



# eAgreements Handbuch mit Printscreens

Microsoft Volume Licensing  
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# 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.

The screenshot displays the eAgreements application interface. At the top, there is a search bar for "Agreement Number". Below this, the page is divided into several sections:

- Support Resources:** A section with a title "Support Resources" and a description: "eAgreements allows you to view and create your current in-progress agreements. What would you like to do?". It includes links for "View a Tutorial", "Get Help Getting Started", "Contact Support", and "Links" (Explore.mis, LicenseWise, Partner Portal, Word Viewer).
- Contract Packages:** A section titled "Contract Packages" with a subtitle "Your current in-progress document packages. Click the Contract ID to vi". It features a "My Packages" dropdown menu and a table with columns for "Contract ID", "Actions", and "Organization Name". The table contains three rows of data, each with a "View" link.
- Errors:** A section at the bottom with the text "There are no errors."
- Organization Search Form:** A form on the right side titled "to begin creating a contract package...". It includes a radio button for "Actions" (selected), a dropdown menu for "Renew", a text input for "Agreement Number", a text input for "Organization Name", a text input for "City", a dropdown menu for "Locale" (set to "Choose..."), a dropdown menu for "State/Province", a radio button for "Public Customer Number (PCN)", and a "Start" button.



## 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**.

The screenshot shows a web interface for creating a contract package. On the left, there are input fields for 'Organization Name\*', 'City\*', 'Locale\*', and 'State/Province'. A 'Start' button is visible. On the right, a table titled 'Is the organization listed below?' displays search results. The table has two columns: 'Organization Name' and 'Localized Organization Name'. The first row is highlighted with a red box. Below the table, there are buttons for 'View Organization Detail' and 'Add Program'. At the bottom, there are buttons for 'Create New Organization' and 'Cancel'.

Organization Name	Localized Organization Name
Microsoft	Microsoft
Microsoft Corporation	Microsoft Corporation
Microsoft Inc.	Microsoft Inc.
Microsoft Corporation	Microsoft Corporation
Microsoft Inc.	Microsoft Inc.
Microsoft Corporation	Microsoft Corporation
Microsoft Inc.	Microsoft Inc.

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.



Is the organization listed below?

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

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

View Organization Detail   Add Program

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

Create New Organization   Cancel

### Create New Organization

Enter information for organization and click Save.

Organization PCN:

Locale \* United States   Language \* English

---

Organization Name \* Contoso

Organization Type \* CORPORATE

Address \* Road 123

City \*

State/Province \* Nevada

Zip/Postal Code \* 89101

Tax/Vat ID 1

Tax/Vat ID 2

---

Primary Phone \* 425 99999   Fax

Save   Cancel

## 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.



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

### Choose Program

Choose the program attributes from the drop-downs below.

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

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

Reference Name    Reference Number

Program    Program Type    Version    Partner Type    Agreement Language

- Select the **Program Type**. To create a new contract for this organization, select **Create a new contract** from the dropdown menu.

- ▶ Selecting the **Program Type** automatically populates the **Partner Type** and **Agreement Language** fields. Countries with more than one partner type for a program must choose these fields.

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

Program    Program Type    Version    Partner Type    Agreement Language

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

I would like to register an Additional Affiliate.

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



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

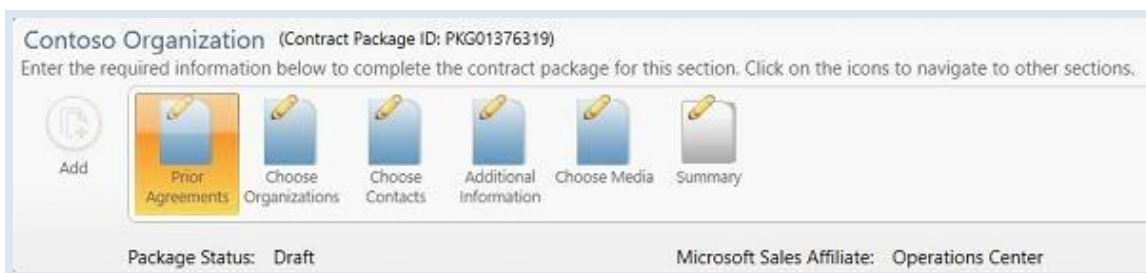
8. Select **Next**.

## 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:

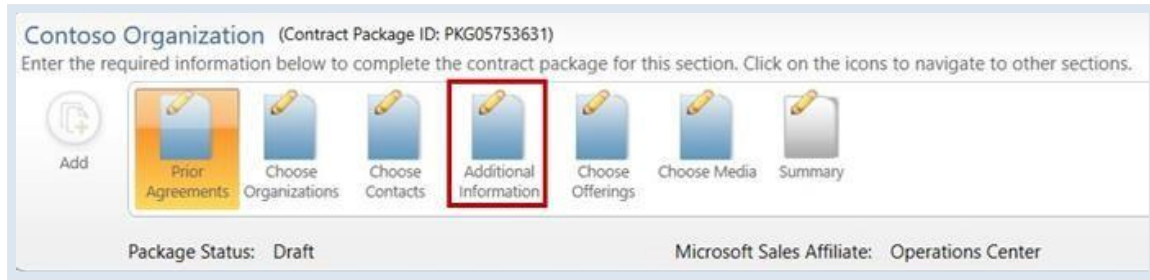
- Service Provider License Agreements (SPLA)
- Enterprise and Enterprise Subscriptions (corporate or state/local government)






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

- Open Value
- Open Value Subscription





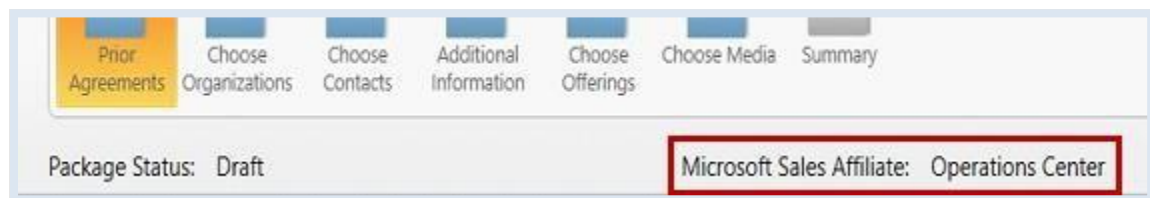
Symbols on the buttons indicate the status of each section in your package:

- 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.

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

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



5. Select the appropriate organization.

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

Options for the customer's enterprise include:

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

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



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

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

## 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.

**Choose Contacts**

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

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

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

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

**Available Participant Roles**

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

Assign >>  
<< Remove

**Assigned Contacts**

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



## 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**.

The screenshot shows a 'Choose Contacts' dialog box. At the top, there are two dropdown menus: 'Organization' (set to 'Test Reseller Account') and 'Contact' (set to 'Reseller Contact, Test'). Below these are search and edit buttons. Underneath, there are fields for 'someone2@example.com' and 'English (United States) (Language)'. The main area is split into two columns: 'Available Participant Roles' and 'Assigned Contacts'. In the 'Available Participant Roles' column, there is one role: 'Reseller - Primary Contact\*'. In the 'Assigned Contacts' column, there are two contacts, each with a list of roles assigned to them. A red box highlights the '<< Remove' button located between the two columns.

## 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

The screenshot displays the 'Additional Information' section of the eAgreements user interface. At the top, there is a navigation bar with icons for 'Add', 'Prior Agreements', 'Choose Organizations', 'Choose Contacts', 'Additional Information' (highlighted), 'Choose Media', and 'Summary'. Below this, the 'Package Status' is 'Draft' and the customer is 'Microsoft'.

The 'Additional Information' section is expanded, showing several fields:

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





## 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

to begin creating a contract package...

(Contract Package ID: PKG03957673)

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

Package Status: Draft      Microsoft Sales Affiliate: Subsidiary

Summary

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

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

Expand section



## 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\*

Title\*

Location\*

Visible to Customer

**Draft Package Documents**

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

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

**Uploaded Documents**

Document Name	Viewable to Customer	Include in Signature Form	Virus Scan



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

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

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



Preview/Upload Documents

**Upload Documents**

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

Type\*

Title\*

Location\*

---

**Draft Package Documents**

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

---

**Uploaded Documents**

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

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

## 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 elektronische Signatur via Adobe Sign für Open Value Subscriptions

### Partner steps

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

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

Bre's Bakery (Contract Package ID: PKG08079771)

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

Package Status: Draft      Microsoft Sales Affiliate: Operations Center

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

Agreement Type Agreement Number Customer PCN Customer Name Localized Customer Name Customer Country  
 Agreement V9629597 AC85E29C Bre's Bakery Bre's Bakery United States

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

**Prepare for Signature**

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

Choose one of the following signature options:

Adobe Electronic (Simple) Signature       Adobe Digital/Qualified Signature

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

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

Optional Email Recipients

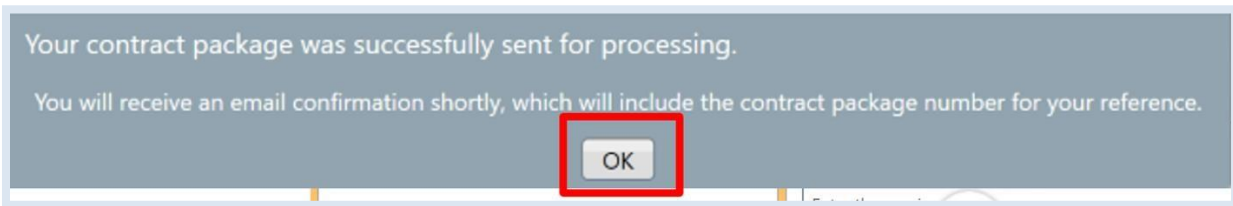
The Signatory Contact will be sent an email notification requesting signature upon submission. If you would like other individuals to be notified, please enter one or more email addresses for individuals to be included on the CC or BCC lines of the email to the Signatory Contact. If entering multiple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

CC YourFavoriteCE@microsoft.com

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

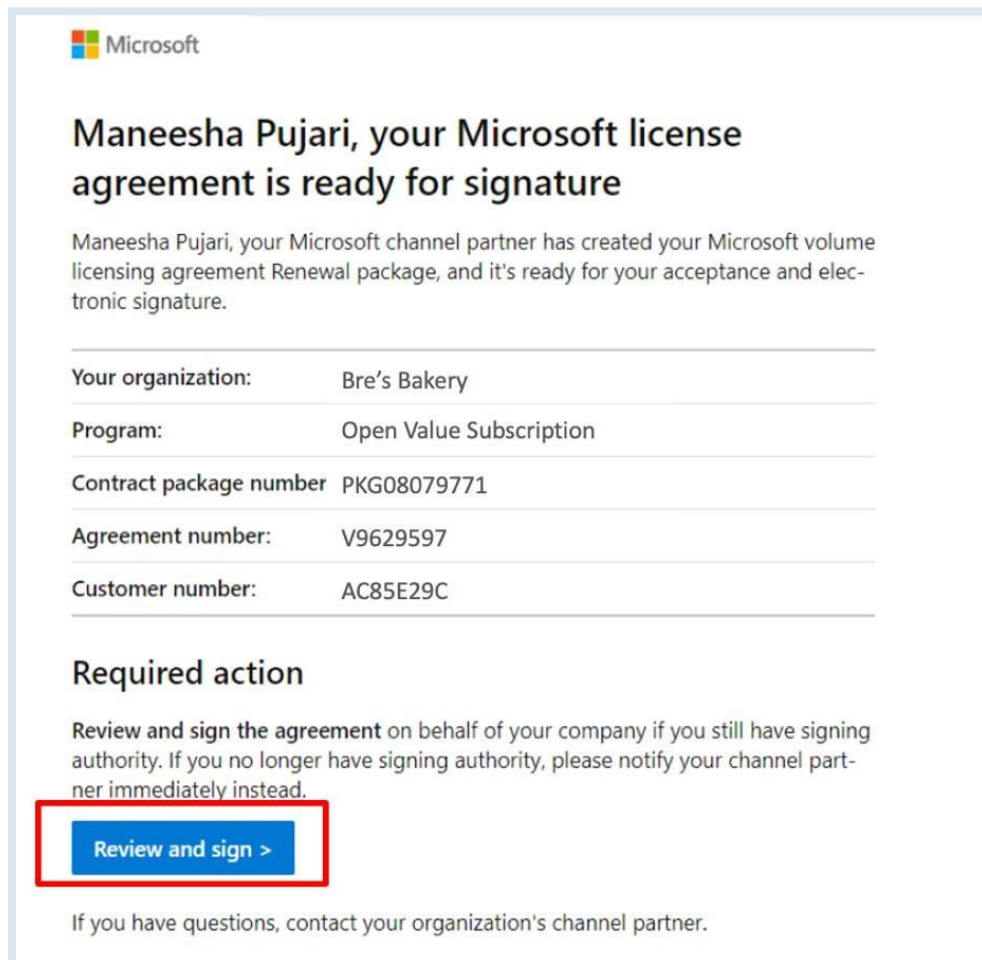


3. VLCM will submit the package for processing. When the submission process is complete, a confirmation dialog box appears. Select **OK**.



## Customer steps

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




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





Signature Date fields are automatically populated.

PKG1234567 Contoso Org EA Renewal


Volume Licensing

## Program Signature Form

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

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

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

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

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

\* indicates required field

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

**Customer**

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

\* indicates required field


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

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

Click to Sign



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



## You're all set

You finished signing "PKG1234567 Contoso Org EA Renewal".

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

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

---

### Share your experience

Thank you for signing the Document.



## 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.

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

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

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



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

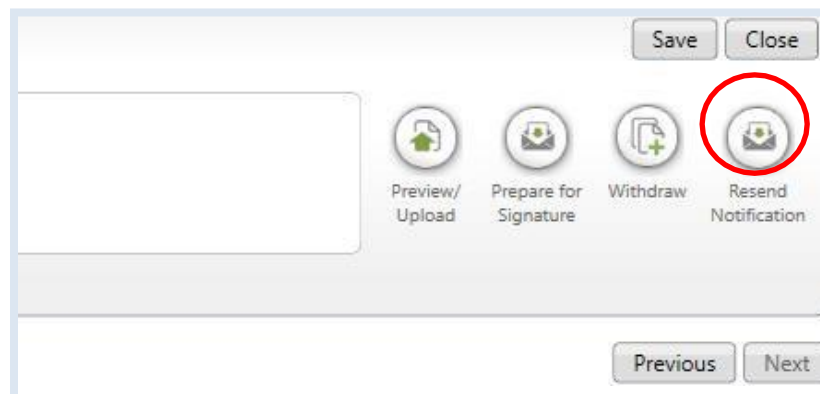


- The status changes from **Pending Customer Signature** to **Draft**.

## 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:** a.mike@microsoft.com

**Additional Recipients:**

**Comments:**



## 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.

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

The following agreement is currently eligible for a renewal.	
Organization Name:	Annie's Orphanage of the US
Agreement Number:	59504744
Program:	Enterprise 6
Start Date:	10/1/2019
End Date:	11/30/2022

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



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

To begin creating a contract package...

**Actions**  
 Renew  
 Agreement Number: 6488667

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

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

Start

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

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

View Organization Detail Add Program

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

Create New Organization Cancel

- Add the new program information for the renewal agreement.

Choose Program

Choose the program attributes from the drop-downs below.

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

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

Reference Name Reference Number

Program Program Type Version Partner Type Agreement Language

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

Next Cancel



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

**Prepare for Signature**

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

Choose one of the following signature options:

Adobe Electronic (Simple) Signature     Adobe Digital/Qualified Signature

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

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

Optional Email Recipients

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

CC annen@microsoft.com

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

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

Your contract package was successfully sent for processing.

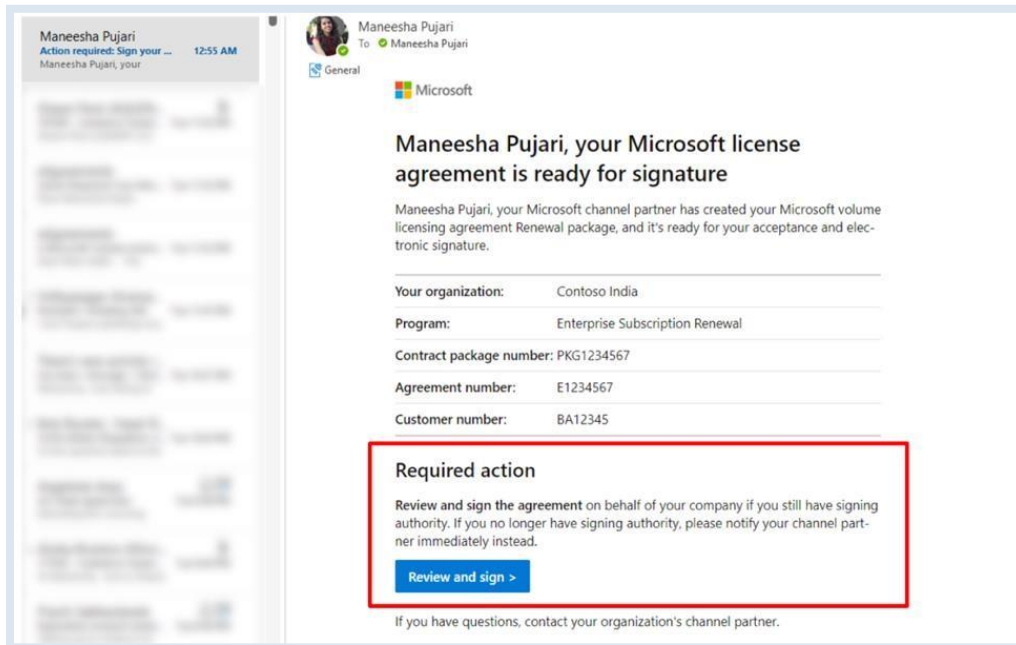
You will receive an email confirmation shortly, which will include the contract package number for your reference.



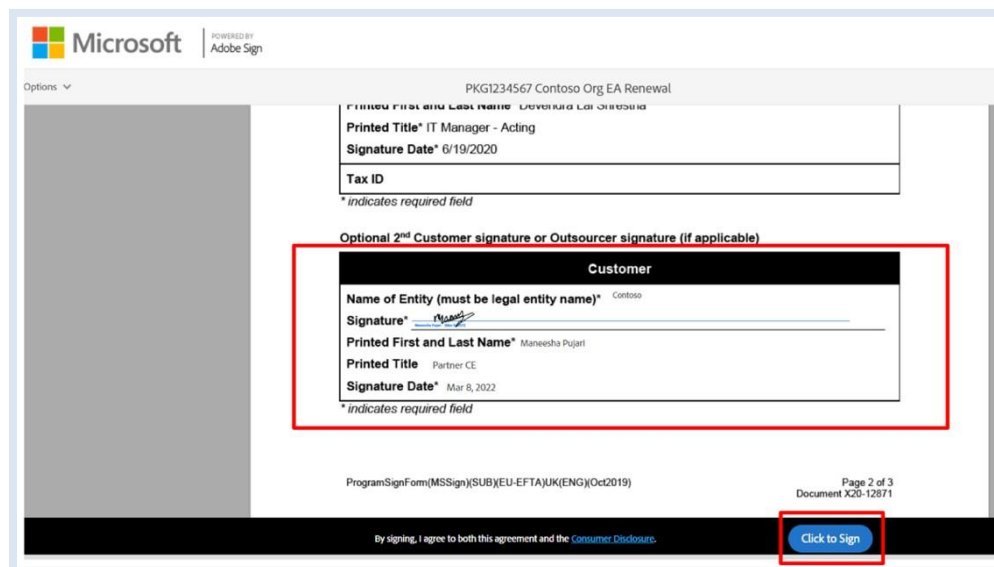


## Kundenschritte

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

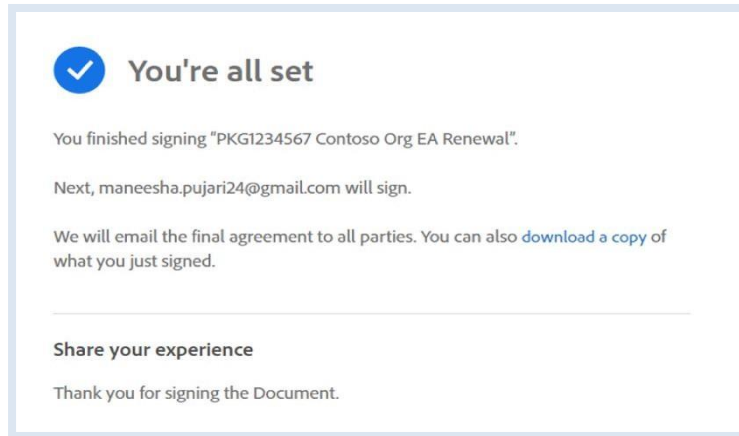


2. This will take them to the Adobe Sign portal, where they will sign on the signature placeholders, namely the **Signature** and **Printed Title** fields. The **Printed Name** and **Signature Date** fields are automatically populated.





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](#)