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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.

The eAgreements tool lets you create contract packages for all these Microsoft licensing programs:

- 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
- Enrollment for Education Solutions (EES)

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

- Service Provider License Agreement (SPLA)
- Open Value
- Open Value Subscription
- Enterprise Agreement
- Enterprise Server and Cloud Enrollment (SCE)
- Select Plus Agreements
- Enrollment for Education Solutions (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 Partner Domain Account information or their Microsoft Account, depending on their role.

The eAgreements sign in page is at [https://eagreements.microsoft.com/](https://eagreements.microsoft.com/)

After you sign in, this will open the Organization Search page, which is the start screen in eAgreements.
Find or create a customer

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

**NOTE:** If you are 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.)
   - Or
   - Enter your customer’s **Public Customer Number (PCN.)**

2. Click **Start**.

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

3. If the customer you are looking for is in the results list, select the customer name and then click **Add Program**. If the customer is not in the results list, double check your search criteria, and if you’re still not able to locate the customer, click **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 this customer has, such as 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 drop-down.
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.

![Image showing the Select Plus, Academic, Version, Single Tier, and English options with a note about choosing the most appropriate statement.]

**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. Click **Next**.

**Navigate through eAgreements**

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

Customers with these types of agreements will have six buttons:

- Service Provider License Agreements (SPLA)
- Enterprise and Enterprise Subscriptions (corporate or state/local government)
Customers with these types of agreements will have an additional button for a section titled **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 mark on the button ✅ means the section is complete.
- A pencil graphic on the button 📝 means no information has been entered yet in this section.
- An exclamation mark on the button ❗️ means some information is missing and the section is not complete.

Immediately below the six buttons are two fields that show the **Package Status** and **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, please contact the ROC or the Microsoft subsidiary for your customer’s country, depending on which is listed here.

**Create an agreement (contract package)**

After you have 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 organization, since eAgreements will pre-populate your partner information.

**Save a draft**

At any stage in the process of creating a contract package, you can click the **Save** button in the upper right corner 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 renewal.

1. Select the **Prior Agreements** button.
2. Select **Yes** or **No** to confirm whether the new agreement you are creating is part of a Software Assurance (SA) renewal.
Choose Organizations

1. Select the Choose Organizations button.

2. Click Search/New to add details of the partner associated with this contract package.

3. Enter the Distributor’s Organization Name or Public Customer Number.

4. Click Search.

5. Click on the appropriate organization and click Select.
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 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% 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, click the **Choose Contacts** button.

2. Select the Customer organization from the **Organization** drop-down list box to view the available contacts for that organization. Use the **Contact** drop-down list box to choose the appropriate contacts within the organization.
   - To add contacts, click **Search/New** next to the **Contact** drop-down list menu.
   - To add details for an existing contact, click **Edit** next to the **Contact** drop-down list menu.

3. Select any or all of the roles in the **Available Participant Roles** box.
A red asterisk after a participant role indicates you must assign someone to this required role.

**NOTE:** When the customer organization is selected in the **Organization** drop-down 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.

4. Click **Assign** to move the participant roles 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 signatory.

5. Select the distributor **Organization** and **Contact** from their corresponding drop-down lists.
6. Choose the roles associated with the Distributor contact from the **Available Participant Roles** field and click **Assign**.

**Verify roles and contacts**

Before completing the **Additional Information** section, verify that all the roles are 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. Click **Remove**.
Provide Additional Information

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

The example below is the Additional Information page a user would see during the creation of Open Value Agreements.

1. On the navigation menu, click Additional Information.
2. Under Microsoft Contact, type a contact name if one is not 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

The **Choose Offerings** section allows you to select from various purchasing options and determine the Customer price level.

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

- Open Value
- Open Value Subscription
- Enterprise Server Cloud Enrollment (SCE)
- Enterprise SCG
- Enrollment for Education Solutions (EES)
Select Plus

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

1. Select the **Choose Offerings** button on the top menu.
2. Choose from the **Purchasing Options** and **Customer Price Level** options as required.

**NOTE:** The purchasing options and customer price level options may differ slightly from this screen shot, depending on whether you are 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, click **Choose Media**. The **Download** option is preselected. No other action is required; go to the **Summary** section.

View the summary

The **Summary** section provides a single page on which to view a summary of all the agreement content.

View each area within the summary by clicking on the headers on the left. You can revisit an area by clicking the links on the right.

The areas are:

- Header Details
Preview/Upload and prepare for signature

Before submitting the contract package to your customer for signing, you can preview it. You can also attach additional documents, if required.

1. On the navigation menu, click Preview/Upload.
2. The **Preview/Upload Documents** screen opens. Under **Document Name**, click any file you want to review or print. These are *draft* documents in PDF format.
3. To attach any additional documents, select the **Type** from the drop-down menu, and then enter a **Title** for the document.

4. Click **Browse** to locate the document for attaching. (SPLA customers can attach an SPLA Affiliate form here.)

5. On the **Select file to upload** dialog box (not shown), click **Open**.

6. Click **Upload**, and then click **OK**. The file will attach and appear under **Uploaded Documents** once a virus scan is complete.

7. Select the **Visible to Customer** check box if you want this new document visible to the customer when they sign. If there are reasons why the customer should not see the document, do not select this choice.

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

8. Click **Close** when you are done.

**NOTE:** You can remove any **Uploaded Documents** uploaded in error. To do this, select the document and click the **Remove** button.

Prepare for signature

This section describes the two submission options for signing: electronic and physical.
Electronic signature

Choose **Electronic Signature** if you want to submit this contract package for the customer to sign electronically. An email will be sent to the specified signatory requesting their signature. The distributor and reseller contacts listed during the package creation will receive a copy of the invitation email by default.

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

![Prepare for Signature dialog box](image)

2. The **Prepare for Signature** dialog box opens. Click the **Electronic Signature** option button, and verify the **Primary Signatory Contact**.

   **NOTE**: You will see a warning message now if you did not include an electronic signatory when you prepared your agreement package for signing. If this package requires an electronic signature, you must return to the **Choose Contacts section** and assign electronic signatories. You can also assign signatories here by clicking the **Assign** link.

3. Provide any **CC** or **BCC** email addresses for people you want to receive the signing email, and then click **Submit**.

   This will send an email message to the signatory you specified, requesting his or her signature. The reseller will also receive this email message by default.
4. When the confirmation dialog appears, click **OK**.

**Physical signature**

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

2. Click the **Physical Signature** option button.

   The contract and signatory forms in the **Documents Requiring Signature** area will populate with the information you selected in previous steps.
3. To review a document, click the document’s name. The document opens in Adobe Reader.

   **NOTE:** All documents that you print before submitting will contain a “Draft” watermark. The Regional Operations Center (ROC) will invalidate documents submitted with the “Draft” watermark.

4. When you have completed your review, close the Adobe Reader window. The **Prepare for Signature** dialog reappears.
5. To submit the contract, click **Submit**.

6. When the submission process is complete, a confirmation dialog box appears. Click **OK**.
   
   You must now print all documents included in the contract package.

7. Click **Prepare for Signature** again, and click the **Physical Signature** option button.

8. To open the required document, click the document’s name. The document opens in Adobe Reader.
   
   All documents should now have a watermark that says *Physically Submitted* rather than *Draft*.

9. In Adobe Reader, print the document by clicking the print icon or go to the **File** menu and click **Print**.

10. Provide the physical contract package to the customer for signing.

    **NOTE:** *It is important that the date of the physically signed agreement is not earlier than the agreement submitted date, or it will be invalid and the Regional Operations Center will reject it.*

**Withdraw a submission**

After the customer reviews their electronic agreement, they may want changes. Additionally, the partner may want to alter the agreement. In these instances, it is possible to withdraw the submission of an agreement. The customer can reject the agreement or the partner can withdraw it without the customer’s rejection.

Once withdrawn, the previous version of a contract is void.

When you submit a contract package, the navigation menu’s **Delete** button changes to **Withdraw**.

1. Click **Withdraw** to withdraw the agreement.

2. Click **Yes** to confirm the withdrawal.
When complete, there are two indicators that the package has been withdrawn:

- The **Withdraw** button reverts to the **Delete** button.

- The **Status** changes from **Pending Customer Signature** to **Draft**

**Resend the email notification**

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

1. Click **Resend Notification**.

   ![Resend Notification](image)

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

2. Enter the email address of any **Additional Recipients** you want to add (optional.)

3. Enter any necessary comments.

4. Click **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. Here’s how:

1. Go to the Organization Search page.
2. Enter the number of the Master Agreement you want to extend in the Renew Agreement field.
3. Click **Start**.

4. A pop-up screen appears to show that this agreement is eligible for extension.
   
   **NOTE:** The pop-up can also show that the agreement is eligible to be renewed.

5. Select **Extend existing agreement**.

6. Choose from the **Language** drop down list.

7. Click **Continue**.
8. Select the appropriate signatory from the Signatory drop-down list box.

9. Click **New** to add a new signatory where required. Complete the contact details for the signatory. Alternatively, click **Edit** to amend the signatory’s details.

10. Click **Preview and Upload** and attach any documents required.

11. Click **Prepare for Signature**. For instructions, see [Prepare for Signature](#).
Renew an agreement
Customers can renew an existing agreement up to 60 days before it expires and 30 days after it expires.

Microsoft Regional Operations Center (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 they approve your request, include the special deal number in the CLT log, ask to have the new agreement set up as a renewal, and backdate the renewal to ensure there is no gap in coverage.

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 drop-down menu under Actions, select Renew.
3. Enter the Agreement Number of the Master Agreement you want to extend.
4. Click **Start**.

5. A pop-up screen appears to show that this agreement is eligible for renewal.

   **NOTE:** *The pop-up may also show that the agreement is eligible to be extended.*

6. Select **Renew into a new agreement** or **Extend existing agreement** (if that option is available.)

7. Click **Continue**
6. Select the organization name.
7. Click Add Program.

8. Configure your program choices on the Choose Program dialog box.
9. Click Next.

This action brings the user to the Prior Agreements page.

10. Choose Yes or No to indicate whether the customer organization has agreements that are eligible for Software Assurance by selecting the appropriate media button.
You may add additional prior agreements simply by entering additional prior agreements in the Prior Agreement Number field and clicking Search. Additional prior agreements will appear in the Selected Prior Agreements table.

Next Steps

To finish renewing an agreement, follow the rest of these 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

Accept and sign an agreement (customer steps)
Here are the steps customers should follow after their partner sends them a contract package to review and sign.

When the partner creates and submits a contract package for electronic signature, Microsoft will send an email message to the customer signer with Action Required highlighted, asking them to complete
the agreement process. They must click the **Accept and Sign** link in the email message, sign into eAgreements website, and then electronically accept the agreement.

**NOTE:** *Customers can't access the eAgreements smart client, which is only for partners.*

1. The customer clicks the link in the notification email to open eAgreements.
2. The customer signs in with their **Microsoft Account**, which opens the Contract Package view.

   **NOTE:** With eAgreements, customers can now sign multiple contract packages for the same organization using a single Microsoft Account.

3. The customer then clicks the **Document Name** to view the contents of each document.

   Here is what this will show if the sales package is managed by the Microsoft Regional Operating Center (ROC):
eAgreements

Contract Package Details

Contract Information
Organization Name: Contoso Ltd
Public Customer Number (PCN): 8C7D28E20
Contract Package ID: PKG04138155

Contract Package Status: Pending
Submitted Date: 5/20/2010
Submitted By: Jay Hamlins

Please review the above for accuracy. If any of the information is incorrect (e.g., if the "Organization name" is not the legal name of the company to be legally bound by the agreements), do not sign the agreement(s) and contact your Channel Partner. If the above is accurate, proceed.

Contracts for review and signature (1)

Please open and review, or have reviewed by legal counsel, each of the documents shown in the table below. If any of the information in the agreements is incorrect, do not sign and contact your Channel Partner. These agreements contain damage and warranty exclusions, limitations and disclaimers, as well as other important terms and conditions that should be reviewed before signing.

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Number or Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Value Agreement</td>
<td>20015</td>
</tr>
</tbody>
</table>

Documents not requiring signature (2)

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Number or Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial Signature Form – No Microsoft Signature</td>
<td>20033</td>
</tr>
<tr>
<td>Miscellaneous Documents</td>
<td>eAgreements brochure</td>
</tr>
</tbody>
</table>

If you cannot view the PDF files, please download a free PDF viewer: http://www.adobe.com

The documents in the table above do not need to be signed, but are relevant to or are part of the agreements to be signed. For example, a document in this section might be incorporated by reference in an agreement that will be signed, contain pricing terms that are part of an agreement to be signed, or for informational purposes.

By clicking the "I Confirm" button below, the signing agent represents, warrants and agrees that he or she has been duly authorized to sign for the organization named in the "Contract information" section and has reviewed each of the documents in the tables above.

I Confirm  I Reject
Here is what this will show if the sales package is managed by a Microsoft country subsidiary:

**Microsoft Licensing Contract Documents (5)**

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Number or Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Business and Services Agreement</td>
<td>X20-10006</td>
</tr>
<tr>
<td>Enterprise Agreement</td>
<td>X20-10109</td>
</tr>
<tr>
<td>Enterprise Enrollment</td>
<td>X20-10303</td>
</tr>
<tr>
<td>Product Selection Form</td>
<td>psf</td>
</tr>
<tr>
<td>Enterprise Amendment</td>
<td>amd</td>
</tr>
</tbody>
</table>

**Microsoft Sales Contract Documents (2)**

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Number or Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Agreement</td>
<td>X20-10103</td>
</tr>
<tr>
<td>Enterprise Agreement Customer Price Sheet</td>
<td></td>
</tr>
</tbody>
</table>

**Reference Documents – Do not require signature (1)**

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Number or Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signature Form</td>
<td>X20-12802</td>
</tr>
</tbody>
</table>

If you cannot view the PDF files, please download a free PDF viewer: http://www.adobe.com
If you cannot view the Word files, please download a free Word Viewer or Microsoft Office 2010 Trial version.

**Sign the agreement**

To sign the agreement (contract package), the customer signer should review the documents and acknowledge they have done so.

If the customer is signing their contract electronically:

1. To acknowledge they have reviewed their documents, the customer should click **I Confirm**.
2. Select **I hereby authorize Microsoft to apply my signature to the signature form**.
3. Type their name exactly as it appears on the form in the **Name** field.
4. Enter their job title in the **Job Title** field.
5. Enter their purchase order number in the **Purchase Order Number** field (optional.)

6. Click **Submit**.

![Screenshot of eAgreement interface](image)

After the customer submits their signature, the document package goes to Microsoft for final processing. Once Microsoft signs and activates the agreement, Microsoft will send the customer a welcome email message.

**Reject the agreement**

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

1. To reject their contract package, the customer should click **I Reject**, select the reason from the **Rejection Reason** drop-down menu, and add any additional notes in the **Comment** field.

   - After a contract is rejected, the document package is returned to the partner, who reviews the comments, edits the contract package, and resubmits it to the customer, if appropriate.
   - If customers want to keep copies of any documents in their package, they should save or print them before they reject the package. Once rejected, the document package will disappear because it will no longer be active.
The documents in the table above do not need to be signed, but are relevant to or are part of the agreements to be signed. For example, a document in this section might be incorporated by reference in an agreement that will be signed, contain pricing terms that are part of an agreement to be signed, or for informational purposes.

By clicking the 'I Confirm' button below, the signing agent represents, warrants and agrees that he or she has been duly authorized to sign for the organization named in the "Contract Information" section and has reviewed each of the documents in the tables above.

© I Confirm  ◀ I Reject

Rejection Reason*

Comment*

Maximum 250 Characters. (250 characters left)

* = Required

Submit  Cancel
Create a Service Provider License Agreement (SPLA)

The Microsoft Services Provider License Agreement (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 in to eAgreements

Microsoft partners sign in to the eAgreements application using their Partner Domain Account information or their Microsoft Account, depending on their role.

After you sign in, this will open the Organization Search page, 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.)
   - Or
   - Enter your customer’s **Public Customer Number (PCN)**.

2. Click **Start**.
   The results of the search appear in a table in the right pane, listed under **Organization Name**.
If the customer you are looking for is in the results list, select the customer name and then click **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 this customer.

3. Select the **Program Type**. To create a new contract for this organization, select **Create a new contract** from the drop-down list under **Program Type**.

   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. When you select a 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 among three options:
   - Create a Master Agreement and an Enrollment under an existing MBSA
   - Add an Academic Addendum to an existing Corporate Agreement
   - Create a new contract (MBSA, Agreement, and Enrollment)

8. Click 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 instructions above for Prior Agreements.

Choose Organization

1. On the navigation menu, click Choose Organizations.

2. If your partner organization is not in the table that appears, click a 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 click **Search**.

4. When you find the appropriate partner organization, select it and then click **Select**.
5. The **Choose Organizations** window opens and the partner organization appears after **Standard Enrollment Reseller**.
   - To alter these items, click **Edit**.
   - To replace these items, click **Search/New**.

6. Click 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% 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, click Choose Contacts.

2. To view the available contacts for an organization, select the applicable organization from the Organization drop-down list. To choose the appropriate contacts within the organization, use the Contact drop-down 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 Available Participant Roles field.
4. To move Participant Roles to the Assigned Contacts field, click Assign. This action assigns the participant to those roles in the contract.

   **NOTE:** When the customer organization is selected in the Organization drop-down 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 drop-down list, select the appropriate partner organization to make the organization active in the Choose Contacts section.

   You may also click Search/New to search for a different organization.
7. Select the **Reseller Primary** listing from the **Available Participant Roles** field, and click **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, verify that the Contact field shows the required contact.

You may need to remove one or more of the roles or choose another contact. If you must make a change, do so at this point in the process to avoid having to return later. It is 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 you want to remove, and click 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 Preparing for Signature
- Prepare for Signature
- Electronic Signature
- Physical Signature
- Withdraw a Submission
- Resend the Email Notification
- Extending an Agreement
- Renewing an Agreement
- Accept and Sign the Agreement
Add an Academic Addendum to a SPLA agreement
A customer that has an existing, active SPLA agreement may 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 following these instructions: [Sign in to eAgreements](#)
2. Find the appropriate existing customer following these instructions: [Find or Create 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. In the **Program** list, choose SPLA.
3. In the **Program Type** list, the system preselects ASP.
   Selecting the SPLA **Program** automatically populates the **Program Type** and **Partner Type** fields.
4. Choose the required version of the agreement program from the **Version** list. In this case, select **20171** (for Direct Channel model.)
5. Select the correct language for the agreement from the **Agreement Language** list.
6. When you select a 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. Click 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 may also add new electronic signatories.

Next Steps

Follow the steps listed in the top section of this guide 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. Before submitting the Academic Addendum for signing, you can preview it.

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

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

2. To find a document to attach, click **Browse**.

3. On the **Select file to upload** dialog box (not shown), click **Open**.

4. Click **Upload**, and then click **OK**. The file will attach once the virus scan is complete.

Submit the Addendum for signing

Now you are 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 electronically or physically (on paper.) Here’s how:

- 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 signing 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 following these instructions: Sign in to eAgreements

   After you sign in to eAgreements, a four-pane screen appears.

2. In the pane titled To begin creating a contract package, type the existing SPLA agreement number in the Renew Agreement box, and click Start.
If the agreement exists and is eligible for renewal, the organization’s details appear in the results pane on the right. If the agreement is not eligible for renewal, an error message appears that explains the reason why you cannot renew the agreement.
3. To start the renewal process, select the organization name and click **View Organization Detail**. If you can't find the organization you are looking for, you can select **Create New Organization**.
4. When the organization’s details dialog box appears, **Renew into a new agreement** is the default. Click **Continue**.

The **Prior Agreements** pane appears with the agreement you selected in the **Selected Prior Agreements** table.
NOTE: You cannot 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 cannot renew more than one SPLA agreement at the same time.

5. Below Is this agreement a Renewal?, verify that Yes is selected.
6. To go to the next page, at the far right on the navigation menu, click Next.
7. 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.
8. 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 steps at the top of this guide, starting with Create an agreement.
**Open Value Subscription**
Open Value Subscription provides the lowest up-front 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 rights to run the software throughout your organization only during the term of the agreement with Microsoft. You also have the ability to 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 steps at the top of this guide, starting with Create an agreement.

**Enterprise Agreement**
Microsoft created the Enterprise Agreement (EA) to allow customers with centralized purchasing to standardize their entire organization on Microsoft technology. The EA program allows these customers to 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 steps at the top of this guide, 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.

**Enterprise Server and Cloud Enrollment (SCE)**
Enterprise Server and Cloud Enrollment (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, in the public cloud, or both.
To create a new sales package or renew an existing package for customers with an Enterprise SCE agreement, follow the steps at the top of this guide, 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 purchase order for a Direct Agreement Package on the Additional Information page, which we will cover in the next section. You do not have to enter the customer's purchase order when you create the package, however, the customer must provide a purchase order number before they can sign and submit their sales package.
The Purchase Order Number fields for a Direct Agreement contain 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:** Effective July 1, 2016, in markets where the MPSA (Microsoft Products and Service Agreement) is available, Microsoft stopped accepting 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 steps at the top of this guide, starting with Create an agreement.
Enrollment for Education Solution (EES)

Enrollment for Education Solution (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 steps at the top of this guide, starting with Create an agreement.

On the Choose Program page, choose Campus as the Program and Education Solutions as the Program Type.

Enter the Reference Name and Reference Number if you have them (optional.)
After you reach the section above to Verify roles and contacts, follow the instructions below to Provide Additional Information and Choose Offerings. These two sections differ slightly for EES agreements.

Provide Additional Information
The Additional Information page allows you to add additional 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, click Additional Information.
2. Under Microsoft Contact, type a contact name if one is not 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. Then you will see required actions before submission is allowed.

5. You may upload your amendment documents after you enter the **Proposal ID** (optional.) You can also upload them anytime 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. Click **Choose Offerings** from the top menu.

![Choose Offerings](image)

2. Under **Qualifying Contract**, the user has the option to enter a Qualifying Contract Number. The qualifying enrollment must be for an active EES and 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 inflight 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 you selected the correct contract.

   **NOTE:** If you have a Qualifying Enrollment, you do not need to upload an amendment because the Qualifying Enrollment waives program minimums.
5. Select the Agreement Duration.

6. Configure the Licensing Options by choosing the target audience (Faculty and Staff or Student) and filling in 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 do not need a qualifying enrollment.
   - If you do not have a qualifying enrollment but you do have an amendment to waive the minimum, then upload the amendment and proposal ID.

7. Configure the Price Level by selecting the value from the 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 (optional.) Because you don’t have to select this option, use it on an as-needed basis.
For the rest of the instructions for creating a sales package for educational customers with an EES agreement, return to the steps at the top of this guide, continuing at View the Summary.

**Geographical differences**

**eAgreements differences in Japan**

In Japan, there is a key difference from what users in the rest of the world will see in the Additional Information section. (If you are not in Japan, you can skip this section.)

In Japan, you must enter the purchase order numbers for both the customer and partner.

If you know both of these purchase order numbers, select Yes and then enter them. If you do not know them or do not want to enter them yet, a warning message will appear to alert you that the package will go on hold until you provide them.
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To continue creating a package without the purchase order numbers, Japan users can select **No, I do not have a Purchase order number**. This will allow them to keep working on the package, although they won’t be allowed to send the package to the customer for signature until they provide both the customer and partner purchase order numbers. They can submit their package to Microsoft for pre-validation, but Microsoft will return the agreement package to the partner for any missing purchase order numbers.

**Witnesses (Brazil Only)**

To witness an agreement in eAgreements, a witness must first verify that the customer signatory(s) signed the document package electronically. After that activity is complete, the witness can navigate to eAgreements using the link sent to them in email.

They are required to sign in with a Microsoft Account. If they do not have a Microsoft Account associated with their business email address, they will need to create one.

After they have signed 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 click **Submit**, the contract packaged will be routed to the Regional Operations Center for processing, signature, and activation.