eAgreements Handbuch mit Printscreens

Microsoft Volume Licensing

September 2022

Inhaltsverzeichnis

Übersicht Programme

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.

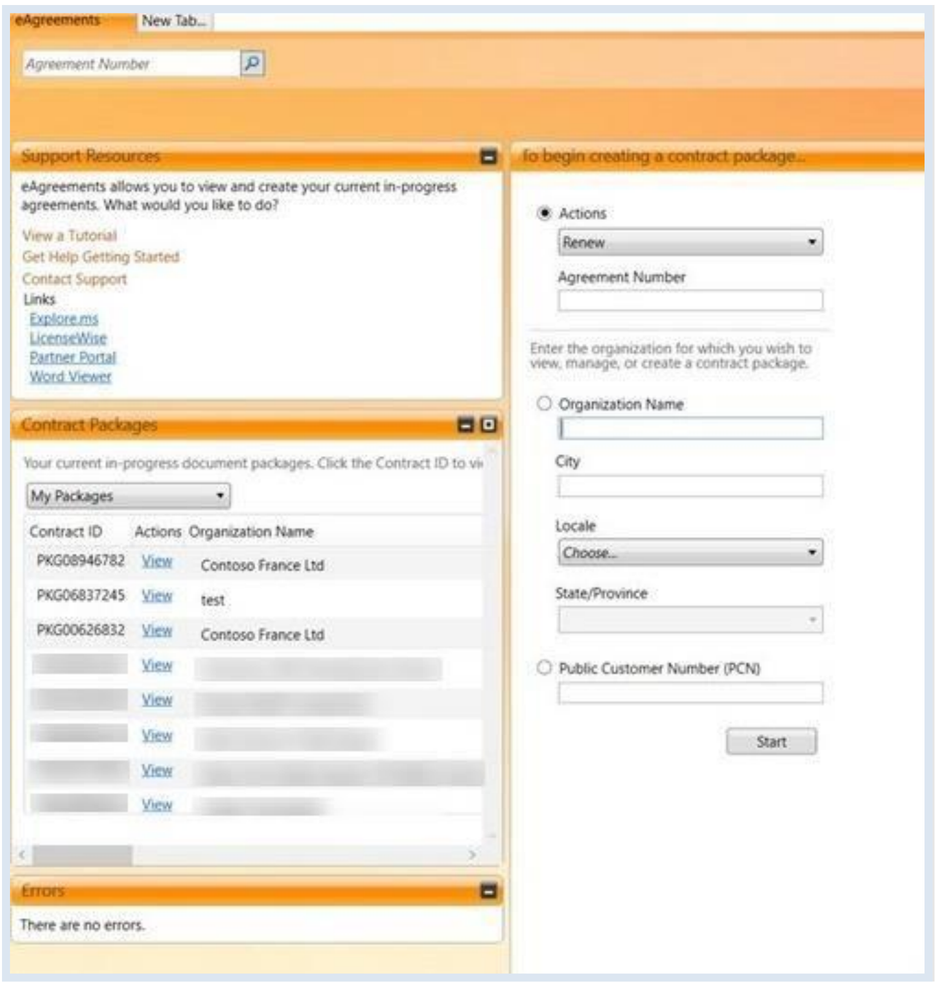
Erstellung eines neuen Vertrages

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

Zugang zu 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.

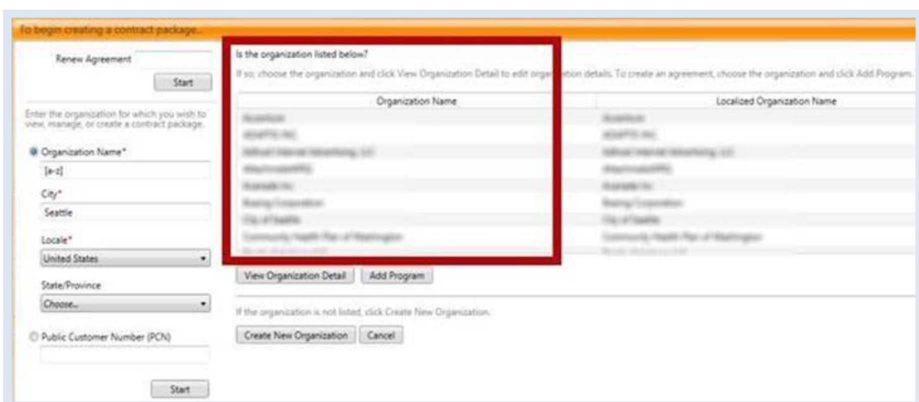


Einen Kunden finden oder anlegen

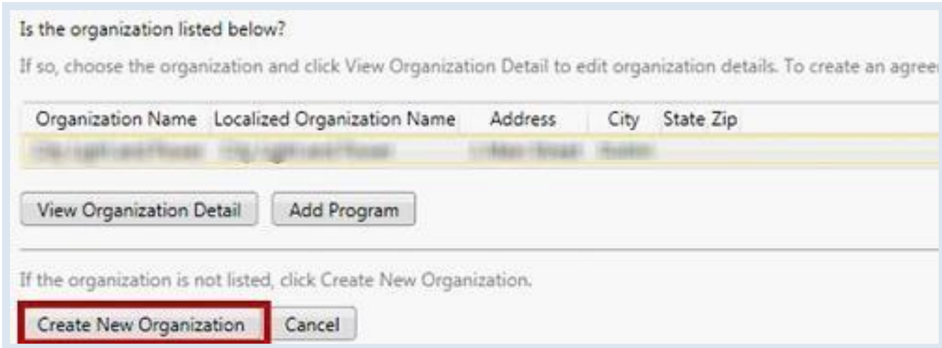
In the **To begin creating a contract package** pane, search for an existing customer or create a new one.

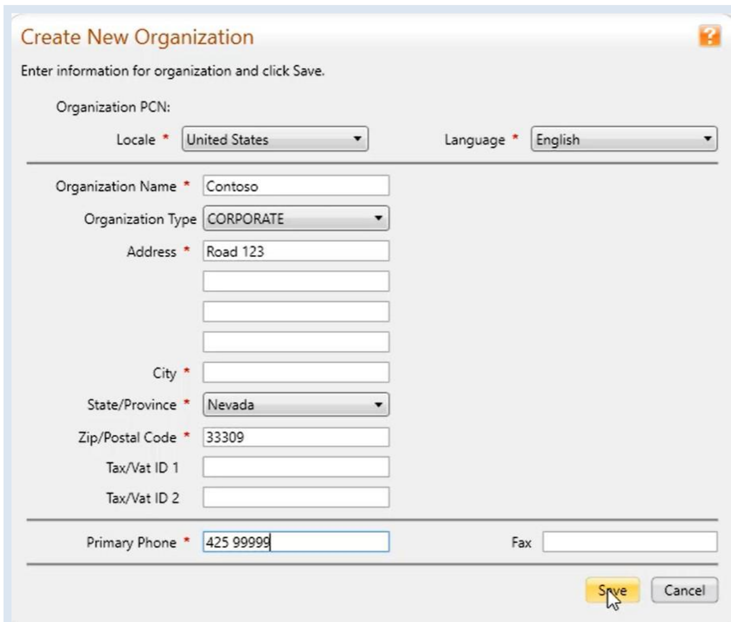
> **NOTE**: If you're renewing an existing agreement, fill in the agreement number in the field after **Renewal Agreement**. For instructions, see [Renew an agreement.](#)

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.





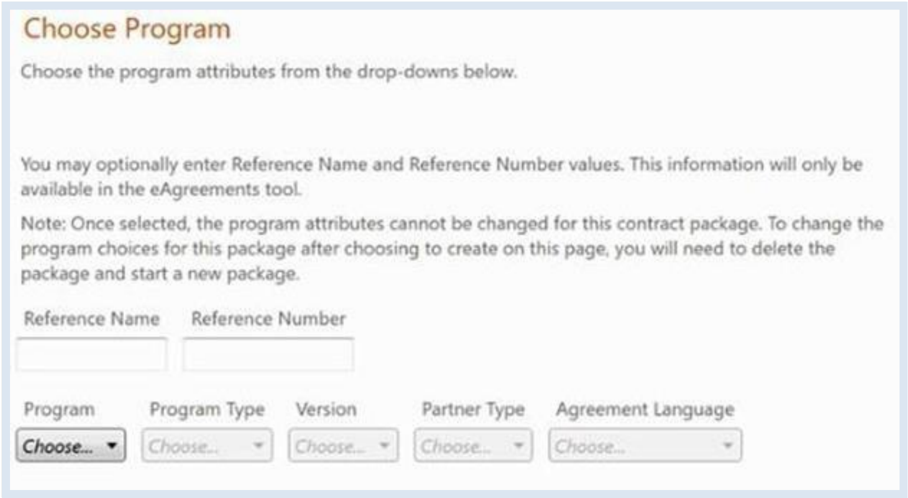
Programmauswahl

The **Choose Program** page opens.

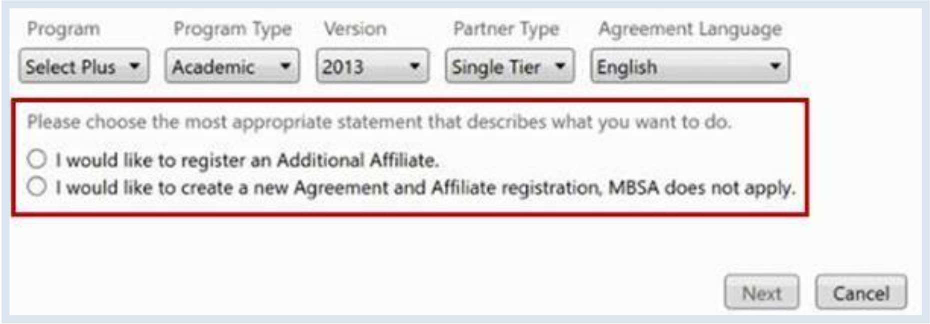
1. Enter a **Reference Name** and **Reference Number** of your choice (optional).

   - 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.



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.

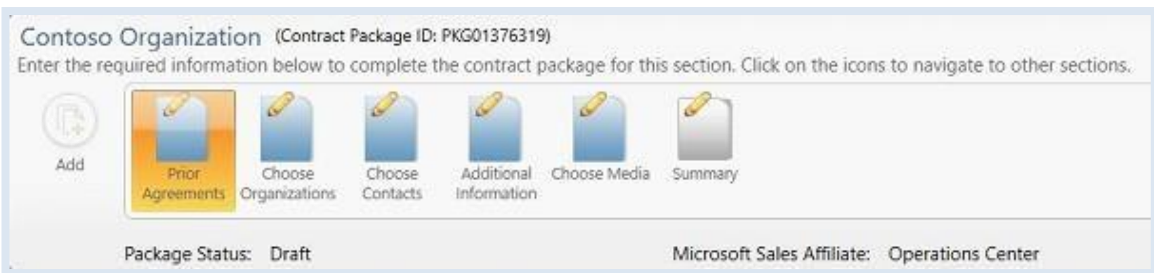
8. Select **Next**.

Navigation durch 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

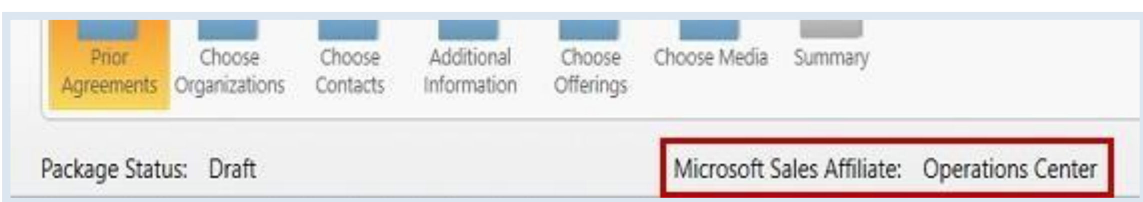
Symbols on the buttons indicate the status of each section in your package:

- 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 Vertriebsgesellschaft

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.



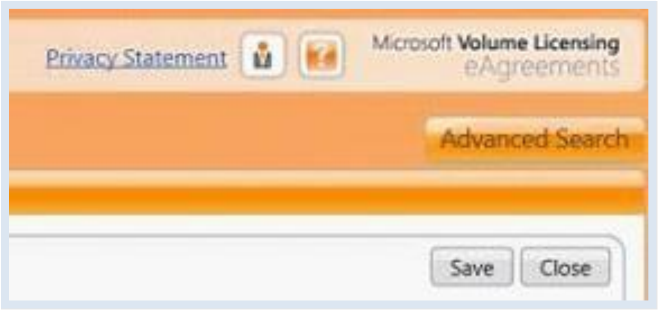
If you have any questions about this contract package, contact either the ROC or the Microsoft subsidiary for your customer's country, depending on which is listed.

Vertragsanlage

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.

Entwurf speichern

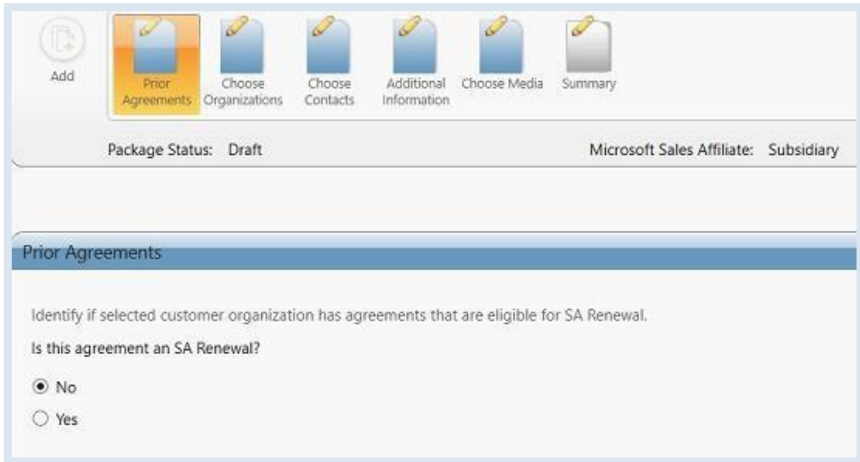
At any stage in the process of creating a contract package, you can select the **Save** button on the upper right of the menu bar to save your draft contract package. Then you can return to complete it later.



Frühere Verträge

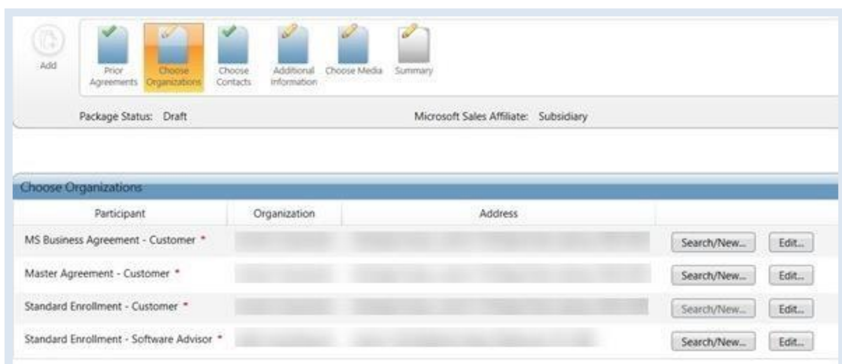
The first step in creating an agreement is to designate whether this agreement is part of a Software Assurance (SA) renewal.

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.



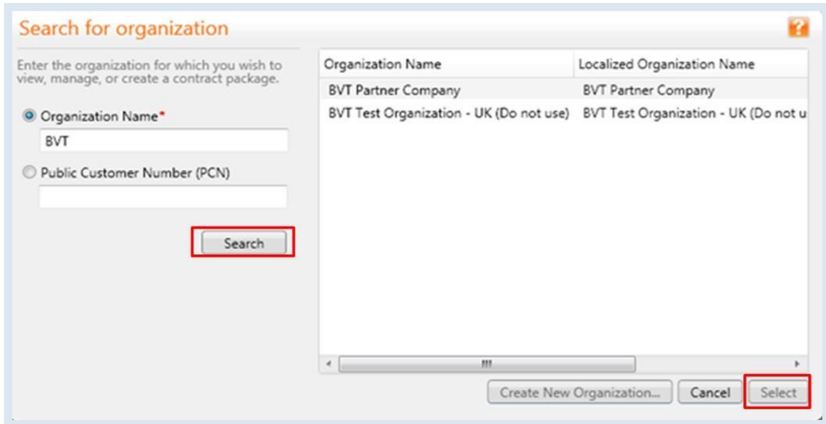
Organisation aussuchen

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.

Kontakt aussuchen

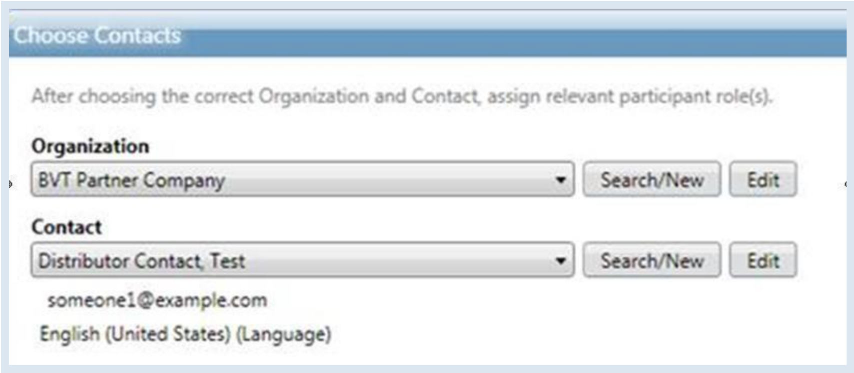
1. To assign **Participant Roles** as **Agreement Contacts**, select the **Choose Contacts** button.
2. Select the customer organization from the **Organization** dropdown menu to view the available contacts for that organization. Use the **Contact** dropdown menu to choose the appropriate contacts within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



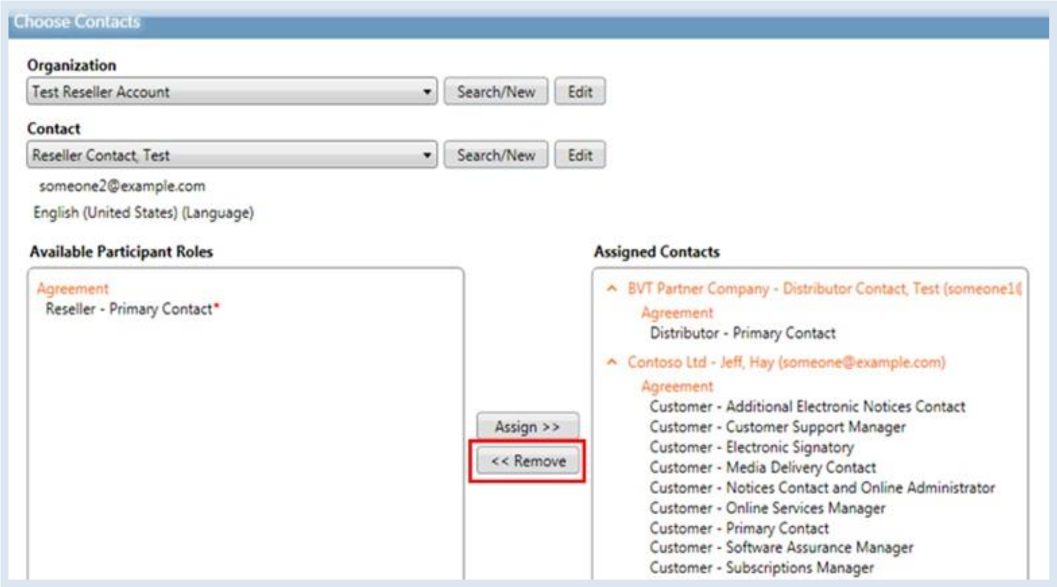
5. Select the distributor **Organization** and **Contact** from the corresponding dropdown menus.
6. Choose the roles associated with the distributor contact from the **Available Participant Roles** field and select **Assign**.

Rollen & Kontakte kontrollieren

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**.



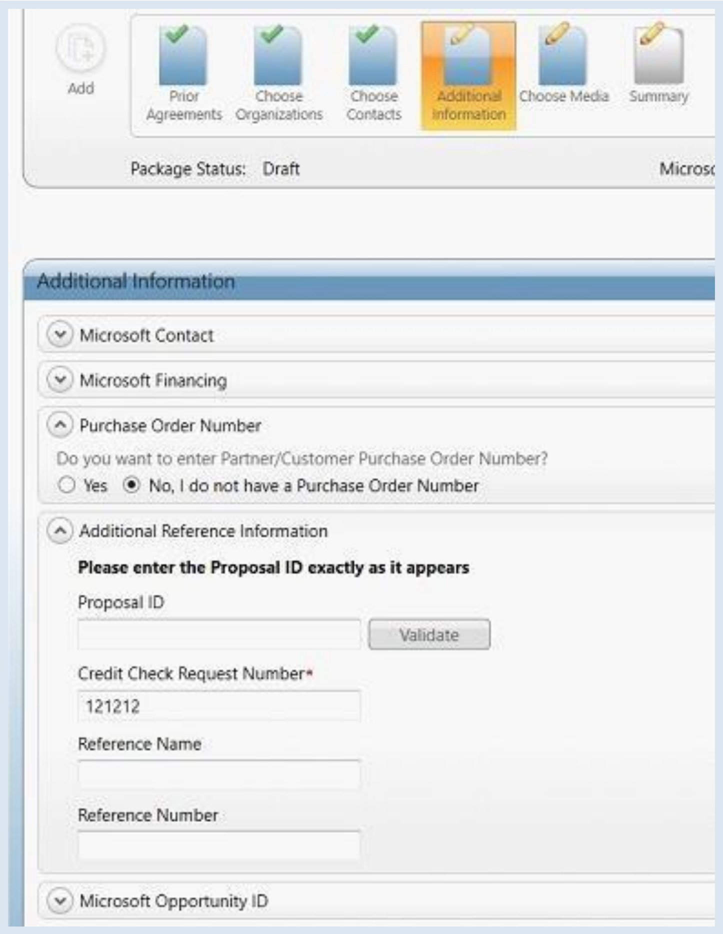
Zusätzliche Informationen

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



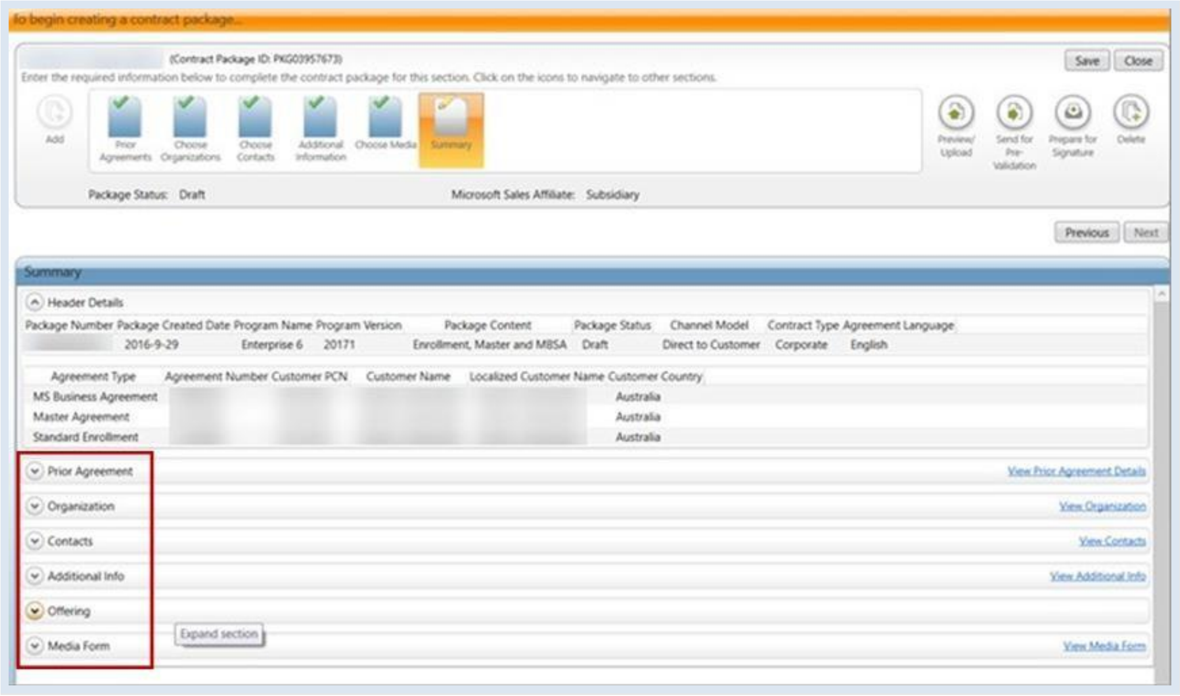
Zusammenfassung

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:

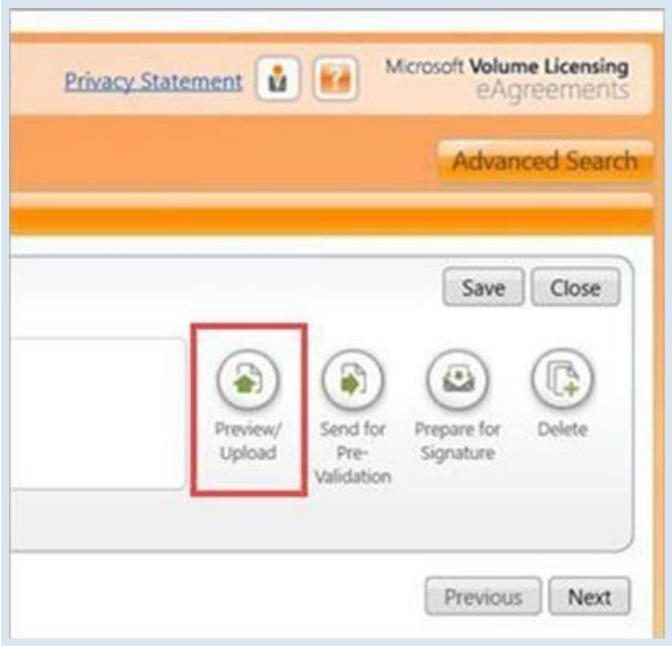
- Header Details
- Prior Agreement
- Organization
- Contacts
- Additional Info
- Offering (applies only to some licensing programs)
- Media Form



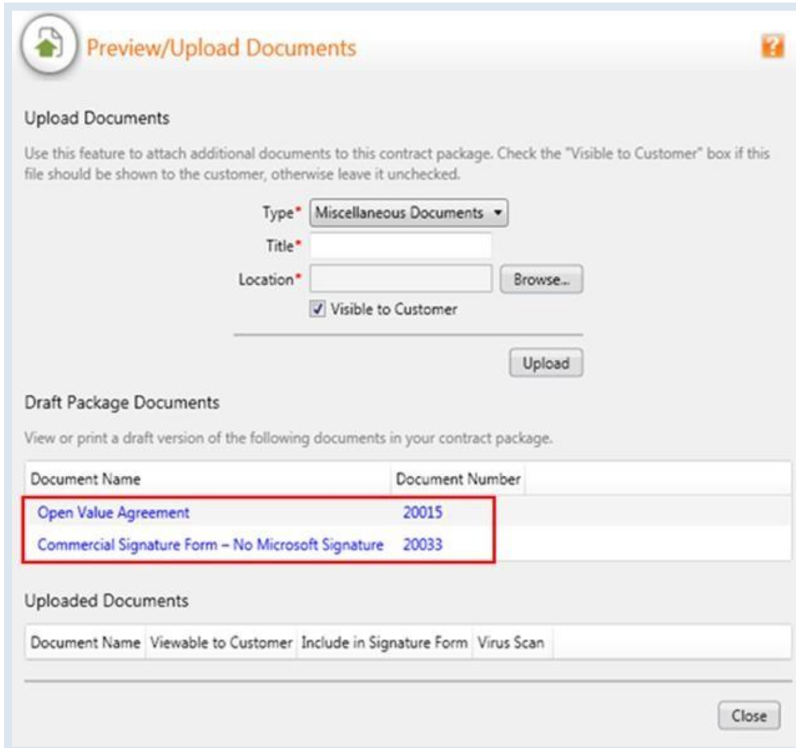
Ansicht/Upload & Unterschriftenvorbereitung

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**.

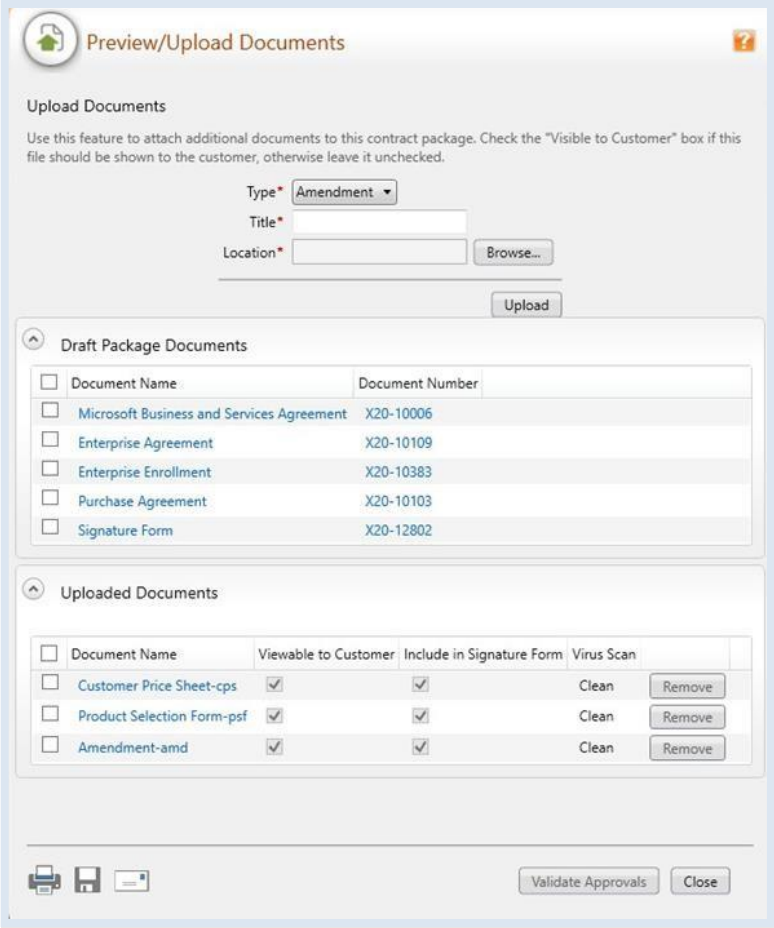


2. The **Preview/Upload Documents** screen opens. Under **Document Name**, select any file that you want to review or print. These are **draft** documents in PDF format.


Preview/Upload Documents
Upload Documents
Use this feature to attach additional documents to this contract package. Check the "Visible to Customer" box if this file should be shown to the customer, otherwise leave it unchecked.
Type*
Miscellaneous Documents
Title*
Location*
Browse...
Visible to Customer
Upload
Draft Package Documents
View or print a draft version of the following documents in your contract package.
Document Name
Document Number
Open Value Agreement
20015
Commercial Signature Form – No Microsoft Signature
20033
Uploaded Documents
Document Name
Viewable to Customer
Include in Signature Form
Virus Scan
Close

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
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.

Vorbereitung für die Signatur (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).

Elektronische Signatur

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)

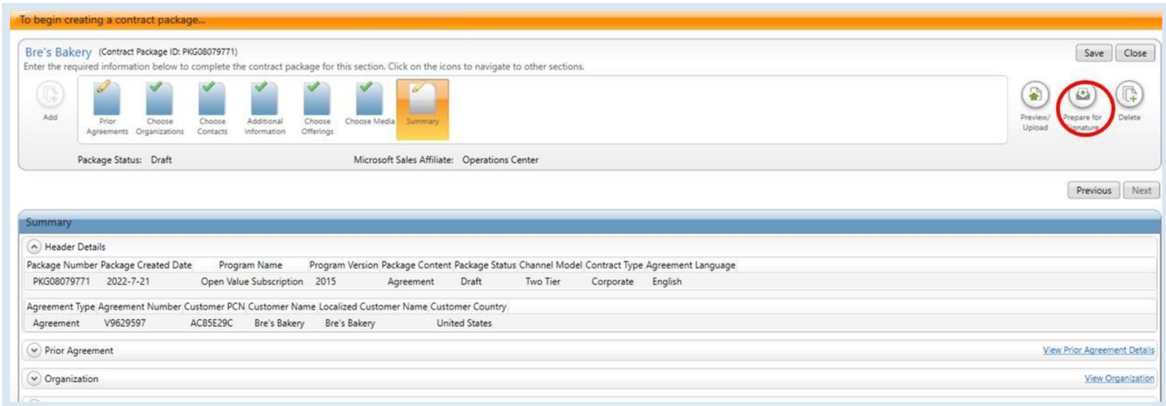
Speak with your customer if they require a digital or qualified signature. The following scenarios demonstrate the updated process for both partners and customers, from preparing the package for signature to signing the package:

- Simple electronic signature for Open Value

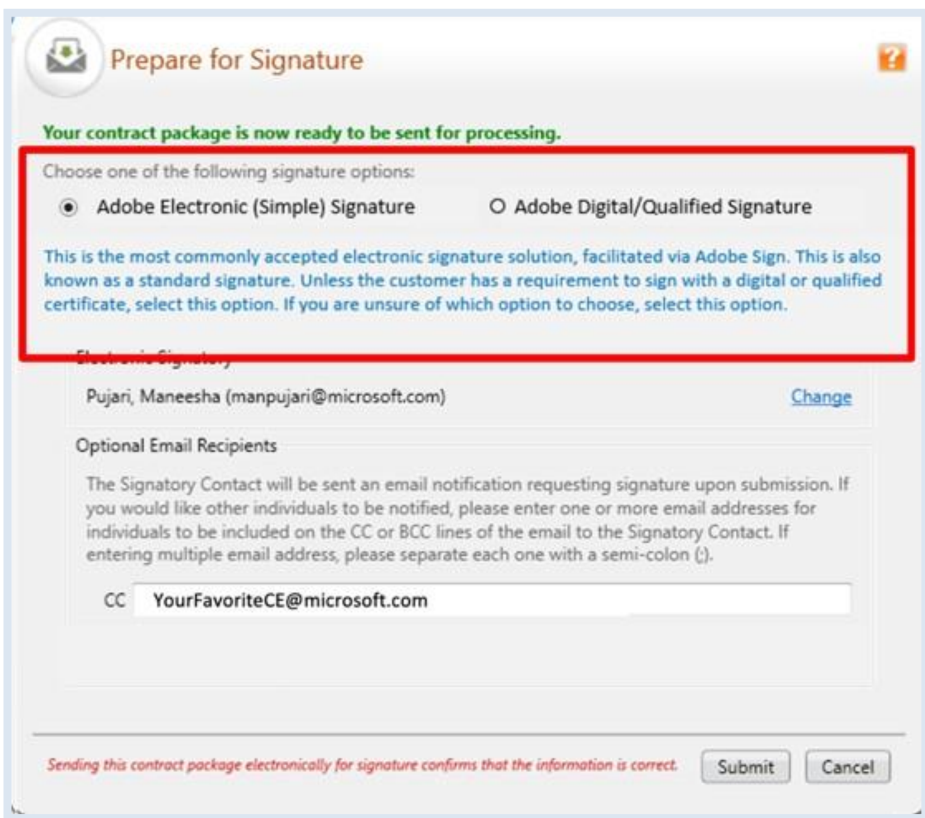
Einfache elektronsiche Signatur via Adobe Sign für Open Value Subscriptions

Partner steps

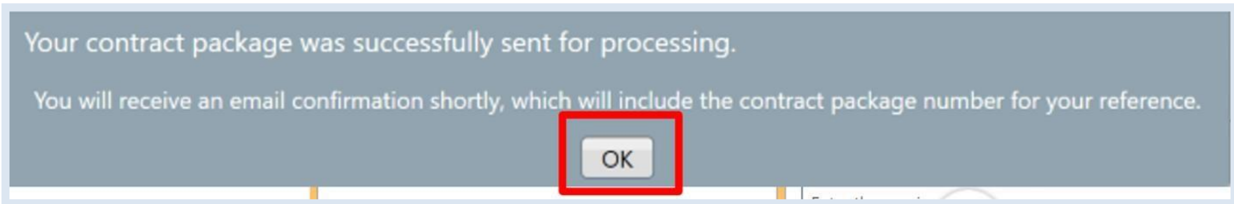
1. After adding all the information, in the navigation menu, select **Prepare for Signature**.



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.

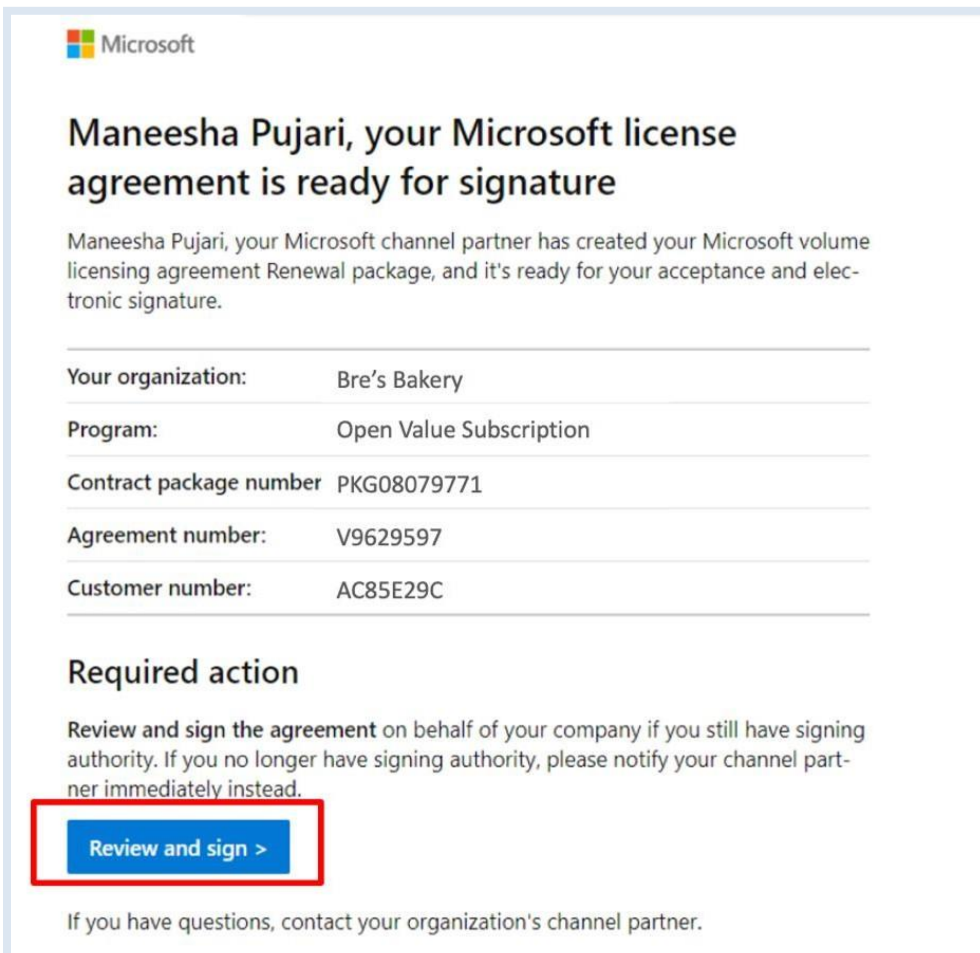


3. VLCM will submit the package for processing. When the submission process is complete, a confirmation dialog box appears. Select **OK.**



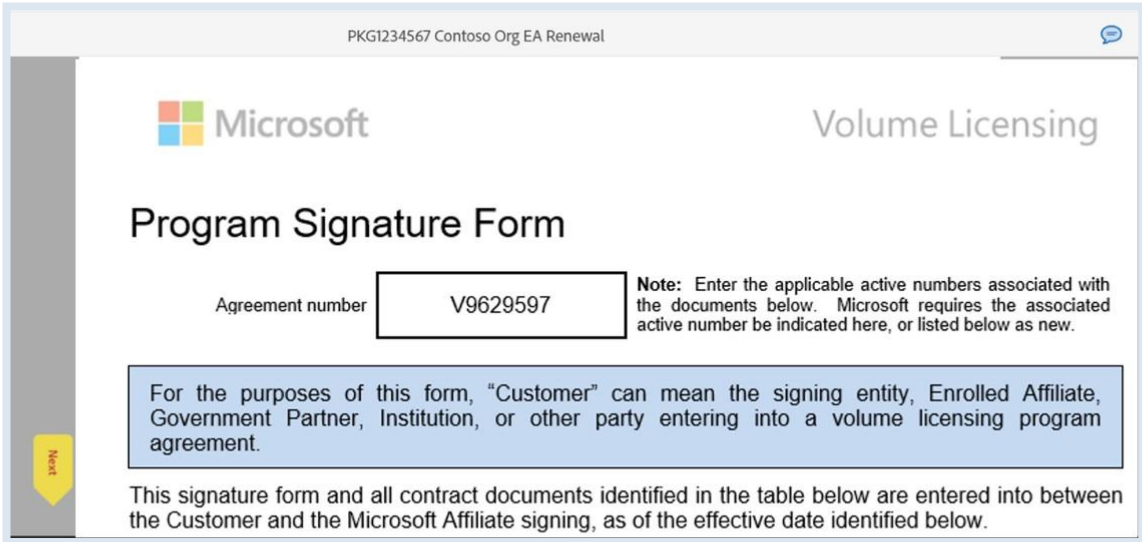
Customer steps

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



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

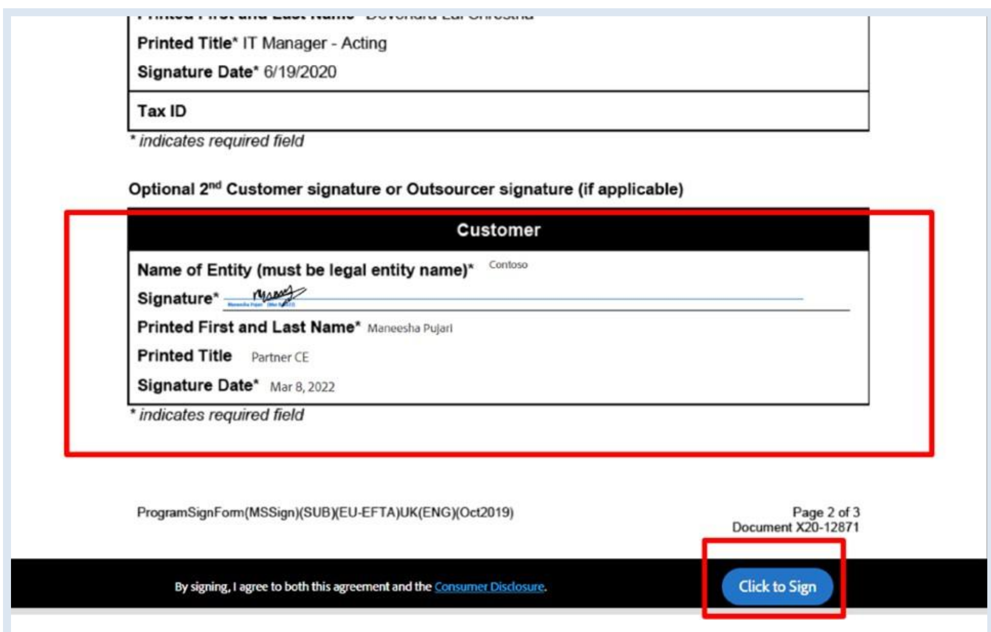
Agreement number: V9629597

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*

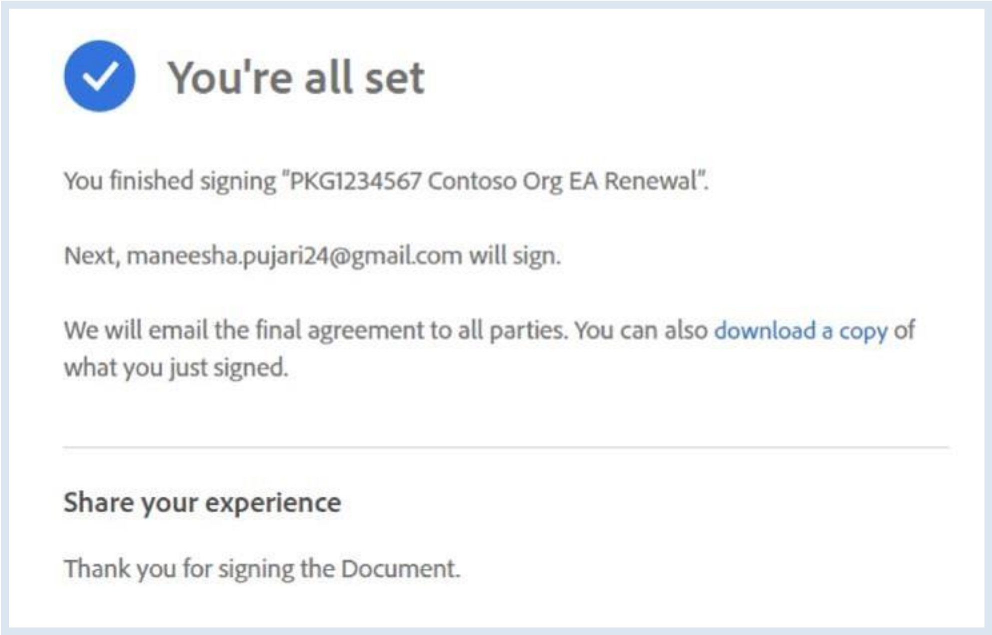
ProgramSignForm(MSSign)(SUB)(EU-EFTA)UK(ENG)(Oct2019)

Page 2 of 3
Document X20-12871

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

Click to Sign

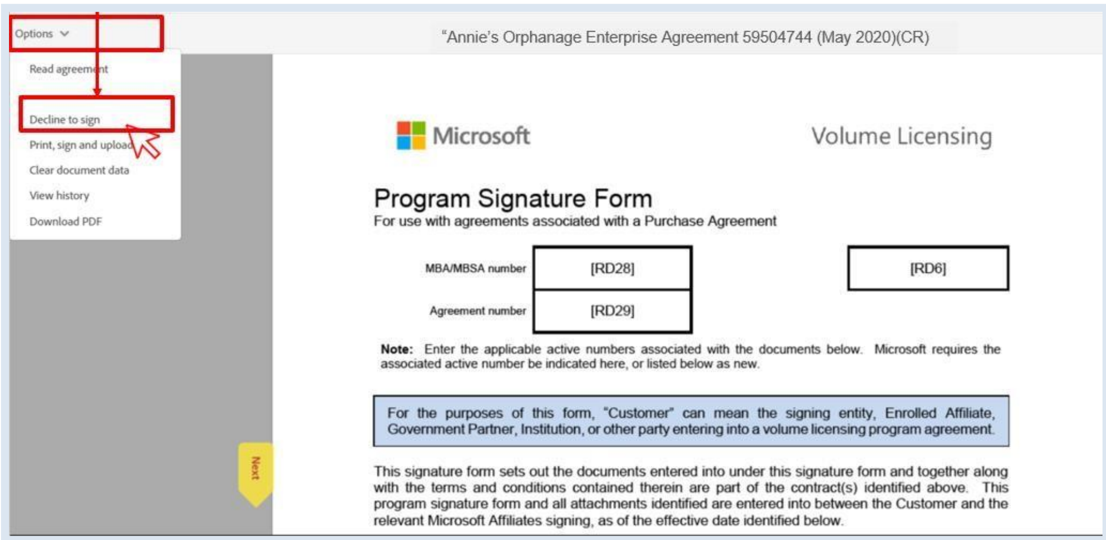
4. After signing, your customer will receive an on-screen confirmation of signing completion.



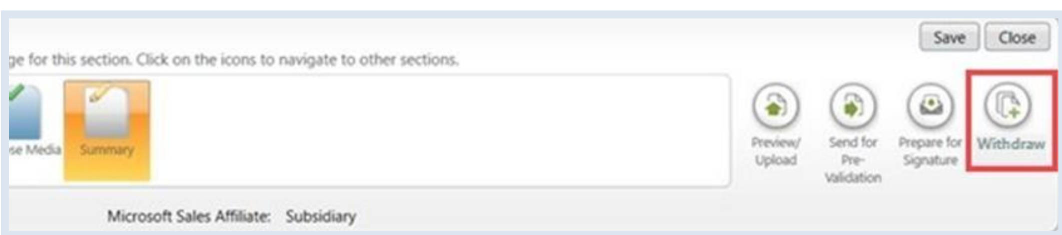
Beitrag zurücknehmen

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**.



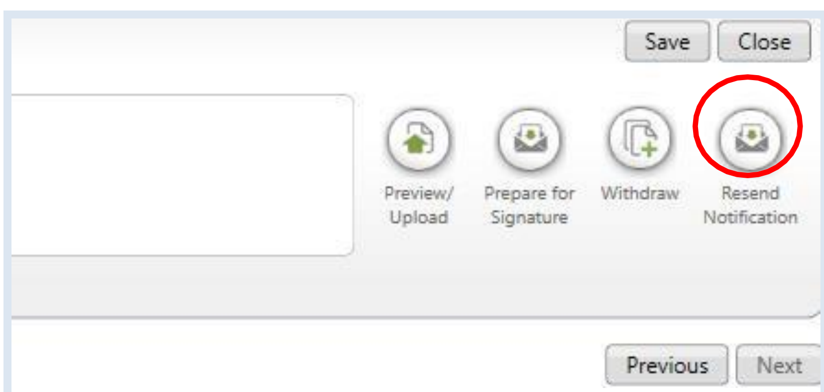
2. Select **Withdraw** to withdraw the agreement. Once withdrawn, the previous version of a contract is void.
3. Select **Yes** to confirm the withdrawal.
   - The **Withdraw** button reverts to the **Delete** button.

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

Die E-Mail-Benachrichtigung erneut senden

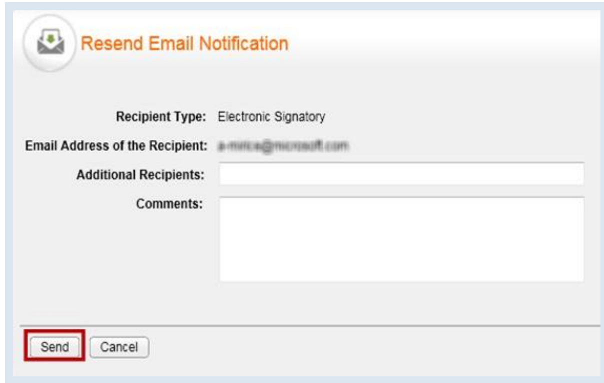
It's possible to resend submission notification emails from eAgreements. You might want to do this if the designated signer for your customer tells you that they never received the email invitation to electronically sign their contract package or can't find it in their inbox.

1. Select **Resend Notification**.



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

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


Resend Email Notification
Recipient Type: Electronic Signatory
Email Address of the Recipient:
Additional Recipients:
Comments:
Send
Cancel

Erneuerung eines Vertrages

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).

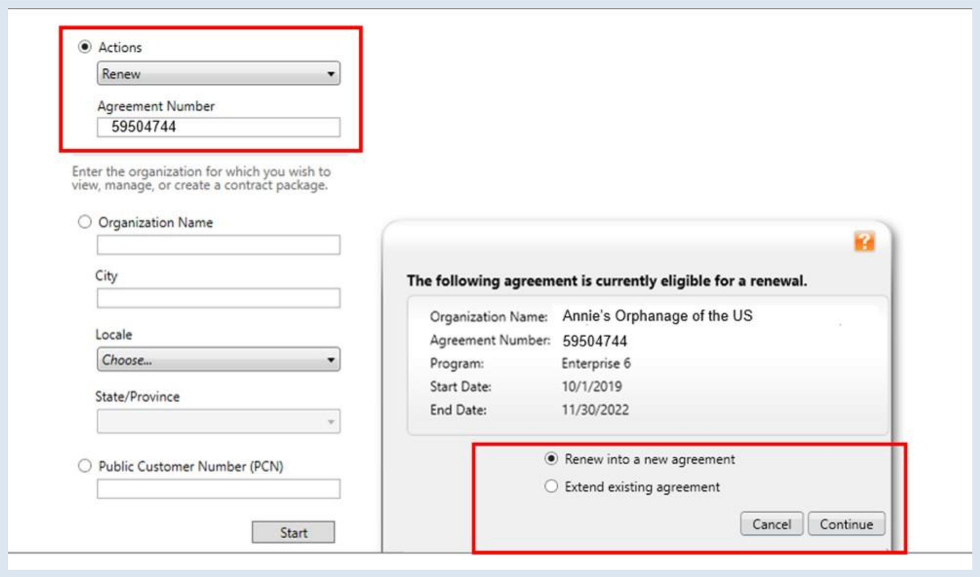
ROCs can approve exceptions up to 120 days after the renewal date.

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.

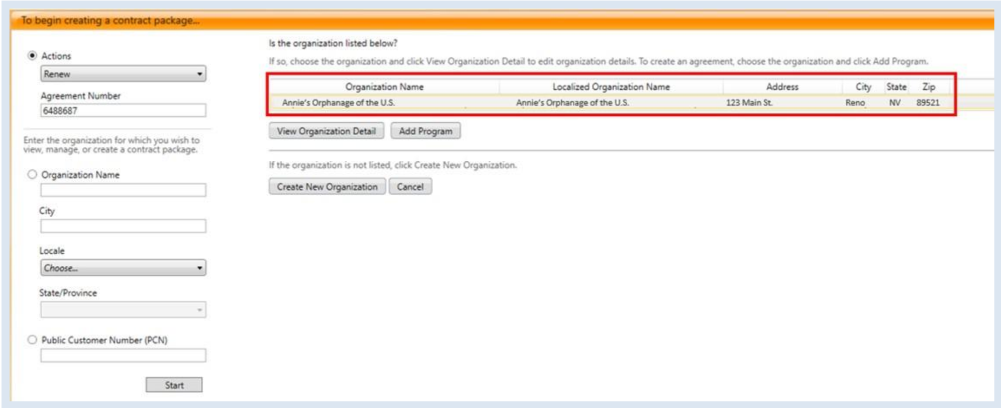
Partnerschritte

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

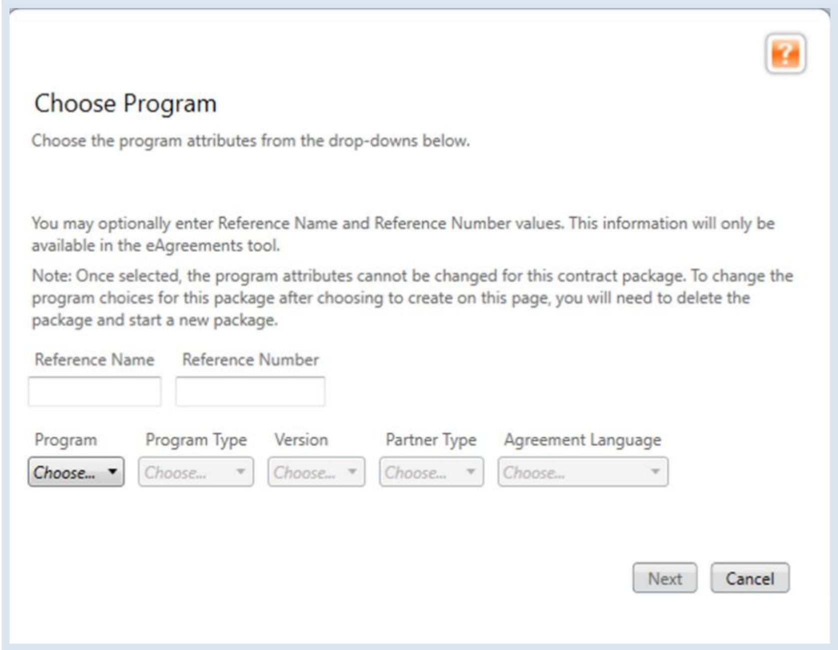
1. Go to the **Organization Search** page.
2. In the dropdown menu under **Actions**, select **Renew**. Enter the agreement number of the agreement you want to extend and select the option to extend the existing agreement.



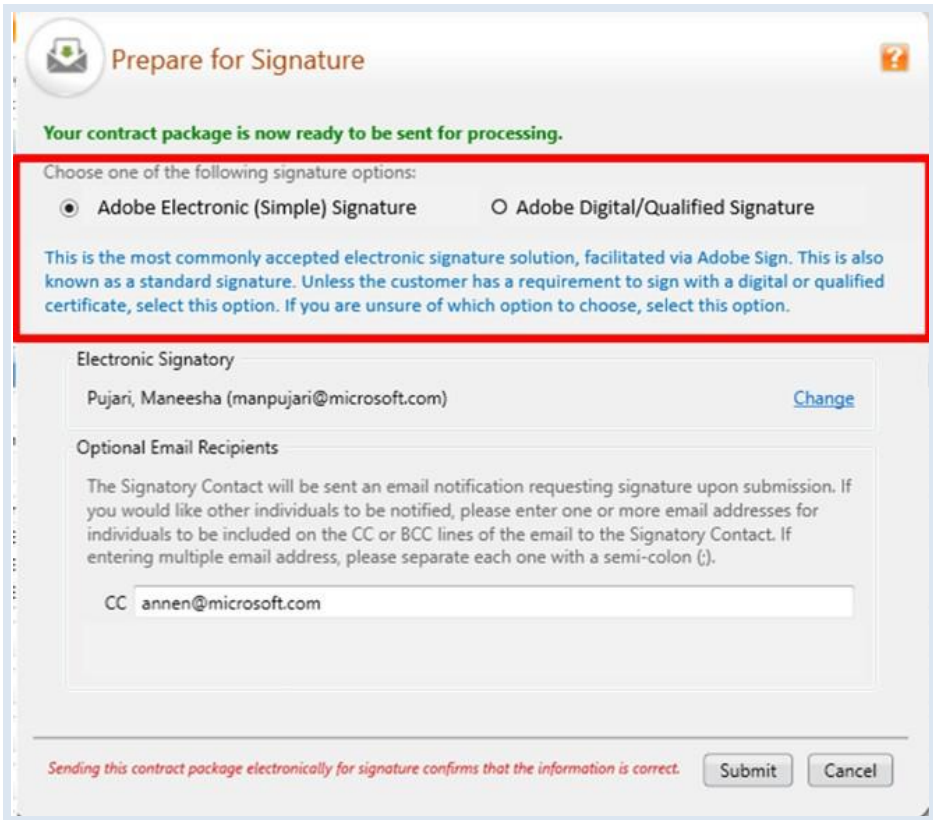
3. Verify that the information on the organization is correct and then select **Add Program**.



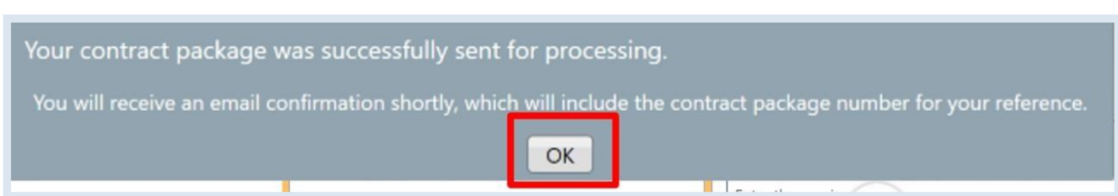
4. Add the new program information for the renewal agreement.



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.

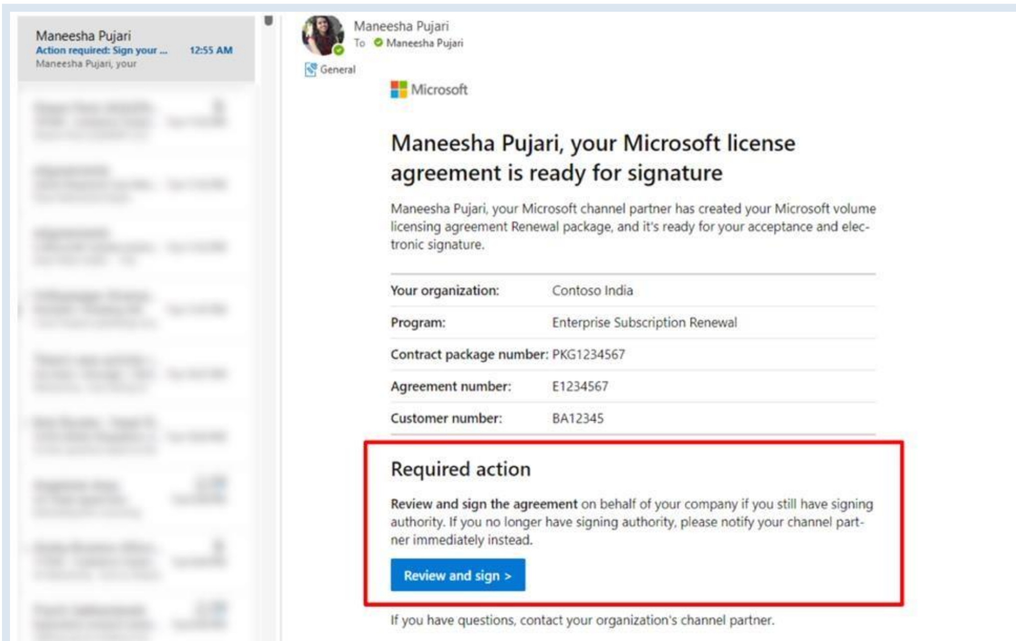


6. VLCM will submit the package for processing. When the submission process is complete, a confirmation dialog box appears. Select **OK.** Take note that for Limited Risk Distributor (LRD) countries, the subsidiary signature will be automatically applied from this point of the process.

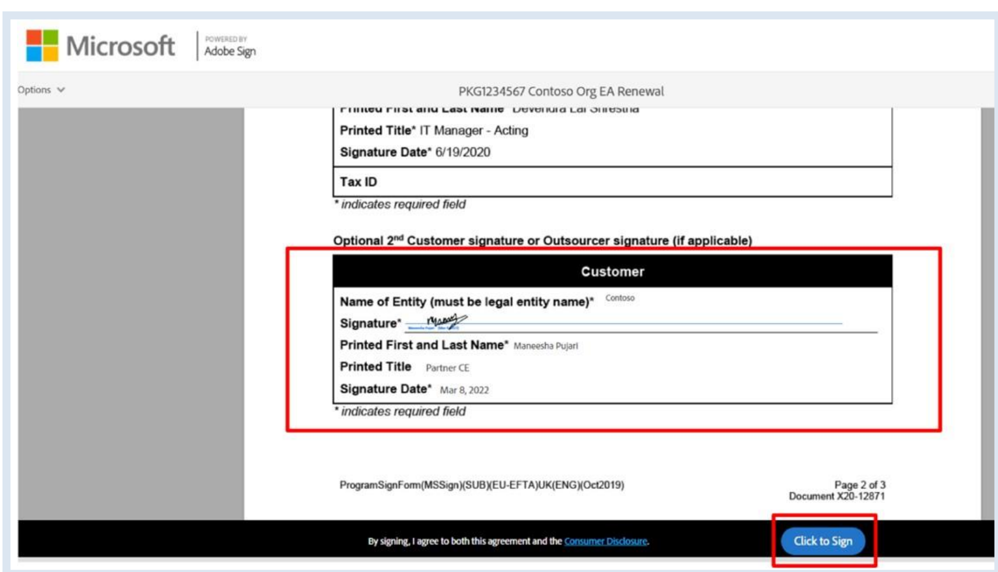


Kundenschritte

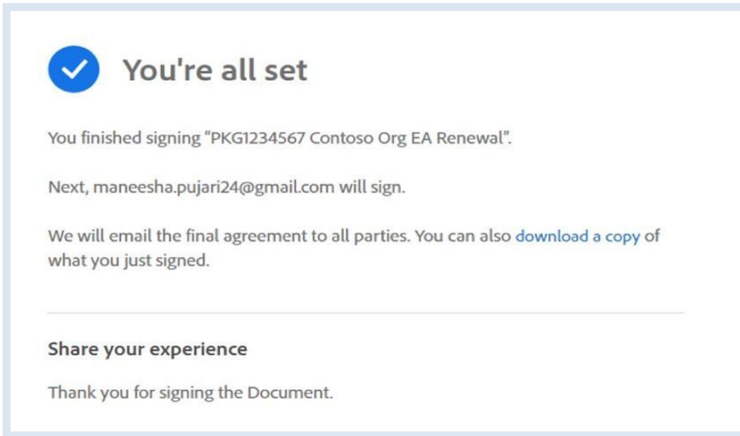
1. Once your customer receives the notification to sign the package electronically, they should select **Review and sign.**



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.



Nächste Schritte

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