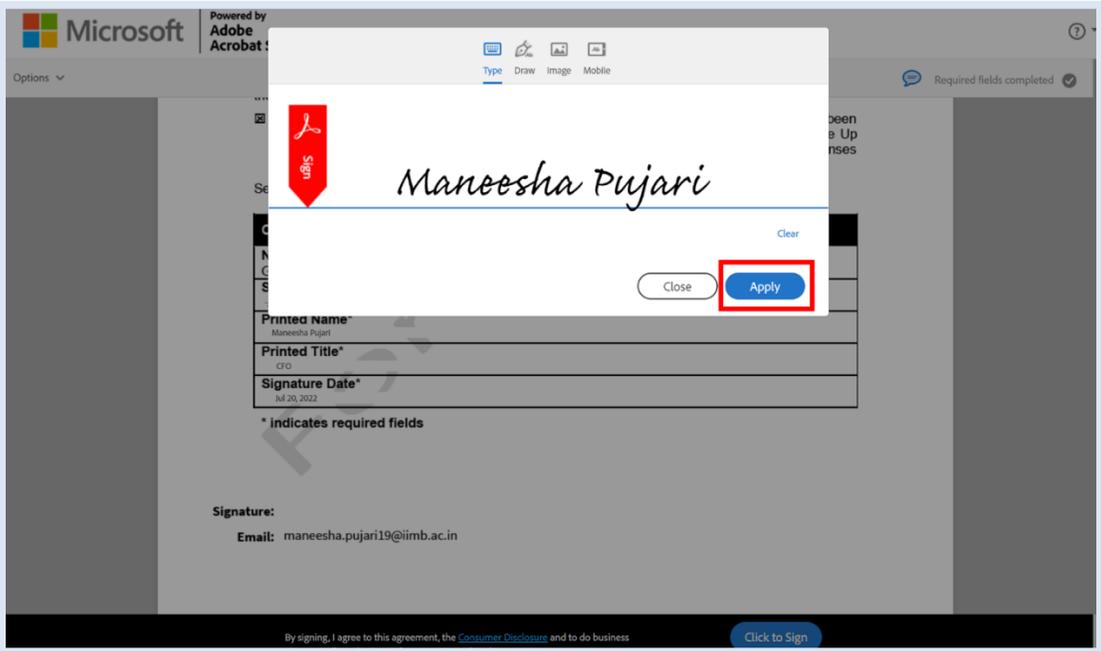
\* indicates required fields

Signature:

Email: maneesha.pujari19@iimb.ac.in



- 3. The customer should enter their name to electronically sign. Once they sign, they select **Apply**.





# Rejecting an agreement (customer steps)

Customer signers also can reject their agreement (contract package).

1. To reject their contract package, on the Adobe portal, the customer can select the **Decline to sign** option.

Options ▾

- Read agreement
- Decline to sign**
- Print, sign and upload
- Clear document data
- View history
- Download PDF

\*Annie's Orphanage Enterprise Agreement 59504744 (May 2020)(CR)

Microsoft Volume Licensing

**Program Signature Form**  
For use with agreements associated with a Purchase Agreement

MBA/MBSA number [RD28] [RD6]

Agreement number [RD29]

**Note:** Enter the applicable active numbers associated with the documents below. Microsoft requires the associated active number be indicated here, or listed below as new.

For the purposes of this form, "Customer" can mean the signing entity, Enrolled Affiliate, Government Partner, Institution, or other party entering into a volume licensing program agreement.

This signature form sets out the documents entered into under this signature form and together along with the terms and conditions contained therein are part of the contract(s) identified above. This program signature form and all attachments identified are entered into between the Customer and the relevant Microsoft Affiliate signing on of the effective date identified below.

2. They will then be prompted to add the reason for declining the package—this is a mandatory step. Once they type in their reason, they can select **Decline** to complete the process.

**Decline this agreement**

Please provide a reason for declining this agreement.

Please type your reason for declining

Cancel Decline



# Create an SPLA

SPLA is for service providers and independent software vendors (ISVs) who want to license the latest eligible Microsoft software products to provide software services and hosted applications to end customers.

With the SPLA, service providers and ISVs can license eligible Microsoft products on a monthly basis, during a three-year agreement term, to host software services and applications for their customers. The SPLA supports a variety of hosting scenarios to help you provide highly customized and robust solutions to a wide set of customers.

## Sign into eAgreements

Microsoft partners sign in to the eAgreements application using their WSA or MSA, depending on their role.

Signing in will take you to the **Organization Search** screen, which is the start screen in eAgreements.

The screenshot displays the eAgreements application interface. The top navigation bar includes a search box for the Agreement Number and a 'Support Resources' section with links to a tutorial, help, and support. Below this is a 'Contract Packages' section showing a table of current in-progress document packages. The main area is titled 'to begin creating a contract package...' and contains a form for selecting an organization. The form includes a dropdown for 'Actions' (set to 'Renew'), an 'Agreement Number' field, and radio buttons for 'Organization Name' and 'Public Customer Number (PCN)'. The 'Organization Name' section has fields for Organization Name, City, and Locale (set to 'Choose...'). The 'Public Customer Number (PCN)' section has a corresponding field. A 'Start' button is located at the bottom of the form. An 'Errors' section at the bottom of the page indicates 'There are no errors.'

Contract ID	Actions	Organization Name
PKG00946782	<a href="#">View</a>	Contoso France Ltd
PKG06837245	<a href="#">View</a>	test
PKG00626832	<a href="#">View</a>	Contoso France Ltd
	<a href="#">View</a>	



1. To find an existing customer, do one of the following:
  - Complete the fields for **Organization Name**, **City**, **Locale**, and **State/Province** (U.S. and Canada only).
  - Enter your customer's Public Customer Number (PCN).
2. Select **Start**.

The results of the search will appear in a table in the right pane, listed under **Organization Name**.

The screenshot shows a web interface for creating a contract package. On the left, there are search filters: 'Organization Name\*' with a dropdown menu, 'City\*' with a text input (Seattle), 'Locale\*' with a dropdown menu (United States), 'State/Province' with a dropdown menu (Choose...), and 'Public Customer Number (PCN)' with a text input. A 'Start' button is at the bottom left. On the right, a table titled 'Is the organization listed below?' is displayed. The table has two columns: 'Organization Name' and 'Localized Organization Name'. The table contains several rows of organization names. Below the table are buttons for 'View Organization Detail' and 'Add Program'. At the bottom of the right pane, there is a section for 'If the organization is not listed, click Create New Organization.' with buttons for 'Create New Organization' and 'Cancel'.

If the customer you're looking for is on the results list, select the customer's name and then select **Add Program**.

## Complete the SPLA agreement

After the partner selects a customer and the SPLA agreement type, the partner must complete the contract package.



## Choose program

The **Choose Program** page opens.

1. Enter a **Reference Name** and **Reference Number** of your choice (optional).

The **Reference Name** and **Reference Number** are identifiers used as eAgreements tracking reference numbers for the partner. Partners can use these numbers to search for an Agreement Package within eAgreements.

### Choose Program

Choose the program attributes from the drop-downs below.

You may optionally enter Reference Name and Reference Number values. This information will only be available in the eAgreements tool.

Note: Once selected, the program attributes cannot be changed for this contract package. To change the program choices for this package after choosing to create on this page, you will need to delete the package and start a new package.

Reference Name	Reference Number				
<input type="text"/>	<input type="text"/>				
Program	Program Type	Version	Partner Type	Agreement Language	
SPLA	ASP	20171	Single Tier	English	

Microsoft Partner Network Member ID\*

Please choose the most appropriate statement that describes what you want to do.

I would like to create a Master Agreement and an Enrollment under an existing MBSA.

I would like to add an Academic Addendum to an existing Corporate Agreement.

I would like to create a new contract (MBSA, Master, and Enrollment).

Next Cancel

2. Under **Program**, choose **SPLA** for your customer.
3. Select the **Program Type**. To create a new contract for this organization, select **Create a new contract** from the dropdown list under **Program Type**.

Selecting the **Program Type** automatically populates the **Partner Type** and **Agreement Language** fields. If you are in a country with more than one partner type for a program must choose these fields.

4. Select the required **Version** of this agreement program.



5. Verify the **Partner Type**.
7. Verify the Agreement Language.
8. When you select an SPLA program, you must provide your customer's valid **Microsoft Partner Network (MPN) member ID**.

If you provide an invalid MPN ID, an error message appears. You will not be able to continue the contract creation process until you provide a valid MPN ID.

You must now select the appropriate contract package. Based on the requirements of the agreement, you may choose between three options:

- Create a master agreement and an enrollment under an existing Microsoft Business and Services Agreement (MBSA): you must provide a valid MBSA number
  - Add an academic addendum to an existing corporate agreement: you must provide a valid SPLA corporate enrollment number
  - Create a new contract (MBSA, Agreement, and Enrollment)
9. Select **Next**.

## Prior agreements

The first step in creating an agreement is to designate whether this agreement is part of a Software Assurance renewal. See the [previous instructions for Prior Agreements](#).



## Choose organizations

1. On the navigation menu, select **Choose Organizations**.
2. If your partner organization is not in the table that appears, select the **Search/New** button to search for the organization or enter a new organization.

Enter the required information below to complete the contract package for this section. Click on the icons to navigate to other sections.

Package Status: Draft      Microsoft Sales Affiliate: Subsidiary

**Choose Organizations**

Participant	Organization	Address		
MS Business Agreement - Customer *			Search/New...	Edit...
Master Agreement - Customer *			Search/New...	Edit...
Standard Enrollment - Customer *			Search/New...	Edit...
Standard Enrollment - Software Advisor *			Search/New...	Edit...

**Define Customer/Enrolled Affiliate's Enterprise**

Please choose the statement below that appropriately defines your Customer/Enrolled Affiliate's Enterprise for this agreement.\*

Customer/Enrolled Affiliate Only  
 Customer/Enrolled Affiliate and all Affiliates  
 Customer/Enrolled Affiliate and the following Affiliate(s)  
 Customer/Enrolled Affiliate and all Affiliates, with the following Affiliate(s) excluded

Please indicate whether the Customer/Enrolled Affiliate's Enterprise will include all new Affiliates acquired after the start of this Agreement: Exclude future Affiliates ▾

3. In the Search for organization dialog box, type the partner **Organization Name** or **Public Customer Name (PCN)**, and then select **Search**.
4. Choose the appropriate partner organization when it appears, and then **Select**.

**Search for organization**

Enter the organization for which you wish to view, manage, or create a contract package.

Organization Name\*  
 Public Customer Number (PCN)

Search

Organization Name	Localized Organization Name	Address
-------------------	-----------------------------	---------

Create New Organization...    Cancel    **Select**



- The **Choose Organizations** window opens, and the partner organization appears after **Standard Enrollment Reseller**.
  - To alter these items, select **Edit**.
  - To replace these items, select **Search/New**.
- Select the appropriate option under Define Customer/Enrolled Affiliate's Enterprise.

**Define Customer/Enrolled Affiliate's Enterprise**

Please choose the statement below that appropriately defines your Customer/Enrolled Affiliate's Enterprise for this agreement.\*

Customer/Enrolled Affiliate Only

Customer/Enrolled Affiliate and all Affiliates

Customer/Enrolled Affiliate and the following Affiliate(s)

Customer/Enrolled Affiliate and all Affiliates, with the following Affiliate(s) excluded

Please indicate whether the Customer/Enrolled Affiliate's Enterprise will include all new Affiliates acquired after the start of this Agreement: \* Exclude future Affiliates ▾

Options for the customer's enterprise include:

- Customer/Enrolled Affiliate Only
- Customer/Enrolled Affiliate and all Affiliates
- **Customer/Enrolled Affiliate and the following Affiliate(s):** If you select this, you will be asked to choose each affiliate to include.
- Customer/Enrolled Affiliate and all Affiliate(s), with the following Affiliates excluded: If you select this, you will be asked to choose each affiliate to exclude.

An affiliate is a company whose parent company owns more than 50 percent of the company. In the **Manage Affiliates** table, the first two options either include or exclude affiliates based on their current and future status. The third option allows you to include the customer and only the affiliates you want to include in this agreement.

**NOTE:** If your customer's organization has acquired any new affiliates since the start of their agreement, you should determine whether to include them.



## Choose contacts

Assign **Participant Roles** as **Agreement Contacts** in the **Choose Contacts** window.

1. On the navigation menu, select **Choose Contacts**.
2. To view the available contacts for an organization, select the applicable organization from the **Organization** dropdown list. To choose the appropriate contacts within the organization, use the **Contact** dropdown list.

3. Select one or more roles in the **Available Participant Roles** box.

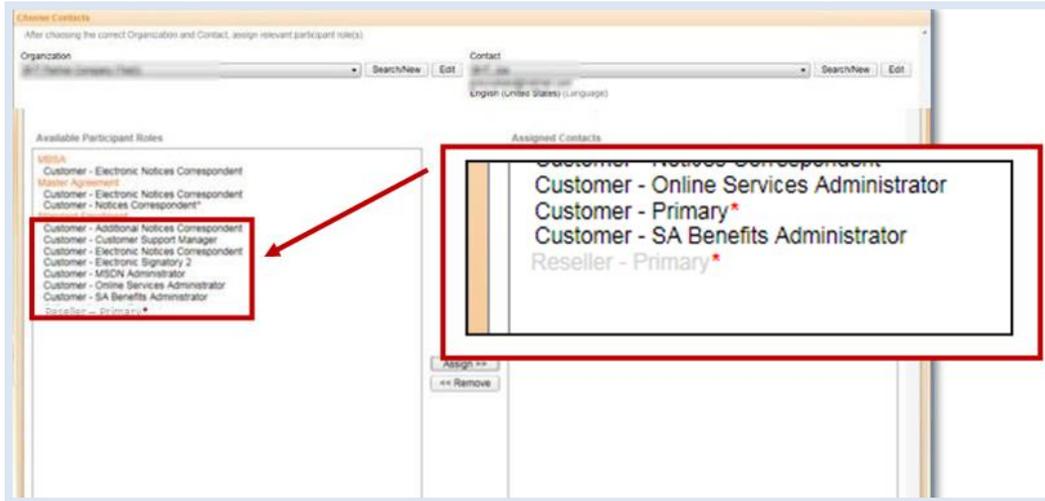
**NOTE:** A red asterisk indicates a required contact role is assigned to a contract in the **AvailableParticipant Roles** field.

4. To move **Participant Roles** to the **Assigned Contacts** field, select **Assign**. This action assigns the participant to those roles in the contract.

**NOTE:** When the customer organization is selected in the **Organization** dropdown list, the Reseller **Primary Contact** and Distributor **Primary Contact** roles are grayed out in the **Available Participant Roles** box, so you cannot attach them to the customer contact.

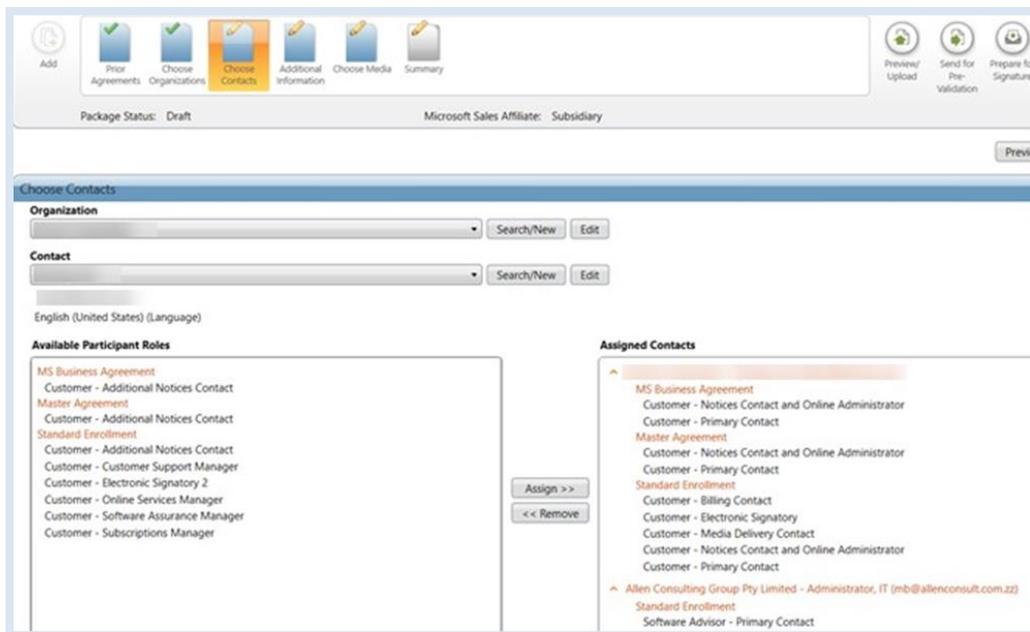


5. Verify that the **Reseller - Primary** contact is listed in the **Available Participant Roles** field.



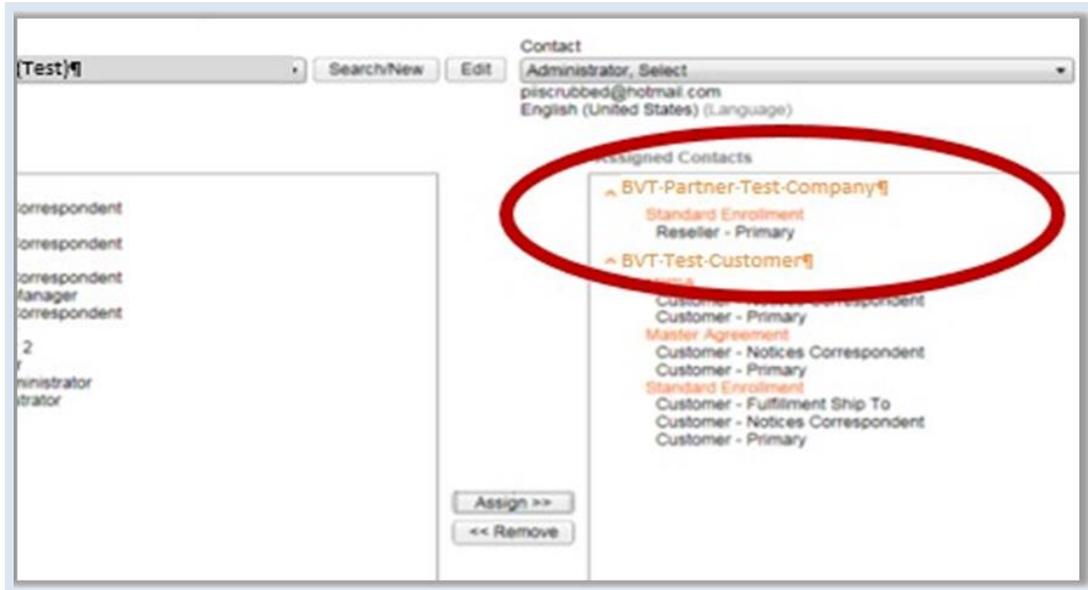
6. In the **Organization** dropdown list, select the appropriate partner organization to make the organization active in the **Choose Contacts** section.

You can also select **Search/New** to search for a different organization.





7. Select the **Reseller Primary** listing from the **Available Participant Roles** field and select **Assign**. The **Reseller Primary** listing moves to the **Assigned Contacts** field.



## Verify assigned roles (remove a role)

Before moving on to complete the **Additional Information** section, verify all the assigned roles. Additionally, confirm that the **Contact** field shows the required contact.

You might need to remove one or more of the roles or choose another contact. If you must make a change, do so at this point to avoid having to return later. It's especially important to add the appropriate number of electronic signatories (one or two) if you want electronic signatures for the contract package.

To remove one or more roles, select the contact participant that you want to remove, and select **Remove**.





## Next steps

Follow the steps listed in the top section of this guide for customers with other Microsoft licensing programs. These same steps apply to customers in the SPLA program:

- [Provide additional information](#)
- [Choose offerings](#)
- [Choose media](#)
- [View the summary](#)
- [Preview/upload and prepare for signature](#)
- [Prepare for signature](#)
- [Electronic signature](#)
- [Physical signature](#)
- [Withdraw a submission](#)
- [Resend the email notification](#)
- [Extend an agreement](#)
- [Renew an agreement](#)
- [Accept and sign the agreement](#)

## Add an academic addendum to an SPLA agreement

A customer that has an existing, active SPLA agreement might want to provide services to academic institutions. To let academic customers receive academic pricing, Microsoft allows partners to add an academic addendum to an existing SPLA agreement.

1. Sign in to eAgreements by following the instructions for [signing in to eAgreements](#).
2. Find the appropriate existing customer by following the instructions for [finding or creating a customer](#).



## Choose program

After you select the customer, you should select the program options on the **Choose Program** page.

1. Enter a **Reference Name** and **Reference Number** of your choice (optional).

The **Reference Name** and **Reference Number** are identifiers used as eAgreements tracking reference numbers for the partner. Partners can use these numbers to search for an agreement package within eAgreements.

2. From the **Program** list, choose **SPLA**.
3. Selecting **SPLA** automatically populates the **Program Type** and **Partner Type** fields. The **Program Type** is set as **ASP**.
4. Choose the required version of the agreement program from the **Version** list. In this case, select **20171** (for the direct channel model).
5. Select the correct language for the agreement from the **Agreement Language** list.

### Choose Program

Choose the program attributes from the drop-downs below.

You may optionally enter Reference Name and Reference Number values. This information will only be available in the eAgreements tool.

Note: Once selected, the program attributes cannot be changed for this contract package. To change the program choices for this package after choosing to create on this page, you will need to delete the package and start a new package.

Reference Name	Reference Number				
<input type="text"/>	<input type="text"/>				

Program	Program Type	Version	Partner Type	Agreement Language
<input type="text" value="SPLA"/>	<input type="text" value="ASP"/>	<input type="text" value="20171"/>	<input type="text" value="Single Tier"/>	<input type="text" value="English"/>

Microsoft Partner Network Member ID\*

Please choose the most appropriate statement that describes what you want to do.

I would like to create a Master Agreement and an Enrollment under an existing MBSA.

I would like to add an Academic Addendum to an existing Corporate Agreement.

I would like to create a new contract (MBSA, Master, and Enrollment).



- When you select an SPLA program, you must provide your customer's valid **Microsoft Partner Network (MPN) Member ID**. If you provide an invalid MPN ID, an error message appears.
- Select **I would like to add an Academic Addendum to an existing Corporate Agreement**.
- Provide a valid SPLA corporate enrollment number. If the SPLA corporate enrollment number is invalid, an error message appears.
- Select **Next**. The **Academic Enrollment** page appears.

**NOTE:** An existing corporate enrollment populates the organization details for an academic enrollment. The end date of the academic enrollment matches the end date of the corporate SPLA agreement.

## Verify or choose signatories

On the **Academic Enrollment** page, you can keep or edit existing customer signatories. You can also add new electronic signatories.

The screenshot shows the 'Academic Enrollment' page within a contract package creation interface. The page title is 'Academic Enrollment' and it displays the following information:

- Organization Name: **ATI Automation Testing Systems Inc.**
- SPLA Corporate Enrollment Number: **00000001**
- SPLA Academic Enrollment Number: **00000001**
- Program: **SPLA**
- End Date: **6/30/2013**

Below the enrollment details, there are two sections for electronic signatories:

- Electronic Signatory 1:** **James Kim** (dropdown menu), with **New** and **Edit** buttons.
- Electronic Signatory 2:** **Choose...** (dropdown menu), with **New** and **Edit** buttons.



## Next steps

Follow the previous steps for customers with other types of licensing programs. These same steps apply to SPLA customers with an academic addendum:

- [Provide Additional Information](#)
- [View the Summary](#)

## Preview the addendum

The system creates an SPLA (Indirect) Qualified Educational End User (QEEU) addendum and a Program Signature Form. You can preview the academic addendum before submitting it for signing.

1. On the navigation menu, select **Preview/Upload**.

For SPLA Academic Enrollment, academic pricing is the default and only pricing option.

To begin creating a contract package...

Microsoft | To Microsoft | My Agreements | My Organizations

Enter the required information below to create a contract package.

**Preview/Upload Documents**

**Upload Documents**

Use this feature to attach additional documents to this contract package. Check the "Visible to Customer" box if this file should be shown to the customer, otherwise leave it unchecked.

Type\*    
 Title\*    
 Location\*     
 Visible to Customer

**Draft Package Documents**

View or print a draft version of the following documents in your contract package.

Document Name	Document Number
Microsoft Business and Services Agreement	1000-1000
Services Provider License Agreement (Indirect)	1000-1000
Signature Form	1000-1000
End User License Terms	1000-1000

**Uploaded Documents**

Document Name	Viewable to Customer	Include in Signature Form	Virus Scan



2. To find a document to attach, select **Browse**.
3. In the **Select file to upload** dialog box, select **Open**.
4. Select **Upload**, and then select **OK**. The file will attach once the virus scan is complete.

## Submit the addendum for signing

Now you're ready to prepare the academic addendum contract package for signing and choose how your customer will sign.

Once you successfully submit the academic addendum package to your customer, they can sign it either electronically or physically (on paper). Follow the steps in these sections:

- [Prepare for signature](#)
- [Electronic signature](#)
- [Physical signature](#)

After you submit the academic addendum contract package to your customer for signing, you have the option to withdraw the submission or resend the electronic signature email notification to your customer:

- [Withdraw a submission](#)
- [Resend the email notification](#)

## Renew an SPLA enrollment

You can sign a new SPLA before your existing SPLA expires or up to 90 calendar days after the SPLA has expired.

1. Sign in to eAgreements by following the [previous instructions](#).
2. After you sign in to eAgreements, a four-pane screen appears. In the **To begin creating a contract package** pane, type the existing SPLA agreement number in the **Renew Agreement** box, and select **Start**.



eAgreements New Tab...

Agreement Number

---

**Support Resources**

eAgreements allows you to view and create your current in-progress agreements. What would you like to do?

- [View a Tutorial](#)
- [Get Help Getting Started](#)
- [Contact Support](#)

**Links**

- [Explore.ms](#)
- [LicenseWise](#)
- [Partner Portal](#)
- [Word Viewer](#)

---

**Contract Packages**

Your current in-progress document packages

No Packages Found.

---

**Errors**

There are no errors.

---

**To begin creating a contract package...**

Renew Agreement

Enter the organization for which you wish to view, manage, or create a contract package.

**Organization Name\***

**City\***

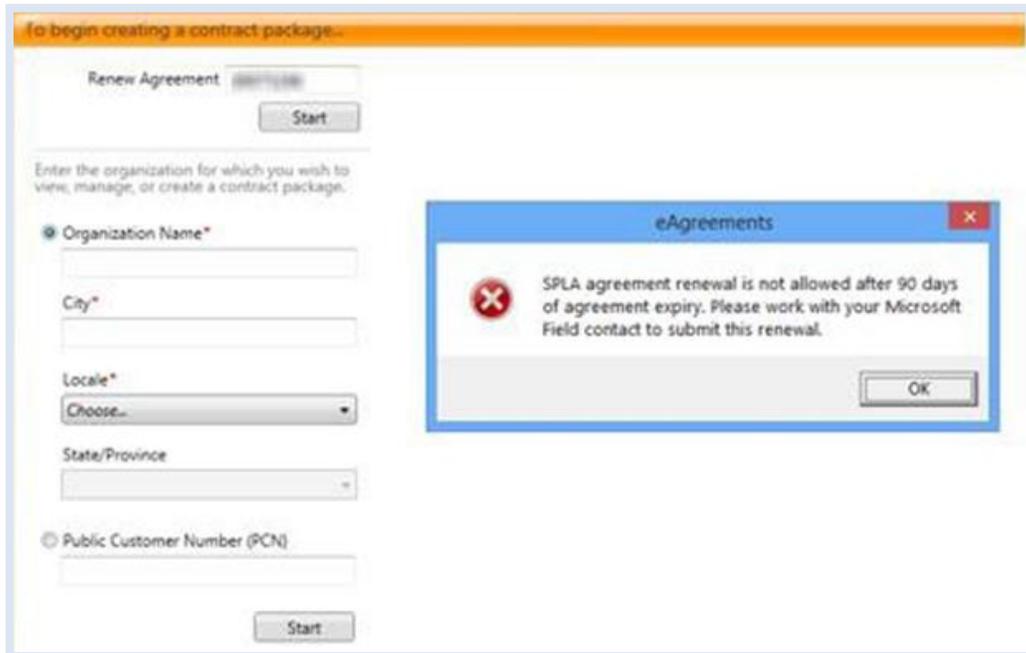
**Locale\***

**State/Province**

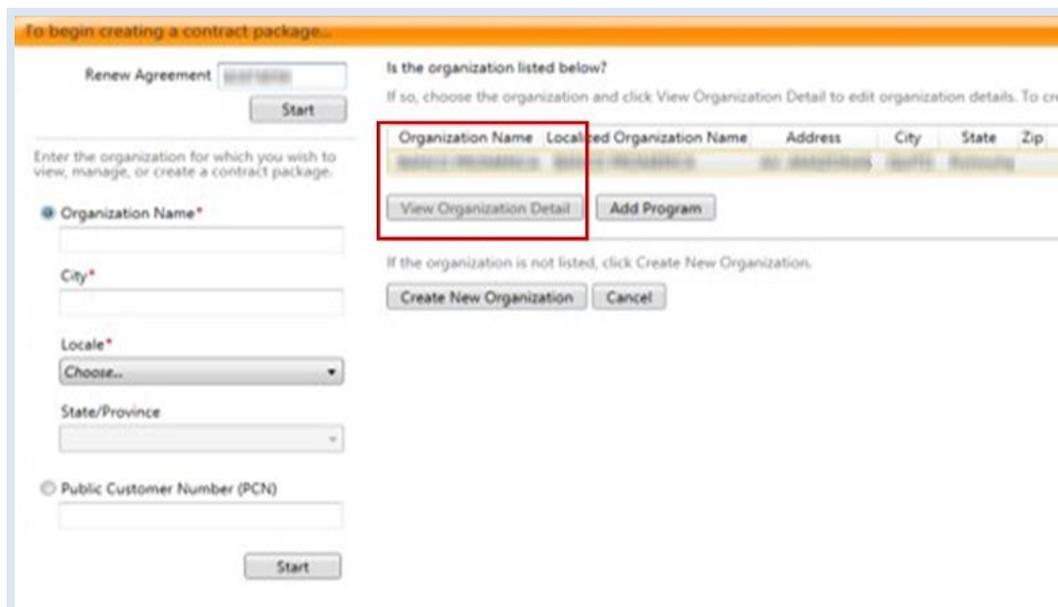
**Public Customer Number (PCN)**



- If the agreement exists and is eligible for renewal, the organization's details appear in the results pane on the right. If the agreement isn't eligible for renewal, an error message appears that explains why you can't renew the agreement.



- To start the renewal process, select the organization name and select **View Organization Detail**. If you can't find the organization you are looking for, you can select **Create New Organization**.





- When the organization's details dialog box appears, **Renew into a new agreement** is the default. Select **Continue**.

The **Prior Agreements** pane appears with the agreement you selected in the **Selected Prior Agreements** table.

Click to Remove	Agreement Number	Program	Agreement Type	End Date	Transfer SAB	Transfer MSDN
Remove	[redacted]	SPLA	Standard Enrollment	6/30/2013	<input type="checkbox"/>	<input type="checkbox"/>

**NOTE:** You can't extend or convert an existing SPLA agreement using the eAgreements tool. You can only renew to a new SPLA agreement.





# Open Value

Open Value is the recommended program if you have a small to midsize organization with five or more desktop PCs and want to simplify license management, manage software costs, and get better control over your investment.

Open Value customers receive Software Assurance, which provides access to valuable benefits such as training, deployment planning, software upgrades, and product support, helping you boost the productivity of your entire organization.

To create a new sales package or renew an existing package for customers with an Open Value agreement, follow the previous steps, starting with [Create an agreement](#).



# Open Value Subscription

Open Value Subscription provides the lowest upfront costs of the Open program options, with the flexibility to reduce the total licensing costs in years when the desktop PC count declines. This option gives your organization the right to run the software throughout your organization only during the term of the agreement with Microsoft. You can also add the single platform option to an Open Value Subscription agreement.

To create a new sales package or renew an existing package for customers with an Open Value Subscription, follow the previous steps, starting with [Create an agreement](#).



# Enterprise Agreement

Microsoft created Enterprise Agreement (EA) to allow customers with centralized purchasing to standardize their entire organization on Microsoft technology. Under the EA program, these customers can maintain an information technology infrastructure on a standard Microsoft software platform.

To create a new sales package or renew an existing package for customers with an Enterprise Agreement, follow the previous steps, starting with [Create an agreement](#).

**NOTE:** You must enter the **partner's** purchase order number on the **Additional Information** page when creating an agreement package for customers with an indirect Enterprise Agreement. The **Customer Purchase Order** number is optional.

Sections	Partner Purchase Order *	Customer Purchase Order	
Section1			Remove
Section2			Remove

Add Section

Customers can either add or modify PO numbers for direct EAs at the time of signing the Customer Price Sheet (CPS).

Partners can add the PO numbers for indirect EAs at the time of signing the Channel Price Sheet (CPS).



# Enterprise SCE

Enterprise SCE simplifies the licensing process by providing a single enrollment for all Microsoft Enterprise products. Enterprise customers can choose among Microsoft's suites of application, system, and infrastructure products, and use only SCE to license them all. SCE also allows customers to purchase perpetual and subscription licenses that they can manage on-premises or in the cloud, or both.

To create a new sales package or renew an existing package for customers with an Enterprise SCE agreement, follow the previous steps, starting with [Create an agreement](#).

On the Choose Program page, select Enterprise as the Program and Server and Cloud Enrollment as the Program Type.

### Choose Program

Choose the program attributes from the drop-downs below.

*Please note you may only choose one enrollment or affiliate registration per contract package, as appropriate.*

You may optionally enter Reference Name and Reference Number values. This information will only be available in the eAgreements tool.

Note: Once selected, the program attributes cannot be changed for this contract package. To change the program choices for this package after choosing to create on this page, you will need to delete the package and start a new package.

Reference Name	Reference Number		
<input type="text"/>	<input type="text"/>		

Program	Program Type	Version	Partner Type
<input type="text" value="Enterprise"/>	<input type="text" value="Server and Cloud Enrollment"/>	<input type="text" value="20201"/>	<input type="text" value="Direct to Customer"/>

Agreement Language

Please choose the most appropriate statement that describes what you want to do.

- I would like to create an Enrollment only.
- I would like to create a Master Agreement and an Enrollment under an existing MBSA.
- I would like to create a new contract (MBSA, Master, and Enrollment).



## Mandatory purchase order

A purchase order is mandatory under the **Enterprise** or **Enterprise Subscription** programs for both direct and indirect channel models. eAgreements will ask for the purchase order when you create an agreement package. There can be one or many purchase orders for a package.

You must provide the purchase order number when creating a contract package or changing the channel partner in eAgreements.

## Direct agreement packages

Enter the **customer's** PO for a direct agreement package on the **Additional Information** page, which we will cover in the next section. You don't have to enter the customer's PO when you create the package. However, the customer must provide a PO number before they can sign and submit their sales package.

Sections	Customer Purchase Order	
Section1		Remove
Section2		Remove

Add Section

The **Purchase Order Number** section for a direct agreement contains a field where you must enter the customer's PO number before you can send the package for customer signature.



# Select Plus agreements

Microsoft Select Plus is for large organizations with multiple affiliates that want to acquire their software licenses and services at any affiliate level, while realizing advantages as one organization.

**NOTE:** In markets where the MPSA is available, Microsoft no longer accepts new orders and Software Assurance renewals through existing commercial Select Plus agreements.

Select Plus agreements can be created for customers in countries around the world and are customized on a regional basis. They are localized in many languages and support dual entry for some locations.

To create a new sales package or renew an existing package for customers with a Select Plus agreement, follow the previous steps, starting with [Create an agreement](#).

### Choose Program

Choose the program attributes from the drop-downs below.

You may optionally enter Reference Name and Reference Number values. This information will only be available in the eAgreements tool.

Note: Once selected, the program attributes cannot be changed for this contract package. To change the program choices for this package after choosing to create on this page, you will need to delete the package and start a new package.

Reference Name	Reference Number
<input type="text" value="SP Name"/>	<input type="text" value="SP Number"/>

Program	Version	Program Type	Partner Type	Agreement Language
<input type="text" value="Select Plus"/>	<input type="text" value="2010"/>	<input type="text" value="Academic"/>	<input type="text" value="Single Tier"/>	<input type="text" value="Polish"/>

Please choose the most appropriate statement that describes what you want to do.

I would like to register an Additional Affiliate.

I would like to create a new Agreement and Affiliate registration, MBSA does not apply.



# EES

EES agreements are designed for educational customers who want to standardize their entire organization on Microsoft technology and maintain an information technology infrastructure on a standard platform of Microsoft software. The program lets educational organizations acquire licenses on a subscription basis, with non-perpetual use rights.

To create a new sales package or renew an existing package for customers with an EES agreement, follow the previous steps, starting with [Create an agreement](#).

1. On the **Choose Program** page, select **Campus** as the **Program** and **Education Solutions** as the **Program Type**.
2. Enter the **Reference Name** and **Reference Number** if you have them (optional).

### Choose Program

Choose the program attributes from the drop-downs below.

You may optionally enter Reference Name and Reference Number values. This information will only be available in the eAgreements tool.

Note: Once selected, the program attributes cannot be changed for this contract package. To change the program choices for this package after choosing to create on this page, you will need to delete the package and start a new package.

Reference Name	Reference Number			
<input type="text"/>	<input type="text"/>			

Program	Program Type	Version	Partner Type	Agreement Language
<input type="text" value="Campus"/>	<input type="text" value="Education Solutions"/>	<input type="text" value="20181"/>	<input type="text" value="Single Tier"/>	<input type="text" value="English"/>

Please choose the most appropriate statement that describes what you want to do.

I would like to create an Enrollment only.

I would like to create an Enrollment and Master, MBSA does not apply.

After you reach the section where you can [verify roles and contacts](#), follow the instructions in the next section for providing additional information and choosing offerings. These two steps differ slightly for EES agreements.



## Provide additional information

The **Additional Information** page allows you to add information to the contract package. All this information is optional unless the field is marked with an asterisk (\*).

To fill in the **Additional Information** section for an EES agreement:

1. On the navigation menu, select **Additional Information**.
2. Under **Microsoft Contact**, type a contact name if one isn't already listed. The default Microsoft contact role is **Account Manager**.
3. If you typed a Microsoft contact name, you must also provide a Microsoft contact email address in the **Microsoft Contact Email Address** field.

If you are creating an EES contract with an amendment, you must also include a **Proposal ID**.

4. After you enter the **Proposal ID**, select the **Validate** button to see if the number is valid and accepted.

**NOTE:** For Japanese contracts, you cannot validate the proposal ID until you submit the package. You'll then see the required actions before submission is allowed.



5. You can upload your amendment documents after you enter the **Proposal ID** (optional). You can also upload them any time before you submit the agreement for signing.

### Additional Information

^ National Cloud

Does this Enrolment require National Cloud T&Cs?

Yes  No

^ Microsoft Contact

Enter additional information for the document package as applicable.

Microsoft Contact Name

Microsoft Contact Role

Account Manager

Microsoft Contact Email Address

 @ 

Microsoft.com

^ Additional Reference Information

**Please enter the Proposal ID exactly as it appears**

Proposal ID

## Choose offerings

Creating an EES agreement is similar in most ways to creating agreements for other Microsoft licensing programs, but there are some differences if the user is creating an EES with a qualifying enrollment on the **Choose Offerings** page.



To choose offerings for an EES agreement:

1. Select **Choose Offerings** from the menu at the top of the page.



2. Under **Qualifying Contract**, you can opt to enter a Qualifying Contract Number. The qualifying enrollment must be for an active EES; it cannot be a master agreement.

3. Select the **Validate** button to see if the **Qualifying Contract Number** you entered is valid and accepted.

**NOTE:** The **Validate** button will be grayed out if this is an in-flight contract package.



- If the **Qualifying Contract Number** is valid, details of the contract you selected will appear under the **Validate** button. Verify these details to make sure that you selected the correct contract.

**NOTE:** If you have a qualifying enrollment, you don't need to upload an amendment because the qualifying enrollment waives program minimums.

Enter the Qualifying Contract Number

**Selected Qualifying Contract(s):**

Click to Remove	Customer Name	Local Customer Name	Agreement Number	Program	Agreement Type	End Date
<input type="button" value="Remove"/>				Campus 3	Standard Enrollment	1/31/2018

- Select the agreement duration.
- Configure **Licensing Options** by choosing the target audience (**Faculty and Staff** or **Student**) and entering the associated licensing count.
  - ▶ If you selected a standard EES enrollment as the **Program** and have a license count of more than 1,000 for faculty, staff, or students, then you **don't** need a qualifying enrollment.
  - ▶ If you **do not** have a qualifying enrollment but you **do** have an amendment to waive the minimum, upload the amendment and proposal ID.
- Configure the **Price Level** by selecting the value from the dropdown lists. The **Faculty and Staff** and **Student** price levels are only available if you selected them under **Licensing Options**.

**Licensing Options**

Faculty and Staff      Organization-wide Count

Student      Student Count

**Price Level**

Enterprise

Faculty and Staff  Student  Additional Product

Buyout



8. Select the appropriate **Education Server Platform Licensing Option**. Use this on an as-needed basis.

Education Server Platform Licensing Option			
	CAL Product Selected	Server Platform Product Selected	Server Product included for unlimited Deployment
<input checked="" type="checkbox"/>	SQL Server CALs	SQL Server Platform Academic	Unlimited Licenses for all editions of the corresponding server Products, plus all editions of BizTalk Server and associated external connectors.
<input type="checkbox"/>	Core CALs (acquired standalone or as part of a platform)	Core Server Platform Academic	Unlimited Licenses for all editions of the corresponding server Products , and associated external connectors.
<input type="checkbox"/>	Enterprise CALs (acquired standalone, as a step-up, or as part of a platform)	Enterprise Server Platform Academic	Unlimited Licenses for all editions of the corresponding server Products and external connectors , plus System Centre 2012 Datacentre and Window Rights Management Service External Connector

For the rest of the instructions for creating a sales package for educational customers with an EES agreement, follow the previous steps listed in this guide, starting with [View the Summary](#).



# Geographical differences

## eAgreements differences in Japan

**NOTE:** This section applies only to users in Japan.

In Japan, there is a key difference in what users will see in the **Additional Information** section. You must enter the PO numbers for **both** the customer and partner.

If you know both purchase order numbers, select **Yes** and then enter the PO numbers. If you don't know the PO numbers or choose not to enter them yet, a warning message will appear to alert you that the package will go on hold until you provide them.

セクション	Partner Purchase Order *	顧客の発注	
Section1			削除
Section2			削除

セクションの追加

*eAgreements users in Japan must enter both the partner and customer purchase order numbers.*

To continue creating a package without the PO numbers, you can select **No, I do not have a purchase order number**. This will allow you to keep working on the package, although you won't be allowed to send the package to the customer for signature until you provide both the customer and partner PO numbers. You can submit the package to Microsoft for pre-validation, but Microsoft can't process the order without the PO numbers in the final submitted package.



## Witnesses (Brazil only)

A witness to an agreement in eAgreements must first verify that the customer signer(s) signed the document package electronically. After this, the witness can navigate to eAgreements using the link in the email they received.

They're required to sign in with an MSA. If they don't have an account that is associated with their business email address, they will need to create one.

After signing in, the witness only needs to indicate that they have witnessed the signing of the document package, and then enter their name exactly as it appears on the customer's RG and CPF. After they select **Submit**, the contract package will be routed to the ROC for processing, signature, and activation.