eAgreements user guide

Microsoft Volume Licensing

September 2022

Contents

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

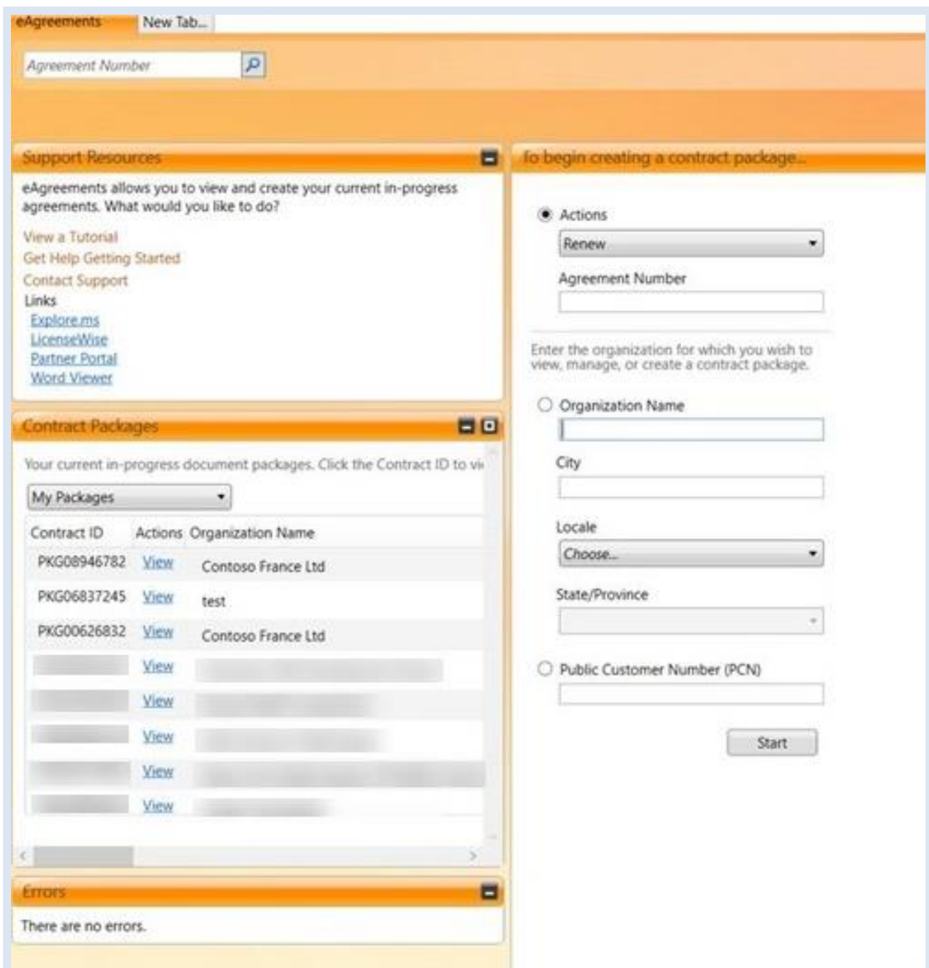
Create a new agreement

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.

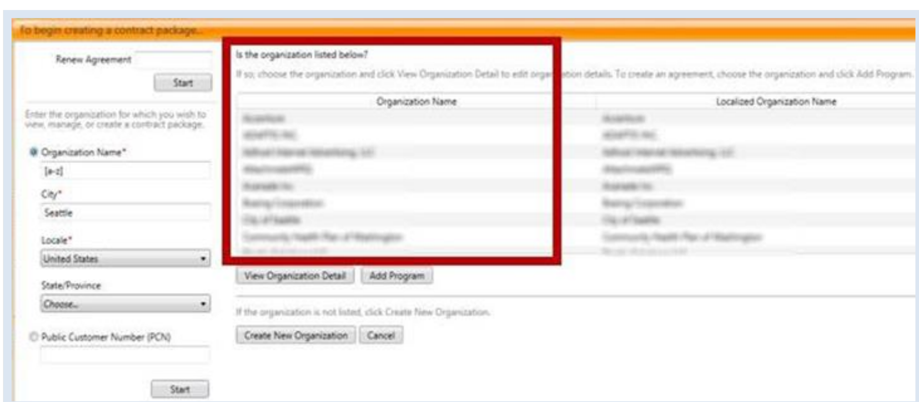


Find or create a customer

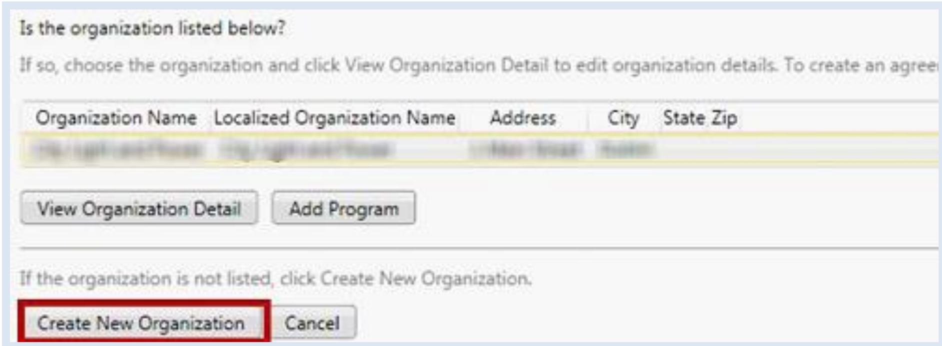
In the **To begin creating a contract package** pane, search for an existing customer or create a new one.

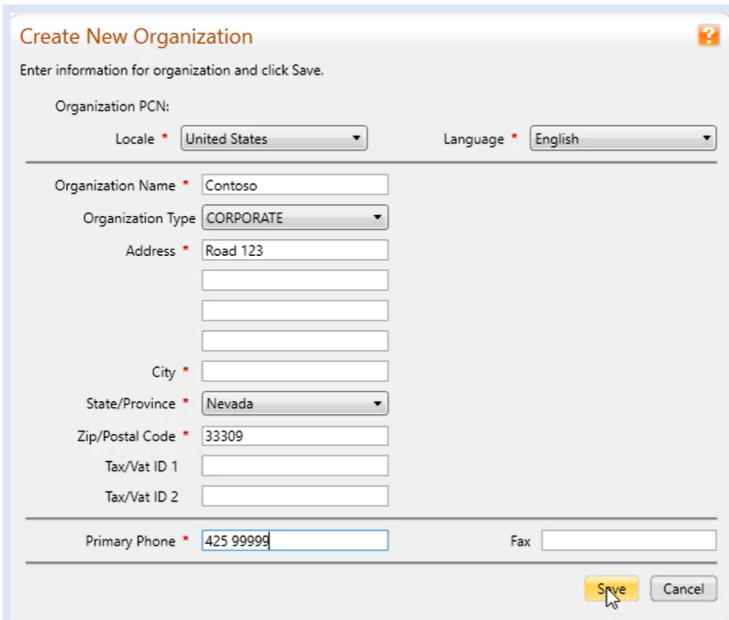
> **NOTE**: If you're renewing an existing agreement, fill in the agreement number in the field after **Renewal Agreement**. For instructions, see [Renew an agreement.](#)

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



3. 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.





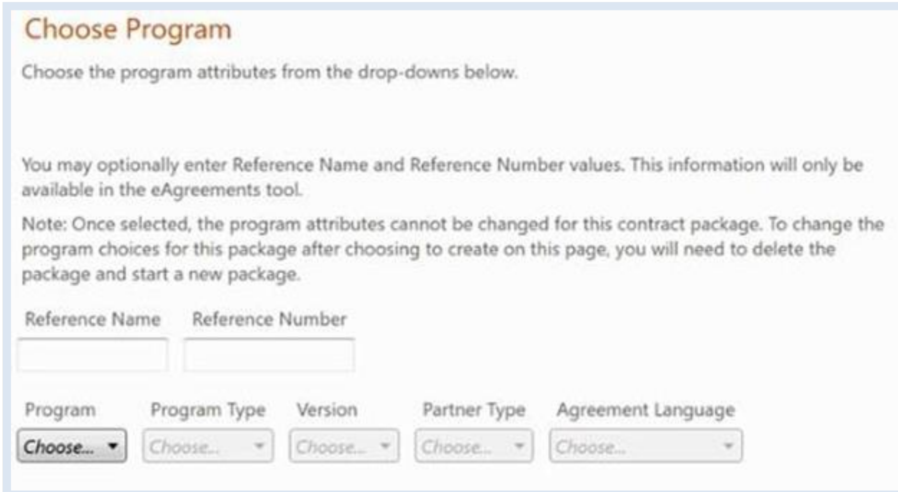
Choose Program

The **Choose Program** page opens.

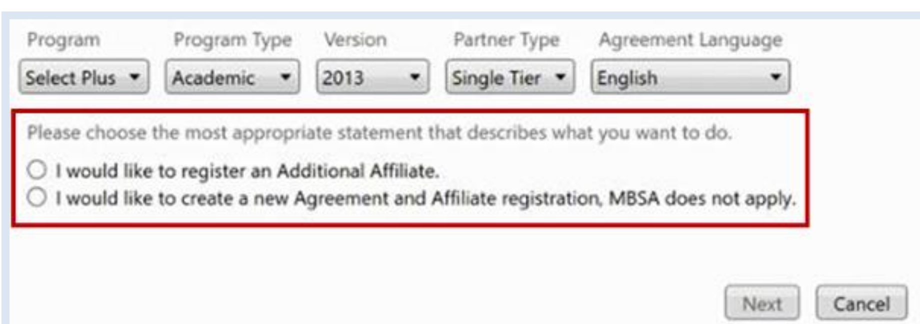
1. Enter a **Reference Name** and **Reference Number** of your choice (optional).

   - 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.

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



3. 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.
4. Select the required **Version** of this agreement program.
5. Verify the **Partner Type**.
6. Verify the **Agreement Language**.
7. Select the most appropriate statement that describes what you want to do.



> **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.

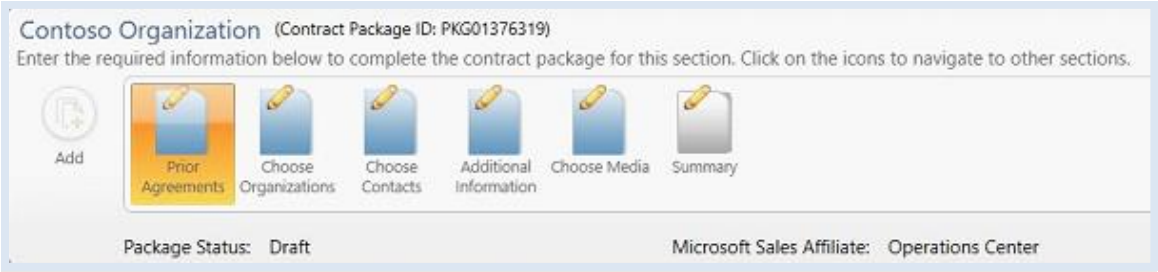
8. Select **Next**.

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:

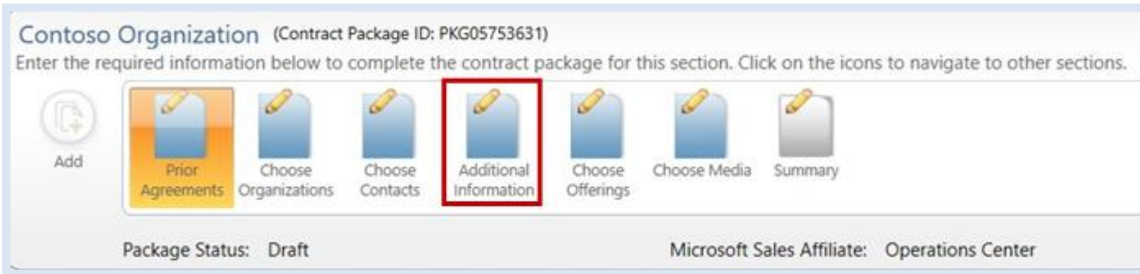
- Service Provider License Agreements (SPLA)
- Enterprise and Enterprise Subscriptions (corporate or state/local government)



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



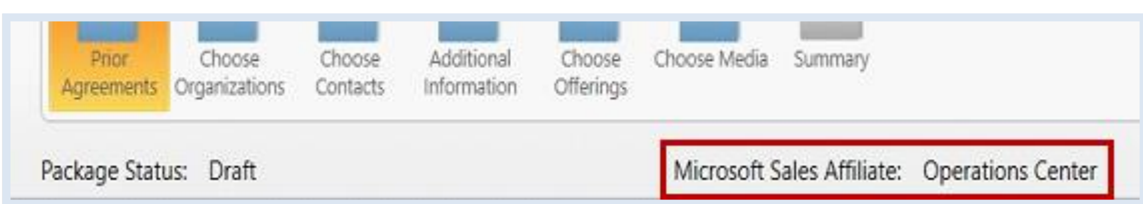
Symbols on the buttons indicate the status of each section in your package:

- 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.



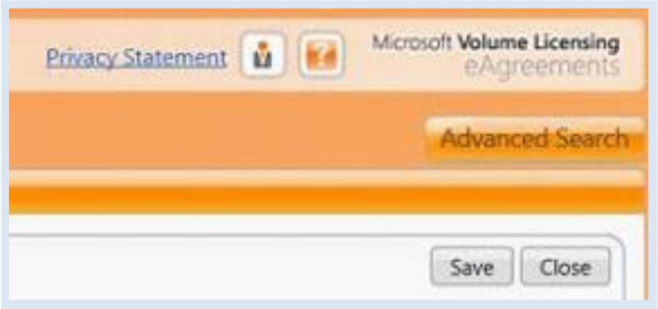
If you have any questions about this contract package, contact either the ROC or the Microsoft subsidiary for your customer's country, depending on which is listed.

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

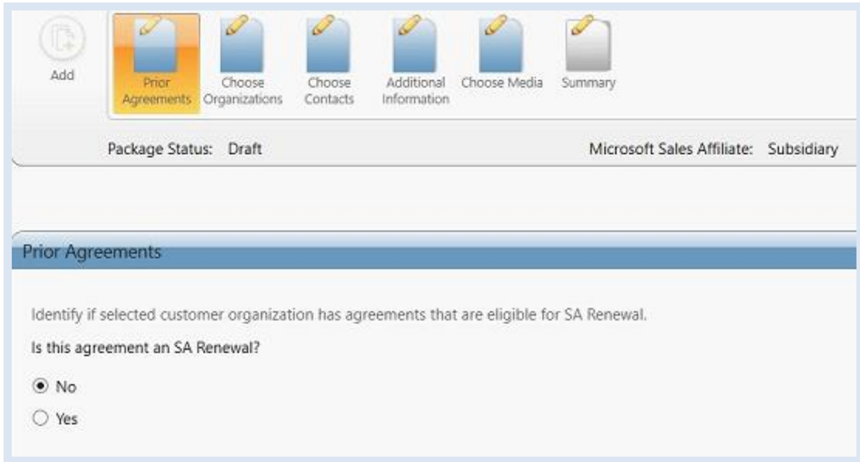
At any stage in the process of creating a contract package, you can select the **Save** button on the upper right of the menu bar to save your draft contract package. Then you can return to complete it later.



Prior agreements

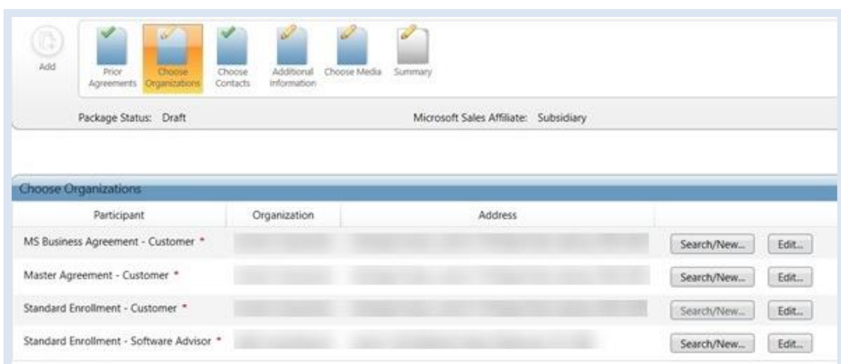
The first step in creating an agreement is to designate whether this agreement is part of a Software Assurance (SA) renewal.

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.



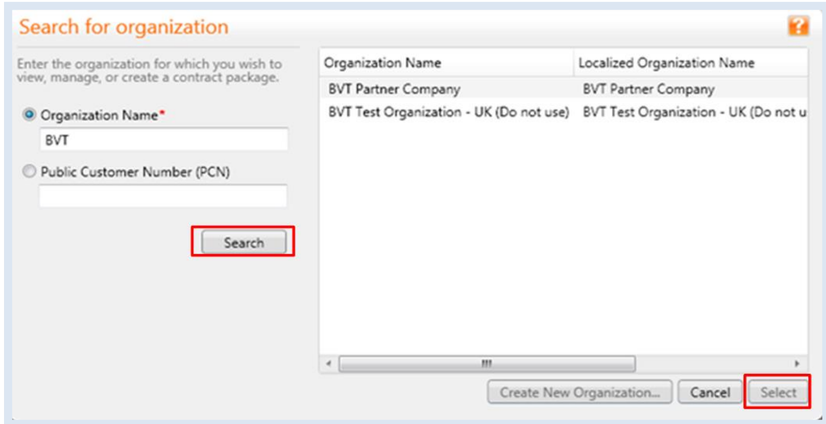
Choose organizations

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

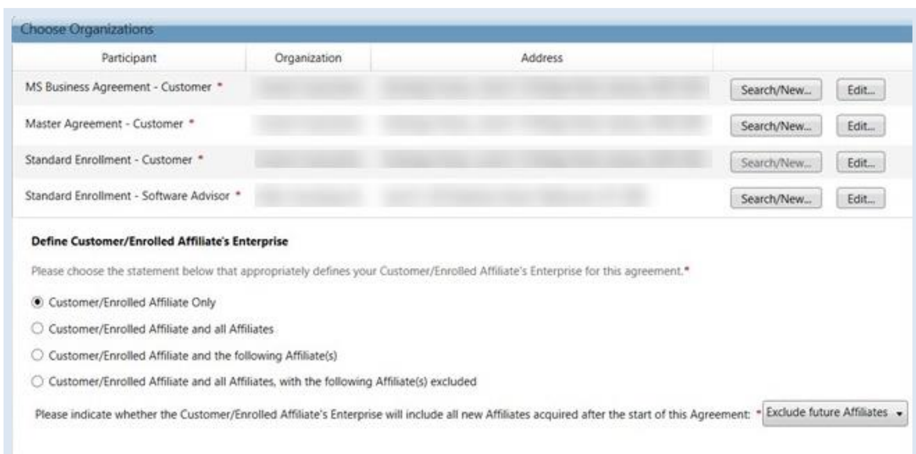


3. Enter the Software Advisor's or Distributor's **Organization Name** or **Public Customer Number**.
4. Select **Search**.

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

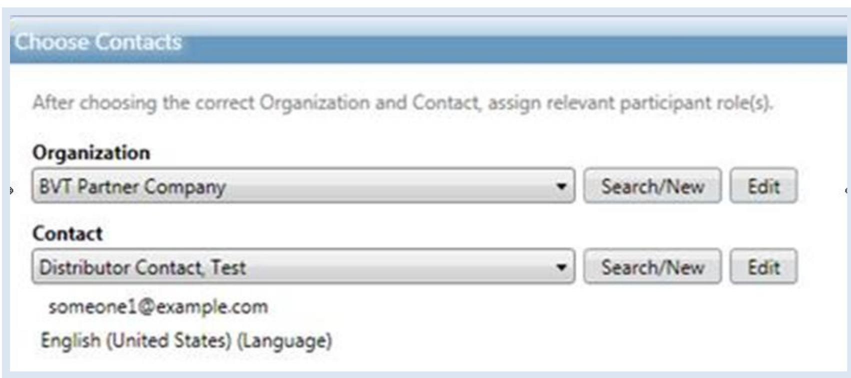
1. To assign **Participant Roles** as **Agreement Contacts**, select the **Choose Contacts** button.
2. Select the customer organization from the **Organization** dropdown menu to view the available contacts for that organization. Use the **Contact** dropdown menu to choose the appropriate contacts within 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.

3. 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.



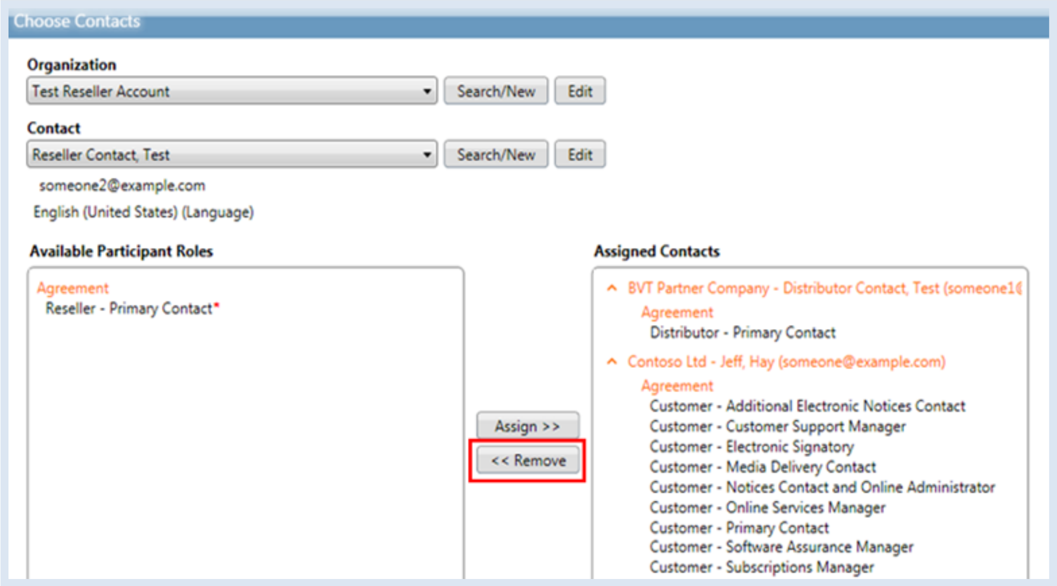
5. Select the distributor **Organization** and **Contact** from the corresponding dropdown menus.
6. Choose the roles associated with the distributor contact from the **Available Participant Roles** field and select **Assign**.

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**.



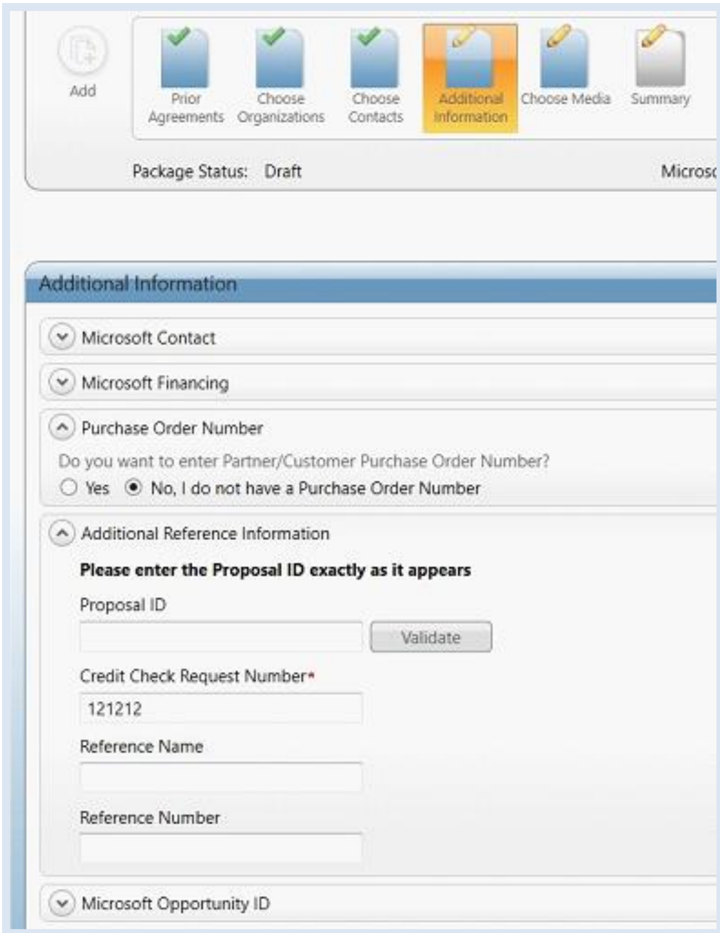
Provide additional information

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



Choose offerings

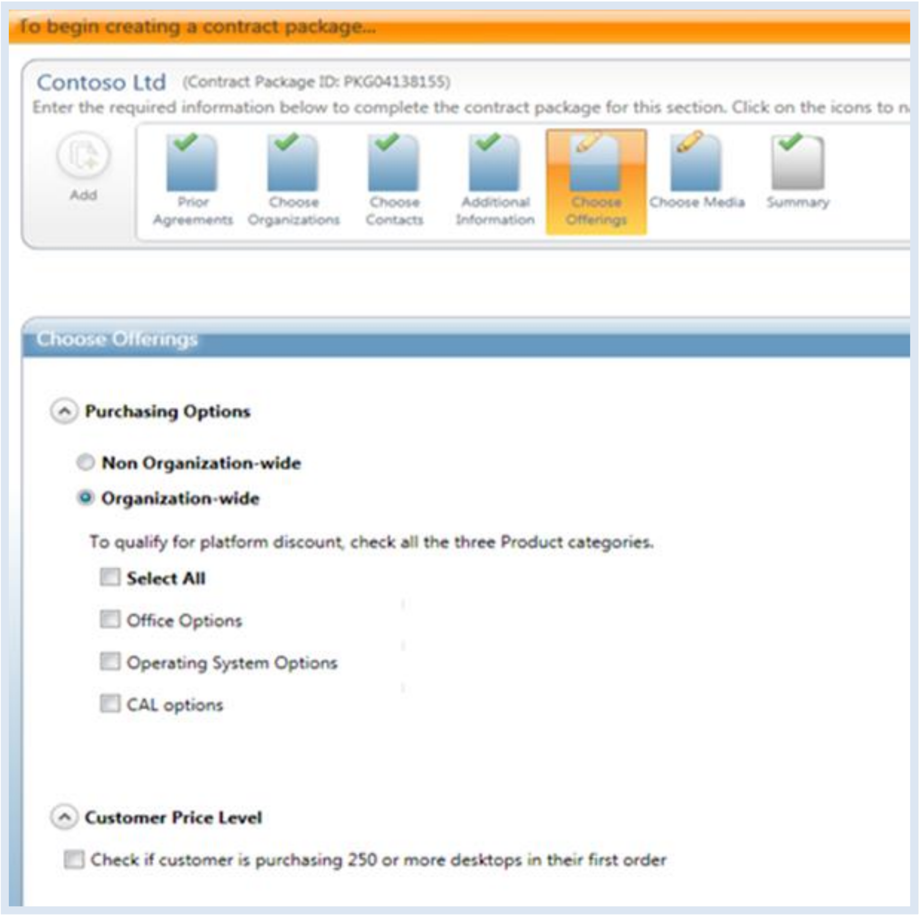
In the **Choose Offerings** section, you can select from various purchasing options and determine the customer price level.

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.

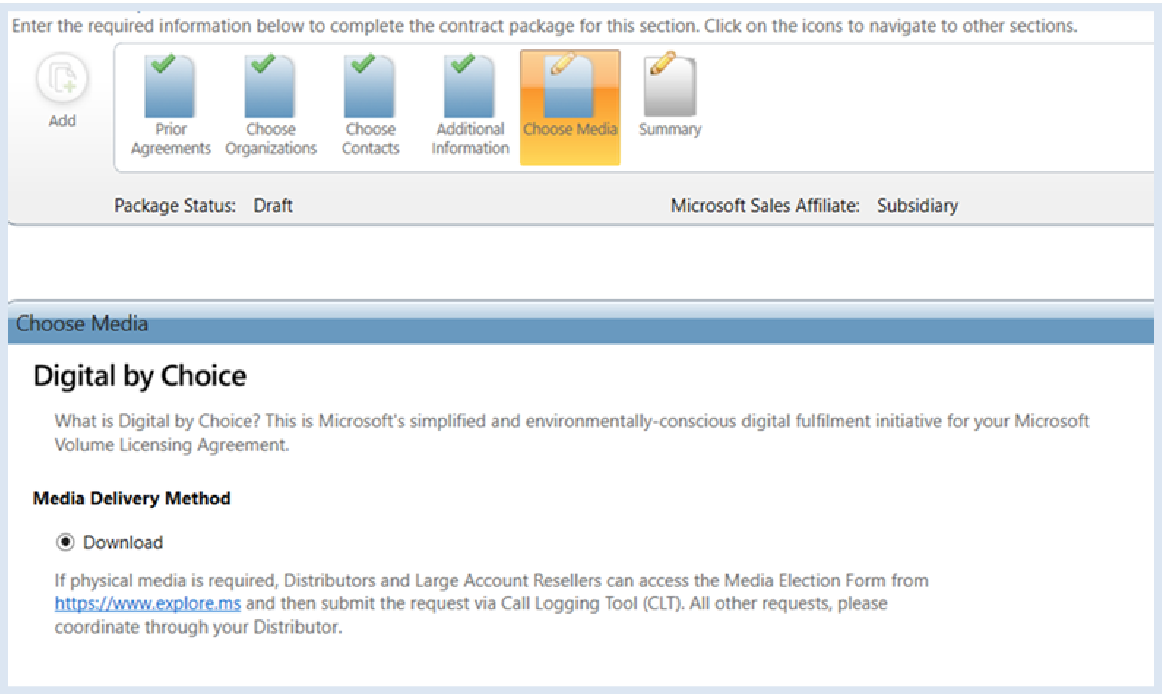


NOTE: The purchasing options and customer price level options might differ slightly from the screenshot, depending on whether you're creating a contract package for the Open Value or Open Value Subscription program.

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.



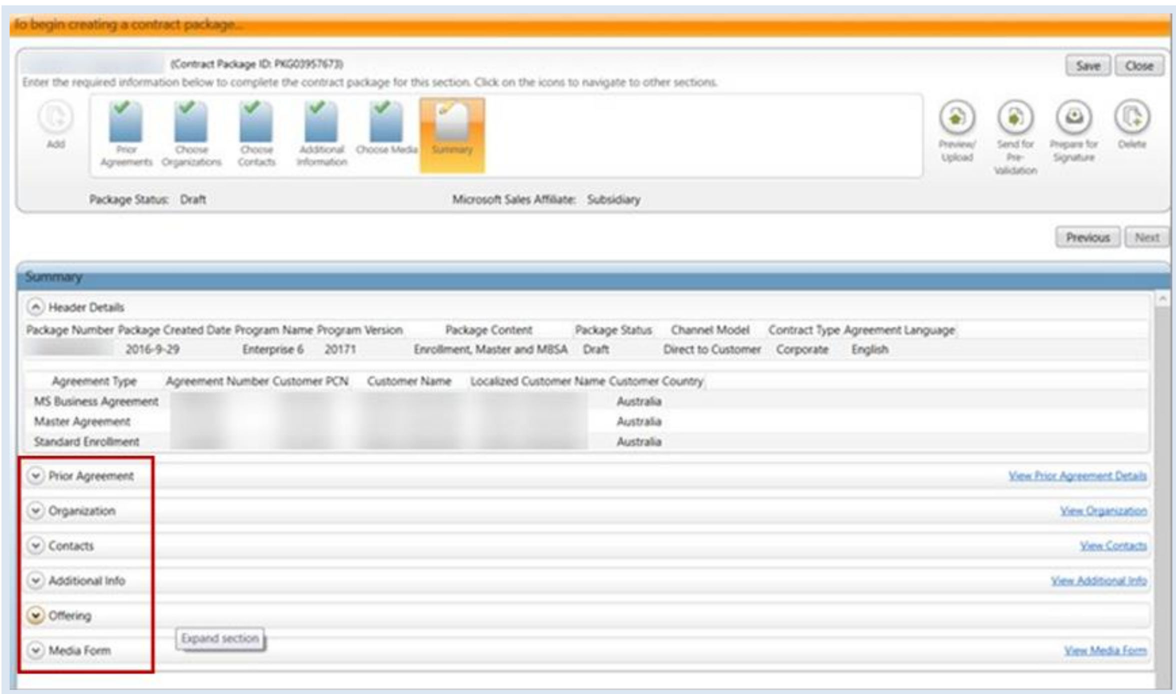
View the summary

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:

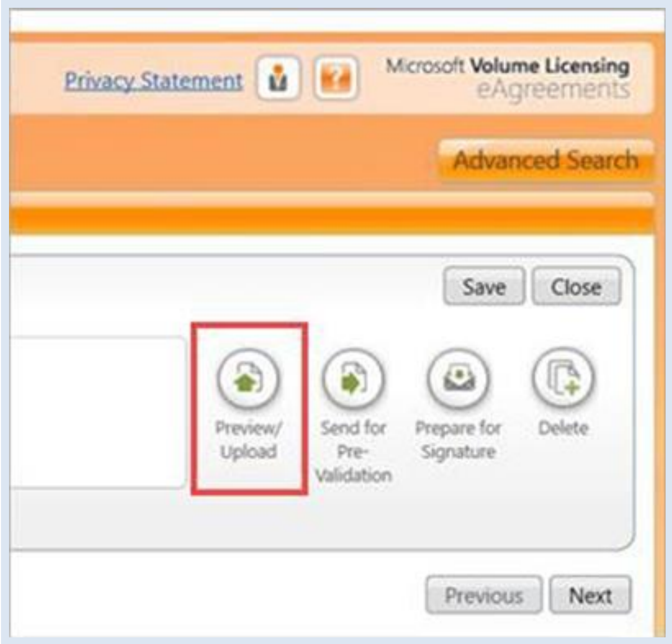
- Header Details
- Prior Agreement
- Organization
- Contacts
- Additional Info
- Offering (applies only to some licensing programs)
- Media Form



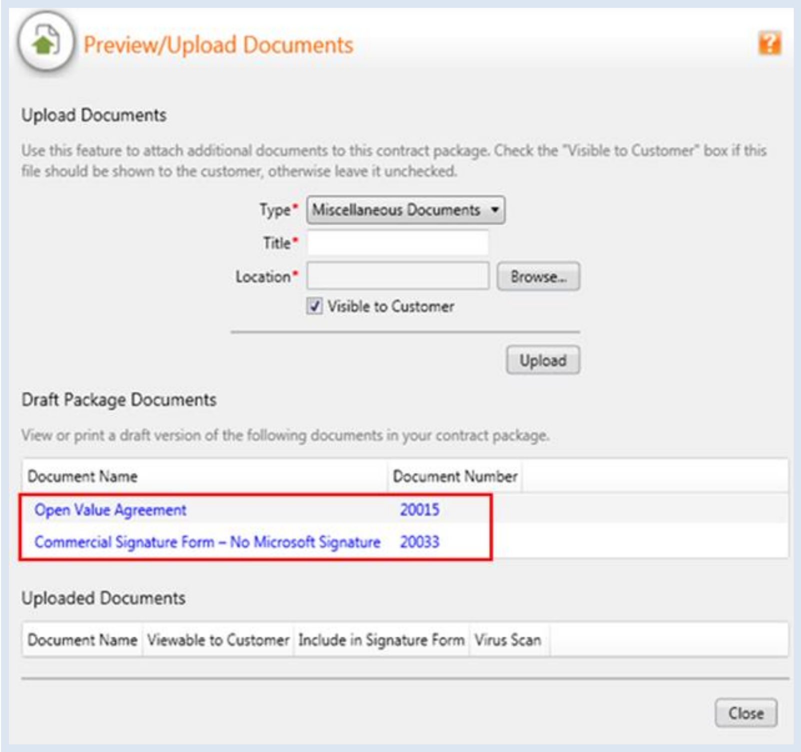
Preview/upload and prepare for signature

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**.

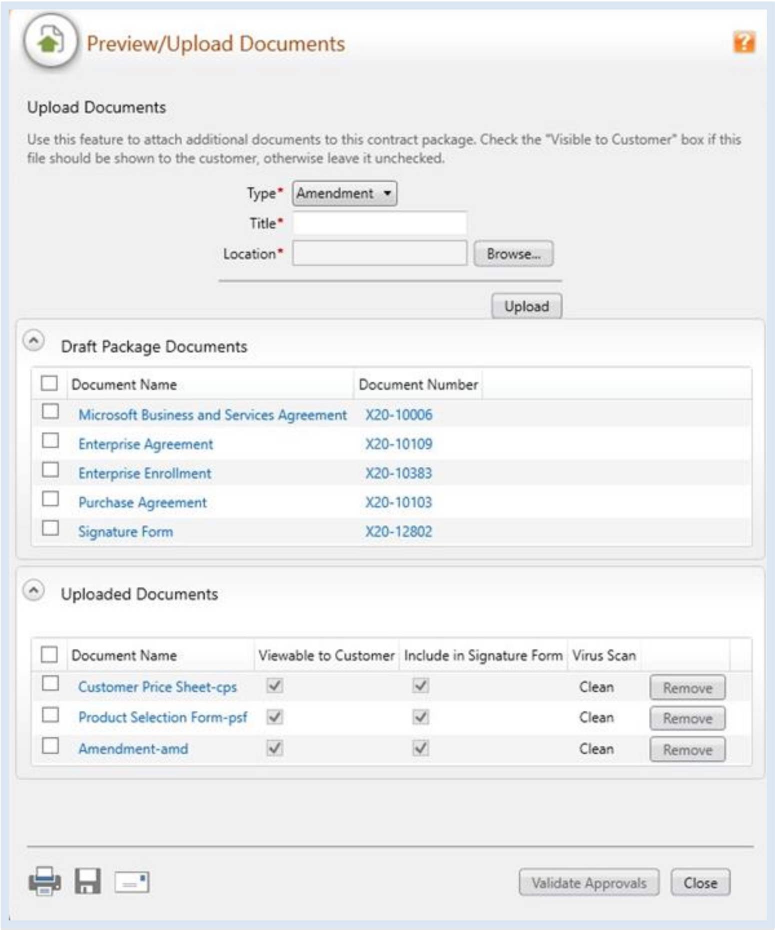


2. The **Preview/Upload Documents** screen opens. Under **Document Name**, select any file that you want to review or print. These are **draft** documents in PDF format.



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



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)

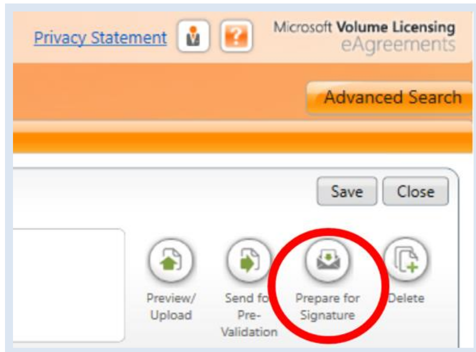
Speak with your customer if they require a digital or qualified signature. The following scenarios demonstrate the updated process for both partners and customers, from preparing the package for signature to signing the package:

- 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

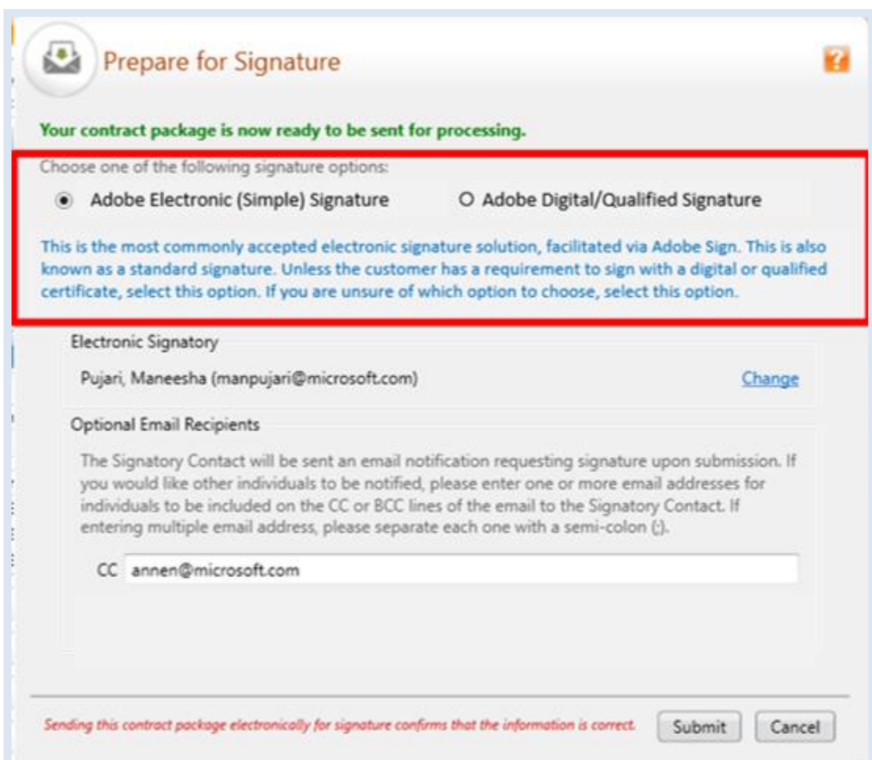
Simple electronic signature for direct/indirect EAs

Partner steps

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

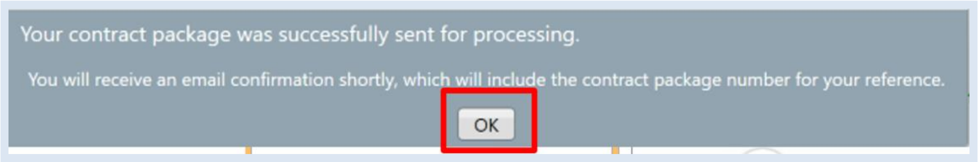


2. The **Prepare for Signature** dialog box opens. Select the **Adobe Simple electronic signature** button, and verify the contact listed as the electronic signatory. Provide any **CC** email addresses for those who need to view a copy of the notification email.



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.

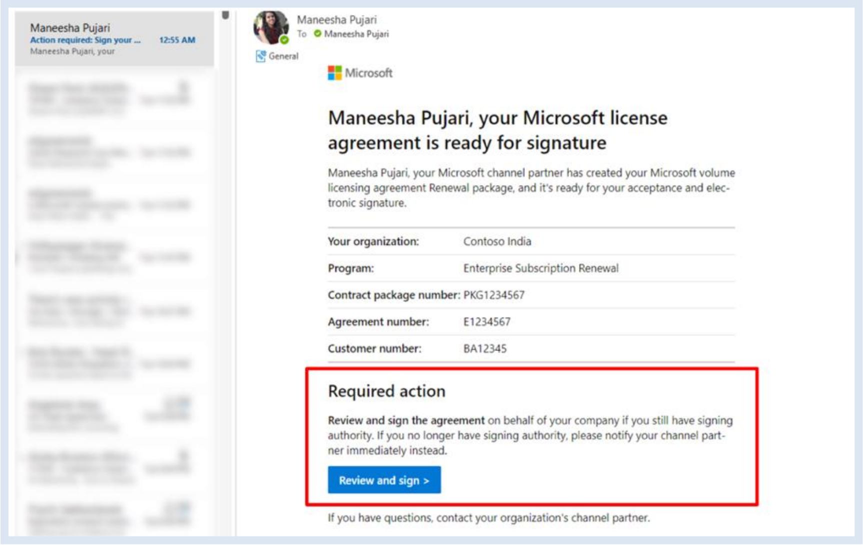
3. Select **Submit.** This will send an email message to the signer that you specified, requesting their simple signature. The distributor and reseller contacts listed during the package creation will receive a copy of the invitation email by default.
4. When the confirmation dialog box appears, select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



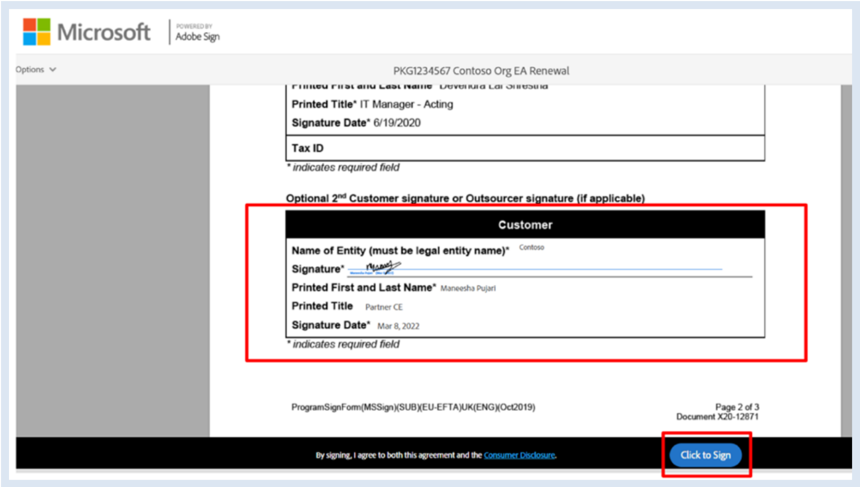
Customer steps

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.**

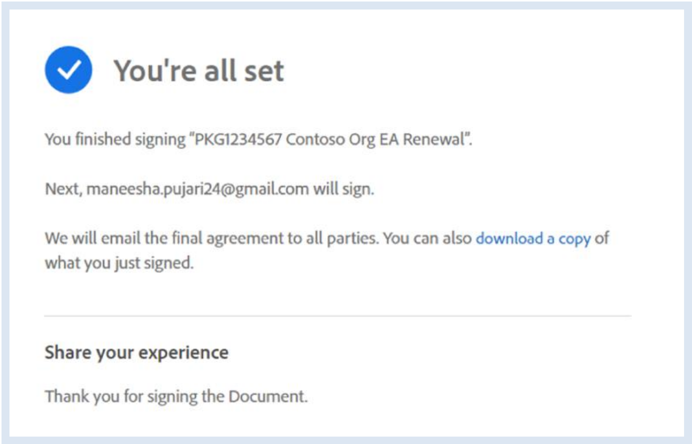


2. This will take them to the Adobe Sign portal, where they will sign on the signature placeholders, namely the **Signature** and **Printed Title** fields. The **Printed Name** and **Signature Date** fields are automatically populated.



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.



5. 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.

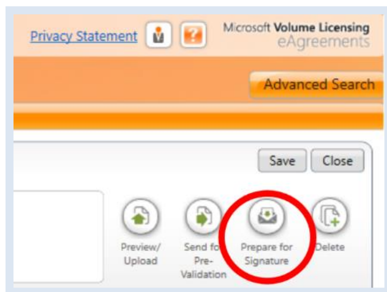
Take note of the following:

- 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.

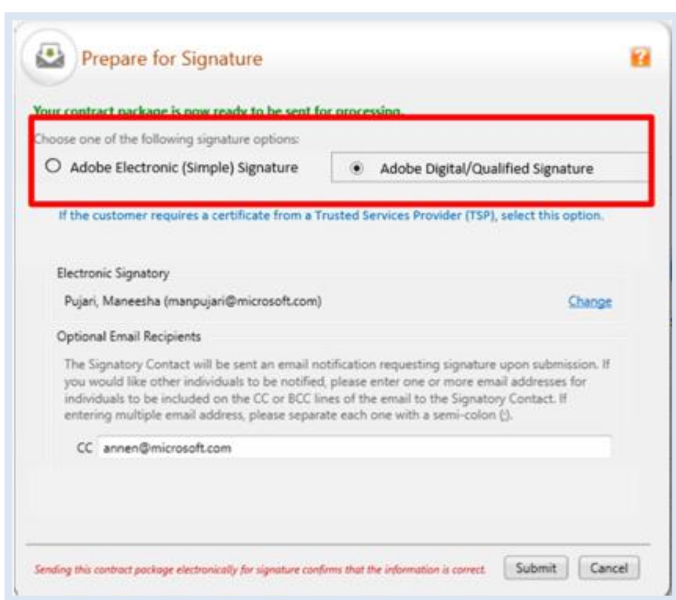
Digital/qualified signature for direct EAs

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.

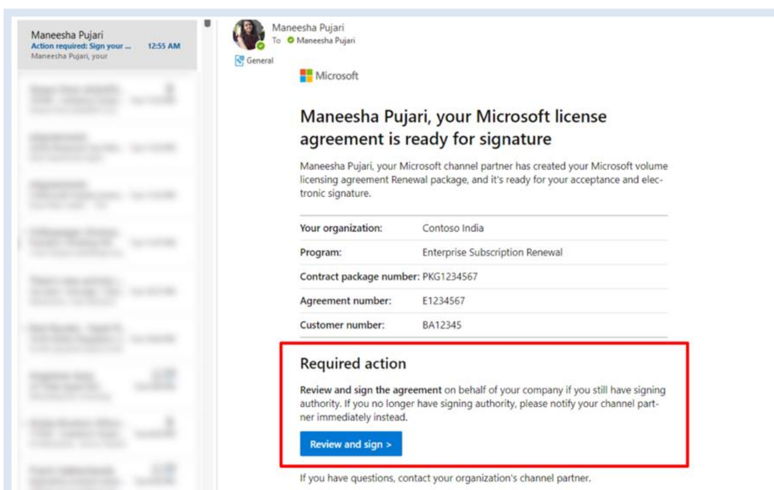


NOTE: You'll see a warning message if you didn't include an electronic signer when you prepared your agreement package contacts. You must return to the **Choose Contacts** section and assign an electronic signatory. You can also assign signatories here by selecting the **Assign link.**

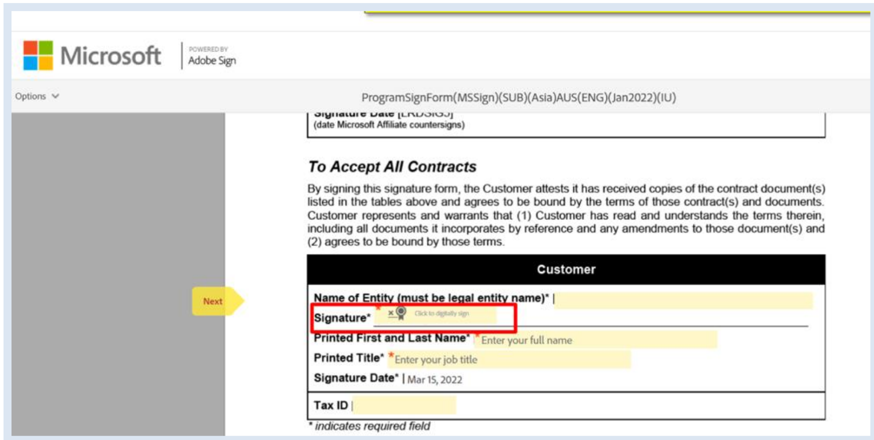
3. Select **Submit.** This will send an email message to the signer that you specified, requesting their digital/qualified signature. The distributor and reseller contacts listed during the package creation will receive a copy of the invitation email by default.
4. When the confirmation dialog box appears,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

Customer steps

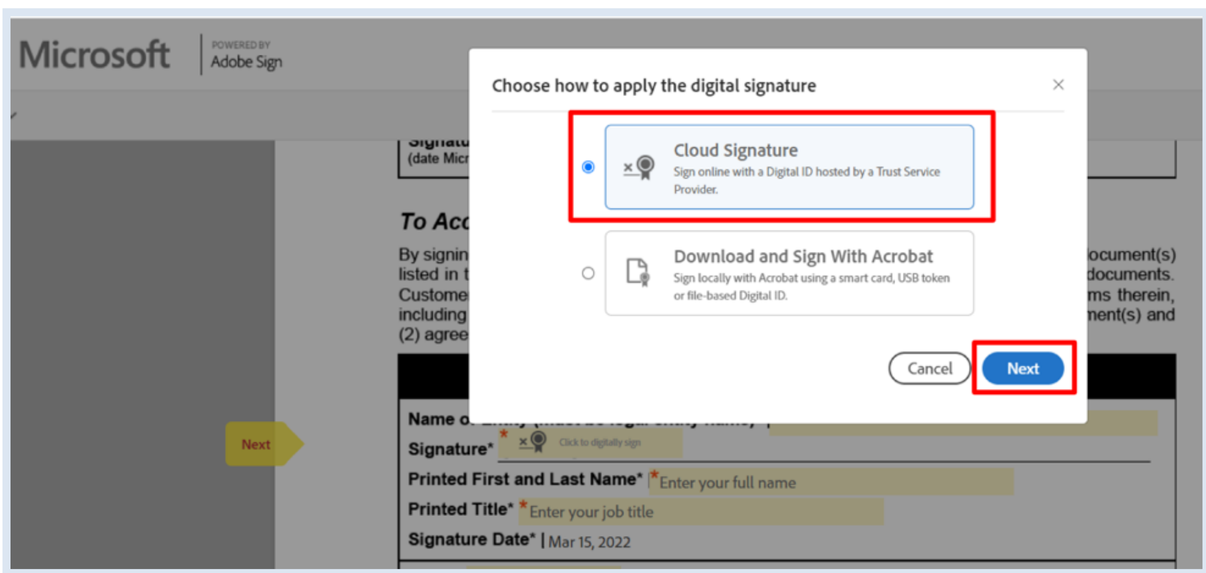
1. Once your customer receives the notification to sign the package electronically, they should select **Review and sign.**



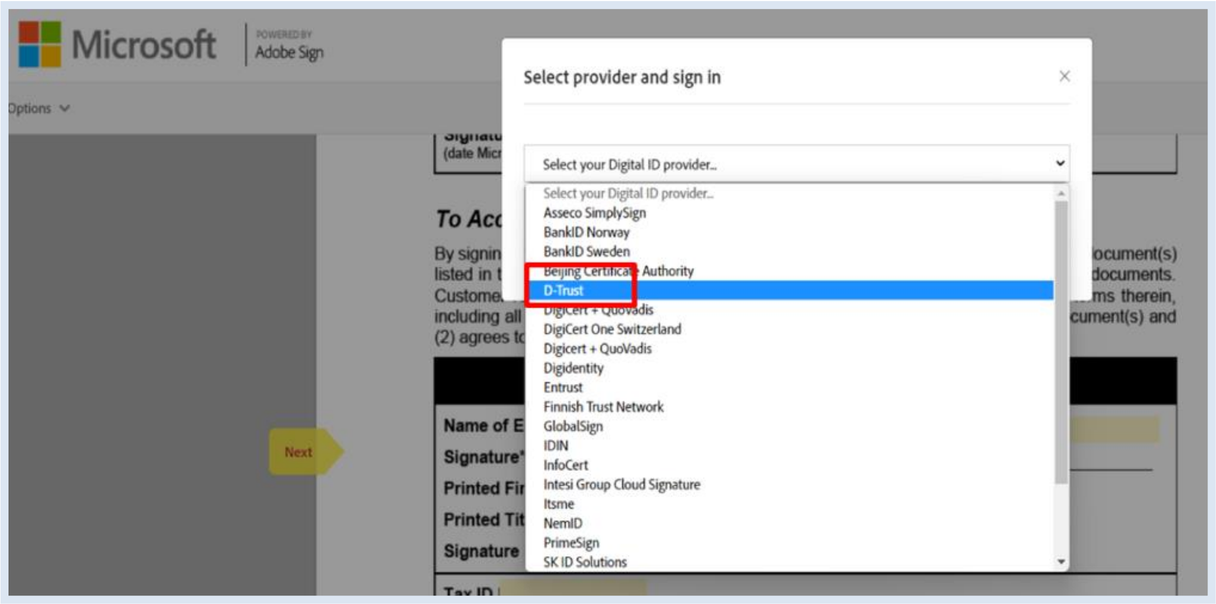
2. This will take them to the Adobe Sign portal, where they will sign on the signature placeholders. Customers can digitally sign the contract by selecting the digital signature block.



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



4. 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.



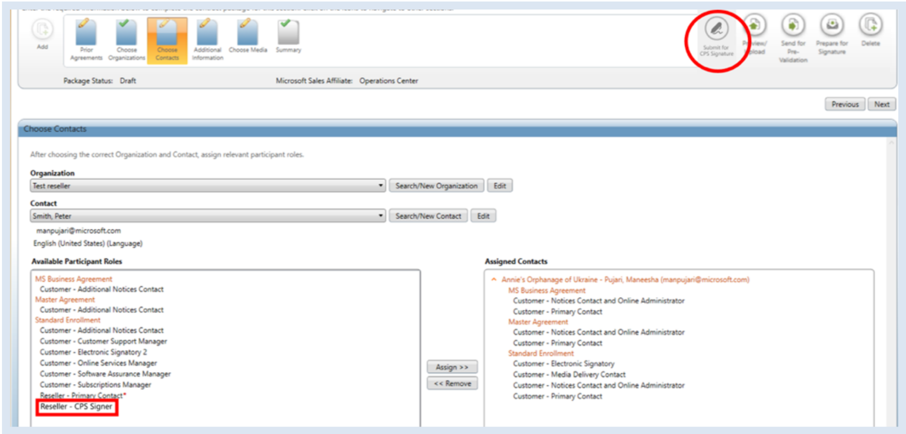
Take note that when a package is submitted for digital signature, the customer must give a valid certificate and can't proceed with a simple signature. Also note, Microsoft will countersign via the Electronic (Simple) Signature method.

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

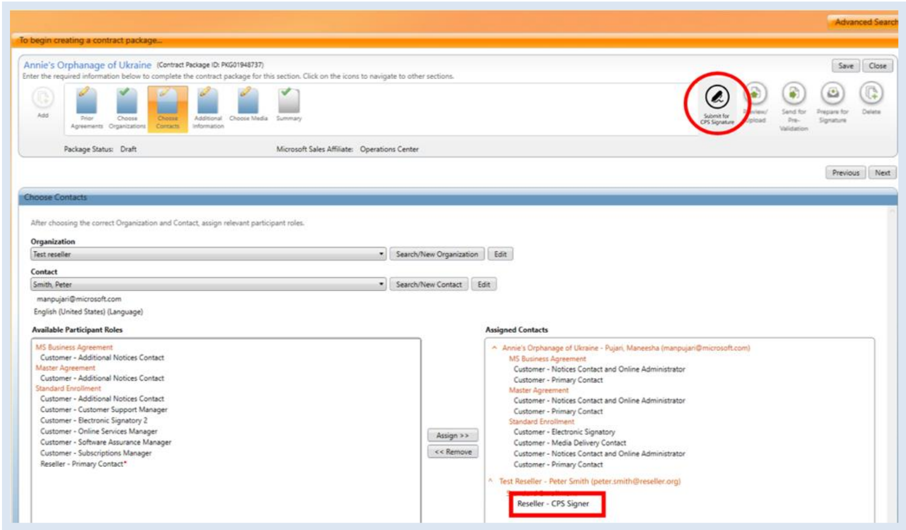
For indirect EAs, Adobe Sign helps in facilitating the signing of the CPS.

Partner steps

1. 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.



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



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

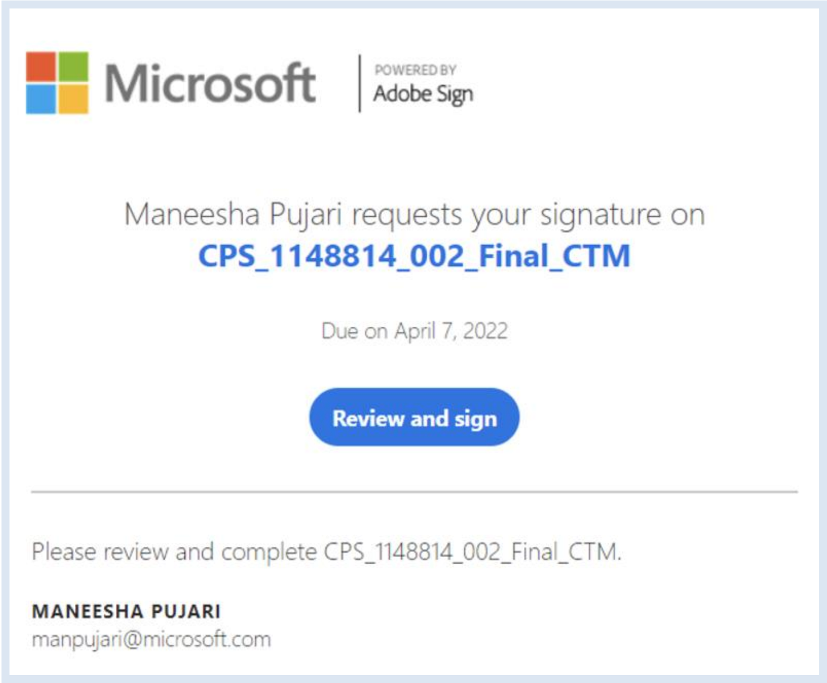
4. Select the **Submit for CPS Signature** button. In the dialog box, you can include additional recipients who wish to view the notification.

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.

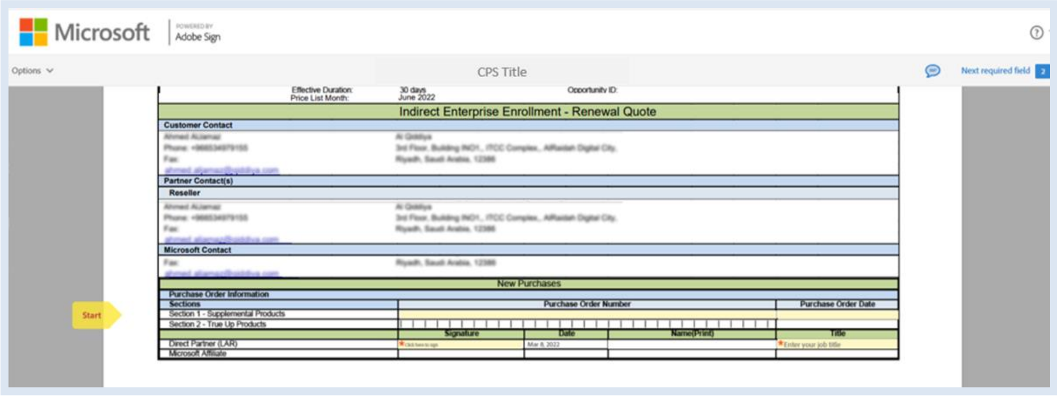
6. Once the CPS has been signed, proceed with the process to prepare the package for customer signature, via simple signature or digital/qualified signature. Note: once the CPS has been signed through this process, it can't be modified.

CPS signer steps

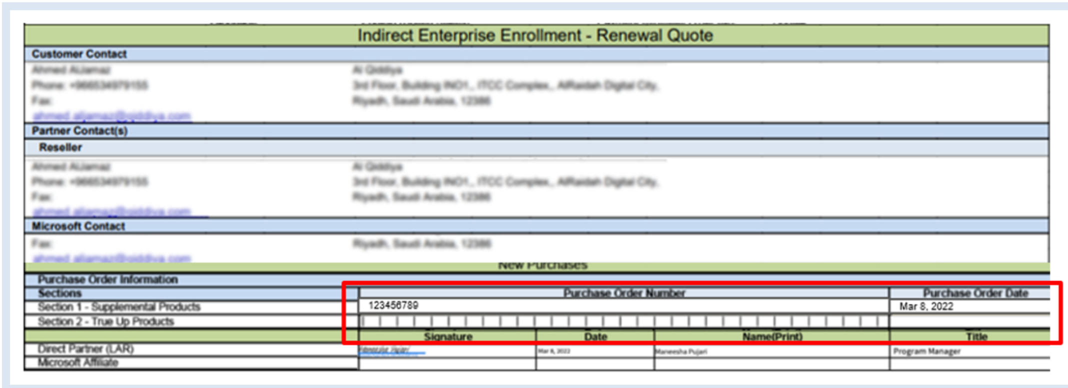
1. The CPS signer will receive a notification to sign the CPS.



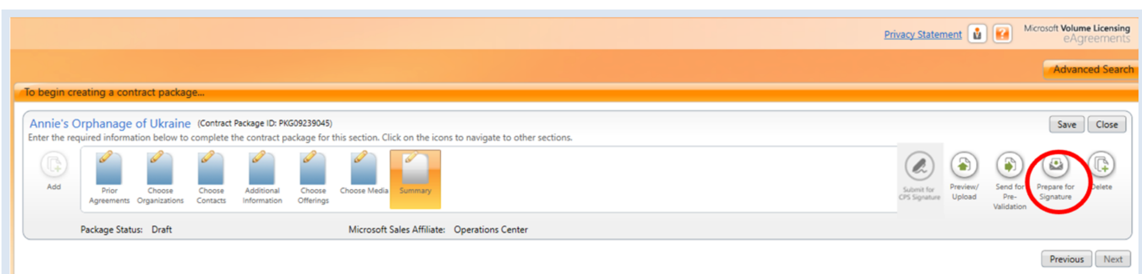
2. The CPS signer should follow the Adobe prompts to populate the applicable fields.



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



4. 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*.
5. After signing the CPS, you can select the **Prepare for Signature** button to send it to your customer for signature.

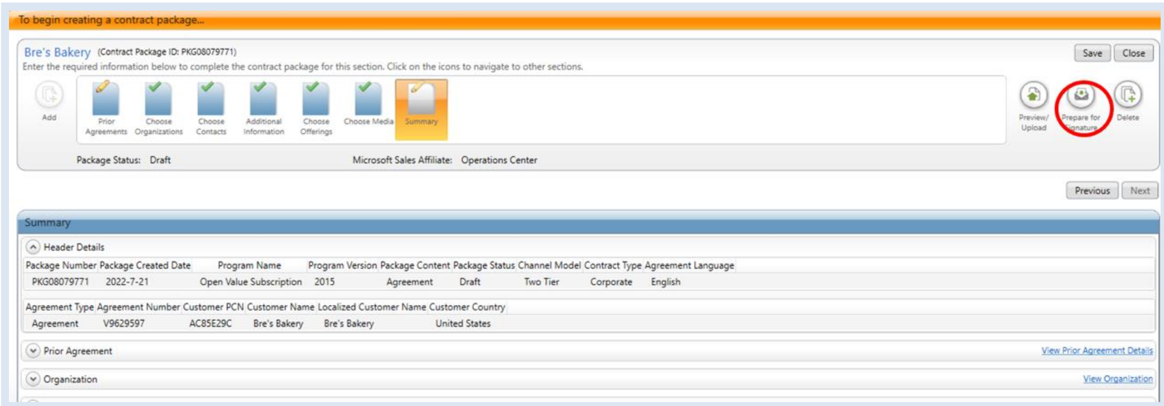


6. Continue with the process to send the package to the customer for signature, as detailed in the scenario for [simple electronic signatures for direct/indirect EAs](#).

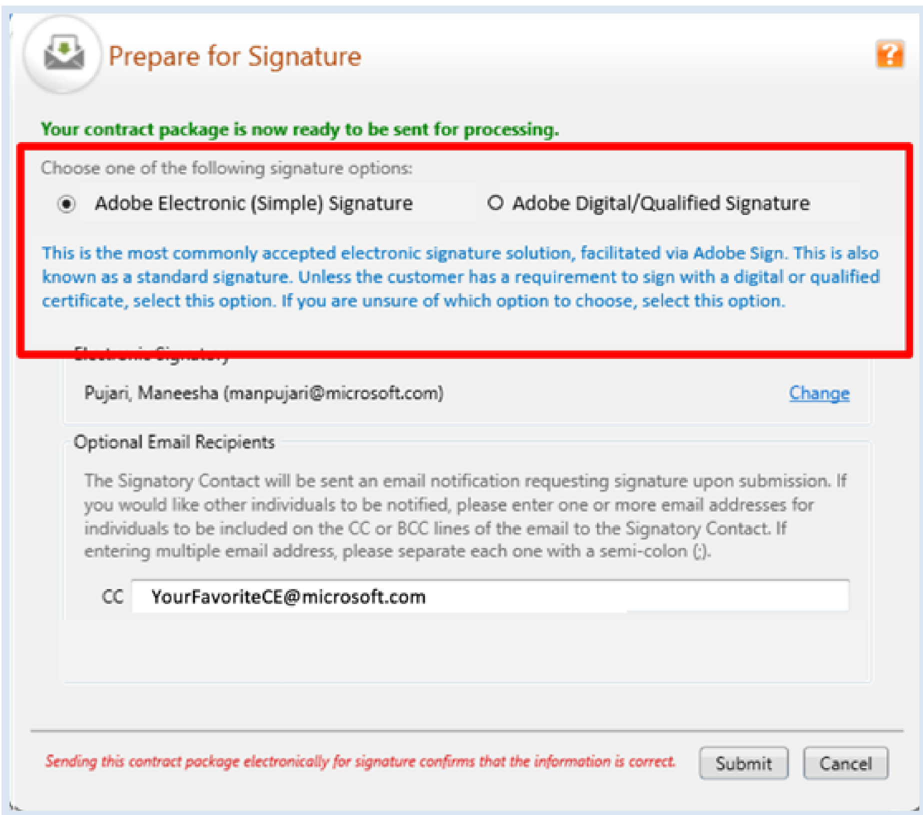
Simple electronic signature via Adobe Sign for Open Value subscriptions

Partner steps

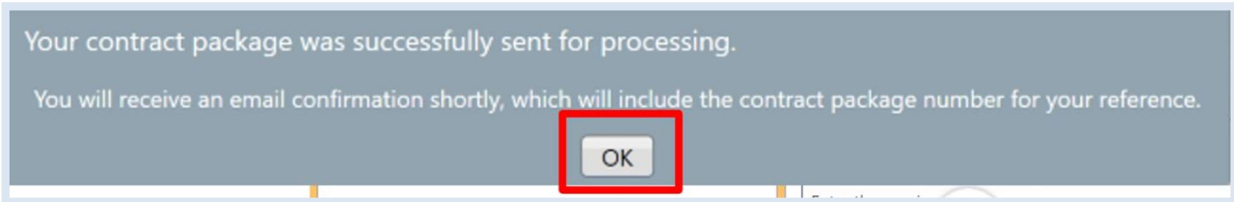
1. After adding all the information, in the navigation menu, select **Prepare for Signature**.



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.

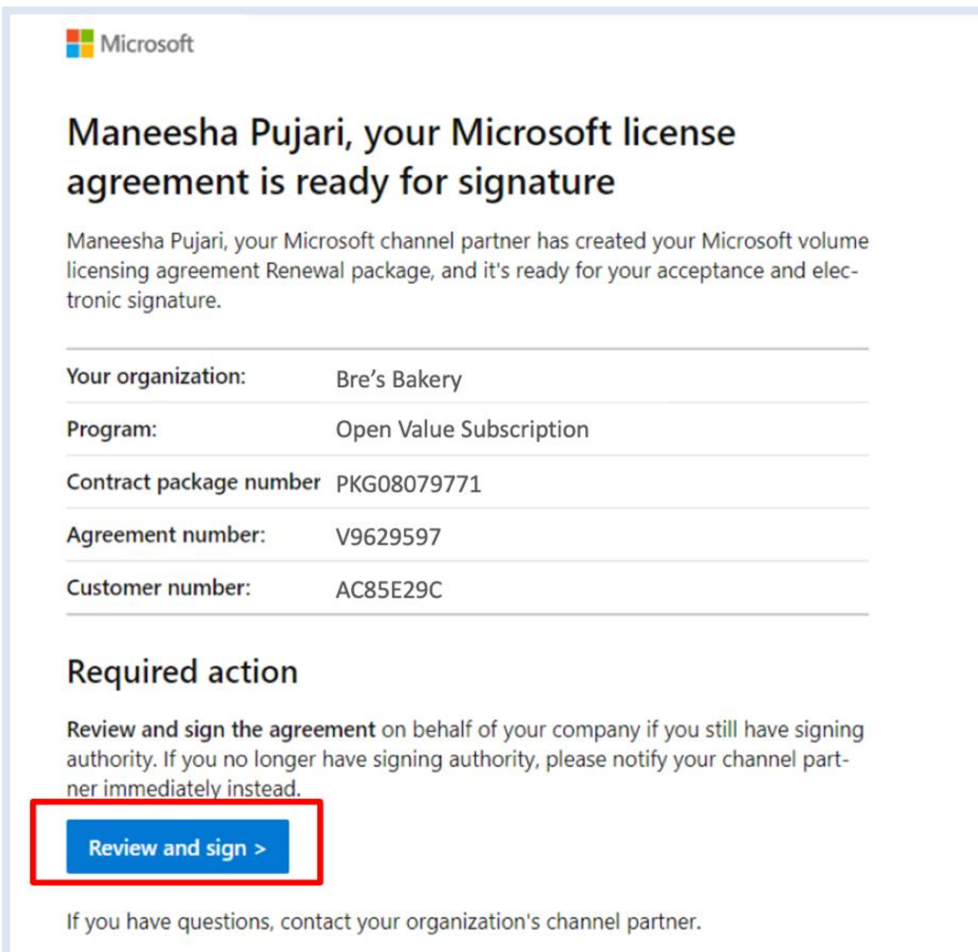


3. VLCM will submit the package for processing. When the submission process is complete, a confirmation dialog box appears. Select **OK.**



Customer steps

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


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:	Bre's Bakery
Program:	Open Value Subscription
Contract package number	PKG08079771
Agreement number:	V9629597
Customer number:	AC85E29C

Required action

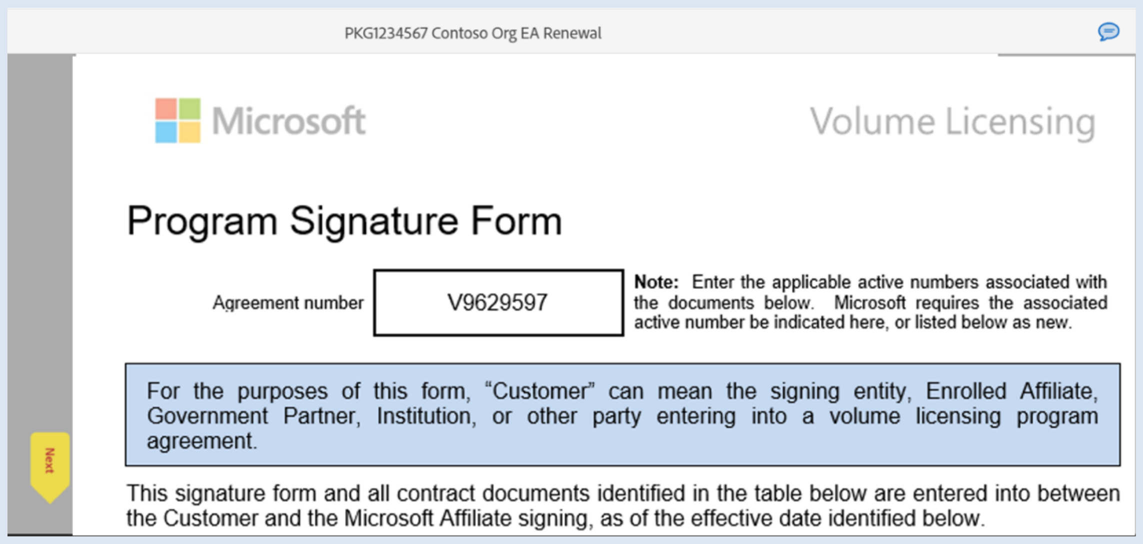
Review and sign the agreement on behalf of your company if you still have signing authority. If you no longer have signing authority, please notify your channel partner immediately instead.

Review and sign >

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

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

Microsoft Volume Licensing

Program Signature Form

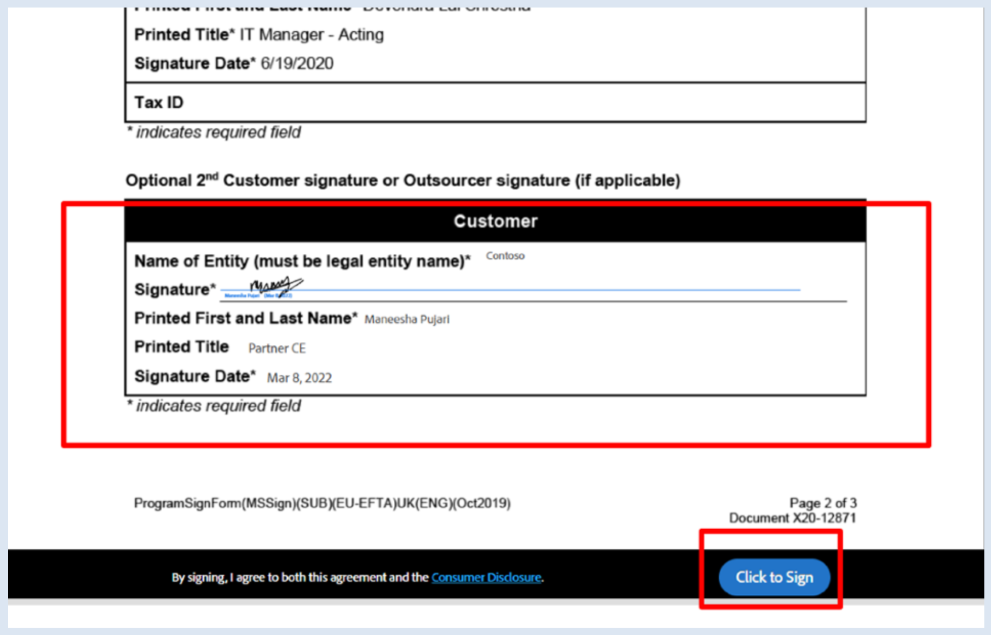
Agreement number V9629597

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 2nd 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*

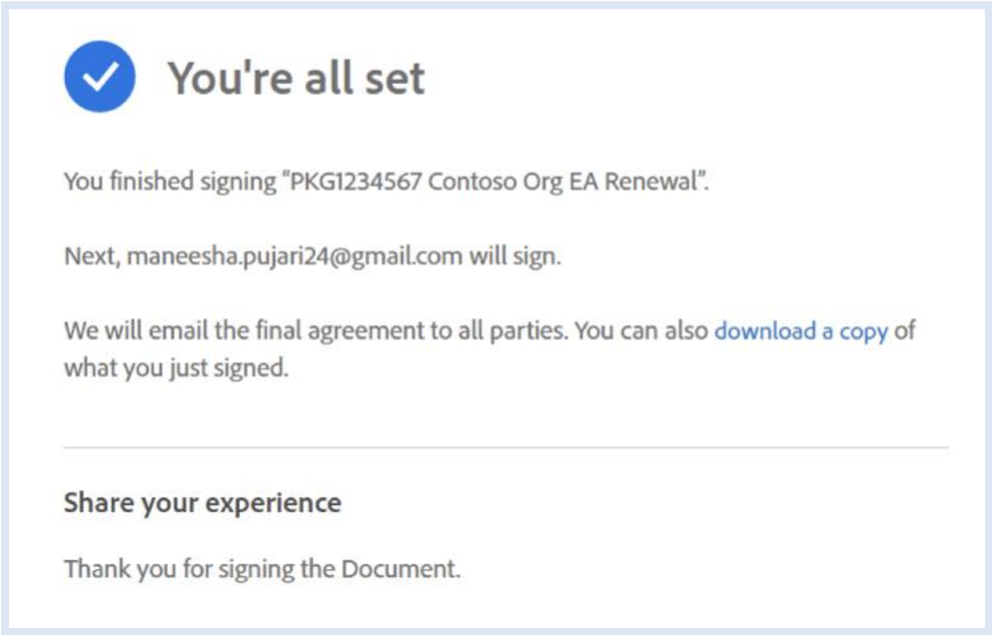
ProgramSignForm(MSSign)(SUB)(EU-EFTA)UK(ENG)(Oct2019)

Page 2 of 3
Document X20-12871

By signing, I agree to both this agreement and the Consumer Disclosure.

Click to Sign

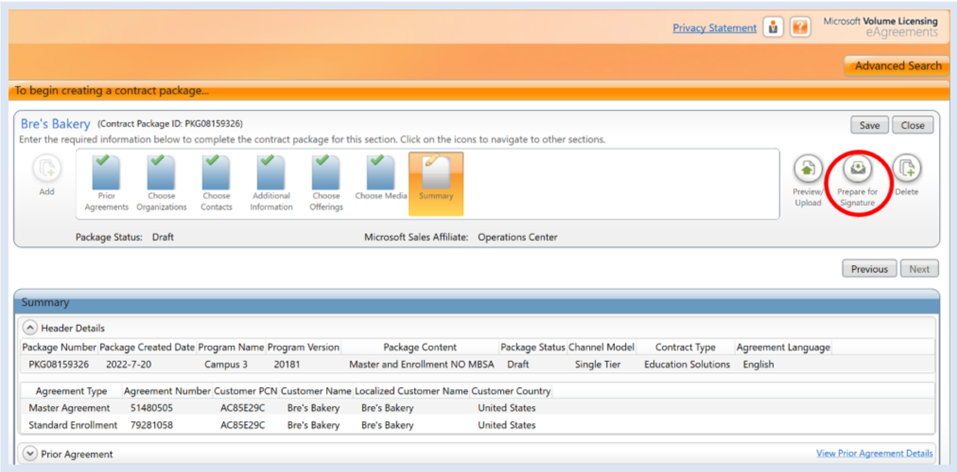
4. After signing, your customer will receive an on-screen confirmation of signing completion.



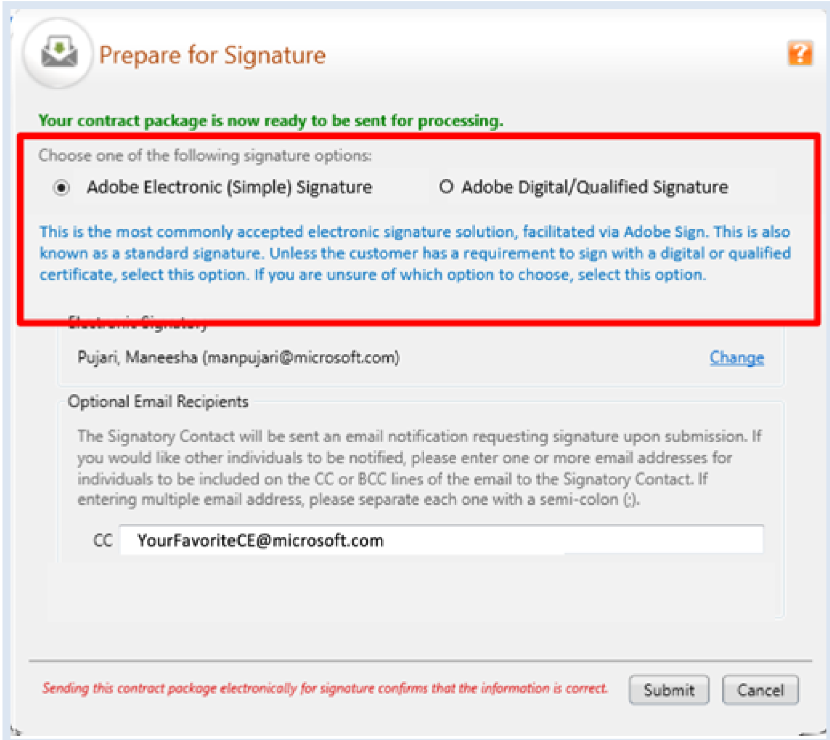
Simple electronic signature via Adobe Sign for Campus Education subscriptions

Partner steps

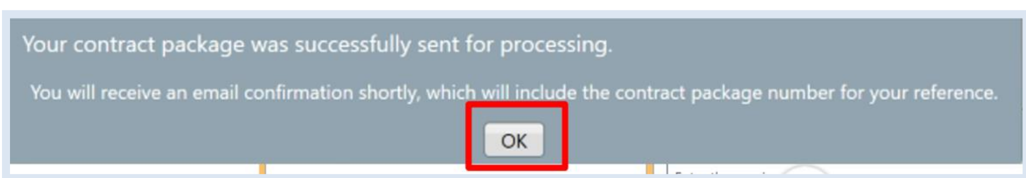
1. After adding all the information, in the navigation menu, select **Prepare for Signature**.



2. The **Prepare for Signature** dialog box opens. Select the **Adobe 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.

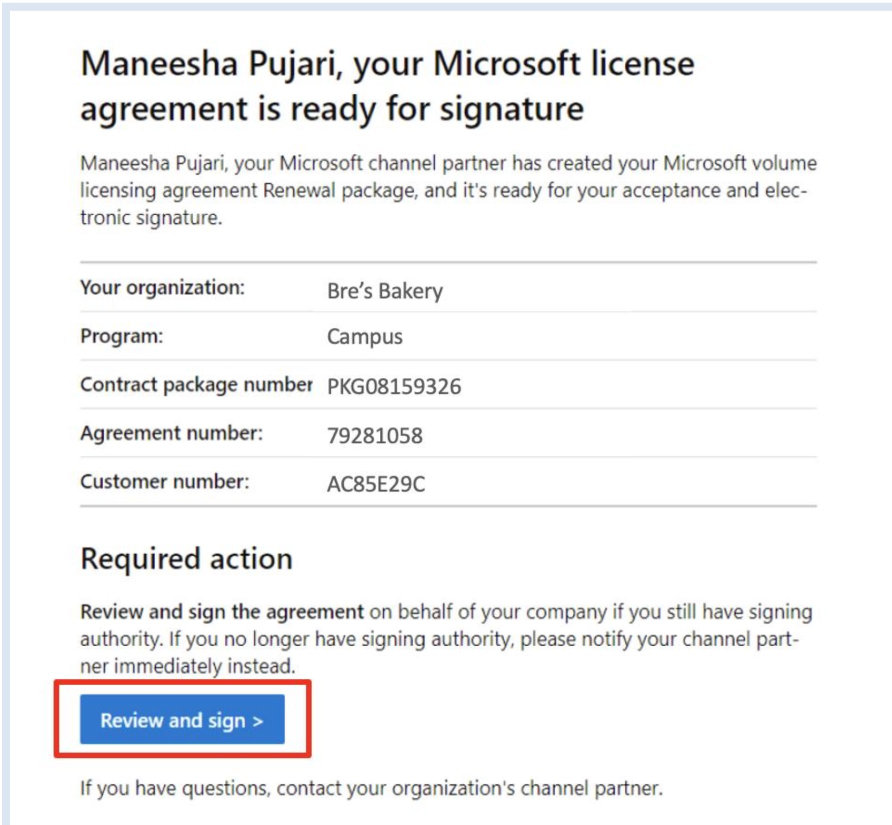


3. VLCM will submit the package for processing. When the submission process is complete, a confirmation dialog box appears. Select **OK.**



Customer steps

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



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

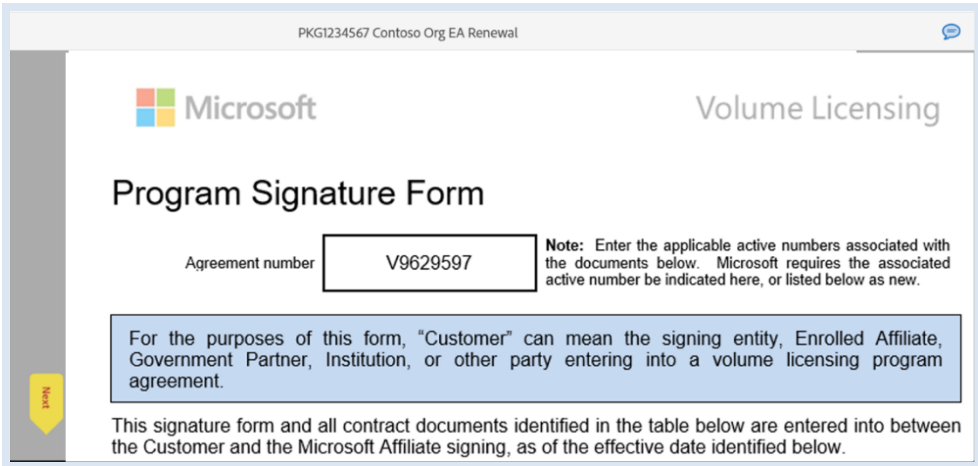
Required action

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.

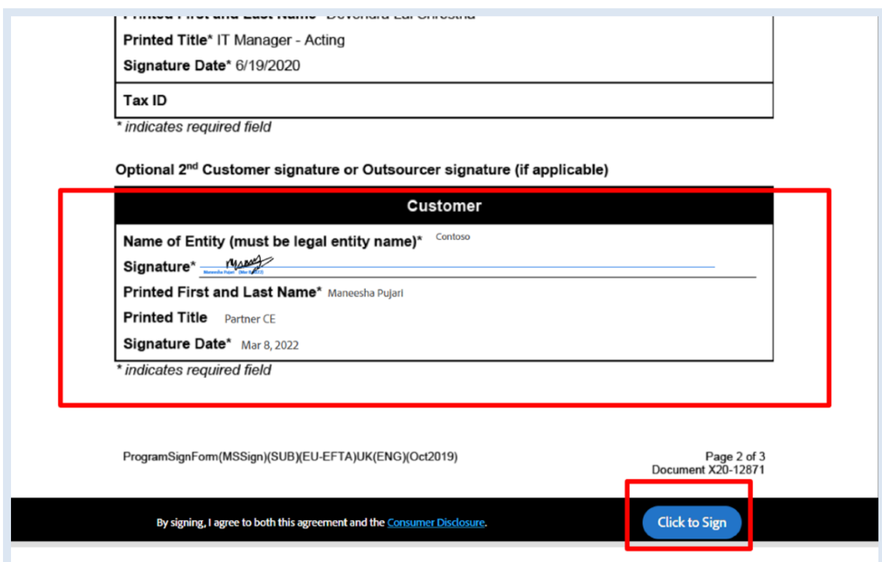
Review and sign >

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

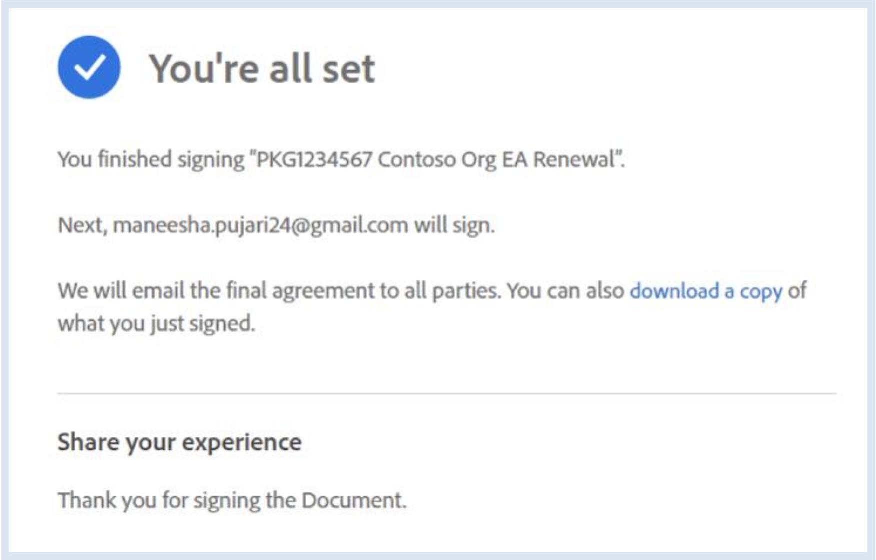
2. This will take them to the Adobe Sign portal, where they will sign on the signature placeholders, namely the **Signature** and **Printed Title** fields. The **Printed Name** and **Signature Date** fields are automatically populated.



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.



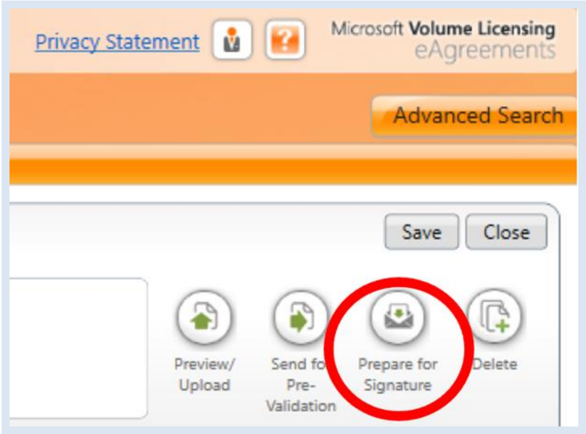
Physical “wet” signature via Adobe Sign

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.

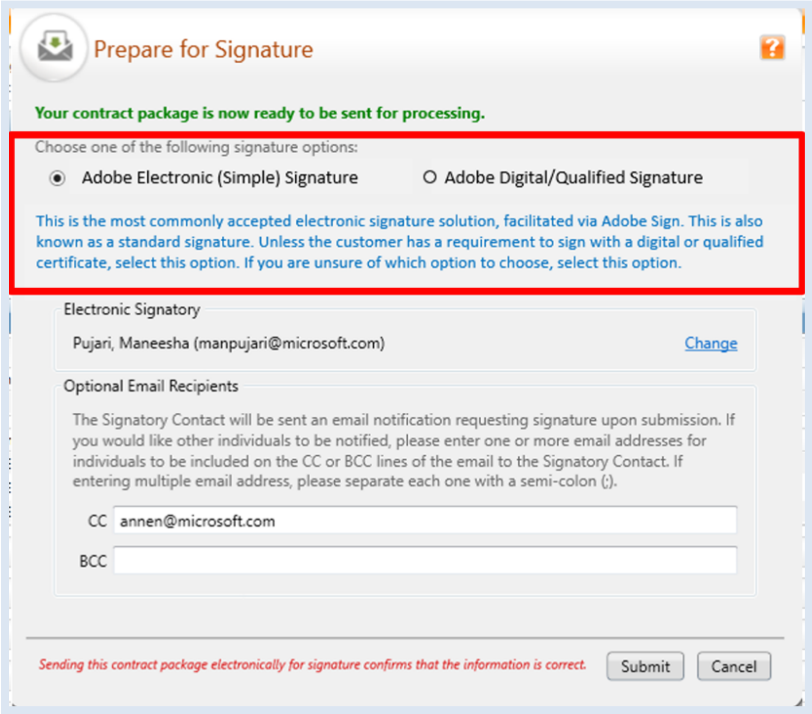
> **NOTE**: Because Microsoft is a digital company, the default Regional Operations Center (ROC) countersignature type will be Adobe Sign. If the customer requires a physical “wet” countersignature from Microsoft, upload (as a miscellaneous document) an image of the customer email indicating this requirement 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

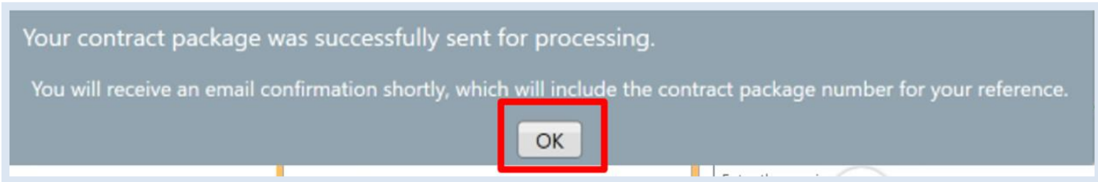
1. After adding all the information, in the navigation menu, select **Prepare for Signature**.



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.

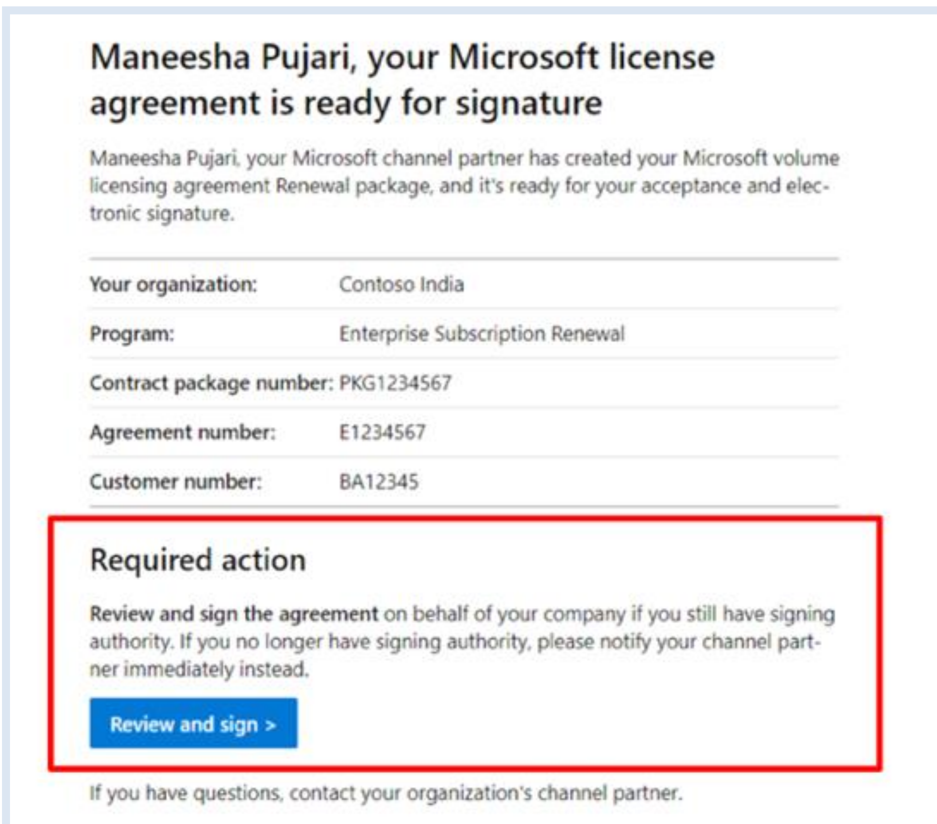


3. VLCM will submit the package for processing. When the submission process is complete, a confirmation dialog box appears. Select **OK.**

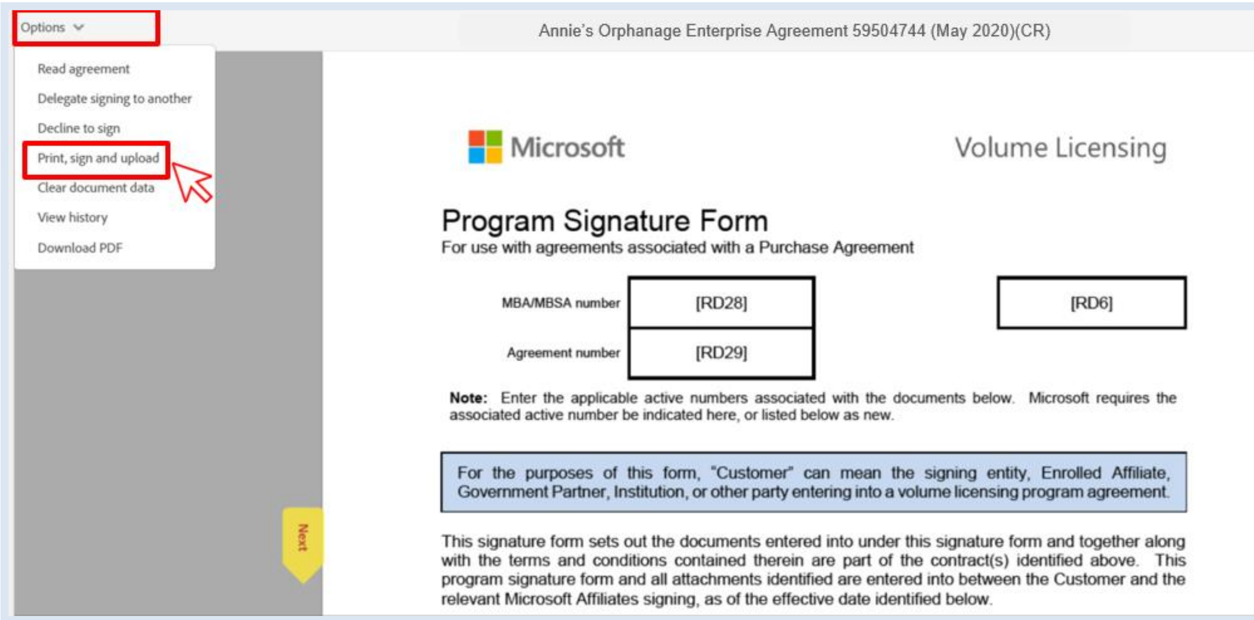


Customer steps

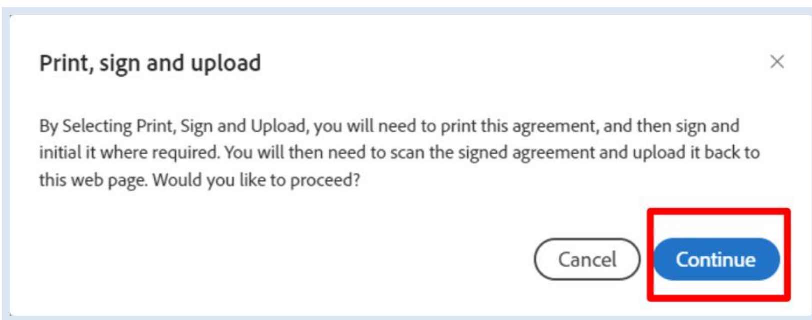
1. Once your customer receives the notification to sign the package electronically, they should select **Review and sign**.



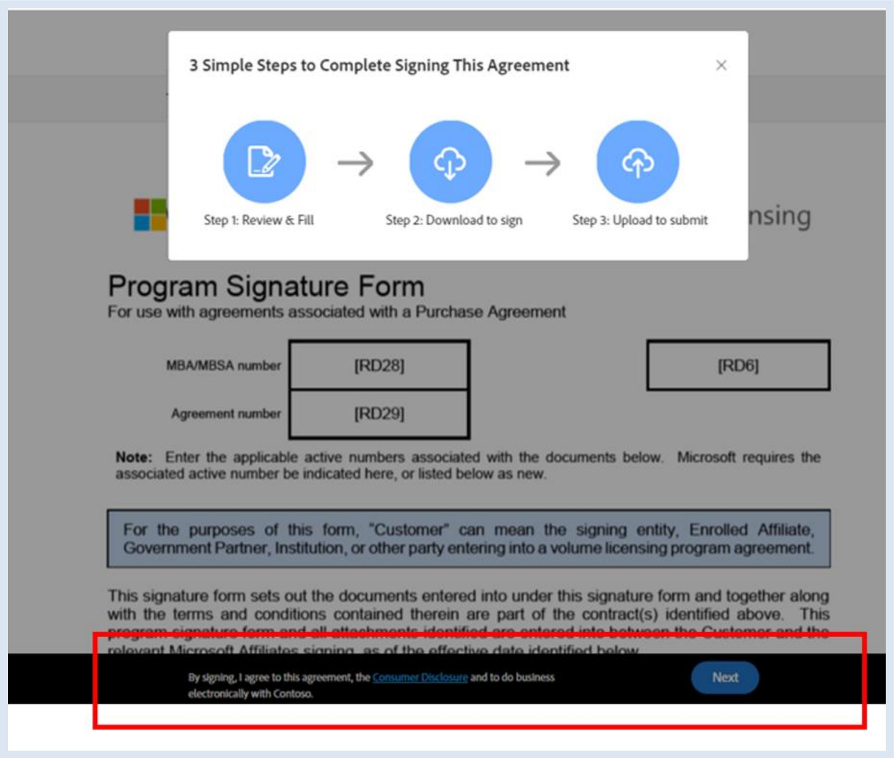
2. In the Adobe Sign portal, to physically sign the document, the customer should select **Print, sign and upload** under the **Options** dropdown menu.



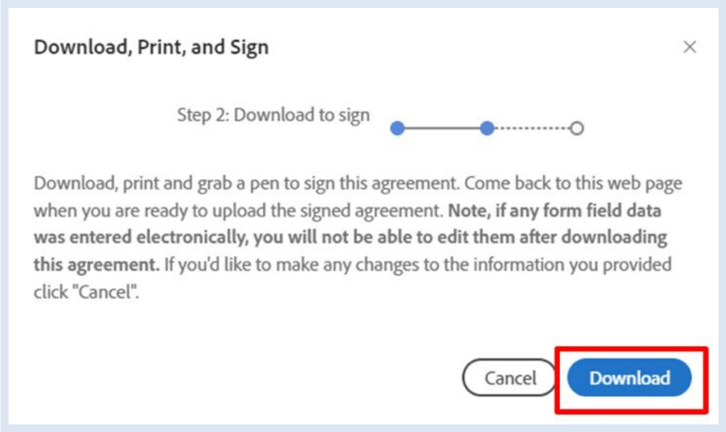
3. The customer should select the **Continue** button to proceed with the physical download process.



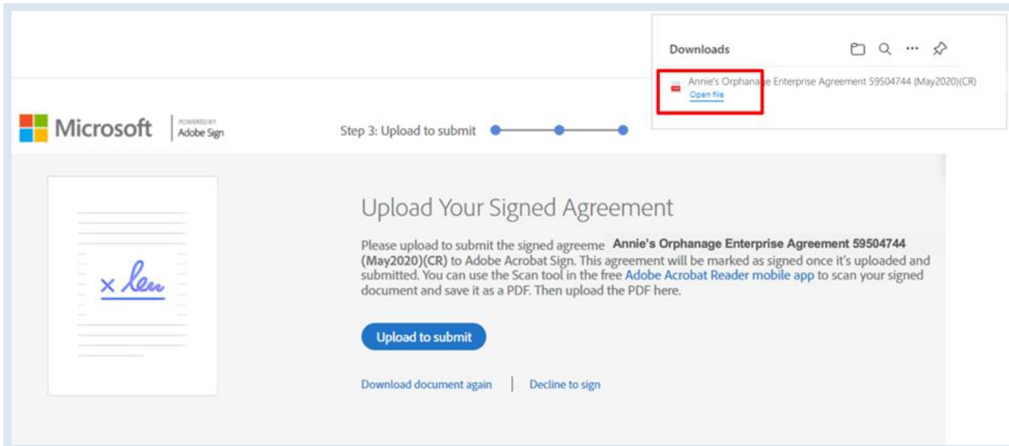
4. They should first read through the **Consumer Disclosure** document before selecting **Next** to proceed.



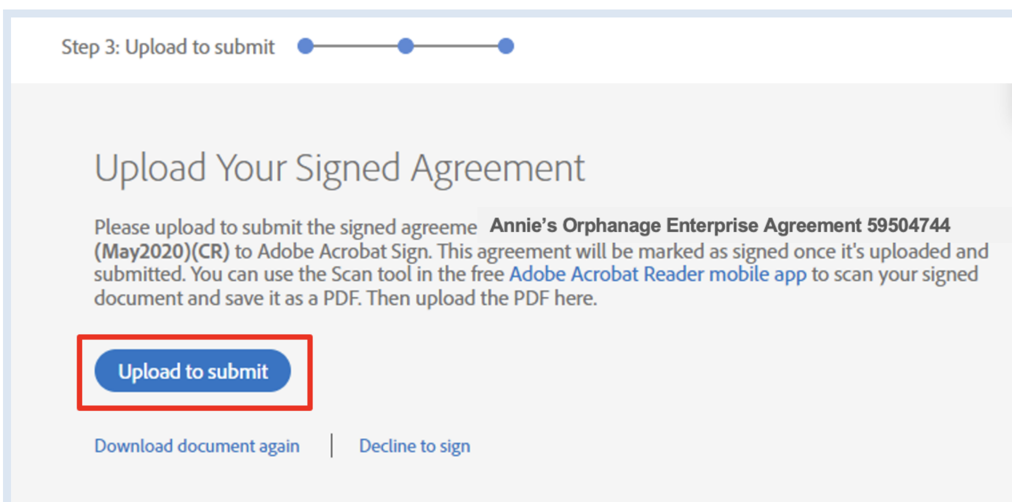
5. In the dialog box, they should select the **Download** button to proceed.



6. 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.



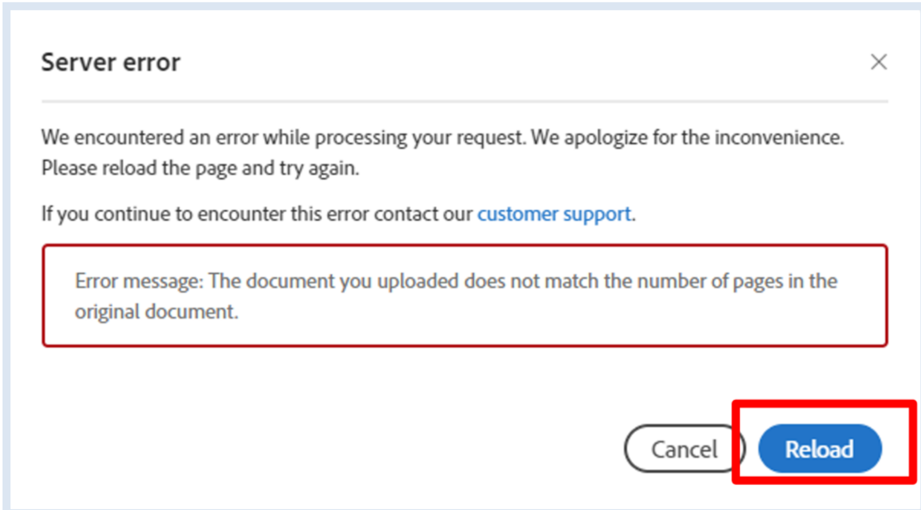
7. After scanning the document, the customer should locate the signed agreement, highlight it, and double-click it for upload. To upload it to the Adobe Sign portal, the customer should select the **Upload to submit** button.



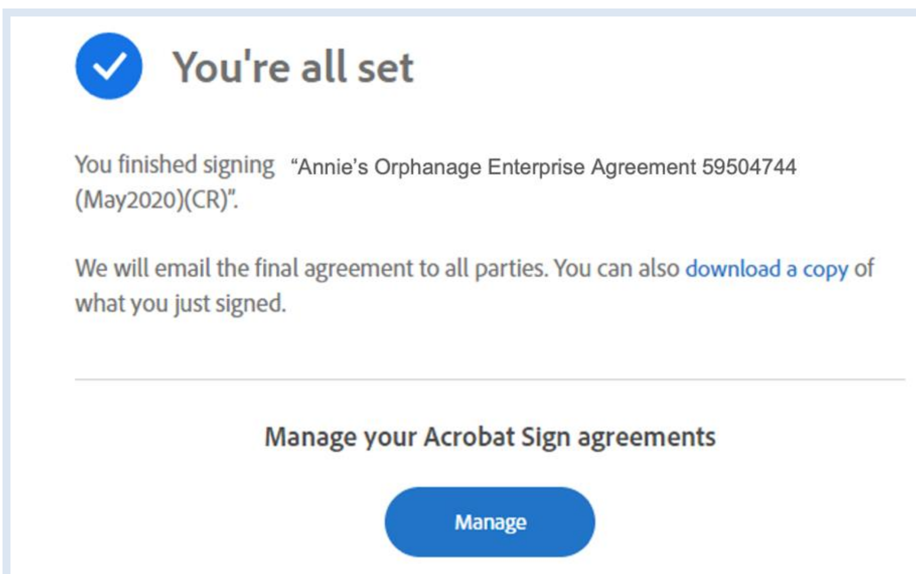
To make sure that the upload goes smoothly, the customer must take note of the following:

- 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.



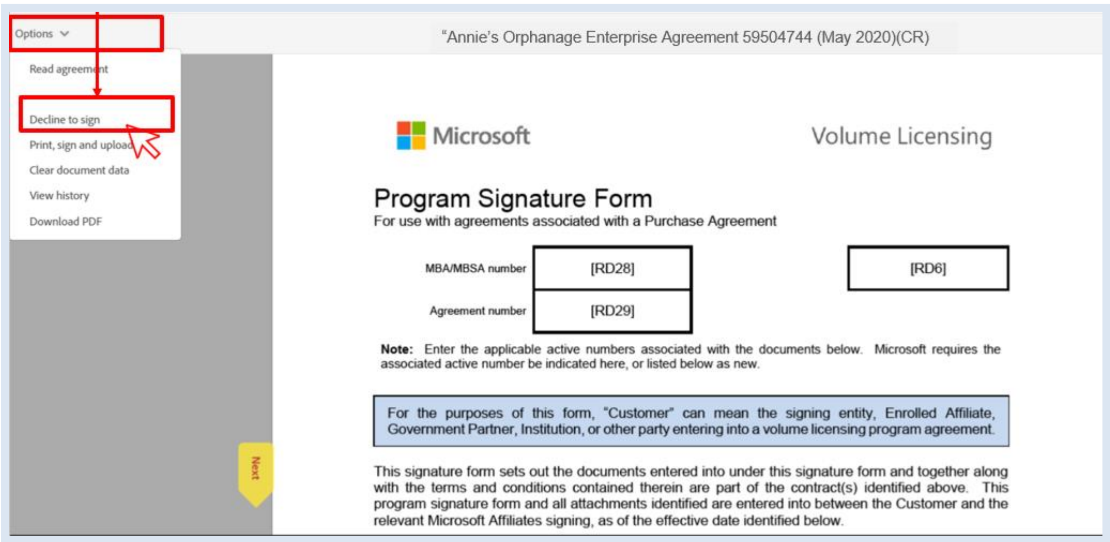
9. Once the document has been successfully uploaded, the customer will receive a notification. The contract package will automatically be submitted to the ROC for processing and countersignature, and the default countersignature type will be via Adobe Sign. The customer can access the uploaded document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



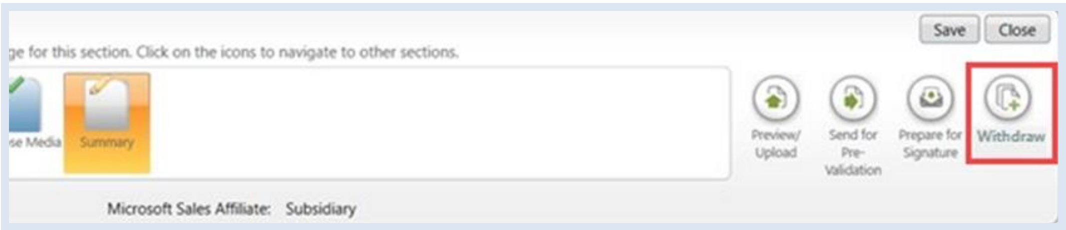
Withdraw a submission

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.



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



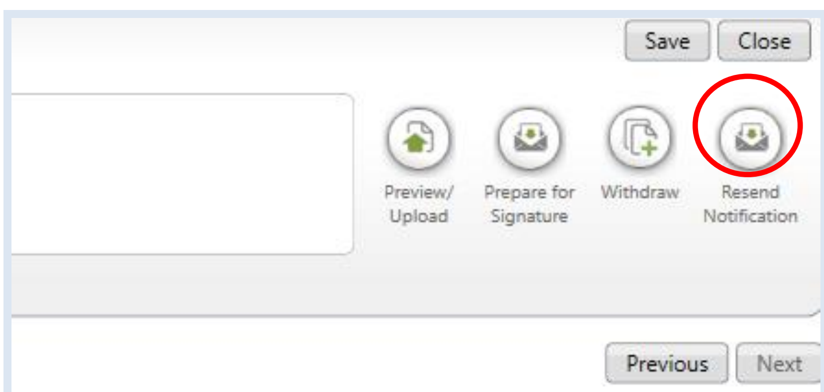
2. Select **Withdraw** to withdraw the agreement. Once withdrawn, the previous version of a contract is void.
3. Select **Yes** to confirm the withdrawal.
   - The **Withdraw** button reverts to the **Delete** button.

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

Resend the email notification

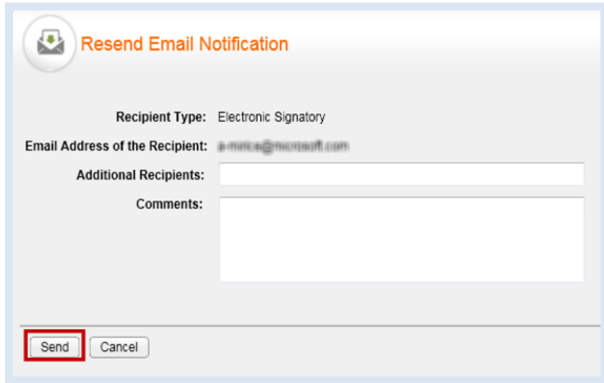
It's possible to resend submission notification emails from eAgreements. You might want to do this if the designated signer for your customer tells you that they never received the email invitation to electronically sign their contract package or can't find it in their inbox.

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**.



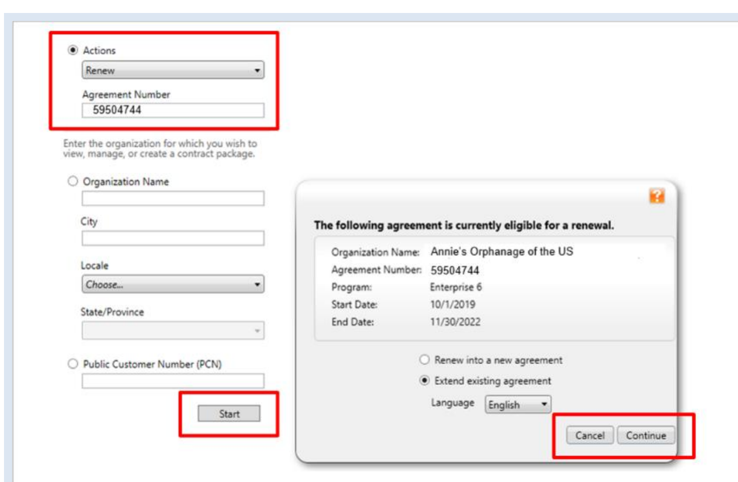
Extend an agreement

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.

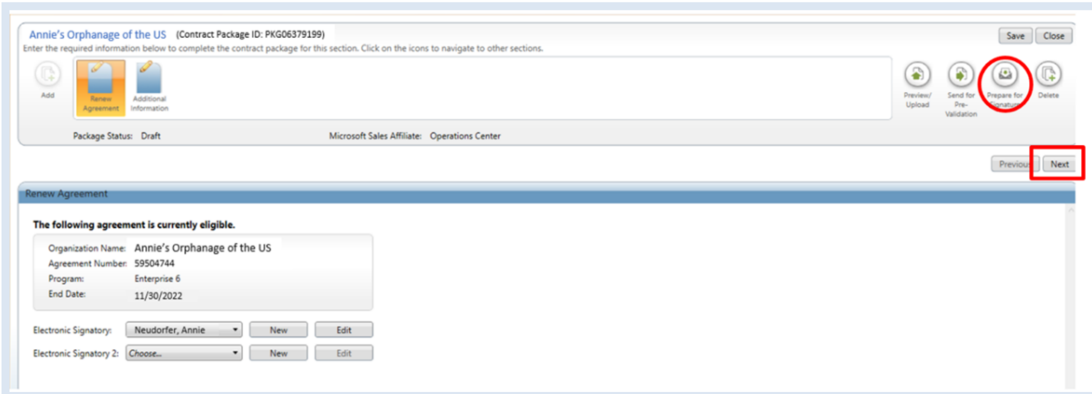
You can do this anytime up to 60 days before an agreement expires or up to 30 days after it expires.

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.

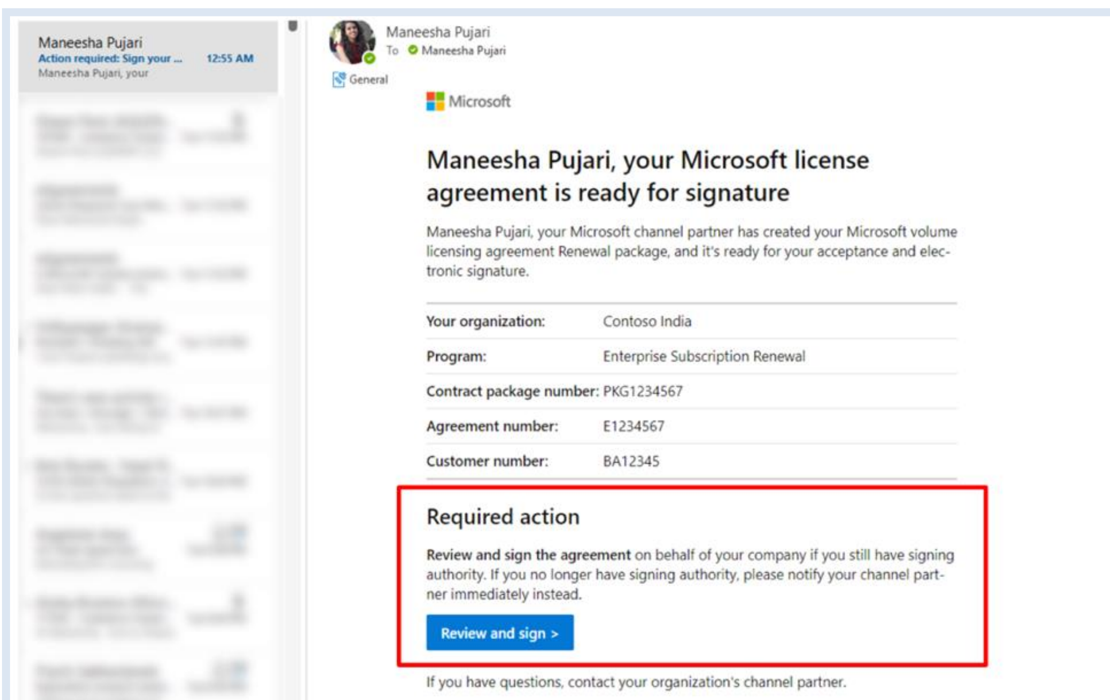


3. After validating that the information on the organization is correct, select the **Prepare for Signature** option.

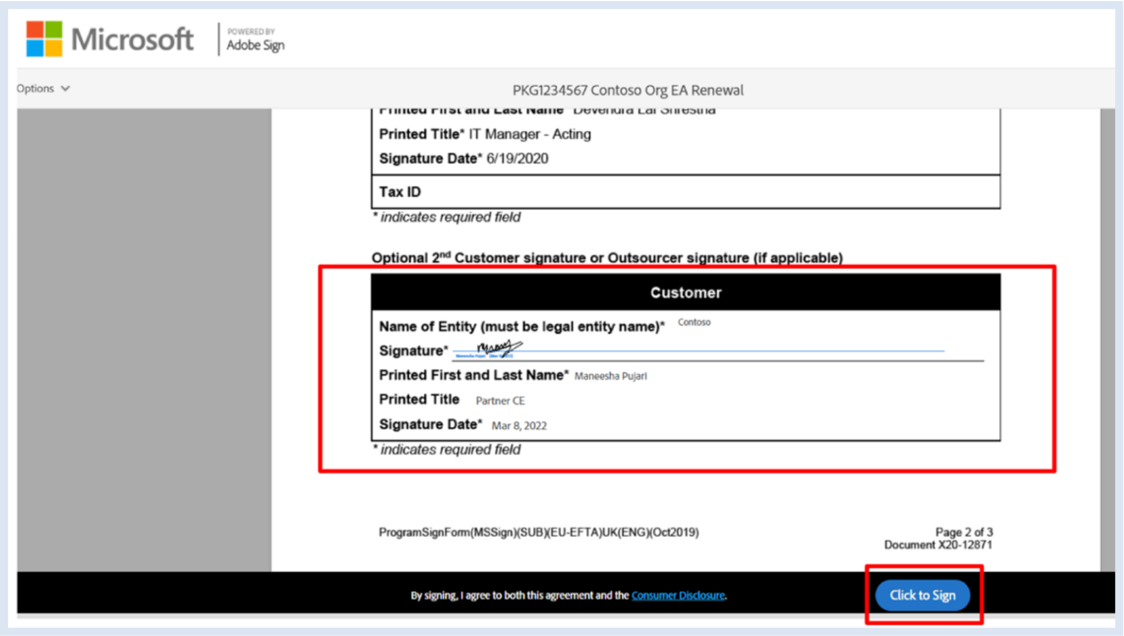


Customer steps

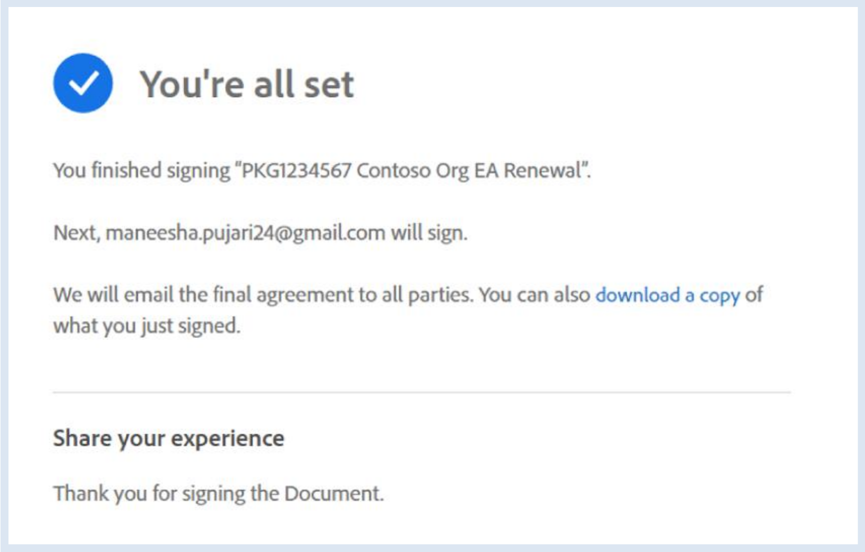
1. Once your customer receives the notification to sign the package electronically, they should select **Review and sign.**



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.



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).

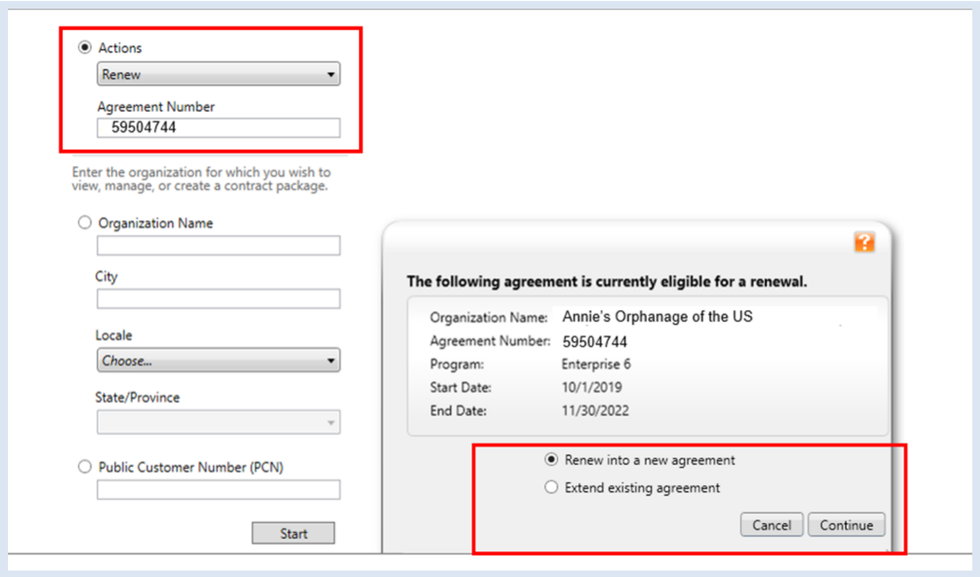
ROCs can approve exceptions up to 120 days after the renewal date.

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.

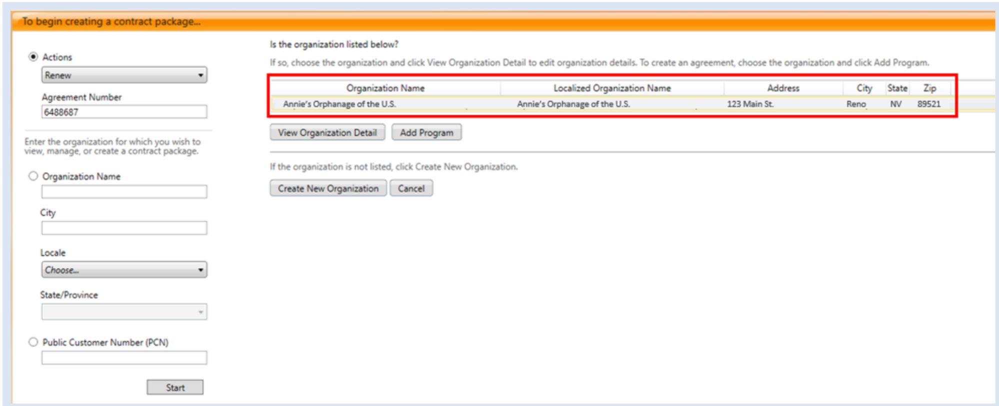
Partner steps

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

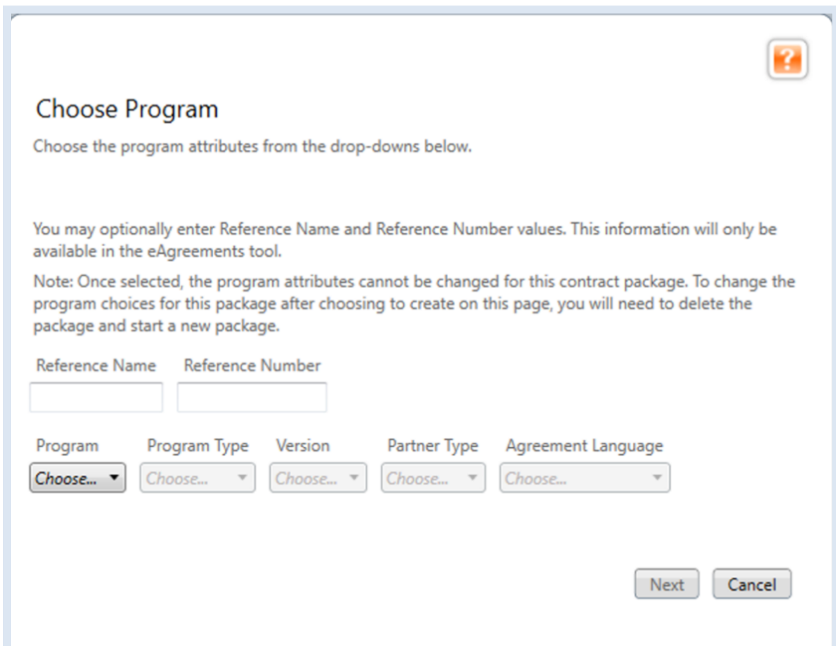
1. Go to the **Organization Search** page.
2. In the dropdown menu under **Actions**, select **Renew**. Enter the agreement number of the agreement you want to extend and select the option to extend the existing agreement.



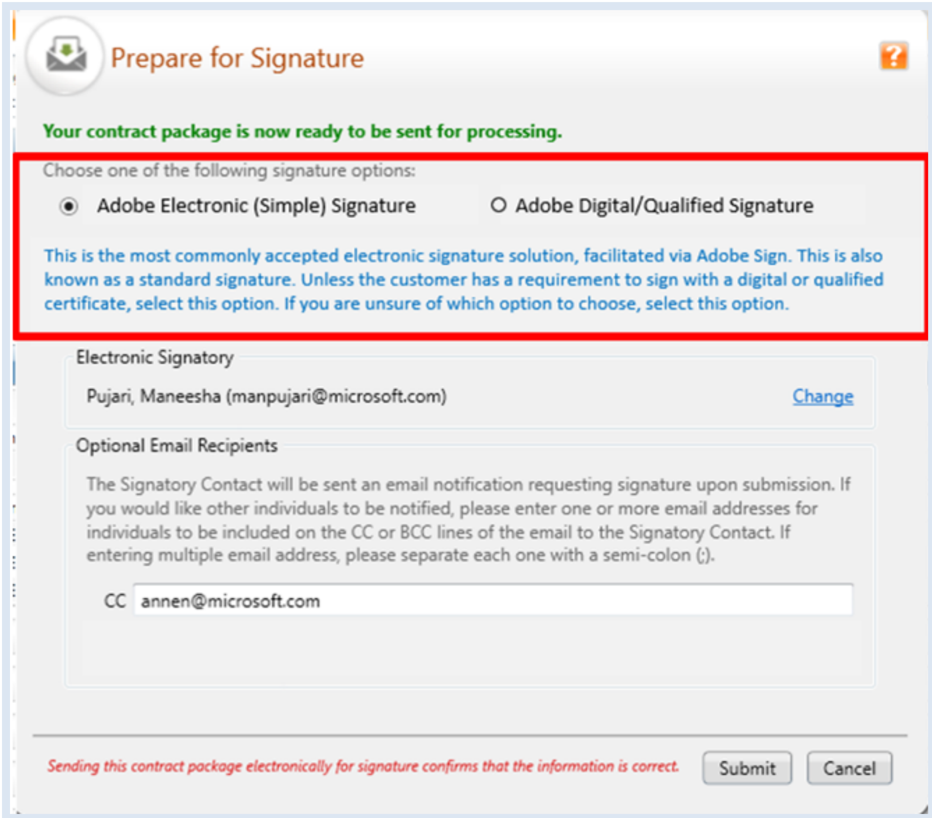
3. Verify that the information on the organization is correct and then select **Add Program**.



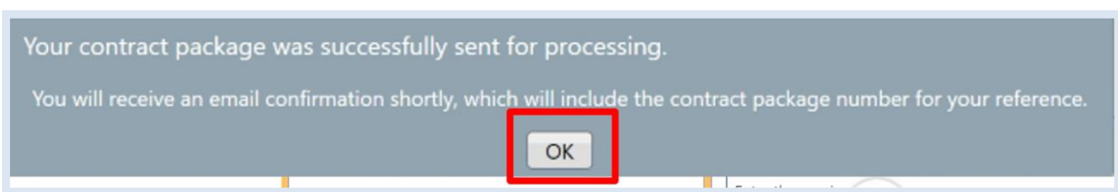
4. Add the new program information for the renewal agreement.



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.

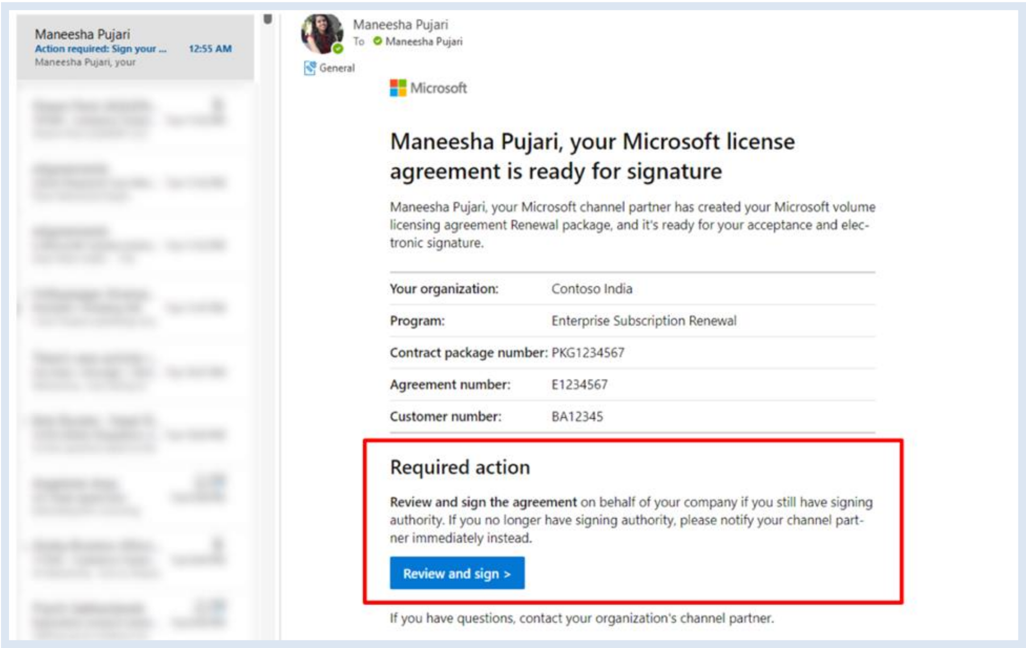


6. VLCM will submit the package for processing. When the submission process is complete, a confirmation dialog box appears. Select **OK.** Take note that for Limited Risk Distributor (LRD) countries, the subsidiary signature will be automatically applied from this point of the process.

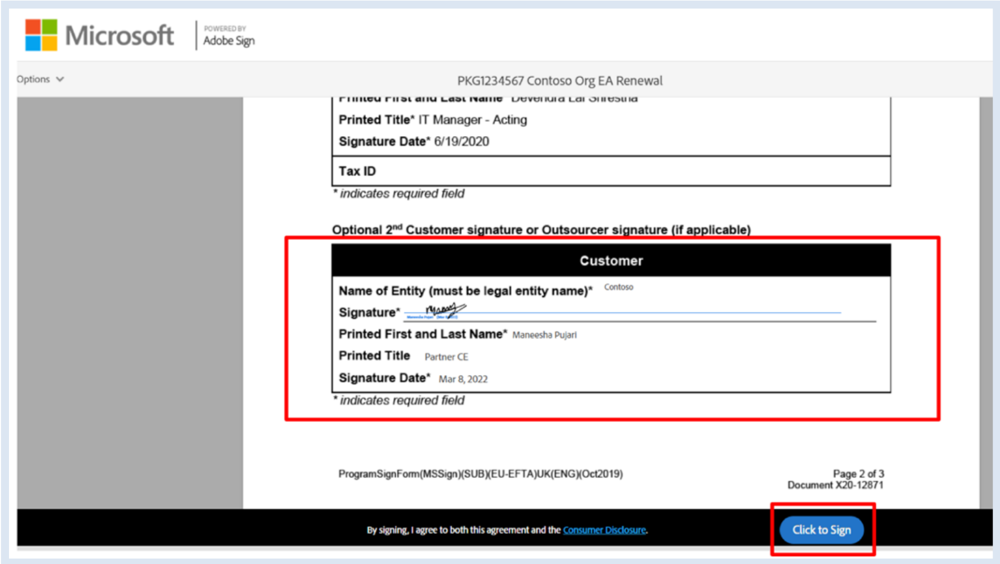


Customer steps

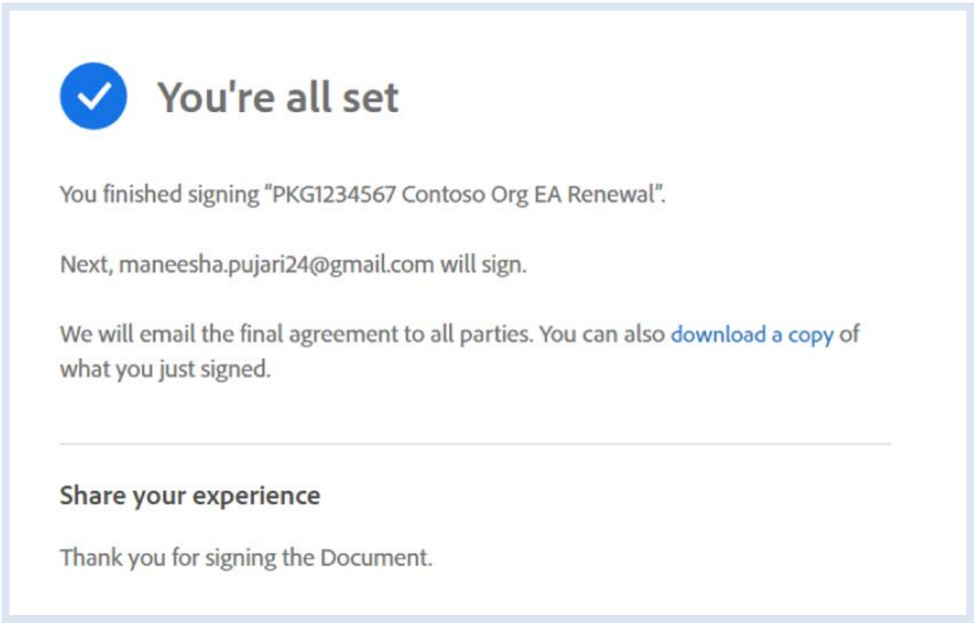
1. Once your customer receives the notification to sign the package electronically, they should select **Review and sign.**



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

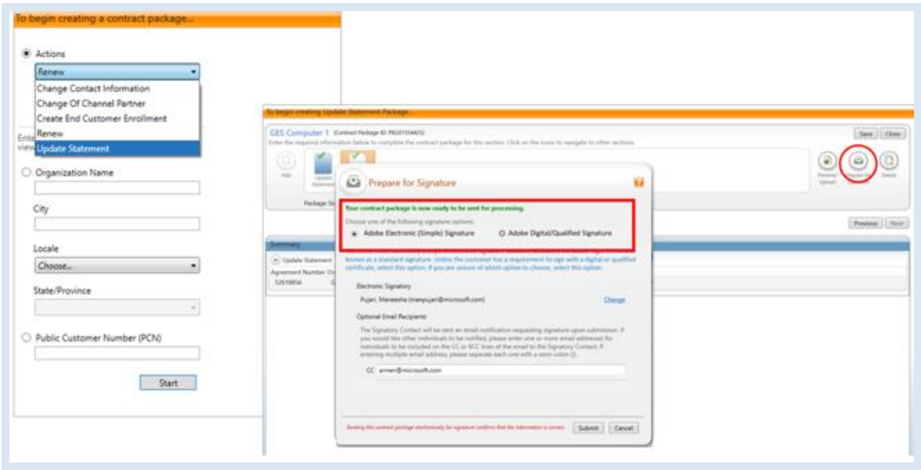
Creating an Update Statement

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

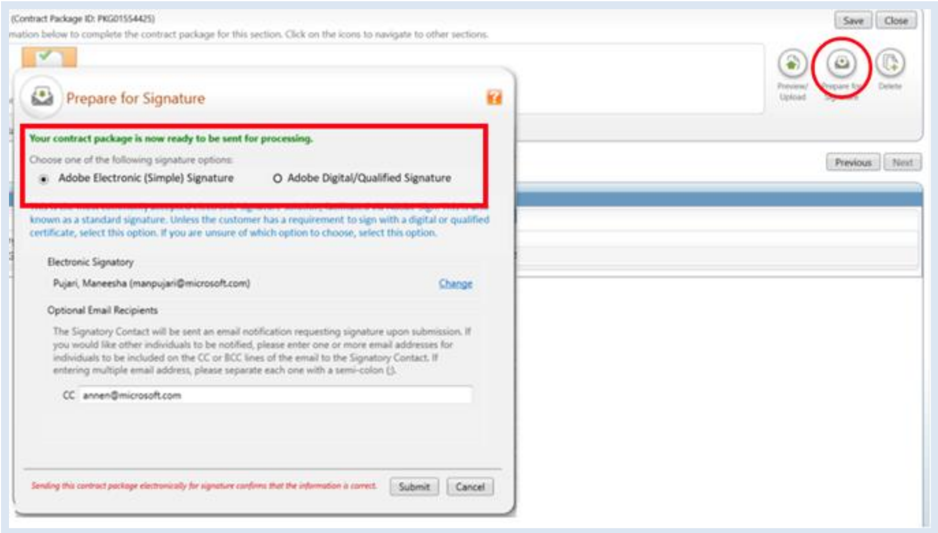
Partner steps

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**.

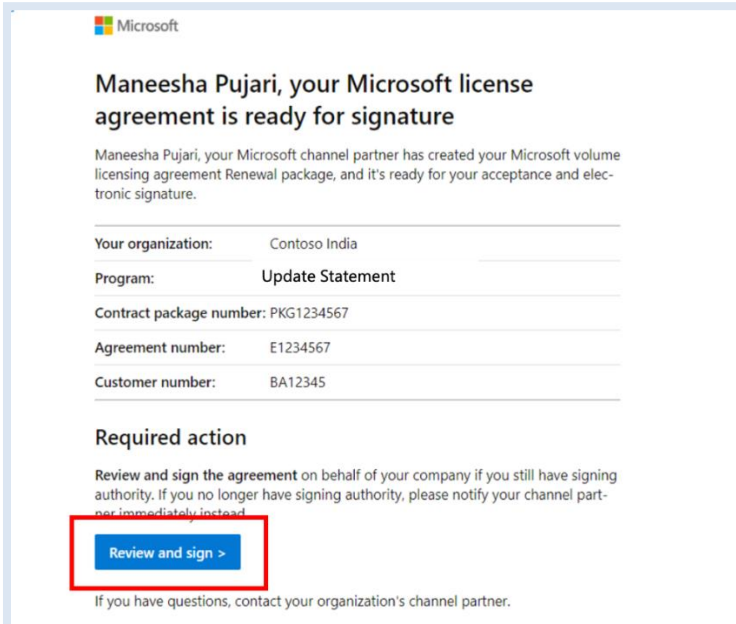


2. Select **Prepare for Signature** and then select the signature type.

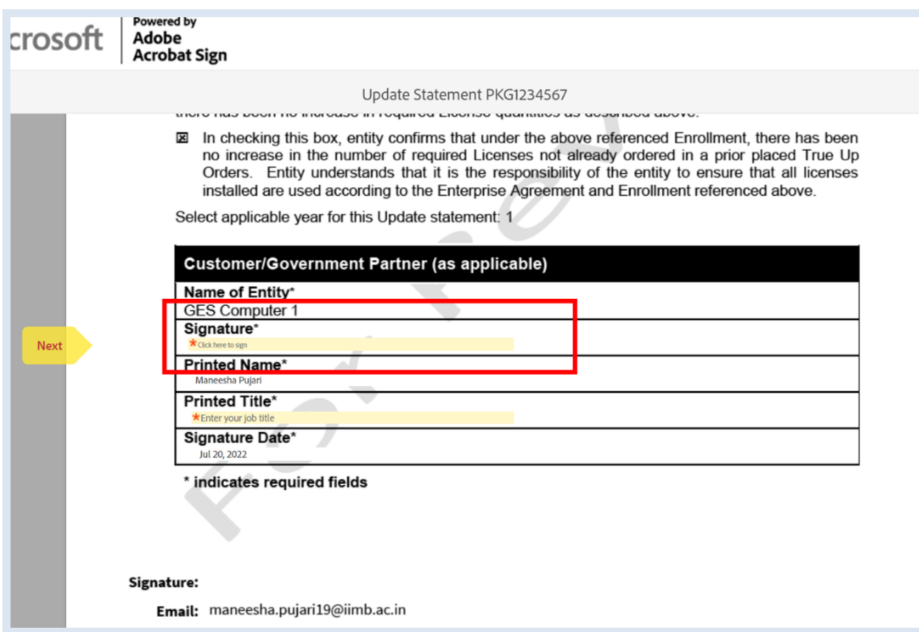


Customer steps

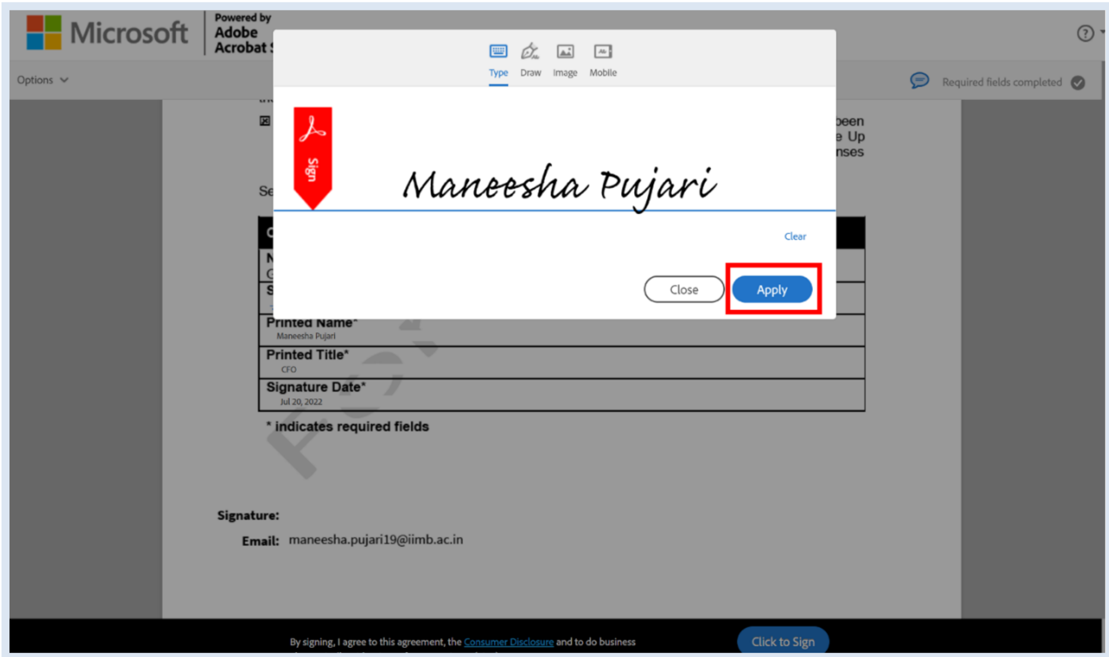
1. Once your customer receives the notification to sign the package electronically, they should select **Review and sign.**



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



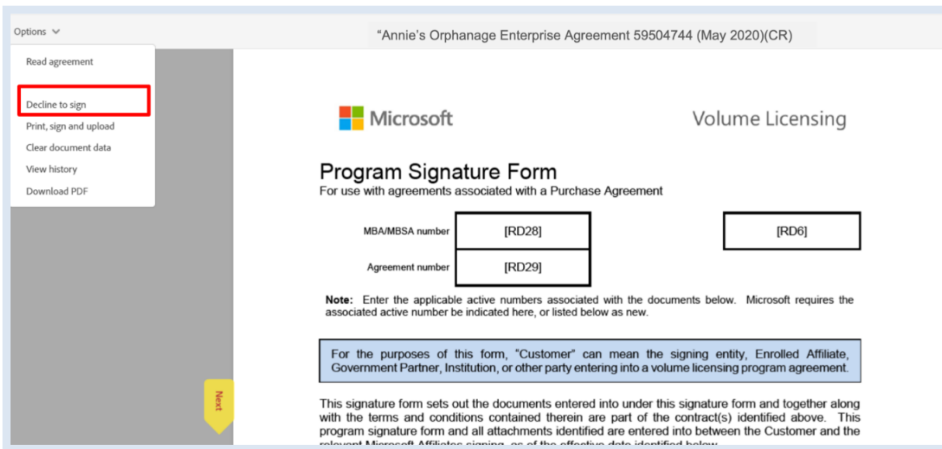
3. The customer should enter their name to electronically sign. Once they sign, they select **Apply**.



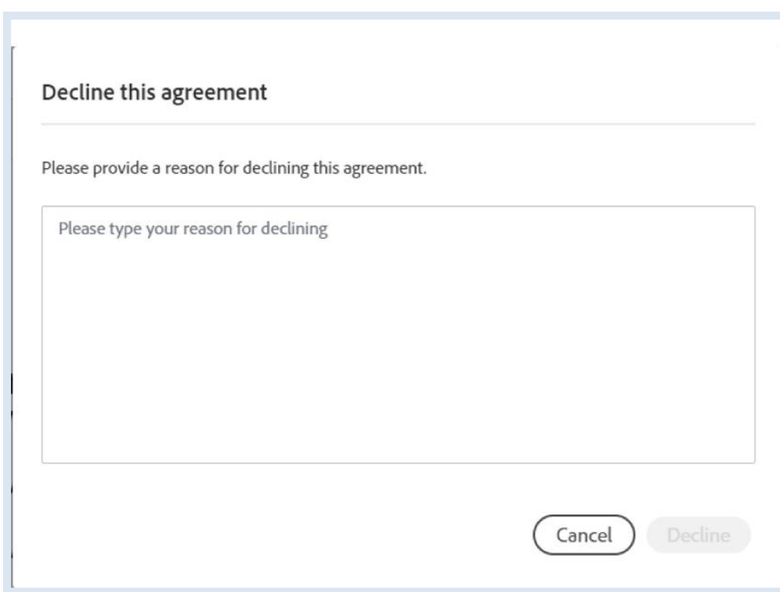
Rejecting an agreement (customer steps)

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.



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.



Create an SPLA

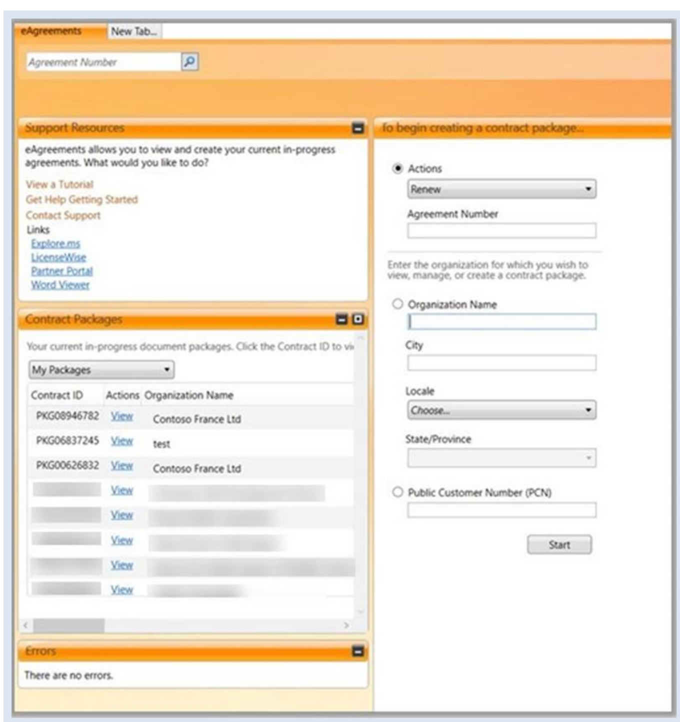
SPLA is for service providers and independent software vendors (ISVs) who want to license the latest eligible Microsoft software products to provide software services and hosted applications to end customers.

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

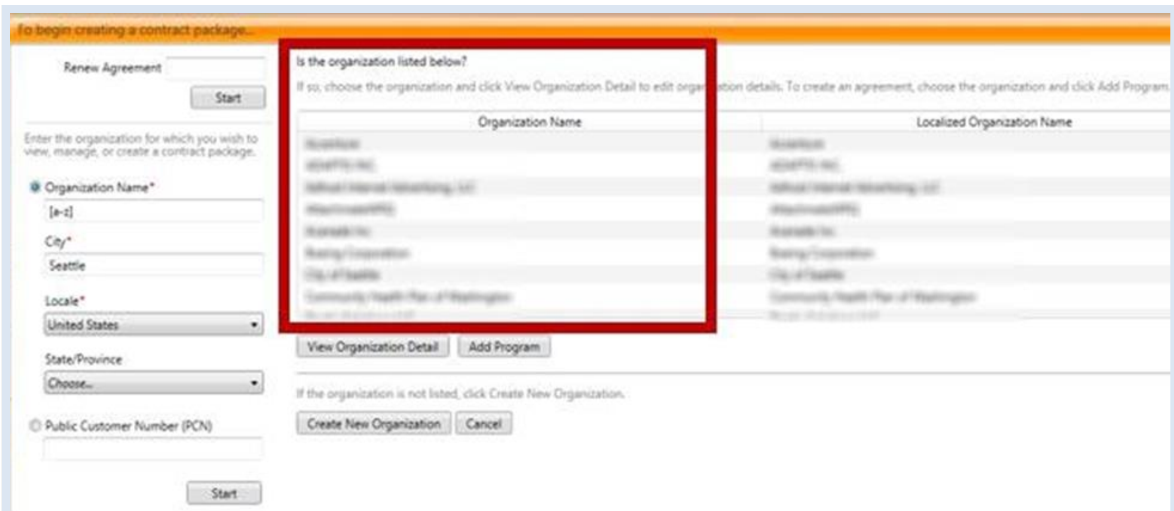
Microsoft partners sign in to the eAgreements application using their WSA or MSA, depending on their role.

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



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**.



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

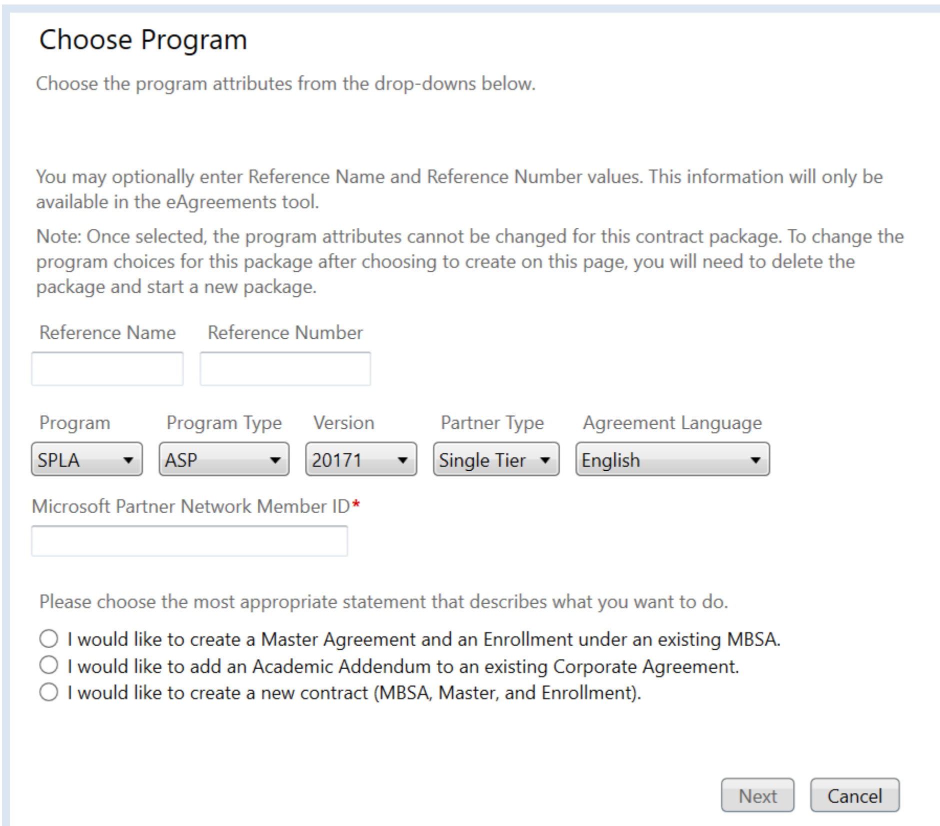
After the partner selects a customer and the SPLA agreement type, the partner must complete the contract package.

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.



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:

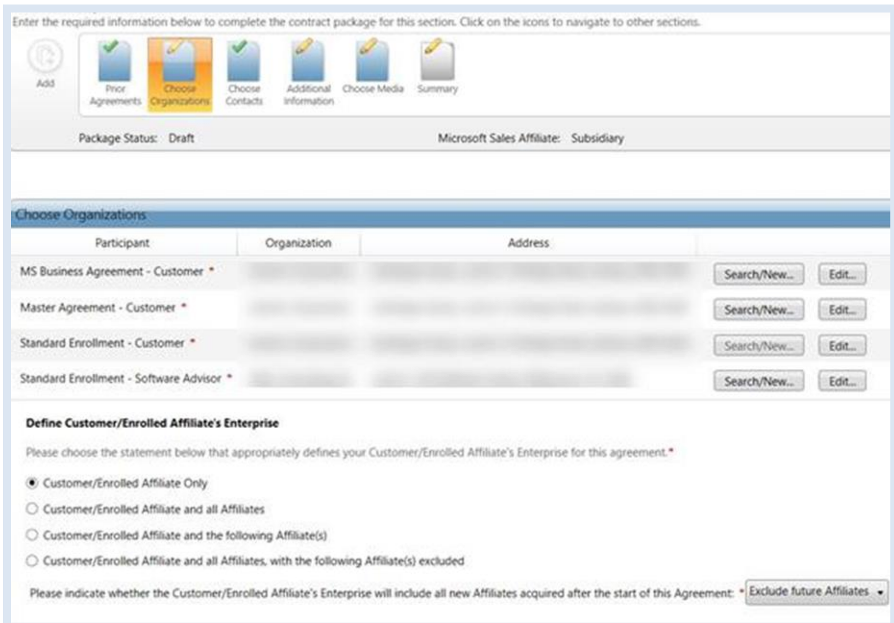
   - Create a master agreement and an enrollment under an existing Microsoft Business and Services Agreement (MBSA): you must provide a valid MBSA number
   - Add an academic addendum to an existing corporate agreement: you must provide a valid SPLA corporate enrollment number
   - Create a new contract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

Prior agreements

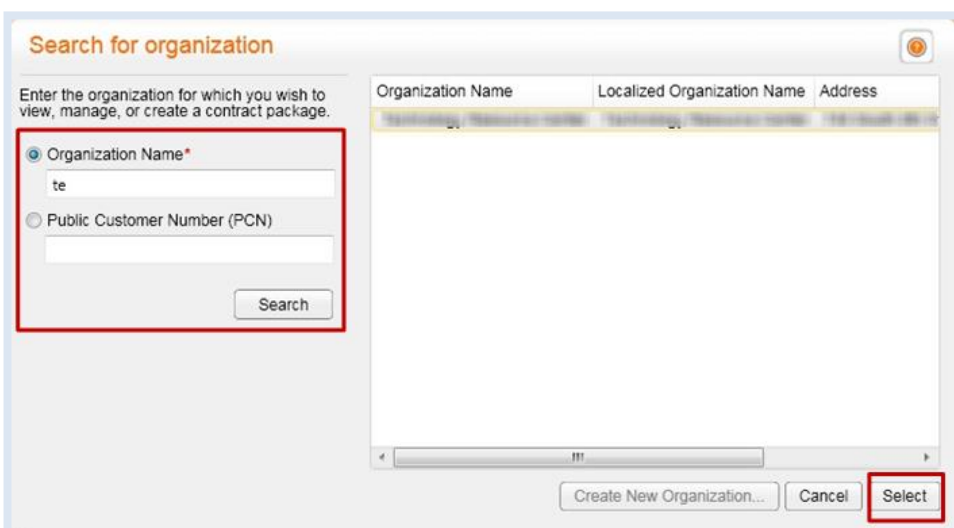
The first step in creating an agreement is to designate whether this agreement is part of a Software Assurance renewal. See the previous instructions for Prior Agreements.

Choose organizations

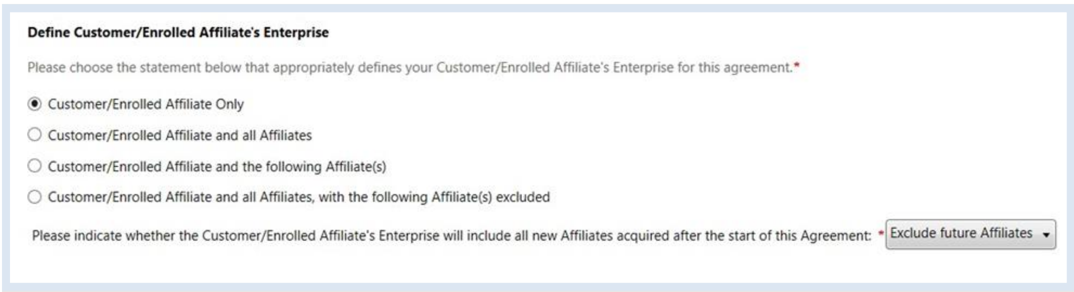
1. On the navigation menu, select **Choose Organizations**.
2. If your partner organization is not in the table that appears, select the **Search/New** button to search for the organization or enter a new organization.



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**.



5. 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**.
6. Select the appropriate option under Define Customer/Enrolled Affiliate's Enterprise.



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.

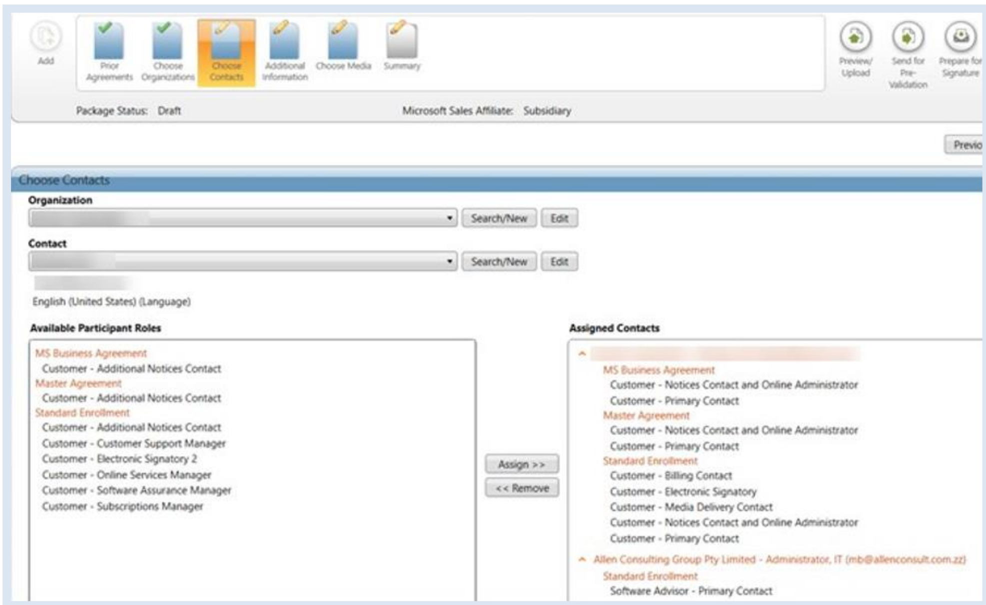
  An affiliate is a company whose parent company owns more than 50 percent of the company. In the **Manage Affiliates** table, the first two options either include or exclude affiliates based on their current and future status. The third option allows you to include the customer and only the affiliates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



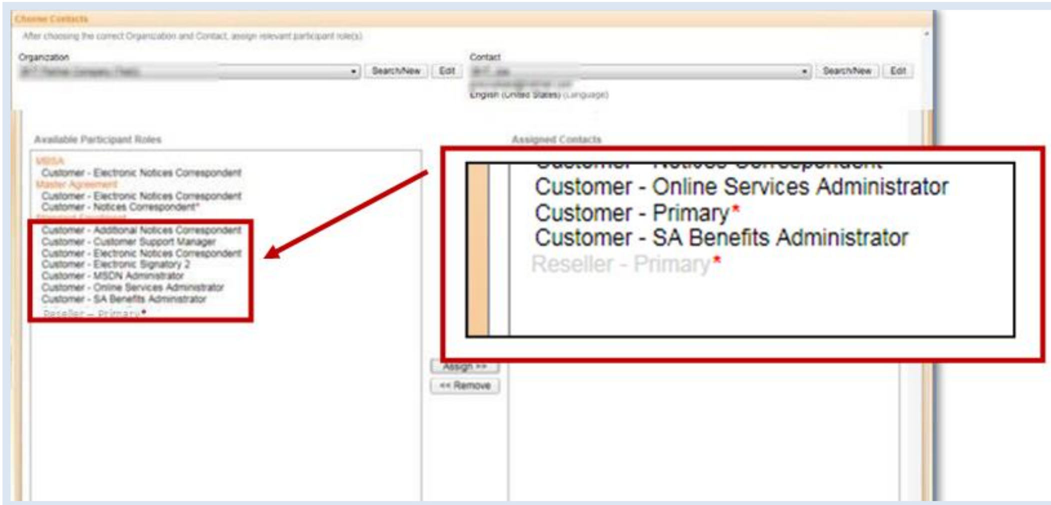
3. Select one or more roles in the **Available Participant Roles** box.

> **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.

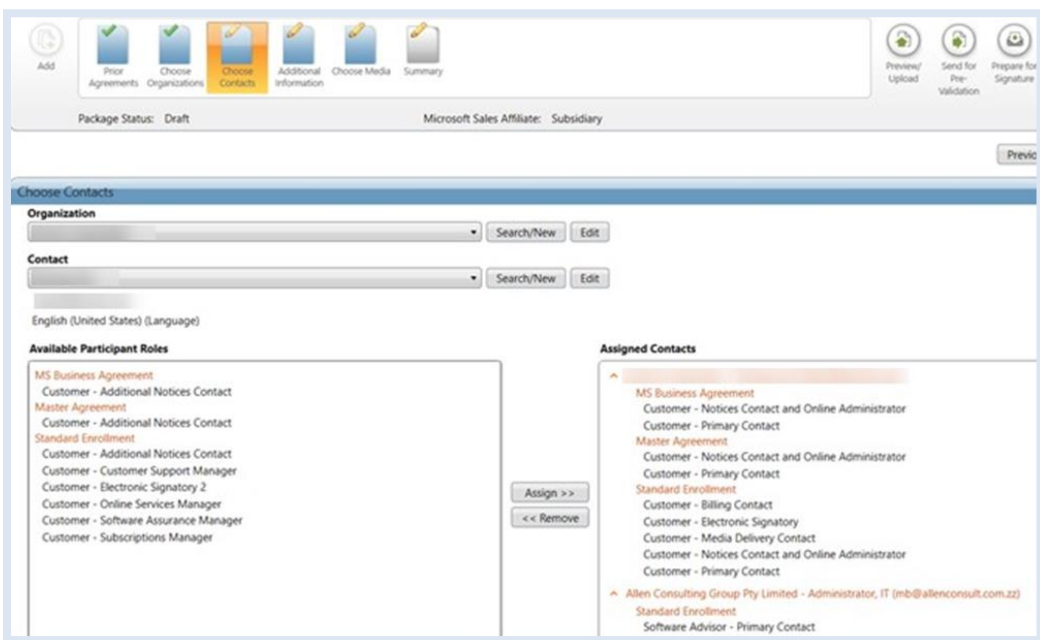
> **NOTE:** When the customer organization is selected in the **Organization** dropdown list, the Reseller **Primary Contact** and **Distributor Primary Contact** roles are grayed out in the **Available Participant Roles** box, so you cannot attach them to the customer contact.

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

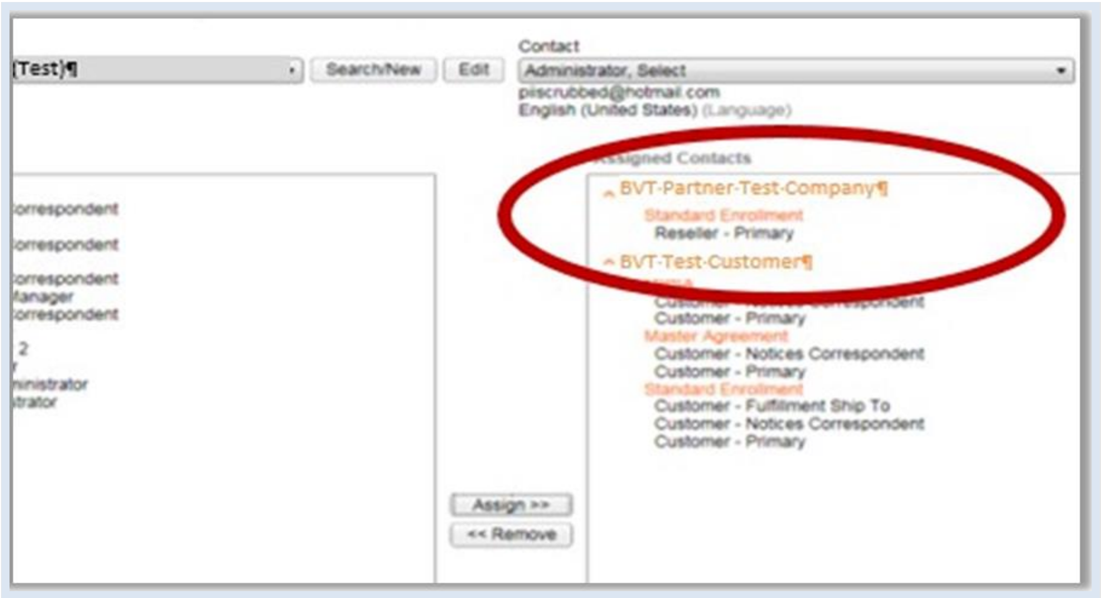


6. In the **Organization** dropdown list, select the appropriate partner organization to make the organization active in the **Choose Contacts** section.

   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.

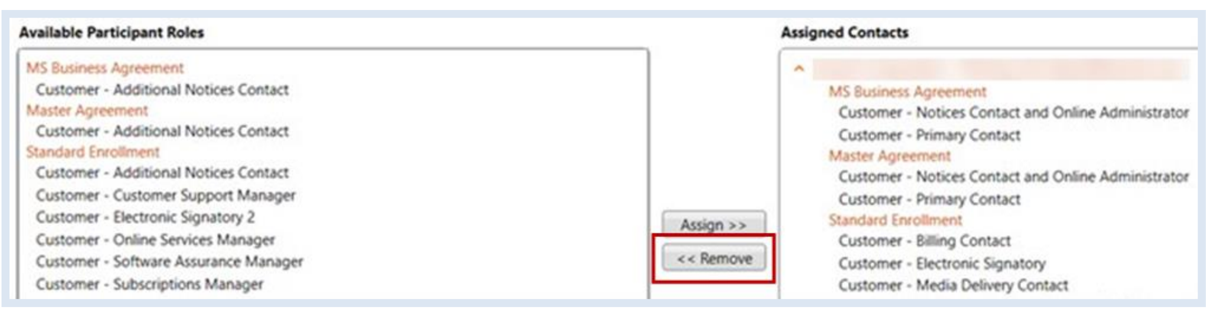


Verify assigned roles (remove a role)

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.

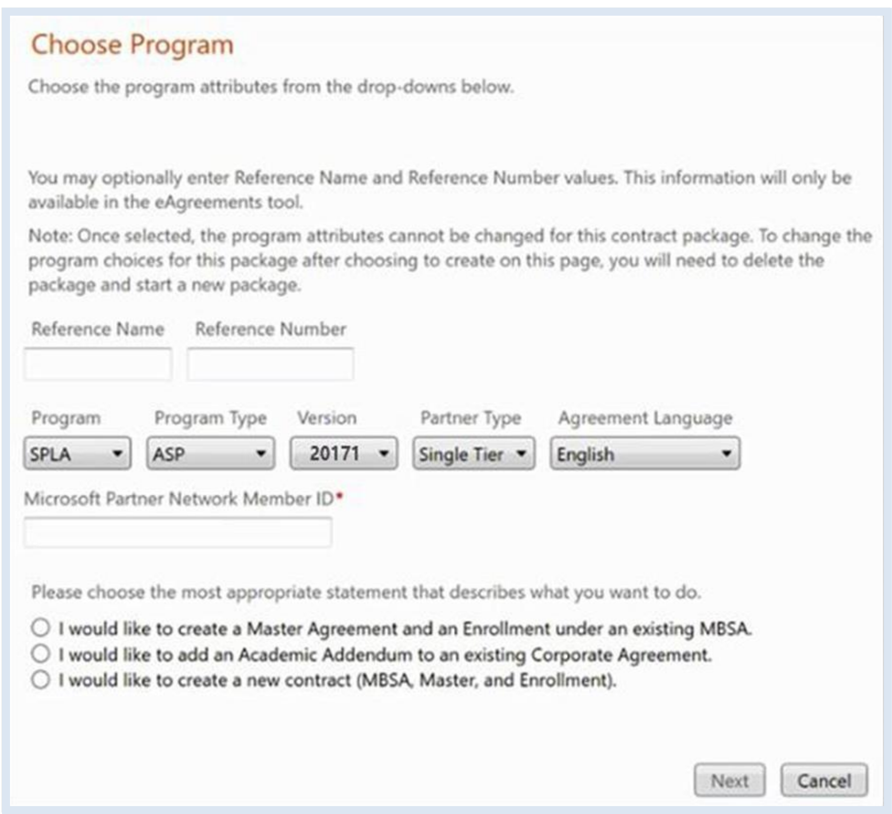
2. From the **Program** list, choose **SPLA**.

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.

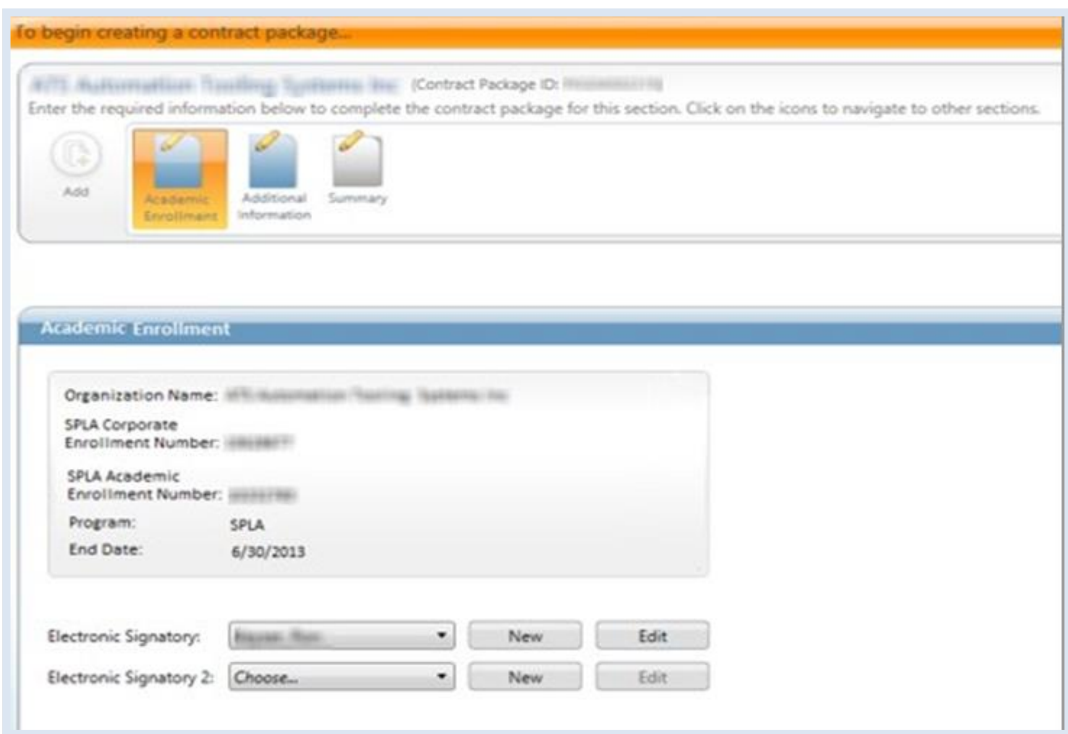


6. When you select an SPLA program, you must provide your customer's valid **Microsoft Partner Network** (MPN) **Member ID**. If you provide an invalid MPN ID, an error message appears.
7. Select **I would like to add an Academic Addendum to an existing Corporate Agreement**.
8. Provide a valid SPLA corporate enrollment number. If the SPLA corporate enrollment number is invalid, an error message appears.
9. 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.



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:

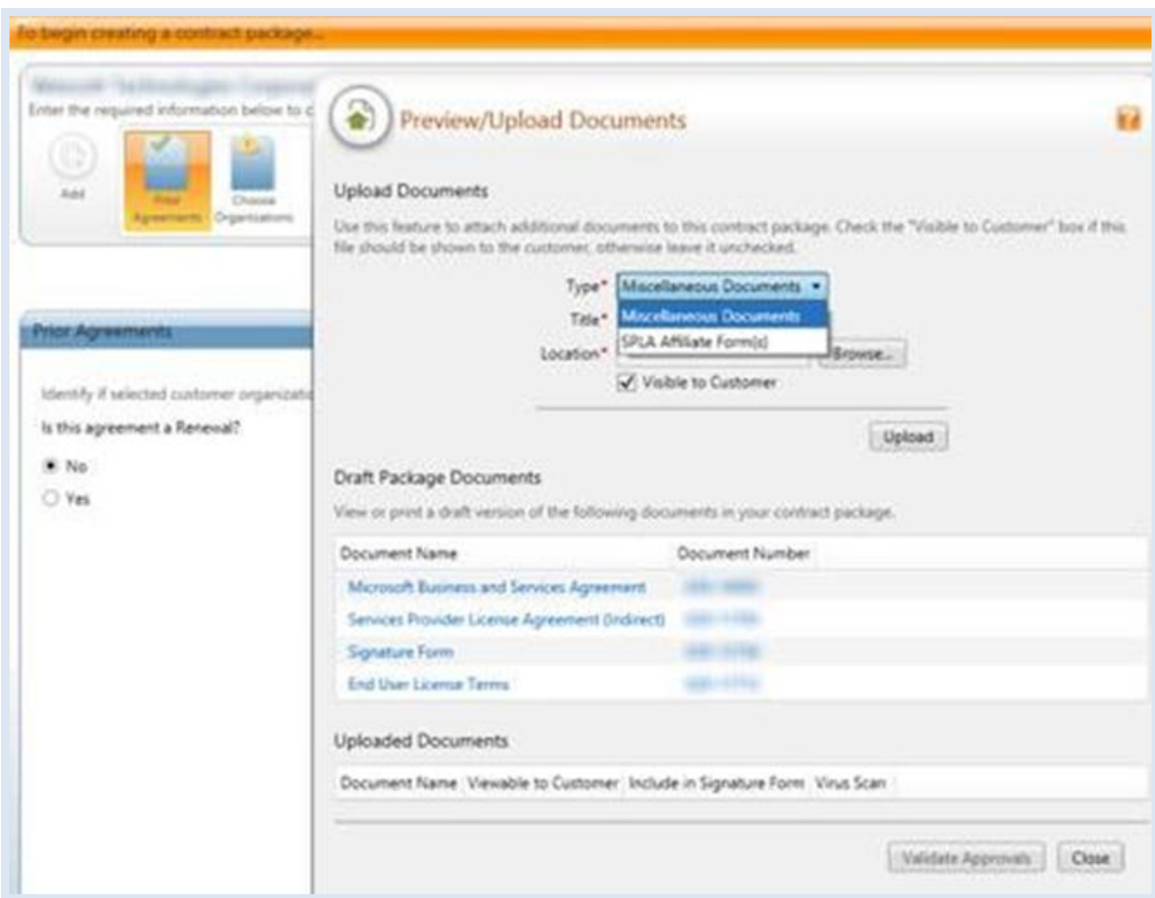
- Provide Additional Information
- View the Summary

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.



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:

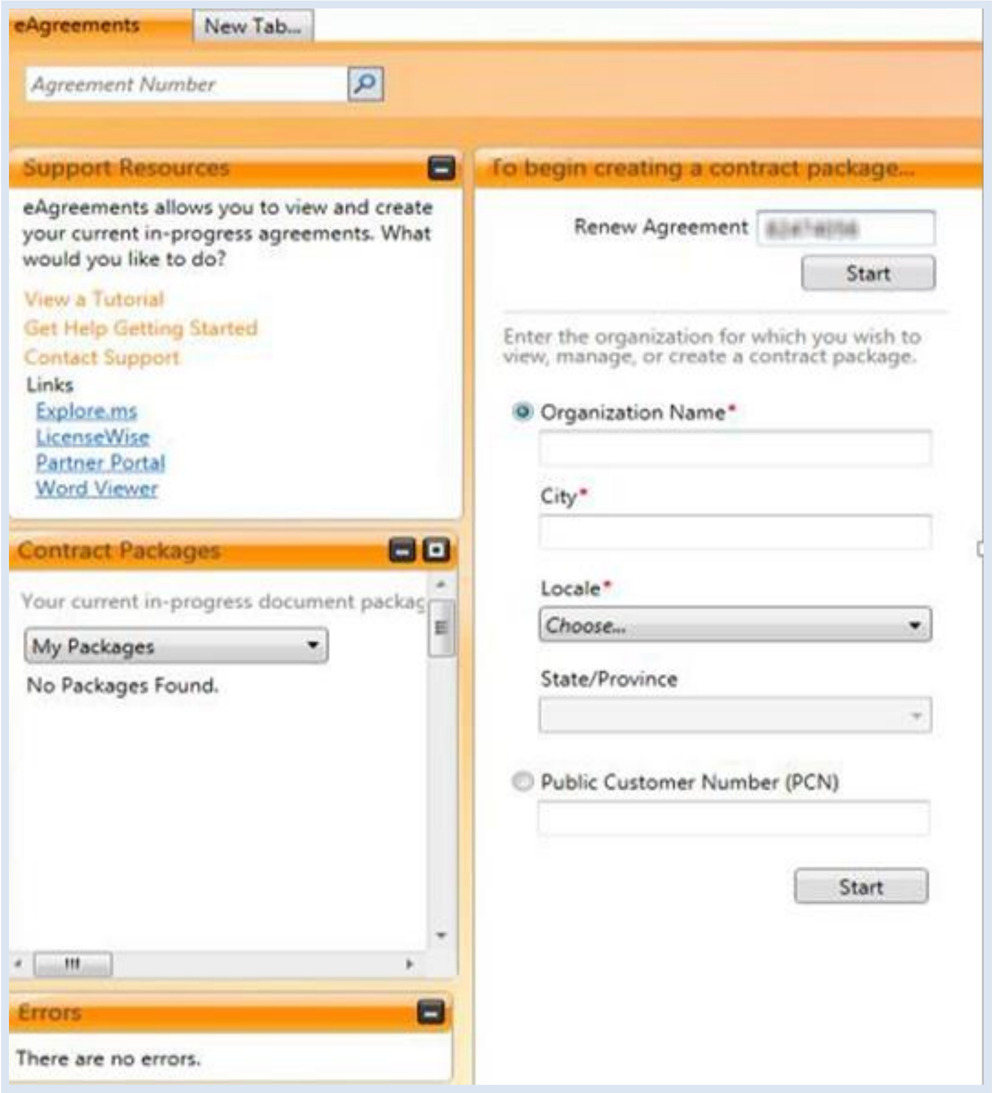
- Withdraw a submission
- Resend the email notification

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.

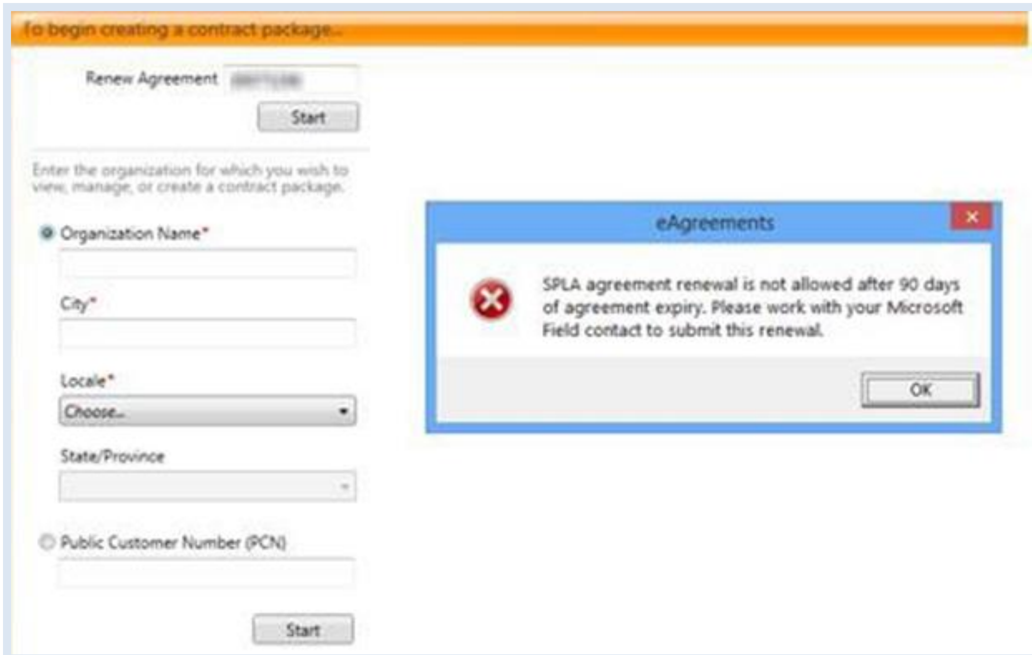
1. Sign in to eAgreements by following the previous instructions.

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**.

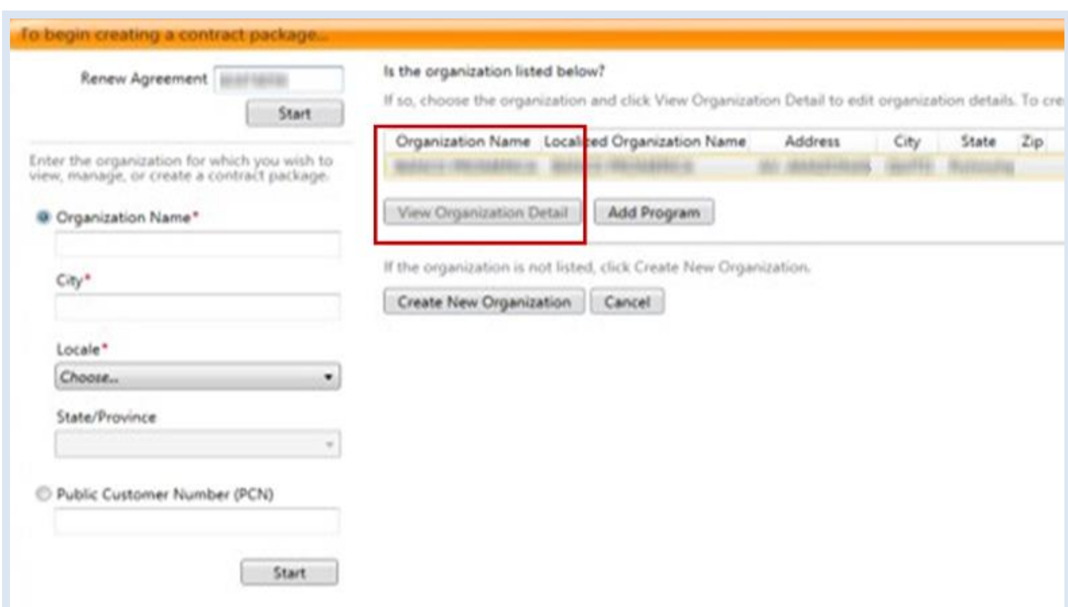


eAgreements
New Tab...
Agreement Number
Support Resources
eAgreements allows you to view and create your current in-progress agreements. What would you like to do?
View a Tutorial
Get Help Getting Started
Contact Support
Links
Explore.ms
LicenseWise
Partner Portal
Word Viewer
Contract Packages
Your current in-progress document packag
My Packages
No Packages Found.
Errors
There are no errors.
To begin creating a contract package...
Renew Agreement
Start
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

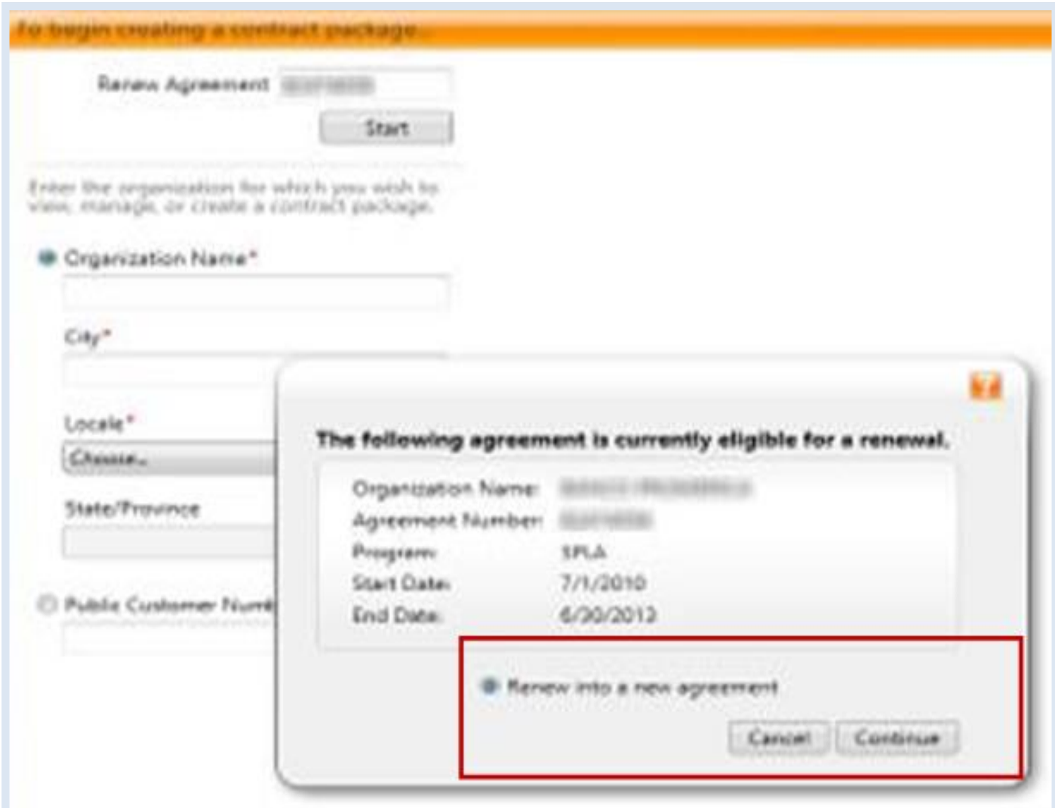
3. If the agreement exists and is eligible for renewal, the organization's details appear in the results pane on the right. If the agreement isn't eligible for renewal, an error message appears that explains why you can't renew the agreement.



4. 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**.



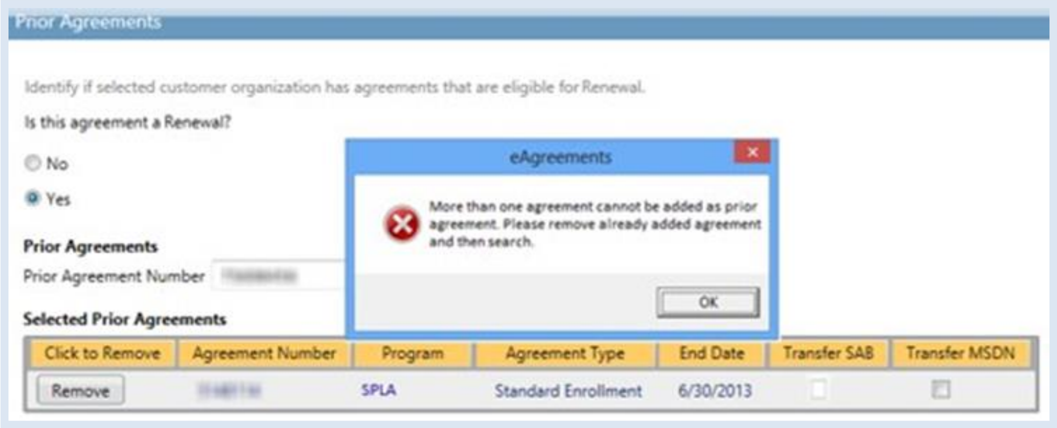
5. When the organization's details dialog box appears, **Renew into a new agreement** is the default. Select **Continue**.



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

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

If you search for another agreement using the **Prior Agreement Number** box on this page, an error message appears. You can't renew more than one SPLA agreement at a time.



6. Under **Is this agreement a Renewal?**, confirm that **Yes** is selected.
7. To go to the next page, select **Next**.
8. On the **Choose Program** page, select **I would like to create a Master Agreement and an Enrollment under an existing MBSA**. You must provide a valid MBSA number for the existing agreement.
9. Complete the rest of the **Choose Program** page.

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.

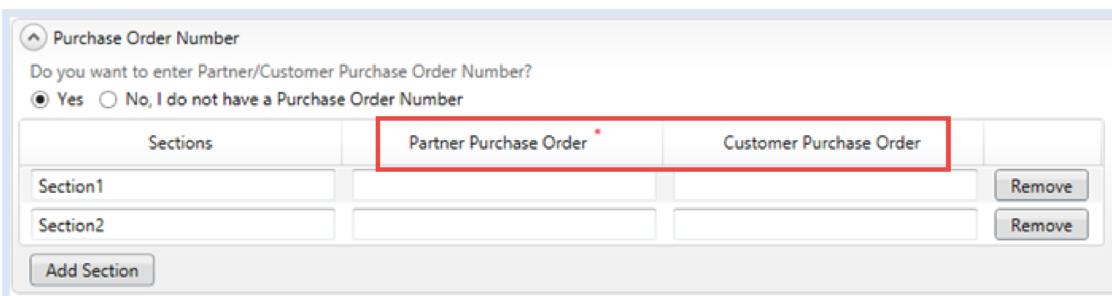
To create a new sales package or renew an existing package for customers with an Open Value Subscription, follow the previous steps, starting with Create an agreement.

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.



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

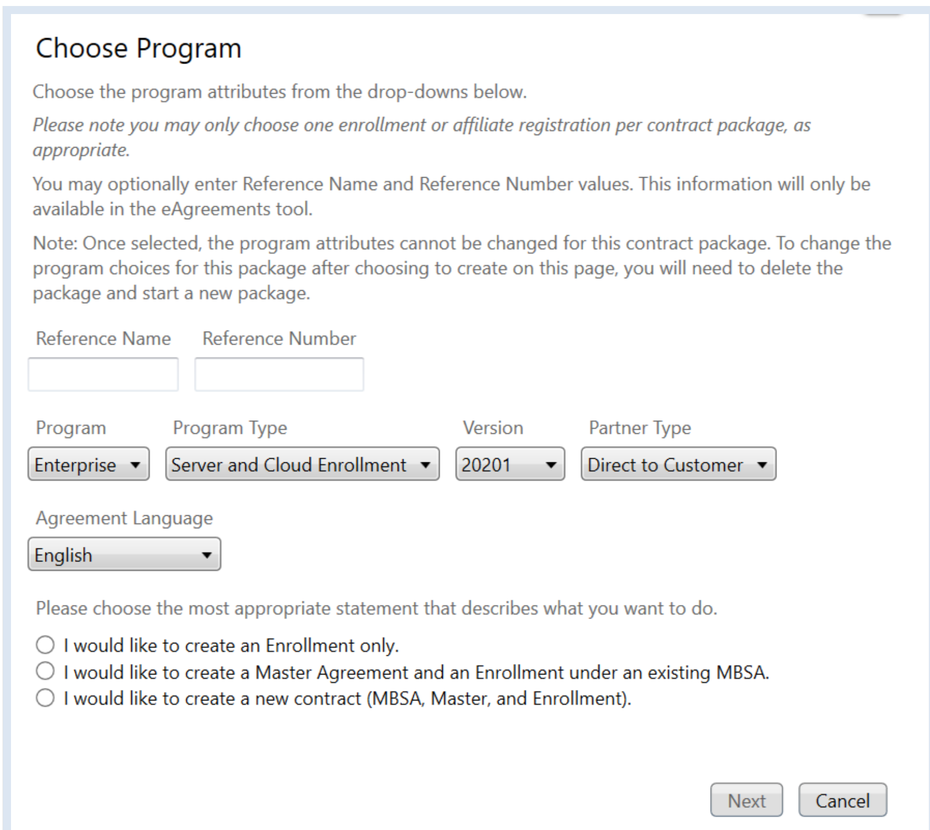
Partners can add the PO numbers for indirect EAs at the time of signing the Channel Price Sheet (CPS).

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.



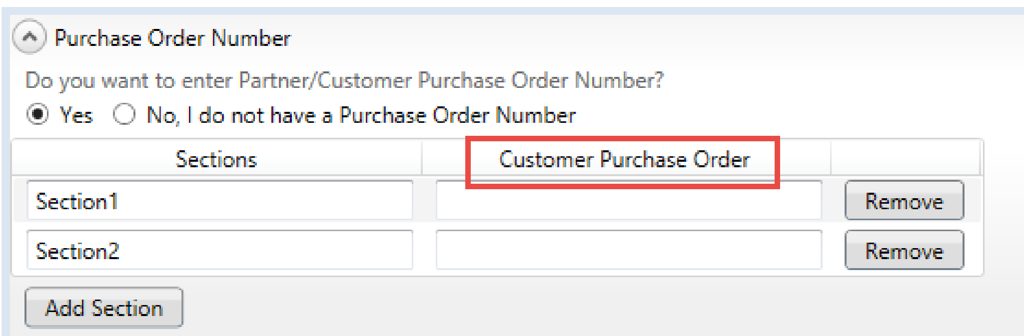
Mandatory purchase order

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.



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.

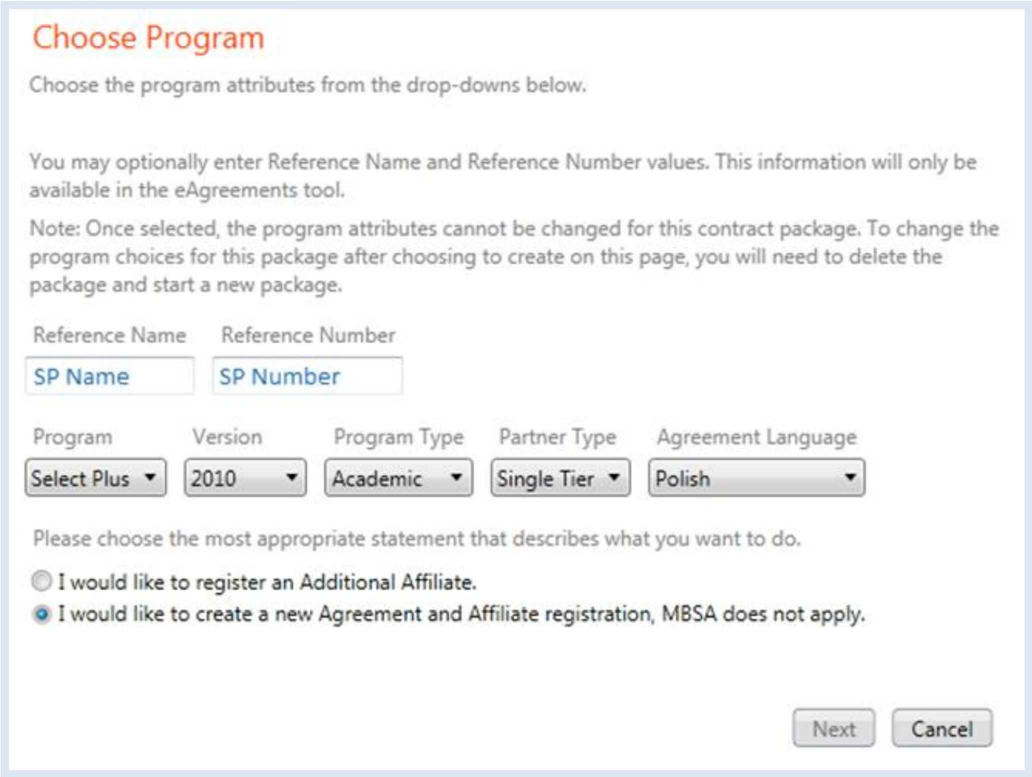
Select Plus agreements

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.

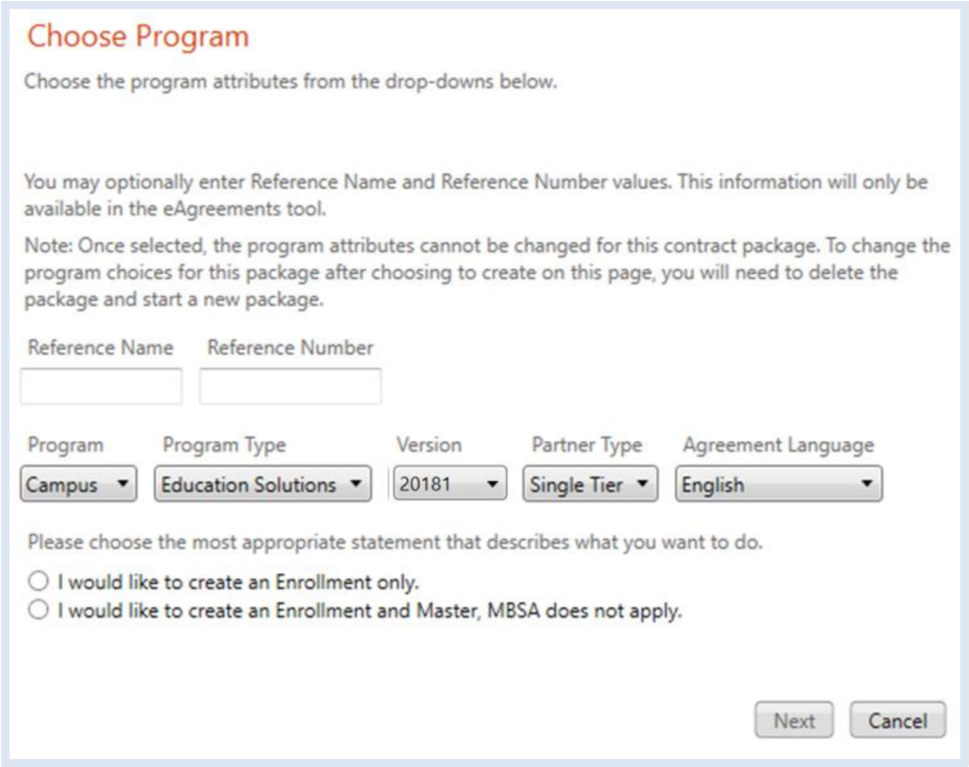


EES

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).



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 (*).

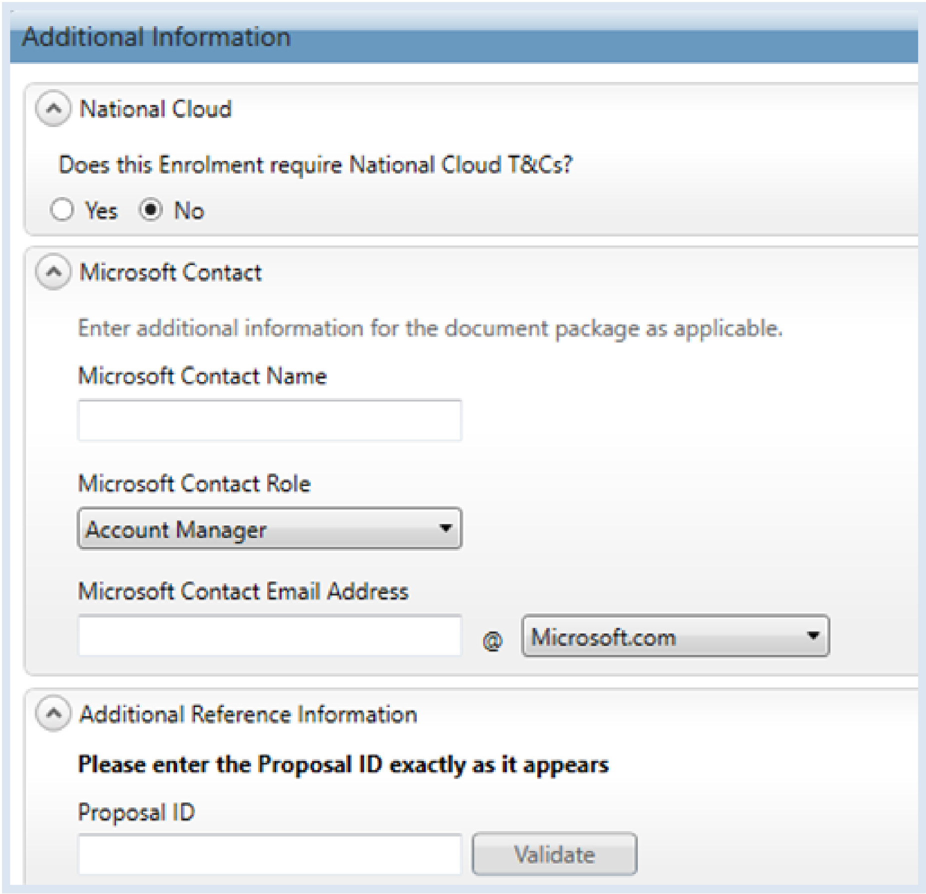
To fill in the **Additional Information** section for an EES agreement:

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.



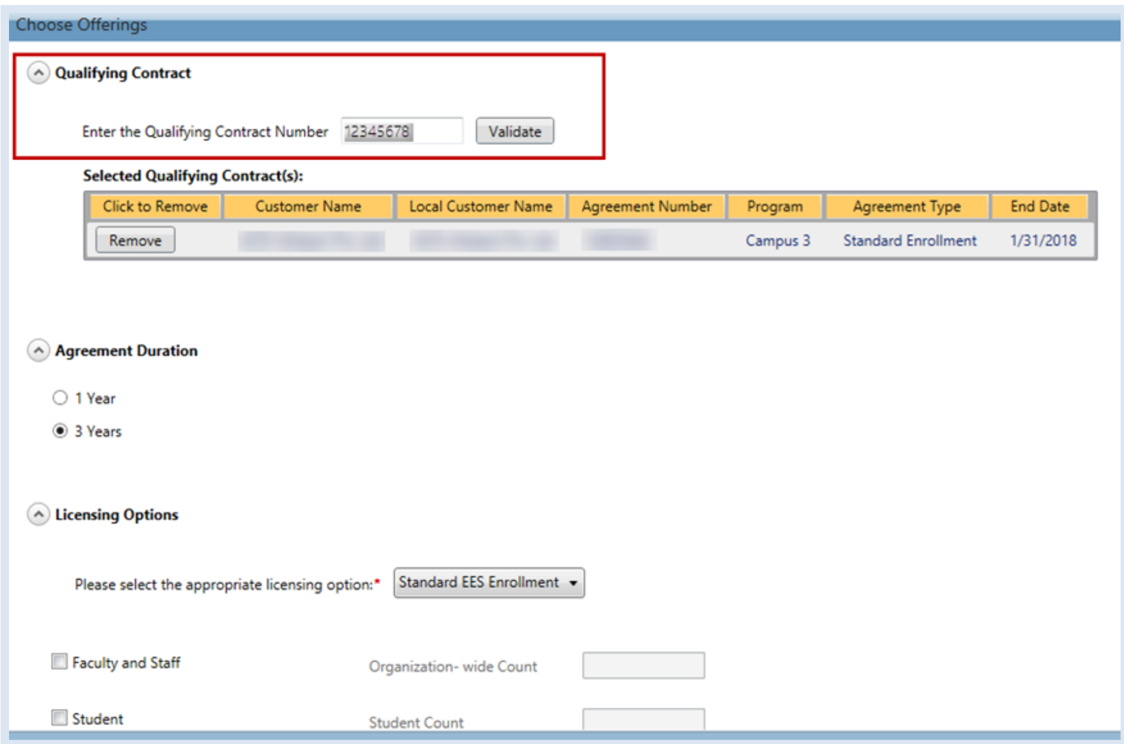
Choose offerings

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.

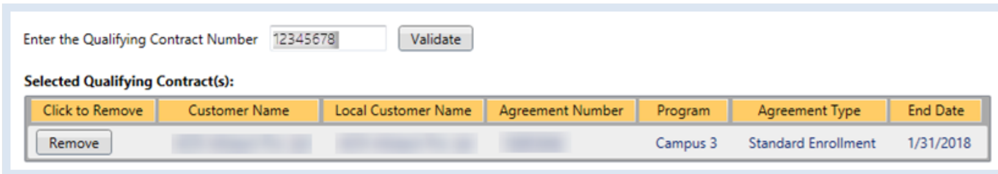


3. Select the **Validate** button to see if the **Qualifying Contract Number** you entered is valid and accepted.

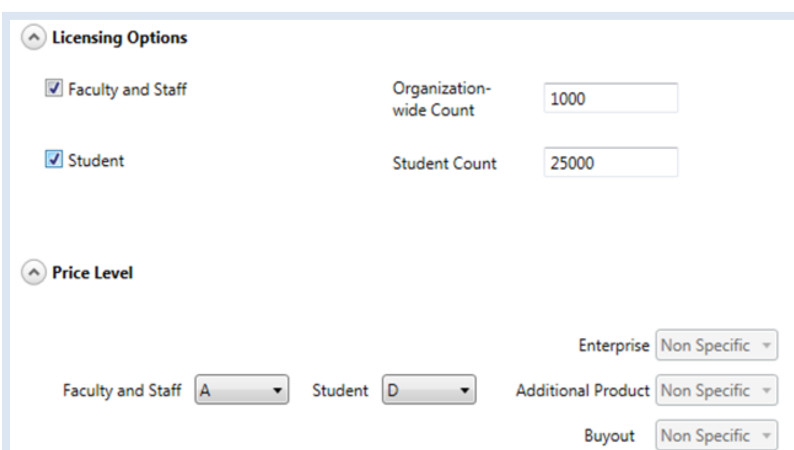
> **NOTE**: The **Validate** button will be grayed out if this is an in-flight contract package.

4. 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.



5. Select the agreement duration.
6. 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.
7. 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**.



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
☑	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.
☐	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.
☐	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.

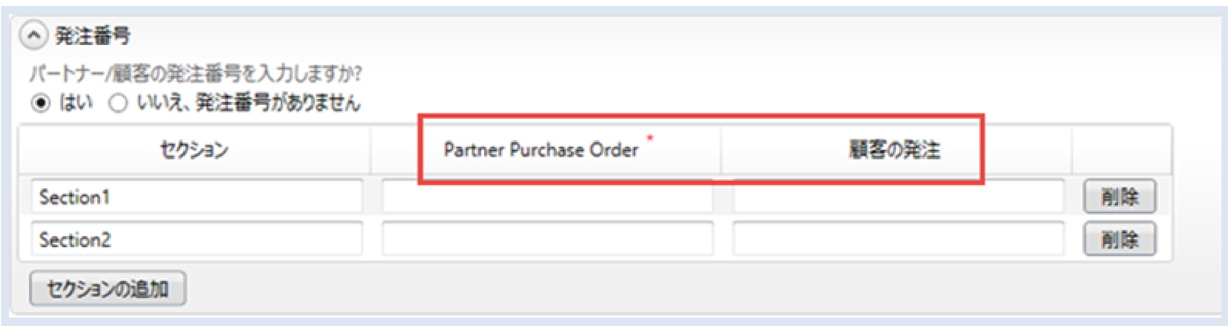
Geographical differences

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.



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.