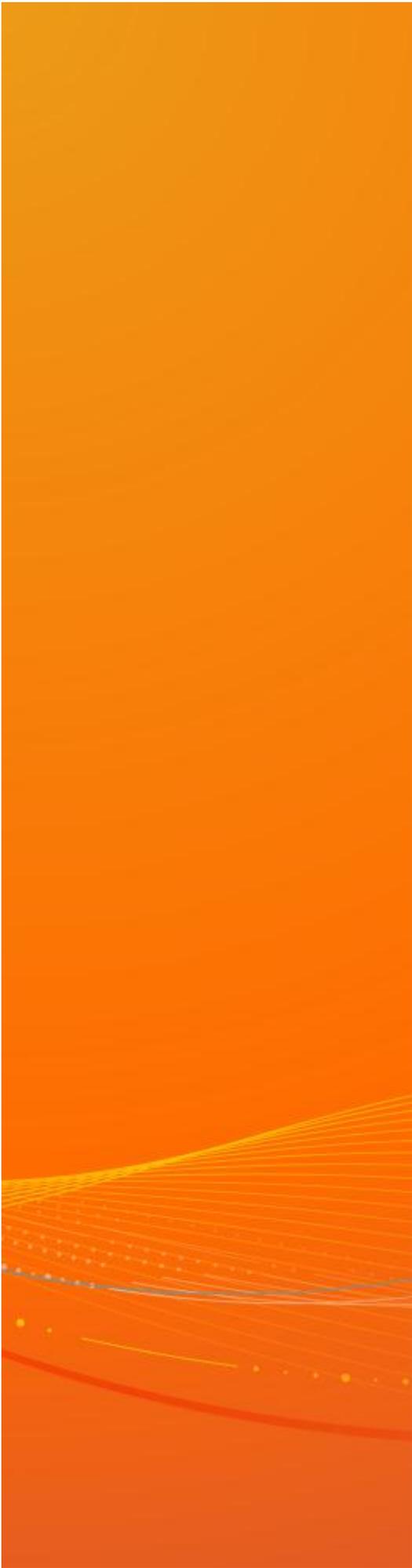


# Microsoft Office 365 for midsize businesses and enterprises

## Customer Purchase and Support Guide



This guide will help you learn more about **Office 365 for midsize businesses and enterprises** and how it can benefit your organization. The guide focuses primarily on the Office 365 commerce experience and will help you to buy and manage your Office 365 subscriptions. This document is not a contract and does not replace the **Microsoft Online Subscription Agreement (MOSA)**.

If you are interested in purchasing through the [Microsoft Online Services Portal](#), this guide is for you. *Enterprise Agreement, Enterprise Services Agreement, or Enrollment for Education Solutions* customers, please contact your Microsoft Account Representative or Microsoft Partner for more information. For more information on these programs, click [here](#).

**NOTE:** The information included in this guide is subject to change. Your account representative or partner can provide you with the latest information.

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## About Office 365

Microsoft Office 365 Plans for midsize businesses and enterprises are designed to help meet your business's needs for robust security, reliability, and end-user productivity.

### Office Professional Plus

Enjoy the value of the world's leading productivity tools in a form that fits your business, today and tomorrow. Office Professional Plus is a version of Microsoft Office delivered as a flexible service and supported by cloud-connected Office 365 services. You get the latest versions of the familiar Office applications and Office Web Apps, freeing your people to create, communicate, and work together efficiently from virtually any device.

### Exchange Online

Exchange Online offers email, calendar, and contacts designed to provide your business with the control you want and the security and reliability you need. With Exchange Online, you run your email on our globally-redundant servers, protected by built-in antivirus and anti-spam filters and unlimited, IT-level phone support 24 hours-a-day, seven days-a-week.

### SharePoint Online

SharePoint Online will help keep your teams synchronized. SharePoint Online gives you a central place to share documents and information with colleagues and customers. Designed to work with familiar Office applications, it's easy to save documents directly to SharePoint, and work together on projects in real-time because you have access to the documents and information you need from virtually anywhere.<sup>1</sup>

### Lync Online

Lync Online is a next-generation cloud communications service that connects people in new ways from anywhere by using presence, instant messaging, audio/video calling, and rich online meetings with audio, video, and web conferencing. Lync Online transforms interactions with colleagues, customers, and partners from today's hit-or-miss communication to a more collaborative, engaging, and productive experience.

## Licensing

Office 365 is sold through the User Subscription License (USL) Model. A company and its affiliates can purchase a USL for every employee in their company or a subset of employees. Each USL is assigned to an end user.

### Key USL Terms

- Subscriptions are contracted between Microsoft and a customer through the Microsoft Online Service Agreement (MOSA). For more details on the MOSA, go [here](#). A single subscription contains one or more USLs.
- All subscriptions are for a 12-month term, and all USLs follow the subscription term.
- The USL is tied to the user. Within the context of this document, "user" refers to end user of the service.

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<sup>1</sup> Access from mobile devices requires Wi-Fi capability or depends on carrier network availability.

- When purchasing through Microsoft Online Services Portal the minimum purchase requirement is one USL.

## Pricing

For the purpose of this guide the terms, “Pricing, Price, Prices” refer to the cost of a single User Subscription License (USL). All prices are stated in currency per user per month. For the most recent Office 365 pricing, go [here](#).

### Price Protection

Price protection means that your subscription USL price-per-user will stay the same throughout your 12-month subscription.

### Office 365 Volume Discount

A volume discount is a reduction in your price based on your total USLs purchased within a single subscription. These discounts are structured in specific tiers with specific thresholds that you will need to meet to get the discount. As each threshold is met, all of your USLs within the subscription will benefit from the lower price. These volume discounts are applied at the time of purchase in the Microsoft Online Services Portal. The specific tiers are provided below. To see specific discounts for the service you are purchasing, click [here](#).

Pricing Tier	Number of USLs
Level 1	0-249
Level 2	250-2,399
Level 3	2,400-5,999
Level 4	6,000-14,999
Level 5	15,000+

### Discount for Software Assurance Customers

If you are a qualified customer with current software assurance, a credit for up to half of the Office 365 price is available. Eligibility is detected post-purchase (as the subscription is provisioned), and the discount is applied in the form of a credit on a subsequent bill (typically the second bill after purchase). After that, you will receive invoices at the discounted rate throughout the duration of the subscription. For full details about this discount please work with your account team or partner.

## Office 365 Plans

Plans are listed in the catalog and define the types of pricing and features available when purchasing subscriptions. You can purchase a 1-year subscription of any of the Office 365 Plans mentioned below.

Office 365 has multiple plans to ensure that one fits your needs with each service plan representing a unique price and feature set. One significant advantage of this is the breakaway from the “one size fits all model,” allowing you to maximize functionality while managing budget. For the functionalities included in Office 365 Plans, go [here](#).

## Office 365 Trial Plans

Trial Plans allow you to experience Office 365 functionality free of charge for a period of 30 days.

1. These trial plans are available to customers with a Microsoft Online Services ID. For new customers, an ID will be generated as part of the trial signup process. Before signing up for your trial, you are required to sign the Microsoft Online Subscription Agreement.
2. The functionality in the trial plan is identical to the functionality in the corresponding paid plan.
3. Support is provided for all active trial accounts.

### Office 365 Trial Plans

Microsoft Office 365 (Plan E3)
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Microsoft Office 365 (Plan K2)
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## Office 365 Paid Plans

You can purchase any number or combination of plans based on your needs. Paid plans are available to customers with a Microsoft Online Services ID. Before purchasing your subscription, you are also required to sign the Microsoft Online Subscription Agreement.

## Office 365 Suite Plans

A suite plan consists of a set of component plans. A suite is always sold at a discount relative to the sum of the prices of its components. The following is the catalog of Office 365 Suite Plans:

### Office 365 Suite Plans

Microsoft Office 365 (Plan E1)
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Microsoft Office 365 (Plan E2)
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Microsoft Office 365 (Plan E3)
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Microsoft Office 365 (Plan E4)
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Microsoft Office 365 (Plan K1)
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Microsoft Office 365 (Plan K2)
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## Office 365 Component Plans

Components plans are individualized plans that are available for purchase both as a standalone or part of a suite (the only exception is Exchange Online Archiving which is only sold standalone). The following is the catalog of Office 365 component plans.

### Office 365 Component Plans

Office Professional Plus
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Office Web Apps with SharePoint Plan 1
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Exchange Online (Plan 1)	Office Web Apps with SharePoint Plan 2
Exchange Online (Plan 2)	SharePoint Online (Plan 1)
Exchange Online (Plan 2)	SharePoint Online (Plan 2)
Exchange Online Archiving	Lync Online (Plan 1)
Exchange Online Kiosk	Lync Online (Plan 2)

## Purchasing your Office 365 Subscription

Once you have made the decision to purchase a subscription, you have your choice of two options:

1. **Convert an existing trial subscription to a paid subscription:** If you choose to convert your trial subscription to a paid subscription of the same plan, your end users on the trial subscription are automatically transferred (with service data) to the paid subscription.
2. **Purchase a new paid subscription:** If you choose to purchase a new paid subscription, or a paid plan that is different from your trial subscription, you may need to manually assign your users to the paid subscription.

The subscription term will begin on the day you convert to or purchase the new paid subscription plan.

### Customer Credit Check

If you choose the invoice payment method (see payment methods below) with an order totaling more \$3,500 USD per month, you will be required to go through a credit check process. If a credit check is required, you will be notified at the time of purchase of your subscriptions, and you will receive an email message that includes more information about applying for credit approval. This process is simple and will only require you to fill out a short form. You will not be able to complete your purchase or make any changes to your subscriptions until the credit check process is completed and you are approved. If you prefer not to complete a credit check, choose to pay by credit card when you purchase Office 365.

Keep in mind when selecting a payment method that once your order is placed, the payment method cannot be changed for that particular order.

## Managing your Office 365 Subscriptions

Within this section you will find information that will help you understand how to make changes to your Office 365 subscriptions. Users designated as billing or service **administrators** can manage subscriptions in the portal on your behalf.

### Adding USLs to Your Office 365 Subscription

You can add USLs to an existing Office 365 subscription at any time via the Microsoft Online Service Portal. When you are adding USLs you should consider:

- You can add USLs to your subscription at any time at the current subscription purchase price.

- The added USLs will follow your original subscription anniversary date for renewals.
- When adding USLs moves you to a new pricing tier, all existing and new USLs take on the pricing of that new tier from that point onward.
- New USLs added between billing cycles will be billed on a prorated basis in the next billing cycle.

## Reducing USLs from Your Office 365 Subscription

You can reduce USLs from an existing Office 365 subscription at any time by paying a cancellation fee. Call [support](#) to help you with this transaction. When you are removing USLs you should consider:

- Reductions within the first 30 days are allowed at no fee.
- Reductions within the last 11 months of the subscription period are allowed. The customer is responsible for paying a fee equal to 25% of the remaining value of the contract.
- If reductions move you to a new pricing tier, all of your USLs assume the pricing within the new tier.

## Buying Add-On Plans

The only Add-On Plan (at this time) is SharePoint Online Partner Access.

## Reconciling your Licenses (USLs)

Each time you reduce USLs, reconcile your subscriptions by manually disabling the corresponding users via the Microsoft Online Services Portal. You will be prompted in the portal to reconcile your licenses after making a reduction. In the portal you will be able to select the users to be disabled. Once the number of users assigned USLs is equal or less than the number of USLs you have purchased, the "error message" prompting on the portal will go away.

## Changing your Office 365 Plans

You can change your Office 365 Plans for ALL or a subset of USLs any time during the term of your subscription. For example, if you had a component plan, e.g., **Exchange Online (Plan 1)**, subscription with 100 USLs and you wanted to move all users to a suite plan, e.g., **Microsoft Office 365 (Plan E3)** subscription, you would take the following steps:

1. Purchase a new **Microsoft Office 365 (Plan E3)** subscription with 100 USLs through the Microsoft Online Services Portal.
2. Go to user management in the portal and transfers users from the **Exchange Online (Plan 1)** subscription to your **Microsoft Office 365 (Plan E3)** subscription.
3. Call [support](#) to cancel the **Exchange Online (Plan 1)** subscription.

If you want to change plans for only a subset of the users (e.g., in the above example you want to change plans for only 50 users) then you would still perform steps 1 and 2. In step 3 you would call [support](#) to reduce 50 USLs in the **Exchange Online (Plan 1)** subscription. Our support agents will waive cancellation fees when these changes are related to an upgrade in your plans.

## Cancelling your Office 365 Subscription

You can cancel your Office 365 subscriptions at any time by paying a cancellation fee. Call [support](#) to help you with this transaction.

- **Considerations when cancelling your Office 365 Subscription:** Cancellations within the first 30 days are allowed at no fee.

- Cancellations within the last 11 months of the subscription term are allowed. You will be responsible for paying 25% of the remaining value of your subscription.

## Renewing Your Subscription

### Auto-Renewal of Your Office 365 Subscription

All subscriptions are set to auto-renew by default at the time of purchase. Nearing the end of your subscription, you will be notified electronically that your subscription is coming to an end. If no action is taken, your subscription and USLs will automatically be renewed for another 12-month term. Subscriptions are always renewed at the current market price. Upon renewal, the new price is protected through the renewed subscription term.

### Manual Renewing Your Office 365 Subscription

You can opt out of auto-renew through the Microsoft Online Services Portal at any time during your subscription term. If you opt out of auto renew but would like to continue using your Office 365 service when your subscription ends, call [support](#) to manually renew the subscription before the end of the 30-day grace period. Subscriptions are always renewed at the current market price.

## Paying your Office 365 Subscription

There are two different billing cycles and two different payment methods available in Office 365. The way you pay is determined by the choices you make at the time of purchase.

### Billing Cycle (annual vs. monthly)

- If you choose annual billing, you will receive a bill for the entire year on the purchase date. All subsequent additions (USLs or plan add-ons) to your subscription(s) will be billed annually (i.e., for the rest of the term).
- If you choose monthly billing, you will receive a bill in advance every month for quantities included in your subscription. All subsequent additions (USLs or plan add-ons) to your subscription(s) will also be billed monthly.

When additions to your subscription(s) occur in the middle of a billing cycle, these additions will be reflected in your next bill and will be prorated to the date of purchase.

### Payment Methods

You can choose either of two payment methods at the time of initial purchase. You will receive an electronic statement (via the Microsoft Online Services Portal) showing the amount you owe Microsoft for that billing cycle.

- **Credit Card:** You can make payments using an International credit or debit card. Your credit/debit card is charged on the billing date. VISA, MasterCard, American Express, Discover, and JCB are accepted.

- **Invoice (Wire/Bank Transfer):** In addition to the credit card option, if you qualify you may opt to pay using wire/bank transfer. In this payment option Microsoft will issue an electronic statement and you must initiate funds transfer to Microsoft (within 30 days of the billing date). To qualify for this payment option, your total invoice must be equal to or greater than \$500 USD per invoice in the United States or be equal to or greater than \$250 USD per invoice outside the United States. India is an exception and only requires a purchase of \$50 per invoice.

#### **Considerations when choosing your payment parameters:**

- Statements are only available online in the portal.
- The payment method you choose for your subscription(s) will remain the payment method for the life of that subscription.
- All subscriptions and add-ons that are purchased simultaneously will be included on the same statement.

## Customer Support

You are encouraged to contact the Office 365 Support team for technical or billing related assistance. During your active trial or following purchase you have a choice of three support options:

1. **Community:** The [community forum](#) is a place where you or anyone using Office 365 can post a question, and others in the forum can answer.
2. **Online Support:** For [billing and subscription issues](#), create a service request in the Microsoft Online Services Portal to communicate with an Office 365 support representative. To do this, in the header, click Admin. In the left pane, under Support, click Service requests, and then follow the instructions. The online support option is available 24 hours-a-day, seven days-a-week in all markets where Office 365 is available.
3. **Telephone Support:** For urgent billing or subscription issues, call a support agent. Click [here](#) to see operating hours and other details for the [telephone support](#) option.

More information from trusted sources is available to you online, including the [Office 365 Blog](#) and the [Office 365 Wikis](#).

## Microsoft Online Services Partner

A Microsoft partner serving as your subscription advisor provides you with the sales, support, and technical expertise to set up and maintain your subscription. Working with a partner is an excellent way to maximize the benefits available in Microsoft Office 365 for enterprises. You can add and authorize a partner to assist with your subscription(s) at the time or purchase at a later date through the Microsoft Online Services Portal. Partner availability depends on the services you use and the country or region where you will use those services. You can also change or remove the partner from your subscription at any time. If you are adding a partner or changing the partner for your subscription, you will need the Microsoft Partner ID number. Find more information about adding, changing, or removing partners from your subscription [here](#).

## Global Availability

### Service Availability

Office 365 is available in the following countries:

Australia, Austria, Belgium, Canada, Colombia, Costa Rica, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Greece, Hong Kong, Hungary, India, Ireland, Israel, Italy, Japan, Luxembourg, Malaysia, Mexico, Netherlands, New Zealand, Norway, Peru, Poland, Portugal, Puerto Rico, Romania, Singapore, Spain, Sweden, Switzerland, Trinidad & Tobago, United States, UK.

### Languages Supported

Office 365 is supported in the following languages:

English, Chinese, Czech, Danish, Dutch, Finnish, French, German, Greek, Hungarian, Italian, Japanese, Norwegian, Polish, Romanian, Spanish, Swedish.

### Currencies Supported

Office 365 Plans are priced in the following currencies:

AUD, CAD, CHF, DKK, EUR, GBP, JPY, NOK, NZD, SEK, USD.

### Data Centers

Data centers are the actual facilities in which your data is stored by Microsoft.

Microsoft Online Services uses data centers located in the United States, Singapore, and Ireland to best serve our subscribers. A data center will be assigned based on the location of your organization.

Countries served by each data center:

United States Data Center	Singapore Data Center	Ireland Data Center
Canada	Australia	Austria
Columbia	Hong Kong	Belgium
Costa Rica	India	Cyprus
Mexico	Japan	Czech Republic
Peru	Malaysia	Denmark
Puerto Rico	New Zealand	Finland
Trinidad and Tobago	Singapore	France
United States		Germany
		Greece
		Hungary
		Ireland
		Israel
		Italy
		Luxembourg
		Netherlands
		Norway
		Poland

		Portugal
		Romania
		Spain
		Sweden
		Switzerland
		United Kingdom

Visit the [Microsoft Data Centers](#) for more information.

## Service Level Agreement

Microsoft Online Services guarantees you 99.9% uptime for all Office 365 services in our Service Level Agreement (SLA). These service levels are financially backed. That means, if Microsoft does not meet the terms of your Service Level Agreement, you are eligible to receive service credits equal to a percentage off your total monthly bill. You can find the full Service Level Agreement [here](#).

These are the service credit tiers for any loss of monthly uptime:

Monthly Uptime Percentage	Service Credit
< 99.9%	<b>25%</b>
< 99%	<b>50%</b>
< 95%	<b>100%</b>

## Glossary

**Volume Licensing (VL)** – A set of programs and policies allowing customers to attain licenses to software and services in a way that works for them. Examples of programs: Enterprise Agreement (EA), Enterprise Services Agreement (EAS), or Enrollment for Education Solutions (EES), Select License, Select Plus, Open License, Open Value, or Open Value Subscription. Click [here](#) for more information about Microsoft’s Volume Licensing programs.

**Microsoft Online Services Portal (Portal)** – The Web portal that customers use to try or buy Office 365 plans, manage active Office 365 subscriptions, and/or manage user accounts and other service capabilities included in their Office 365 subscriptions.

**Billing Administrator** – This administrator role can buy or manage Office 365 subscriptions and update billing information, payment options, etc.

**Service Administrator** – This administrator role can create or manage user accounts, manage service requests, and monitor service health.

**Global Administrator** – This administrator role can act as both the billing and service administrator.

**Microsoft Online Services ID** – The unique ID that is required to administer or use Office 365 services. The Microsoft Online Services ID can be created when you try or buy an Office 365 plan for the first time. Alternatively, an administrator creates a new ID when s/he creates a new user and assigns the user an Office 365 USL.

**Plan** – Office 365 Plans are listed in the online services catalog within the Microsoft Online Services Portal. Each plan includes a set of online services capabilities or functionalities. A customer can subscribe to any Office 365 plan for a fixed term length (12 months for paid plans and 30 days for trial plans).

**Pricing, Price, Prices** - For the purpose of this guide the terms “Pricing, Price, Prices” refer to the customer cost of a single User Subscription License (USL). All prices are stated in currency per user per month.

**Subscription** - A subscription represents the detailed attribute of an agreement between Microsoft and a customer who has subscribed to a Microsoft Online Services plan. Every Office 365 enterprise subscription is for a 12-month term length.

**User Subscription License (USL)** – Microsoft Online Services are subscription-based and provide access to software and services. Licensing for Office 365 requires a User Subscription License (USL) for each user of the service.

**Billing in Advance** - Billing in advance is a billing structure in which a customer is billed at a predetermined rate for Microsoft Online Services before s/he uses the service.

**Microsoft Online Services Agreement (MOSA)** – The contract between Microsoft and a customer for Office 365 services purchased.

**Service Request (SR)** - A Service Request is how customers engage Microsoft Online Services support for issues – regardless of whether the support is provided online or via phone.

**Microsoft Online Services Partner (MOSPA)** - A partner who has signed the Microsoft Online Services Partner Agreement (MOSPA) and is certified to sell Office 365.

**Partner of Record (POR)** - The term used to reference the Microsoft Online Services Partner tied to a specific subscription. The Partner of Record is the partner recognized for selling a customer an Office 365 subscription and will be providing that customer with value added services using Office 365.

