

# Enterprise Agreement



## Optimizing your licensing position with the True-up process

The rapid pace of technological change creates both opportunities and challenges for today's organizations. This change is driving organizations around the world to make decisions about whether they will embrace the cloud as a reality today, empower the flexible workstyles employees are demanding, or work on a strategy to harness the rapidly growing volume of data that is available to help drive business decisions.

Microsoft understands that technology licensing can help or hinder organizations that need the agility to respond to these technological opportunities. That is why the Enterprise Agreement True-up supports business growth by giving organizations the flexibility to add cloud services, software, users, and devices to the Enterprise Agreement when needed at pre-agreed terms and pricing without having to report or order each time. The True-up is an annual inventory of products, services, users, and devices added during the year.

### Best value

Buy the technology and services you need and use what you have.

### Flexible

Respond to changing business needs by getting the latest technologies from Microsoft when you need them.

### Manageable

Simplify purchasing and license management through a single annual order.

### Best value

The True-up allows you to lock in pricing by purchasing additional quantities of products and services at any point during your Enterprise Agreement term at pre-negotiated pricing and terms.

This is important because most organizations do not have a clear idea of how many users or devices they will have over the next three years, and they may be inclined to over-purchase to be safe. The True-up helps save money by allowing you to purchase just what is needed today and then add more quantities when they are needed.

And because one only purchase order is issued each year to cover additional quantities, procurement costs are reduced.

### Flexible

The True-up allows you to be highly responsive to changing needs by adding cloud services and on-premises software as needed without having to place individual purchase orders.

New online services can easily be provisioned as needed through License Reservation and reconciled annually.

The True-up process represents a point in time during the Enterprise Agreement term that gives you the opportunity to plan more strategically for future investments by evaluating what software and services are being used and ensuring that this use is in line with current and future organizational priorities.

## Manageable

License compliance can be challenging for many organizations. With the True-up, compliance can easily be managed by ensuring that licensing is current and accurate each year.

The True-up process also provides a great opportunity to work closely with your Microsoft Certified Partner or account team to identify new needs and define the best solutions for your organization going forward, including taking advantage of new licensing options like the Enterprise Cloud Suite (ECS).

## True-up timeline

The annual True-up order must be received by Microsoft in the period between 60 days and 30 days prior to the anniversary of your agreement:

- **120 days:** Discuss the True-up with your account team, LSP, or ESA.
- **90 days:** Review the licensing changes you have found with your account team, LSP, or ESA.
- **60 days:** Review the True-up order provided by your by account team, LSP, or ESA.
- **30 days:** Finalize your True-up between 60 and 30 days prior to your Enrollment Anniversary.
- **Right before:** Your True-up order is placed and any changes to license counts are recorded.

If no changes have been made, an Update Statement must be submitted to Microsoft.

## Get the best out of your investment with Software Assurance

Software Assurance supports your ongoing success by helping you take full advantage of your investments in IT. Software Assurance is a comprehensive program that includes a unique set of technologies, services, and rights to help you deploy, manage, and use Microsoft products efficiently. It keeps you up to date and ready to respond quickly to every new change, challenge, and opportunity.

- Unlock the full potential of your investments in Microsoft technologies.
- Get a broad range of benefits that help improve business agility.

## Flexible payment options

More and more Enterprise Agreement customers are choosing Microsoft Payment Solutions to help create a flexible payment structure for their complete range of technology needs, including software, services, partner products, and hardware. Flexible payment options include Deferred Payments, Ramped Payments, and Equal Monthly or Quarterly Payments.

## Next steps

1. Learn more: <http://www.microsoft.com/licensing/licensing-options/enterprise.aspx>
2. Start the True-up process 120 days before the anniversary of your Enterprise Agreement. [Find](#) your preferred Microsoft Authorized Enterprise Software Advisor (ESA) or Microsoft Licensing Solution Provider (LSP), or contact your Microsoft Account Representative.
3. Work with us to create an accurate True-up for your organization and help you optimize your investments.

## True-up timeline

