



Operating guide: Microsoft 365, Dynamics 365, Power Platform, and Windows 365 in the new commerce experience in CSP

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This guide is designed to help Cloud Solution Provider (CSP) partners quickly learn and understand how to transact Microsoft 365, Dynamics 365, Power Platform, and Windows 365 offers in the new commerce experience. These offer types are being added to Microsoft's new commerce platform, with new functionalities, capabilities, and policies that differ from the existing offers available in CSP. Additional information can be found in the online Partner Center Documentation as Partner Center features and capabilities continue to evolve.

The experiences documented in this guide reflect the planned target for general availability (GA) release in October. Between now and GA, some details on functionality can shift slightly or change prior to release. Review the change log for specific updates made to this document.

We're always improving—your actual in-tool experience might be slightly different.

Contents

Vision	7
Policies	7
Available geographies	7
Key feature summary	8
Key feature overview	9
Purchasing comparison chart	14
Agreements	17
Price lists	18
How to access price lists	18
Pricing and offer matrix downloads for new commerce	19
Differences between existing offer pricing and new commerce	20
Existing vs. new commerce	20
Offers vs. product SKUs	20
New commerce price list data example	22
Offer list matrix	23
Price list preview	24
New commerce terms and billing frequencies	24
Monthly and annual terms	24
European regional prices	25
API support	25
Purchasing new commerce in Partner Center	25
Add-ons in new commerce	26
Identifying add-ons	27
Purchasing add-ons	27
Add-on enforcement	30
Important details when purchasing add-ons	30
Review and check-out enhancements	31
Promotion pricing transparency	31
Telco and paygo offers	32

Pricing and margins	34
Important details about overage	34
Multipartner overage.....	35
Promotions in new commerce	35
Promotions overview	36
Supported promotions	36
Promotion examples.....	38
Discovering promotions.....	39
Operationalize promotions	39
Promotions, terms, and renewals.....	39
Verify eligibility	39
Promotions and renewals	46
Promotions and upgrades	46
Pricing and reconciliation for promotions.....	46
Cross-channel considerations	46
Subscription management features	47
Upgrades.....	47
Full upgrade.....	47
Partial upgrade	49
Midterm upgrade policy with cancellation.....	50
Upgrade activity table	51
Toggle autorenew and expired states	51
Cancellation.....	52
Cancellation UX flow.....	52
Pause service (suspend) and resume (reactivate) service.....	54
Decreasing seat count while in cancellation window	55
Schedule changes	56
Midterm conversion enhancements	57
Small business seat limits.....	60
Grace period on subscription expiration.....	60
Microsoft 365 admin center customer experience	61

Billing, invoicing, and reconciliation files.....	61
Billing experience updates.....	62
Existing experience vs. new commerce invoices and recon files	63
How NCE reconciliation works	63
What are the different charge types?	63
How one-time and recurring charges are calculated	63
Monthly term billing	65
Switching billing plans	67
Example 1 – Switching from annual to monthly.....	67
Example 2 – Switching from monthly to annual.....	68
Usual subscription purchase scenarios	71
Add or remove seats scenarios.....	74
Suspend subscription scenarios	91
Cancel subscription scenarios	96
Trial subscription scenarios	100
Add-on subscription scenarios	109
Upgrade subscription scenarios	114
Term change scenarios	126
Promotion scenarios	130
Trials.....	132
Migrations.....	133
Suspending a Legacy subscription during migration	134
Billing term and frequency	134
Cancellation policy.....	134
Migration history.....	134
APIs.....	135
Partner Center UI.....	135
Bulk migration.....	138
Enhanced capabilities	139
Software subscriptions.....	139
Toggling autorenew.....	139

Scheduling changes in billing frequency.....	140
Sandbox.....	141
Support requirements	142
Incentives	142
Change log	142
August 2021	142
September 2021	142
October 2021	145
November 2021	148

Vision

The new commerce experience was launched in Microsoft's CSP program for Azure plan, Server subscriptions, and Azure reserved instances in 2019, and in 2021, Microsoft will introduce a new set of commercial-priced offers in the new commerce experience for Microsoft 365, Dynamics 365, and Power Platform (and, in October, Windows 365). Simultaneously, as part of this launch, an array of new features and functionalities will be introduced to CSP in response to partner requests and customer needs.

These efforts will result in a more intuitive and streamlined purchase experience for partners, making it easier to meet the diverse needs of customers and reducing the complexity of the overall sales process between partners and their customers. The revisions and additions to policies, functionalities, offers, processes, and billing included in this release have two goals:

- Introduce a set of new offers, policies, and functionalities that will replace the current experience for partners in CSP. In new commerce, customers have a consistent set of policies, agreements, and procedures across all purchase motions, regardless of how the purchase happens (through a partner in breadth (CSP), through a Microsoft seller in Enterprise or directly on one of Microsoft's commercial marketplaces or online portals).
- Complete the foundation in new commerce for transforming the way that partners sell and customers buy in the cloud, and enable partners to expand their cloud business, offerings, and services in the years ahead.

Policies

An overview of the policies and new feature updates can be found in the [Introduction deck](#). For full details regarding policy information see the [Microsoft product terms](#).

Available geographies

On October 14, 2021, Microsoft 365, Dynamics 365, Power Platform, and Windows 365 will be available on Microsoft's new commerce platform in CSP in 248 countries. Review the list of [countries/regions](#) available and a timeline for the remaining geos.

NOTE

Seat-based offers in CSP new commerce in the following countries will be released at a later date:

- China: TBD

- Brazil: February 2022
- Canada: Telco products will be available to test in the sandbox environment on December 15, 2021 and available for purchase on **January 22, 2022**.

Key feature summary

The following table provides a summary of the key features that will be available for launch and in the integrated sandbox testing environment.

1-tier, 2-tier models	Partial subscription upgrade via support
Partner or customer delegated admin privileges (DAP) set-up	Partial sub upgrade–full feature
Side by side discovery of current and new experience	Scheduled changes at renewal
Discover and purchase Modern (select products)	Suspend or resume (via support)
Manage subscription (autorenew toggle, add seats, cancel motion)	Free trials (MAC-only presentment)
Independent add-ons	Partner currency
Billing plans	Price transparency
Subscription lifecycle management (grace period)	Annual billing plans for multi-year offers
Ownership constraints	Suspend or resume (via self-serve)
Invoice or reconciliation (recon) files	Autoseat reassignment for full quantity SKU transitions
Midterm full quantity SKU upgrades	Free trial (with full presentment)
Cancellation policy enforcement	European regional customer pricing sheets
Price list preview	Promotions
Telco and paygo offers	Add-on enforcement
Migration capabilities	Switch billing plans midterm without resetting term

Midterm conversion enhancements: Midterm free to paid and paid to paid with two plus intents (change quantity, SKU, term, and billing plan)	Partial upgrades • Partial seats with other subscription property changes • Moving partial to existing subscriptions
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Key feature overview

New feature/change	Current experience	New commerce experience	Impact and benefits
Ability to schedule changes at subscription renewal	Not available	Partner can schedule different seat counts, SKU conversions, term-length renewal changes, and renewals to different billing option.	Allows partner to manage subscriptions in advance instead of performing manual changes at renewal. Improves operational efficiency.
Automatic seat assignment with full upgrade	Only available with Small Medium Business (SMB) SKUs.	Seats can also be assigned automatically at upgrade with Enterprise-level SKUs.	Easier and more efficient subscription management for larger customers.
Autorenewal toggle option	Subscriptions are autorenewed by default at end of annual term.	Partner can toggle autorenewal and submit renewal manually.	Easier to manage renewals and plan ahead for subscriptions that will be terminating.

New feature/change	Current experience	New commerce experience	Impact and benefits
Cancellation policy enforcement*	Partner could suspend the annual subscriptions at any time without penalty or early termination fee. However, partner didn't have the option to cancel the subscription immediately.	Partner can cancel with prorated refund within first 72 hours for any term (proration calculated daily). After 72 hours, no cancellation available, and the partner is billed for full term, even if the customer stops paying for or using the subscription (applicable to any billing plan). If seats are added midterm, same 72-hours policy applies to any reduction of additional seats (support request required). <i>NOTE: Microsoft will enable self-service functionality via Partner Center or API for seat-count reductions at midterm (from the number of seats added midterm), instead of this reduction requiring a support request. Testing of this self-serve capability will begin in the integrated sandbox environment on December 10, 2021.</i>	Encourages customer commitment to the full annual term of the subscription purchased and reduces churn; helps partner more effectively retain and forecast revenue; ensures ROI for provision of support and services.

New feature/change	Current experience	New commerce experience	Impact and benefits
Monthly term subscriptions	Only annual-term subscriptions for license-based offers.	Subscriptions available on *monthly terms at a premium price. Aligned with other purchase motions (self-serve and Enterprise) and how competitors sell. * Some commercial seat-based offers in new commerce won't have the monthly term option at launch; see the CSP catalog and pricing list to confirm monthly-term availability.	Option for customers hesitant to commit to annual subscription; allows them to pay more for ability to cancel anytime with no further costs. Incentivizes customer commitment. Enables partner to monetize flexibility.
Multi-year billing plans	Partners selling multi-year subscriptions must pay monthly or upfront.	Partners can also be billed annually for multi-year subscriptions.	Additional option to accommodate customers' payment preferences.
Subscription term options for Windows 365	Subscriptions available for annual term only	Subscriptions available for monthly term only	Option to try Windows 365 in new commerce with no long-term commitment and reduce seat count if needed
Price list integration via API	Not available	Partner APIs provide online monthly pricing lists instead of partner processing lists manually.	Easier automation of offer pricing within partners' sales and billing systems.
Recon file upgrades	Partners receive separate recon files once each month for license- and usage-based subscriptions.	All subscriptions are consolidated into a single recon file. Estimates of charges accrued during the month are provided and updated hourly.	Increased accounting efficiency and options for partners in customer billing.

New feature/change	Current experience	New commerce experience	Impact and benefits
Subscription ownership enforcement	Customers buy from different partners to aggregate instances of the same SMB offer and buy multiple free trials.	Customer SKU limits are enforced across multiple partner tenants, preventing, for example, a customer from purchasing multiple lower-cost SMB SKUs from different partners beyond established offer seat limits defined in Microsoft's product terms.	Prevents customers from "gaming" the system and ensures that partners will be able to maximize the revenue from each customer.
Suspend or resume subscriptions	To pause subscription, partner must suspend it, and then reorder it if subscription terminates after end of term. Partner billing is paused during suspension.	Partner can suspend and then resume a new commerce subscription at any time without cancellation or termination; partner billing continues during suspension.	Helps partner with dunning; subscription can be paused until customer remits overdue payment.
Promotional pricing transparency	No automatic notification for Government and state-owned entity customers when promotional reduced pricing is included in a CSP transaction.	Government and state-owned entity customers receive an email notification from Microsoft with details on the promotional discount and why that pricing was offered in the sale.	Provides price and discount transparency to these customers and supports anticorruption regulations worldwide. Prepares customers to understand this alongside partner pricing.
Add-ons sold separately from base offers	Add-ons are purchased only in conjunction with purchases of the add-ons' base SKUs from the same partner and weren't displayed in the CSP catalog or shopping-cart UI.	Add-ons discoverable in the catalog, with prerequisite SKUs displayed. Prerequisite subscriptions purchased from other partners or channels are accepted to enable add-on purchase.	More flexibility and ease of purchasing for partners and customers, along with upsell opportunities for partners.

Purchasing comparison chart

(NCE = new commerce experience)

 Microsoft Online Services purchasing comparison COMMERCIAL CUSTOMERS Updated June 2021				
This document helps you to compare how licenses for the Online Services are transacted through the different ways to buy that are available to commercial customers. It pertains to licenses for Windows 10 Enterprise, Office 365, EMS, Microsoft 365, Dynamics 365, and the Power Platform products.				
General				
	CSP NCE	CSP legacy	Open programs	EA
Agreement	Microsoft Customer Agreement	Microsoft Customer Agreement	- Open License agreement - Open Value agreement - Open Value Subscription agreement	Enterprise Agreement
Product availability	All products aimed at small and medium organizations <i>(Not available: Microsoft Relationship Sales Solution)</i>	All products aimed at small and medium organizations <i>(Not available: Microsoft Relationship Sales Solution)</i>	- Limited products available: - Office 365 E1, E3 - EMS E3, E5 - Microsoft 365 Business Basic, Standard	All products aimed at larger organizations <i>(Not available: Dynamics 365 Business Central, Microsoft 365 Business plans)</i>
Subscription term	1 month or 12 months for all products 36 months for some products	12 months for all products 36 months for some products	12 months	12 months as an Additional Product 36 months as an Enterprise Online Service
Price protection	For the term of the Subscription	For the term of the Subscription	None	For the term of the Enrollment
Price levels	1	1	1	4
Minimums	1 User SL	1 User SL	1 User SL	500 User SLs of Enterprise Online Services 1 User SL if bought as an Additional Product when the on-premises enterprise-wide commitment is already met
Billing options	- Upfront monthly - Upfront annually	- Upfront monthly - Upfront annually	Upfront in full	- Upfront in full - At anniversary via License Reservation and True Up processes
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Microsoft Online Services purchasing comparison

COMMERCIAL CUSTOMERS

Updated Nov. 2021

This document helps you to compare how licenses for the Online Services are transacted through the different ways to buy that customers. It pertains to licenses for Windows 10 Enterprise, Office 365, EMS, Microsoft 365, Dynamics 365, and the Power Platform products.

General

	CSP NCE	CSP legacy	Open programs	EA
License type available	- Full User SLs - From SA User SLs for Dynamics 365	- Full User SLs - From SA User SLs for Dynamics 365	Full User SLs	- Full Users SLs - From SA User SLs - Add-on User SLs
Add-ons	Purchased independently of qualifying licenses	Purchased within context of qualifying licenses	Purchased independently of qualifying licenses	Purchased independently of qualifying licenses
Cancellation terms	Cancellation only possible within first 72 hours of term with prorated refund (proration calculated daily)	No penalties currently enforced for cancellation at any time, and prorated refunds at any time	N/A	N/A
Subscription suspension	- Suspends the service for the customer - Partner billing continues	- Suspends the service for the customer - Stops billing for the partner	N/A	N/A
Subscription Auto-Renew	On as a default, can be turned off	On as a default, cannot be turned off	N/A	Within the term of the Enrollment, then on a monthly basis for up to 1 year for eligible services if the Enrollment is not renewed
Product use rights	Limited use rights for certain products	Limited use rights for certain products	Full use rights for limited products available	Full use rights for all products

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Microsoft Online Services purchasing comparison

COMMERCIAL CUSTOMERS

Updated June 2021

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Making changes

	CSP NCE	CSP legacy	Open programs	EA
SKU upgrades	- Partial or full upgrades at midterm - Schedule upgrade with a lower or higher quantity of seats at renewal	Full upgrade or greater at midterm	Purchase new licenses	Via Step-up SKUs
Change billing option	At renewal	- At renewal - Can transfer to a new Subscription with a different billing option	N/A	N/A
Increase seats in an existing Subscription	At any time	At any time	At any time with blended end-dates	At any time
Decrease seats in an existing Subscription	At renewal	- At renewal - Midterm, currently with no penalty	At renewal of the Subscription	- Additional Products: at anniversary - Enterprise Online Services: at anniversary to program minimums
Schedule changes (SKU upgrade / downgrade, seat quantity, billing frequency, term)	Yes	No	No	No

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Trials

	CSP NCE	CSP legacy	Open programs	EA
Availability of trials	• Yes, for some products	• Yes, for some products	• No	• No
Ability to change seat count or cancel trial	• No	• No	• N/A	• N/A
Ability to convert trial to paid Subscription during trial	• Yes: with the same seat count • Yes: with a different seat count	• Yes: with the same seat count • No: with a different seat count	• N/A	• N/A
Conversion of trial to paid Subscription	• Auto-convert on as a default • Scheduling possible	• Manual conversion only	• N/A	• N/A
Availability of trials	• Yes, for some products	• Yes, for some products	• No	• No
Ability to change seat count or cancel trial	• No	• No	• N/A	• N/A

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Agreements

[Learn more about the Microsoft Partner Agreement \(MPA\) CSP program partners.](#)

Terms and conditions for partners to transact in the CSP program can be found in the [MPA](#). Partners should review this agreement to ensure that they're operating in compliance within the program.

As for any offer in the CSP program, as a CSP partner you'll need to have the customer accept the Microsoft Cloud Agreement (MCA) in the new commerce experience. If the customer has already accepted the MCA, they don't need to re-accept. Note the following terms included by accepting the MCA:

- o Online Services terms and conditions
- o Microsoft product terms
- o Online Services Service Level Agreement

Price lists

How to access price lists

New commerce experience pricing for Microsoft 365, Dynamics 365, Power Platform, and Windows 365 is posted in Partner Center in the Sell section on the [Pricing and offers](#) page, **license-based services**. The new commerce pricing lists will be labeled to clearly distinguish the new commerce pricing files from the existing license-based price files.

The screenshot shows the Microsoft Partner Center interface. The left sidebar contains navigation links: Home, CSP, Overview, Customers, Sell, Pricing and offers (selected), Marketplace, Promotions, Support, Billing, Azure spending, Analyze, Partner contribution, Referrals, and Support. The main content area is titled 'Pricing and offers' and includes a search bar and a date selector set to 'January 2021'. Below this is a table with columns for Category, Description, and Download. The table lists several pricing categories, including 'License-based services', 'Usage-based services', 'Microsoft Azure Reserved Instances', 'Software subscriptions', 'Perpetual software', and 'Azure plan pricing'. A red dashed box highlights the 'License-based services' row, which includes a 'New commerce' badge and a 'License-based pricing' link. A blue arrow points to the 'License-based pricing' link.

Category	Description	Download
License-based services	See pricing information for Office 365, Enterprise Mobility + Security E3, and Dynamics 365.	License-based pricing Cloud Reseller offer matrix
License-based services New commerce	See pricing information for modern commerce versions of Office 365, Enterprise Mobility + Security E3, and Dynamics 365. Learn more.	France License-based pricing Cloud Reseller offer matrix
Usage-based services	See pricing information for Microsoft Azure and Visual Studio. You can also use the Azure Services in CSP Pricing Calculator .	Usage-based services pricing
Microsoft Azure Reserved Instances	See pricing information for Azure Reserved Instance.	Reserved instance pricing
Software subscriptions	See pricing information for term based software subscriptions.	Software subscriptions pricing
Perpetual software	See pricing information for perpetual software products.	Perpetual software pricing
Azure plan pricing	See pricing information for Azure plan consumption resources and Azure plan reservations. Azure plan pricing includes base line prices. Some partners may be eligible for up to 15% Partner earned credits. Learn more about partner earned credit. See examples of how partner earned credits to calculate	Country/Region Azure plan consumption pricing

New commerce license-based price lists requests are by market or country. For example, if a partner wants to get pricing for products sold to a German (DE) customer, they will ask for the German (DE) price list. For European countries (and only for European countries) these market-based price list files include pricing in all six supported European currencies (SEK, NOK, CHF, DKK, GBP, EUR). This is so that the partner can understand how much they will be billed in their currency regardless of the customer market. If a partner in the United Kingdom, for example, wants to purchase a product SKU for a customer in Germany, they will get the DE price sheet and need only the pricing in British pounds (GBP) because they will be billed at the GBP price point. Supporting pricing by market aligns the product availability to the pricing, so that partners can get pricing for markets even when the product might not be available to

customers in their own country. This design can also support future scenarios if different markets with the same currency need different pricing.

Pricing data is available to partners both from the Partner Center dashboard and through the pricing sheet API. Partners download the price list by going to the price list page. The new commerce offer price list and offer matrix will be labeled with "new commerce".

Price lists include basic information about pricing (how much the product costs). The offer-list matrix includes purchase information about the products (how to buy them). Much of the information included in these download files is also accessible through the various Partner Center APIs (catalog APIs and price sheet APIs). Price lists require the partner to select the market for the pricing that they request while the offer-list matrix is agnostic of market.

Price list and offer-list matrix files default to the current month. To retrieve the previous month's price list, select the month and then download the pricing file for the desired market. Price changes should occur only on a monthly cadence. Partners can use the price list preview to know of price changes coming in the next month. Price changes midmonth rarely occur, usually to correct an error in the data. Any midmonth price changes will be broadly announced and reflected in the price sheet with a new **EffectiveStartDate**.

Pricing and offer matrix downloads for new commerce

Partners rely on both pricing and offer matrix files for license-based offer information. The price list includes per-market pricing for the products, SKUs, and terms to purchase. This pricing is in the currency of the market where the partner is selling. To get the price lists, partners will need to select the market of the customer. This is different from the existing pricing files that include all 15 CSP currencies. In new commerce, it's possible to have the same currency but different prices across different markets or countries. The offer matrix includes additional data to supplement the price list such as prerequisites, conversion paths, and supported markets for all the available product SKUs.

The price list is posted once a month using the standard Partner Center publication cycle of the first of each month. The price list is published in a comma-delimited format allowing partners to download, process, or open in other applications such as Microsoft Excel.

Differences between existing offer pricing and new commerce

Existing vs. new commerce

Price lists include some detailed information about the purchasable products including important identifiers as well as pricing information or “how much does something cost”. Offer matrix includes details about “how to purchase” the various product SKUs. Existing license-based price lists are centered around the offer with an ID.

There are two main differences between existing license-based price lists and the new commerce price lists. First, existing license-based price lists are centered around the offer with an ID. New commerce license-based pricing files are based on products and SKU. The second main difference between existing and new commerce license-based pricing is related to markets and currencies. Existing license-based pricing include all prices for all currencies in one file. New commerce pricing is defined per market or country. This means that the partner should be aware of pricing in the market that their customer is in to understand the price for a particular product SKU. Partners must get price lists in new commerce based on the country that they’re selling to or the customer’s country. Partners can use the Partner Center pricing and offers page to download a price list by country, or they can query the [price sheet APIs](#) if they want to automate fetching price lists for many countries or markets.

With the introduction of the new commerce CSP price lists for seat-based offers as part of the October 14, 2021 technical release, there are some minor price differences in some regions between the existing and new commerce commercial monthly and annual offers across cloud products. We strive for parity between existing seat-based offer pricing and new commerce pricing, but there might be unavoidable discrepancies.

Offers vs. product SKUs

Items in the existing license-based CSP experience are identified as an “offer” with an “offer ID” globally unique identifier (GUID) for each item. New commerce line items are a combination of “product”, “SKU”, and “term”. Purchasing a new commerce offer submits a productid:SKUid:availabilityid (which resolves to the term being purchased). Availability IDs are internal IDs that partners can find in the catalog APIs.

In the existing license-based experiences, partners purchase an offer. In new commerce, partners purchase a product, a SKU, and a term.

Price list data mapping existing offers to new commerce product SKUs

Existing	New commerce	Comments
A/C/D/U	Not available	Partners manage monthly changes

Valid-From Date	EffectiveStartDate	
Valid To Date	EffectiveEndDate	
Offer Display Name	SKUTitle	
Offer ID	Product:SKU:Availability (term)	
License Agreement Type	Not available	Commercial only for October 2021
Purchase Unit	UnitOfMeasure	
Secondary License Type	Tags:Addon	
End Customer Type	Not available	
List Price	UnitPrice	
ERP Price	ERP Price	
Material	Not available	New identifier for SKU in offer matrix

Offer matrix data mapping existing offers to new commerce product SKUs

Existing	New commerce	Comments
Offer Display Name	SKUTitle	
Durable Offer ID	Product:SKU:Availability (term)	
Provisioning ID	ProvisioningString	
Offer Type	Not available	
Duration	Price list: Term duration	Found in the price list line items
Billing Frequency	Price list: Billing plan	Found in the price list line items
Min Seat Count	MinLicenses	
Max Seat Count	MaxLicenses	
Offer Limit	AssetOwnershipLimit	
Offer Limit Scope	AssetOwnershipLimitType	
Depends On	ProductSKUPreRequisites	
Can Convert To	ProductSKUConversion	
Offer URI	Not available	

LearnMoreLink	Not available
Offer Display Description	Description
Allowed Countries	AllowedCountries

New commerce price list data example

Field	Example	Description
ProductTitle	Microsoft 365 Business Basic	Title of the product
ProductId	CFQ7TTC0LH18	ID of the product
SKUId	001	ID of the SKU
SKUTitle	Microsoft 365 Business Basic	Title of the SKU
Publisher	Microsoft Corporation	Company publishing the offer
SKUDescription	Best for businesses that need professional email, cloud file storage, and...	Description of the offer
UnitOfMeasure		Currently only for Azure consumption
TermDuration	P1Y/P1M	Length of the term
BillingPlan	Annual/Monthly	How often billing happens
Market	US	Market for the item
Currency	USD	Currency for the item
UnitPrice	48	Price per unit (license)
PricingTierRangeMin		If tiered pricing is supported, the minimum range for the price point
PricingTierRangeMax		If tiered pricing is supported, the maximum range for the price point
EffectiveStartDate	2/1/2019 0:00	Start date for the item's price point
EffectiveEndDate	11/30/9999 23:59	End date for the item's price point
Tags	License;Trial	Miscellaneous tags
ERP Price	60	Estimated retail price

Offer list matrix

Offer list matrix contains purchase information and rules for the product SKUs. It's market agnostic.

New commerce offer matrix data example

Field	Example	Description
ProductTitle	Microsoft 365 Business Basic	Title of the product
ProductId	CFQ7TTC0LH18	ID of the product
SKUId	1	ID of the SKU
SKUTitle	Microsoft 365 Business Basic	Title of the SKU
ProvisioningId	3b555118-da6a-4418-894f-7df1e2096870	System ID defining the provisioned product
ProvisioningString	O365_BUSINESS_ESSENTIALS	Friendly key name for provisioned product
MinLicenses	1	Minimum number of licenses that can be purchased
MaxLicenses	300	Maximum number of licenses that can be purchased
AssetOwnershipLimit	2	Limit of assets for the given AssetOwnershipLimitType
AssetOwnershipLimitType	ConcurrentCount	Type of AssetLimit. Can be lifetime or concurrent
ProductSKUPreRequisites		List of SKUs the add-on supports
ProductSKUConversion	CFQ7TTC0LDPB/0001, CFQ7TTC0LF8Q/0001	List of SKUs you can convert to
Description	Best for businesses that need professional...	Description of the SKU
AllowedCountries	AD;AE;AF;AG;AI;AL;AM;AO...	List of supported markets

Price list preview

New commerce supports future pricing. Partners can export and view future pricing for the coming month. Existing license-based price lists include flags for new offers, deleted offers, changed, and unchanged. New commerce pricing files enable partners with the data to track these changes by using the EffectiveStartDate and EffectiveEndDates.

New offers will be identified when they're in the future price file but not in the current price file.

Change type	How to identify them
New	Line items in future pricing not in current monthly pricing
Change	Line items in both current and future, where future pricing is different, identified by updated EffectiveStartDates
Deletes	Line item in future with an EffectiveEndDate denoting the end of availability
Unchanged	Not in the future pricing file

New commerce terms and billing frequencies

Partners will be billed in their currency based on the currency value in the price list. This billing charge will remain constant for a billing plan that's shorter than the term. Annual term (P1Y) prices reflect the 12 months—partners divide the total by 12 to get the monthly plan charge.

The new commerce price list has three fields that work together to help partners understand the amount that they will be billed when transacting. TermDuration describes how long the subscription will last. Most subscriptions support annual or pay for one year (P1Y) and monthly pay for one month (P1M). The UnitPrice amount is for the term being purchased. If a partner purchases an annual term with monthly pricing, they will be billed one-twelfth of the total amount each monthly billing period. The amount billed each month for an annual term with monthly billing will be the same each month throughout the term. Price changes during the term don't affect billing plan charges for an existing subscription. Price changes are only relevant for renewals, transitions, and new subscriptions.

Monthly and annual terms

The price list includes TermDuration data that explains how long the term lasts. Many products support both monthly (P1M) and annual (P1Y). However, not all products support monthly term. A few examples of this include Microsoft Intune, Microsoft Defender, some phone system and calling plans, and various Exchange Online standalone products. Partners should refer to the current price list and filter by TermDuration to view product SKUs by term.

European regional prices

Partners transact in [regions](#) that are assigned when they're onboarded. The European region is unique because it supports more than one currency. Partners request pricing based on the customer's market but will be billed in their currency which might be different from the customer market currency. In these cases, a partner will get pricing in all supported currencies for the customer market that they request pricing information for. All European market price lists will include pricing in all supported currencies in the European region. Partners will be billed based on the market price sheet and currency line item aligning with the partner billing currency.

The multicurrency support enables a key scenario that had been blocked for years in traditional license-based, so that a partner can purchase a product SKU for a customer in a different country when the product SKU isn't available in the partner's country. This scenario is now enabled and no longer blocked in new commerce. Products now available in this scenario include some of the calling plans only available in specific EU markets. Other examples include Business Voice product SKUs, only available in the GB but can now be purchased by non-GB EU partners for GB customers.

Important details about the European regional price lists

For the October 14, 2021 technical release, partners might see some variant prices for markets with currencies that are different from their own. This is due to some system limitations that will be addressed going forward.

Example: Product in UK GBP: 30.25, Product for DE in GBP: 30.23

In these cases, partners can always rely on being billed the amount reflected in the price list for the customer market and partner billing currency.

API support

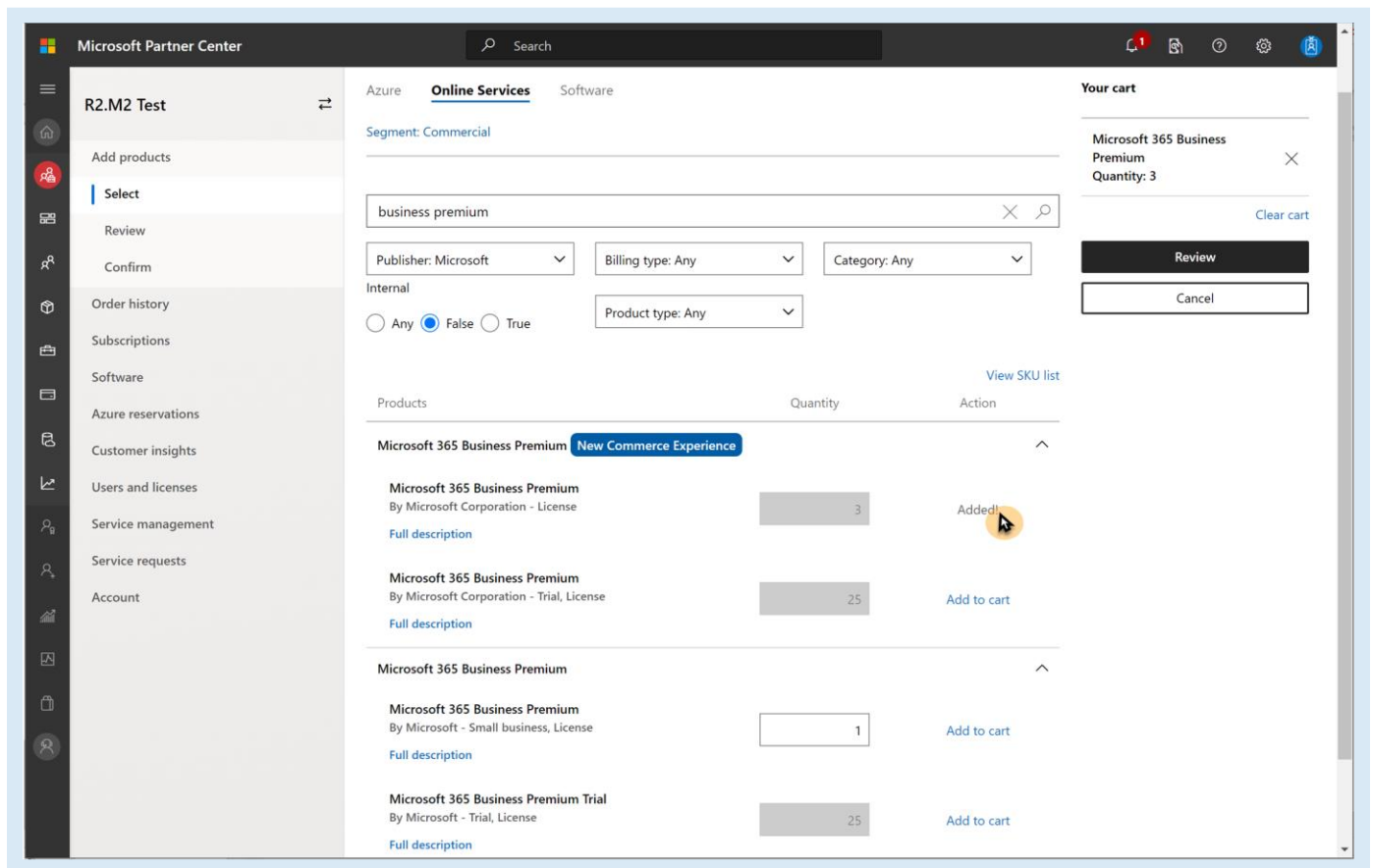
Partners are now able to automate the retrieval of the pricing data and offer matrix details. Information on how to use the pricing APIs to retrieve pricing and offer matrix can be found in the [API documentation](#).

Purchasing new commerce in Partner Center

Discovering and purchasing new commerce license-based offers is very similar to purchasing offers in the current CSP experience. Partners select "Add Subscriptions" from the customer's subscriptions list. This takes the partner to the catalog. Under "Online Services," new commerce items can be identified by a "New Commerce Experience" blue tag.

New Commerce Experience

Currently both existing license-based offers and new commerce versions are available to purchase. The following is an example of Microsoft 365 E3 both existing and new commerce, side by side.



Add-ons in new commerce

Add-ons in new commerce enable a partner to purchase additional services that complement and add functionality to a previously purchased product. Some examples of these are calling plans, additional disk space, or other features that can be added if the customer has the base offer.

New commerce add-ons include similar concepts to existing license-based add-ons. New commerce add-ons, like existing license-based, include the concept of prerequisites. These are product SKUs that the customer must have for the add-on to function correctly. The prerequisites for an add-on can be found in the catalog APIs for a given SKU and in the Partner Center catalog user experience. Purchasing add-ons require one or more of the prerequisites to exist on the customer tenant.

The major difference in the purchasing of add-ons between existing license-based and new commerce is in “how” they’re purchased. In existing license-based, the partner applies the add-on to a base offer subscription after that base subscription has been purchased. In new commerce, partners purchase the add-ons from the catalog itself, no longer having a bifurcated purchase experience for base offers and add-ons; both base offers and add-ons are displayed in the catalog in new commerce.

Many of the concepts about how add-ons work, from a services perspective, remain true across existing and new commerce. Both experiences register and provision the add-on services; there’s nothing different about how the provisioning takes place. Also, a single add-on’s services can complement more than one base product SKU that the add-on is designed to work with.

Identifying add-ons

Partners can identify add-ons and get lists of prerequisites by reviewing the SKU details when [getting SKUs via the API](#). Add-ons are also identified in the offer matrix. Product SKUs with values in the ProductSkuPreRequisites column are add-ons.

Purchasing add-ons

Add-ons exist for both existing license-based and new commerce experiences. The key difference is that new commerce enables discoverability and purchasing from the catalog, alongside the base offers or prerequisites.

Existing license-based add-ons are only discoverable and purchased by going to the base offer’s subscription details page. Once there, the partner selects the requested add on.

New commerce experience add-ons are discovered and purchased in the catalog itself. Partners can filter by new commerce add-ons by selecting the product type dropdown. Add-on products are also easy to see as they have an information icon next to them which explains their add-on status and meaning. (i)

Microsoft Partner Center

Search

Contoso Account Inc.

Add products

Select

Review

Confirm

Order history

Subscriptions

Software

Azure reservations

Customer insights

Users and licenses

Service management

Service requests

Account

Add products

AzureOnline ServicesSoftware

Segment: Commercial

calling

Publisher: Any

Billing type: Any

Category: Any

Product type: Add-ons

These add-ons require a compatible base product subscription to work. Expand the description for more information.

View SKU list

Product	Quantity	Action
Microsoft 365 Business Voice New Commerce Experience		
Microsoft 365 Domestic and International Calling Plan New Commerce Experience		
Microsoft 365 Domestic Calling Plan New Commerce Experience		
Microsoft 365 International Calling Plan for SMB New Commerce Experience		
Microsoft Teams Calling Essentials for US and Canada New Commerce Experience		

Your cart

Your cart is empty.
Specify a quantity of any product and click **Add to cart** to continue.

Review

Cancel

[Learn more about adding products](#)

Partners can get more details about the required products for an add-on by selecting "View compatible base product subscriptions".

Add products

[Azure](#)[**Online Services**](#)[Software](#)

Segment: [Commercial](#)

calling

✕ 🔍

Publisher: Any

Billing type: Any

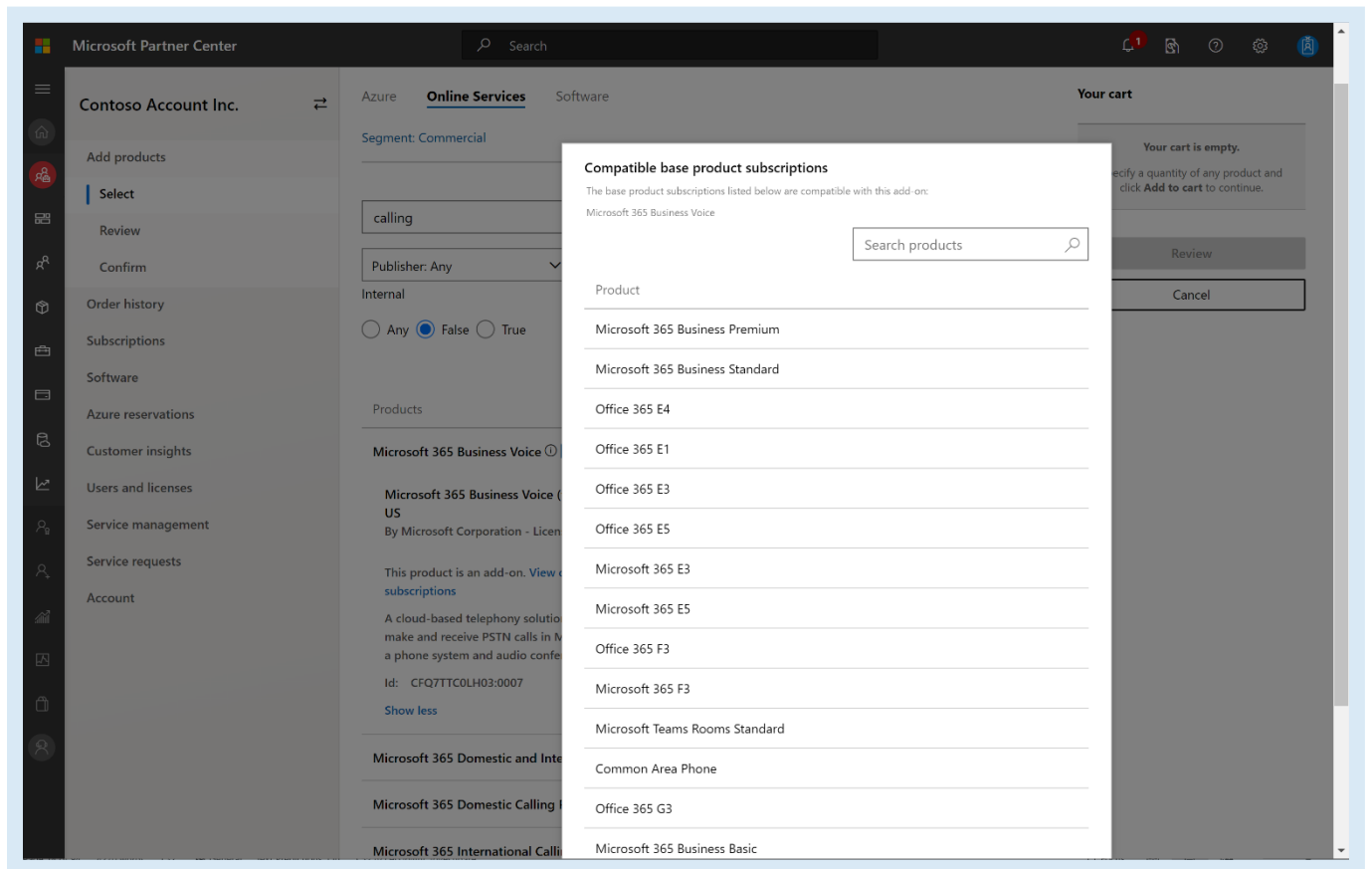
Category: Any

Product type: Add-ons

[View SKU list](#)

Products	Quantity	Action
Microsoft 365 Business Voice ⓘ New Commerce Experience Microsoft 365 Business Voice (without Calling Plan) for US By Microsoft Corporation - License This product is an add-on. View compatible base product subscriptions A cloud-based telephony solution that enables users to make and receive PSTN calls in Microsoft Teams. It includes a phone system and audio conferencing. Id: CFQ7TTC0LH03:0007 Show less	1	Add to cart

This shows a list of product SKUs that must exist for the partner to purchase a given add-on.



Add-on enforcement

Partners will see errors when attempting to purchase a new commerce add-on product when the customer doesn't have any of the pre-requisites. Partners can validate whether an add-on's prerequisites exist in the Partner Center catalog and review page experiences. If the add-on doesn't have the support prerequisites, the user interface (UI) will display this message: "The add-on isn't purchasable without a compatible base product". Partners using the CreateCart API will see an error on the cart line item if the add-on doesn't have the required product SKUs. The error code will be 400041 with the description "The add-on isn't purchasable without a compatible base product".

Important details when purchasing add-ons

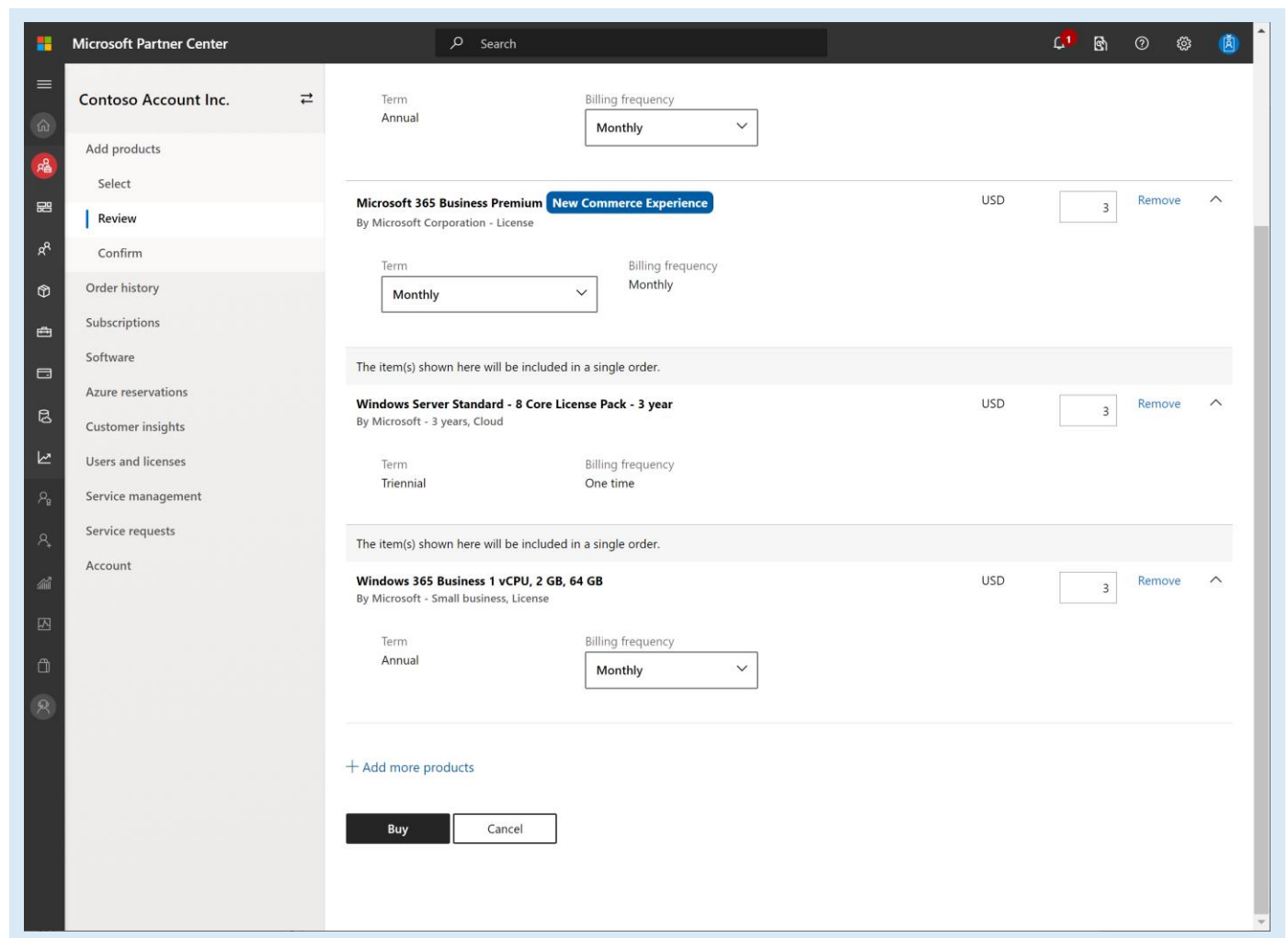
Add-ons are purchased as distinct product SKUs if the customer has a prerequisite subscription. Add-on subscriptions have their own distinct term alignment. Partners that purchase add-ons will notice the term and associated end date might not be the same as those of the prerequisite. If both subscriptions autorenew to new terms, the prerequisite and add-ons will function properly. If the partner decides to end the prerequisite's term by not autorenewing, then the add-on should also be updated to not autorenew at the end of the add-on term if the partner

concludes that it's no longer needed. Partners converting a product SKU to a higher SKU that already has the add-on services can submit a support request to turn off an add-on.

Future iterations of add-ons are expected to eventually support coterminous end dates to enable partners to align an add-on to the prerequisite.

Review and check-out enhancements

The shopping cart experience in new commerce has been enhanced to enable partners to select different terms and billing frequencies for the new commerce purchase. The Review page also enables flexibility for partners to purchase other types of products in the same experience.



Promotion pricing transparency

New commerce purchases align with the recently announced price transparency features. Find out more in the [Partner Center announcement](#).

Telco and paygo offers

NOTE: Canada Telco products will be available to test in the sandbox environment on December 15, 2021 and available for purchase on January 22, 2022.

Some license-based products include services with allocated calling plans. These calling plans typically come with a per-license allocation for minutes per month, usually 120 per license.

In existing license-based partner scenarios, there was no way to enable service usage beyond the monthly limits. Customers requiring more than 120 minutes needed to purchase communication credits or “comm credits” themselves directly from Microsoft. These communication credits weren’t offered in Partner Center.

This limitation has been addressed in new commerce, allowing the partner to enable overage capabilities for services that allow it. Partners can purchase offers that include overage capabilities. These offers are identified in the price list tags column with “IncludeOverage”. The catalog SKU also includes a property of “consumptionType=Overage” to help partners determine if the SKU supports the overage capability. Partners simply purchase the offers as other new commerce product SKUs at no additional cost. Overage charges will only accrue billing if the partner enables overage after the purchase and when customer’s users exceed the allocated monthly calling minutes included with the offer purchased.

Partners can trace overage usage by going to the Azure portal and using the cost management capabilities and features. Partners also have the option at any time to set the overage to “None” if they want to disable or turn off overage at any time.

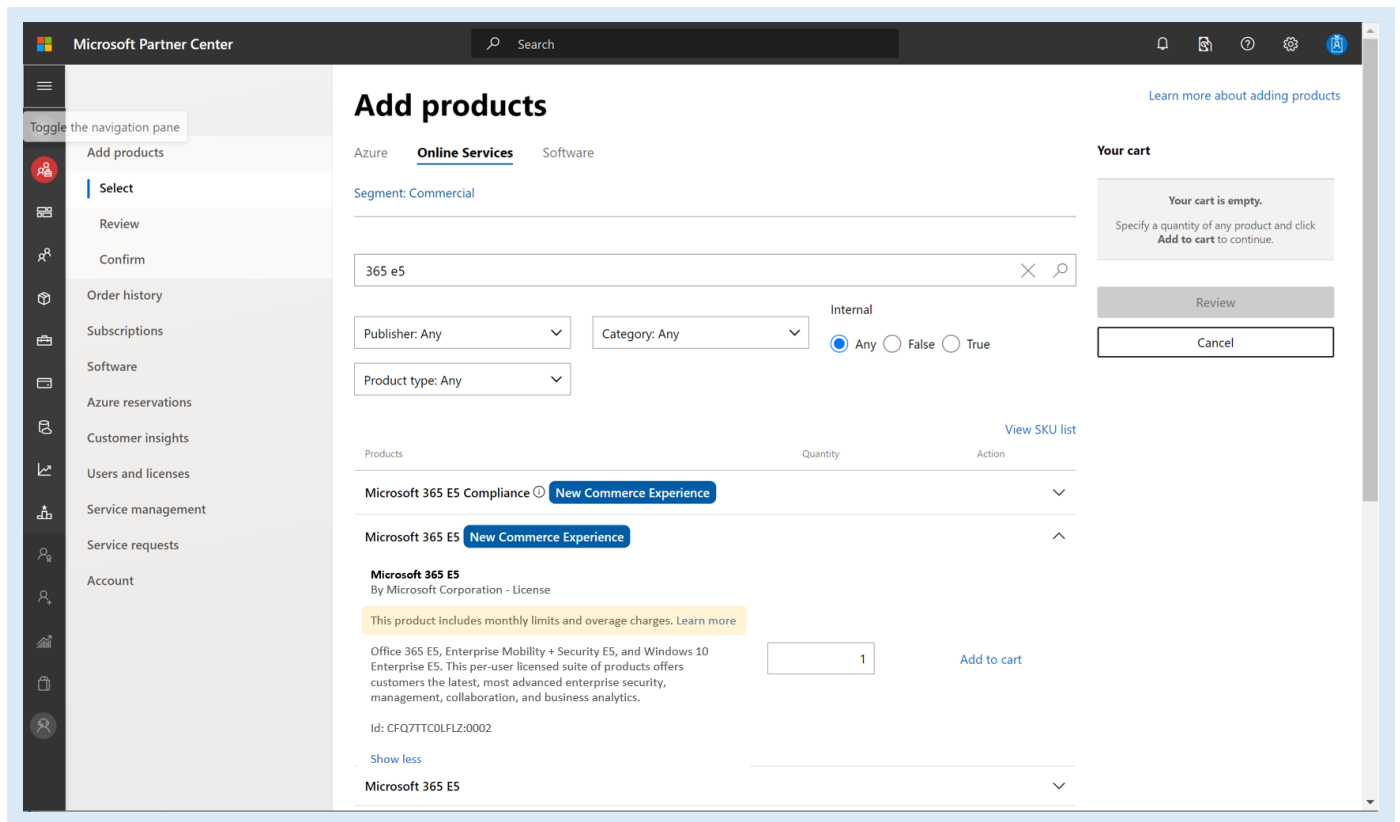
Important

Partners who purchase product SKUs with overage won’t automatically enable the consumption pay-as-you-go-over. Partners have to take a second step to go to the subscriptions management page and “manage overage” to enable the feature. Only admin agents on the transacting partner account can enable overage. Indirect resellers need to have their indirect provider’s admin agents enable overage.

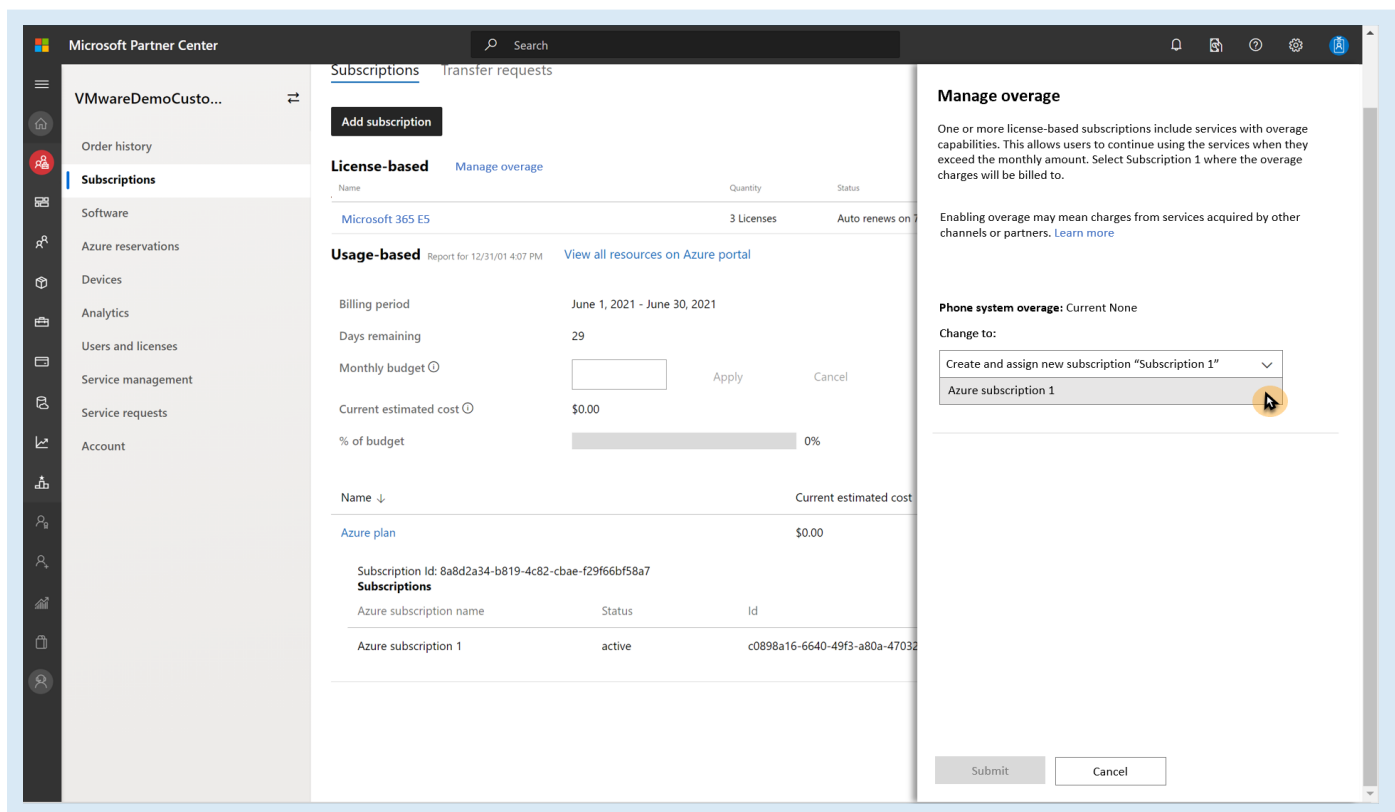
NOTE

Manage overage requires the ability to create an Azure plan. By default, partners can’t provision Azure plans using their **sandbox accounts**. Partners who need to do so with their sandbox account must apply for access. More information can be found in the [Azure plan sandbox documentation](#).

Partners can identify which products include overage capabilities by viewing the Partner Center catalog product SKUs.



Partners enable the overage by accessing the “Manage overage” in the Manage Subscriptions page. This will enable the partner to activate overage and assign the desired consumption subscription to the overage charges. At any time, the partner can turn off overage by assigning the consumption subscription to “None”.



Partners can assign overage or disable it using the “Manage overage” feature on the subscriptions list. This will only be accessible if the partner has subscriptions that enable overage. Monthly overage charges will accrue to the subscription assigned and will be identified in the partner’s recon file. Partners can track overage usage via the Azure cost management capabilities in the Azure portal.

Pricing and margins

Telco pay-as-you-go is billed based on monthly usage when the customer uses the allocated amount of calling minutes for the plan that they have. Partners can discover and download the pricing for these charges at the [Microsoft Teams phone and calling site](#). Partners can go to the “See rates for where you want to call on this page” to download and view the rates for various calling plans.

The pricing and calling plan overage charges aren’t specific or reduced for the CSP audience; they’re channel agnostic. There are no CSP discounts or margins for overage charges.

Important details about overage

Purchasing a product SKU that enables overage will automatically ensure that the partner’s customer is set up to accommodate overage. This will include creating a no-cost Azure plan, an associated default Azure subscription, and a subscription specifically for overage consumption.

Partners can see and assign whichever subscription that they want overage to accrue to under "Manage overage."

Partners can transition from a lower product SKU to a product SKU that contains overage. The transition UI will display if the product SKU that they're moving to contains overage. Partners will need to enable overage after the transition if they so choose, similar to enabling overage after a new subscription.

Overage assignment is determined by the "first in" rule. If a partner purchases E5 with calling plans for a new customer, the partner will have overage assigned to their consumption subscription. If a second partner purchases another copy of E5 with calling plans, the system will respect the first partner's purchase and assignment. Partners can always "manage overage" from the subscriptions page to disable or turn it off by assigning overage to "None".

Overage settings are per service, per customer. If a customer has the same overage services from different partners, only one overage subscription can be assigned at a time. If overage needs to be changed from one partner to another, the three parties involved must first agree, and then the existing partner can simply set overage to "None," enabling the other partner to set overage to their subscription.

API support for telco pay-as-you-go features include:

- [SKU properties](#) include a consumption-type property to help the partner identify whether a SKU enables overage.
- [Get overage](#) to understand if any overage is currently set up for your customer.
- [Update overage](#) to update customer's overage to an Azure subscription or to set it to "None".

Multipartner overage

A partner can purchase a product SKU with overage only to find that the overage has already been assigned to another partner. Because calling service plan minutes are pooled using Azure Active Directory (AAD), the overage can only be assigned to one partner subscription at a time. Partners will see this when they try to manage overage. The subscriptions dropdown will inform the partner that the overage is already assigned to another partner. At this point, the partner and customer can have a conversation about whether to change it to themselves. If both partners and the customer agree, the active partner can assign overage to "None", enabling the second partner to assign overage.

Promotions in new commerce

Microsoft will support promotions in new commerce. These promotions will have varying discount amounts and durations.

Promotions overview

Microsoft will make available Microsoft 365, Dynamics 365, and Power Platforms promotions in the new commerce experience for many annual and monthly term products. New commerce promotions will automatically be applied if the partner's customer is eligible. Partners have two important resources to understand which promotions are available: the [Global Promo Readiness guide](#) and the 'getPromotions' API. Partners can use these resources to understand which promotions are available and specifics concerning eligibility. Promotions will be explained in terms of discount percentages, not final price amounts. Microsoft partners are expected to pass the discount amounts through to their customers.

The wholesale partner margin percentage won't be affected by applicable promotions. Incentives are earned based on wholesale pricing net of discounts or promotions. See the [Partner incentives program](#) page for further details.

Supported promotions

Microsoft will support the following new commerce promotions:

- Percent off subscription
 - Promotions can be implemented as a percentage off a given subscription (monthly, annual, or multi-year).
 - Example: Price reduction by percentage off on given monthly or annual subscription price subscription.

For each promotion, there will be additional guidelines regarding the following:

- Minimum and maximum quantities allowance
 - Promotions can specify minimum or maximum seat allowances.
 - Minimum: Promotion can be applied to purchases of x or more seats.
 - Maximum: Promotion can be applied up to a maximum quantity of seats. Seats beyond the allowed quantity will be at regular price.
 - Promotion eligibility checks will determine if a product SKU purchase is valid. If the purchase goes beyond the maximum, for example, the transaction will be determined ineligible, and the transaction won't include the promotional discount.
 - Seat increases will also enforce maximum constraints. Partners who have acquired a subscription based on a promotion with a maximum constraint will only be able to add seats under that constraint.
- New customer eligibility
 - Current new commerce promotions support confirming whether a customer has an active subscription on a product.

- Add-ons
 - Promotions will be individually applied to both primary offers and add-ons.
- Promotion term
 - Promotions that are acquired will be applicable for the duration of the term being purchased. If a partner purchases an annual term subscription, the promotion price will exist for the entire term. Seat increases during the term will respect the promotion applied for the duration of the subscription's term.
- Redemption limits
 - Some promotions will have a redemption limit defined which allow only for a certain number of times a promotion can be acquired for a customer. This limit is respected at the customer level regardless of how many partners the customer might have.
- Promotions based on existing products
 - Some promotions will be available only if a customer has an existing product. If the customer has the products defined in the eligibility rules, the promotion will be applied to the purchase.
- Geography restrictions
 - Geographic restrictions are based on customer country. This information will be included within the promotional details.
- Promotions can be restricted to specific purchase events
 - Current new commerce promotions support only new subscriptions and renewal events.

Promotion examples

Annual Term Promotion Example

Promotion Guidelines

Promotion summary:

5% discount on a 1-year term FOR Office 365 E3 seats

Duration:

October 14, 2021 - March 31, 2021

Geography:

Worldwide

Discount % and Discount description:

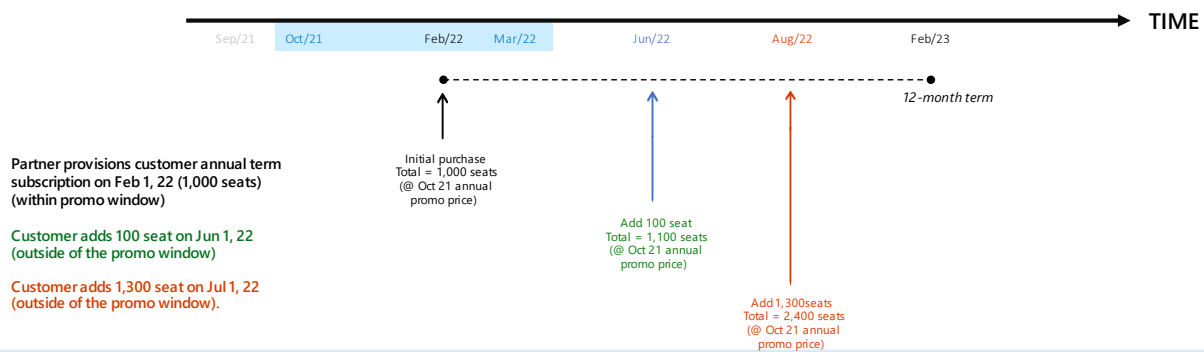
5% discount on initial order and add-ons with a max of 2,400 seats

Promotion Scenario:

- On February 1, 2022, partner provisions customer with 1,000 seats on a 1-year term O365 E3 on February 1, 2022, under the 5% discount promo.
- Customer adds 100 additional seat on June 1, 2022. This is after the promo expiration date. This is after the March 1 price increase.
- Customer adds 2,400 seats on July 1, 2022.

Promotion Starts

Promotion Ends



Monthly Term Promotion Example

Promotion Guidelines

Promotion summary:

5% discount on monthly term for M365 E3 seats

Duration:

October 14, 2021 - March 31, 2021

Geography:

Worldwide

Discount % and Discount description:

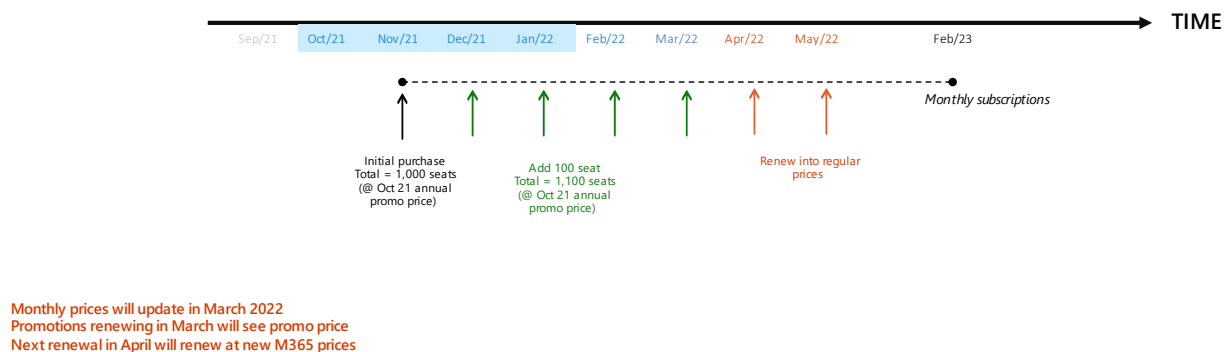
5% discount on initial order and add-ons with a max of 2,400 seats

Promotion Scenario:

- On Nov 1, 2021, partner provisions customer with 1,000 seats on a monthly term M365 E3, under the 5% discount promo.
- Customer adds 100 additional seat on Jan 2, 2022, at the promotional price.
- Monthly renewals for February and March 2022 will be at the promotion price.
- Renewals starting in April 2022 will be at the new M365 pricing

NCE monthly promos start

NCE promos end



To see available promotions, review the [Global Promo Readiness guide collection](#).

Discovering promotions

Partners can discover promotions by visiting the [Global Promo Readiness guide](#), by calling the getPromotions API or by browsing the Partner Center catalog. Product SKUs with available promotions will show a “Promotions available” link allowing the partner to get the details for the promotion. The Global Promo Readiness guide will be updated monthly if any new promotions are introduced.

Operationalize promotions

Partners can operationalize the promotions by using the getPromotions API. This API returns all the promotions that exist for a given market (customer’s country) and segment. The API returns the list of promotions and important information to help the partner understand which promotions are available for customers in different countries.

The getPromotions API includes the following data for a given promotion:

- Duration of the promotion
- The percentage discount for the promotion
- The products and SKUs for which the promotion is available

Promotions are applied automatically by Partner Center when the partner purchases the product SKU for which the promotion is available. Partners will see which promotions are available in the Partner Center catalog UI in the product SKU details. They can select the “View promotion details” to get more information about the promotion. The ability to view the promotion details can be accessed from the catalog page view SKU details, the review page prior to submitting the purchase, the confirmation after the order is submitted, and the order history page.

Promotions, terms, and renewals

Products purchased for a term with a promotion will lock in that price for the remainder of the purchased term. If a partner purchases an annual term with a promotion, the price would be the UnitPrice* the percentage discount. This EffectiveUnitPrice holds true until the end of the term. Any additions to seats during this term will be at this EffectiveUnitPrice for the current term.

A subscription renews to the promotion discount price unless the promotion duration has passed, in which case the renewal will revert to the nonpromotion price.

Verify eligibility

Partners can view whether a customer purchase is eligible for a promotion in the review page in Partner Center prior to purchasing the product. Partners can also call the verifyPromotionEligibility API, passing the customer tenant ID and the and eligibilities to be checked. The eligibility being checked includes the catalog item ID being purchased, quantity, term duration, billing cycle, and the promotion ID. This will return true if the customer is eligible.

If the customer isn't eligible, the API will return the conditions that weren't met for the promotion to be applicable.

Important: Partners should verify promotions before they submit a transaction. In the Partner Center review page, if partners don't see a promotion, it won't be applied on the transaction, and the partner will get the nonpromotion price. Partners can also look at the cart line item API to see if the promotion is present before submitting a transaction. Partners can call verify promotions API before submitting transactions to verify that their customer product SKU combination is eligible for the promotion and if not, the reasons for ineligibility.

There are three reasons a customer might not be eligible for a promotion. These ineligible types will be returned in the validate promotion API in cases where the customer isn't eligible.

Important topics for new commerce promotions APIs:

- [GetPromotions API](#)
- [GetPromotionsById API](#)
- [VerifyPromotionEligibilities](#)
- [Promotions resources](#)

Seat count

Many promotions have a maximum of 2,400 seats stated. In these cases, a transaction including more than 2,400 will be submitted at the nonpromotion prices. These seat counts are also enforced when adding seats to a promotion subscription with these limits. Partners will get an error if they try to increase a promotion-enabled subscription beyond the limits. The seat limits from promotions are enforced across partners, so if one partner purchases a promotion of 2,300 seats with a promotion seat count limit, a second partner who purchases 200 seats would get the subscription price at the nonpromotion price. Promotion eligibility is enforced at the product SKU level that the partner is transacting, so a partner could get promotional pricing for 2,400 seats of Microsoft 365 E3 and also for a different product SKU Microsoft 365 E5. Partners can call the subscribedSKUs API to see how many licenses a customer has for a given provisioned SKU.

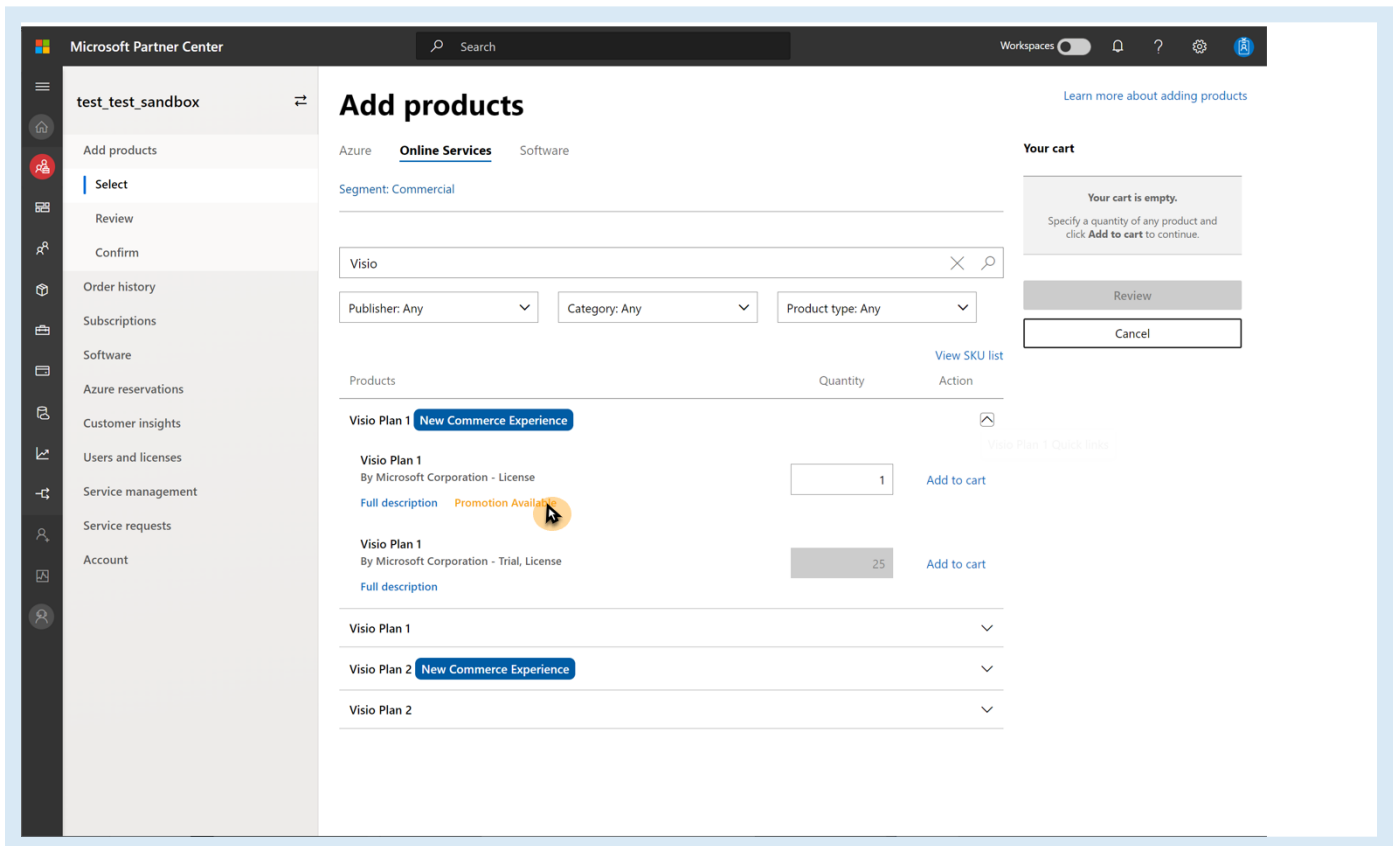
If a partner wants more licenses than the 2,400 seats and they want the promotion, the partner can simply purchase one subscription of 2,400 at the promotion price and a second subscription at the nonpromotion price.

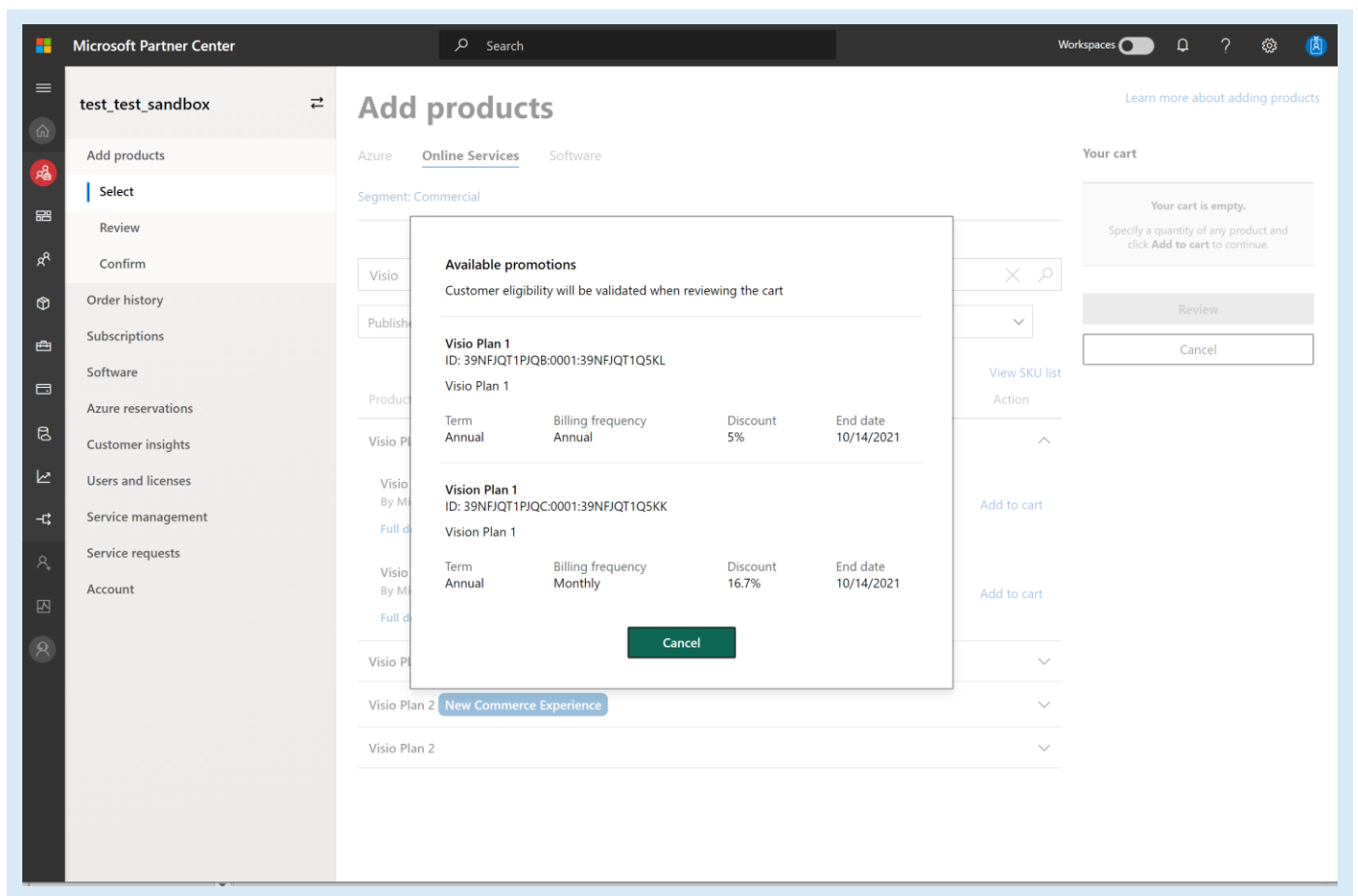
Term

Term constraints define which product SKU terms align to a given promotion. Many promotions have different discounts defined based on the term. If a partner submits a transaction and the term doesn't align with the promotion, they expect the transaction will be at the nonpromotion price that they expect. Examples of terms are annual or monthly.

First purchase

Some promotions enforce only being acquired one time. A partner will see an eligibility of "false" using the validate eligibility API with the error type of FirstPurchase. A partner can still purchase the given product SKU, but the subscription will be at the nonpromotion price. This constraint is per customer, not per partner. Once a customer has a promotion with this rule, they can't get a second instance of the promotion applied by a second partner.



[View promotion details](#)

Microsoft Partner Center

Search

Test_ModernOfficeR2

Add products

Select

Review

Confirm

Order history

Subscriptions

Software

Azure reservations

Customer insights

Users and licenses

Service management

Service requests

Account

Confirmation

Date

July 27, 2021 10:07:48 AM

Customer name

Test_ModernOfficeR2

Customer Id

07d5ec66-b81b-41a2-98d1-846d0731929e

Orders processed

1

Product	Currency	Promotion	Quantity
Order ID: 80009e5d888f			
Microsoft 365 E3 By Microsoft Corporation - License	USD	Microsoft 365 monthly promo Details	1

Review order history

Manage additional areas of your customer's account from the navigation menu under the customer's name.

Print

Verification that the promotion was applied

Microsoft Partner Center

Search

Workspaces

test_test_sandbox

Order history

Subscriptions

Software

Azure reservations

Devices

Analytics

Users and licenses

Service management

Service requests

Account

Order status

All

Pending

Completed

10/7/2021

Id		Time ordered	Currency	Billing frequency	Number of items	Order status	Total price
3aad303370e		11:54 PM UTC	GBP	Monthly	1	Pending	-

Item	Promotion	Order type	Item type	Quantity	Fulfillment status	Indirect reseller	Price
Visio Plan 1	None	New	OnlineServicesNCE	1	Fulfilled	None	-

10/5/2021

Id		Time ordered	Currency	Billing frequency	Number of items	Order status	Total price
343b8c608636		1:17 AM UTC	GBP	Monthly	1	Completed	-

Item	Promotion	Order type	Item type	Quantity	Fulfillment status	Indirect reseller	Price
Microsoft 365 E5	Microsoft 365 ...	New	OnlineServicesNCE	1	Fulfilled	None	-

[Details](#)

There is a delay of up to 15 minutes between the time an order is submitted and when it will appear in a list of a customer's orders.

Microsoft Partner Center

Search

Test_ModernOfficeR2

Order history

Subscriptions

Software

Azure reservations

Devices

Analytics

Users and licenses

Service management

Service requests

Account

Subscriptions

Export subscriptions

Subscriptions Transfer requests

Add subscription

There is a delay of up to 4 hours between the time a subscription is activated and when its activation status is updated in a list of customer's subscriptions.

License-based

Name	Promotion	Quantity	Status
Microsoft 365 E3 New Commerce Experience By Microsoft Corporation	Microsoft 365 monthly promo	1 Licenses	Auto renews on 8/26/2021
Subscription Id: 8c2d68a6-9dcc-4b4f-deb0-0ed33d9d5ec3 Billing frequency: Monthly			
Office 365 E3 - Edit		10 Licenses	Auto renews on 1/11/2022

Quick links Expanded

Usage-based

This customer doesn't have any usage-based subscriptions.

Microsoft Partner Center

Search

Test_ModernOfficeR2

Order history

Subscriptions

Software

Azure reservations

Devices

Analytics

Users and licenses

Service management

Service requests

Account

Microsoft 365 E3

New Commerce Experience

Subscription Id: 8c2d68a6-9dcc-4b4f-deb0-0ed33d9d5ec3

Billing frequency: Monthly

You can upgrade this subscription to one with more services.

Upgrade now

Details

Subscription nickname *

Microsoft 365 E3

Quantity *

1 Licenses

Status

Active

Renews on Thursday, August 26, 2021, 5:00 PM PDT

☒ Auto-renew Will renew to promotion price [learn more](#)

Manage renewal

Suspended

Cancel subscription

Cancel until Thursday, August 26, 2021, 4:59 PM PDT

Submit

Cancel

Viewing renewal options of the promotion

Promotions and renewals

Promotional discounts, when applied, are for the term of the purchase. Subscriptions with applied promotions will retain the promotional price if the renewal date is in the promotion duration date range. Renewals outside of the promotion duration date range will renew to the nonpromotion price (from the price list). Partners can track the renewal status to the price points in the subscription details page and on the getSubscription data renewal instructions.

Promotions and upgrades

Partners who upgrade from a subscription to another SKU will leave the promotion price behind because the promotion was configured for the SKU that they're leaving when they upgrade to another SKU. Partners who upgrade to a SKU that might have a promotion won't automatically get the promotion price. If they need or want the promotion price for the SKU to which they want to move, they will need to manually purchase the new SKU as a new subscription. In the future, conversions might be better supported when moving to a SKU that has a promotion, but for now, promotions are only applied on new subscription purchases and renewals.

Pricing and reconciliation for promotions

Price list files don't include promotion pricing or information. Partners should use the GetPromotions API or discover promotions in the Partner Center catalog purchase experiences. The API and UI include details about the promotions, such as the percentage discount and how long the promotion is available.

Partners can find promotions that they've purchased in their new commerce recon files. The reconciliation line item will have information in the following fields:

- **PromotionID** includes the product, SKU, and availability ID for the promotion. Partners can use the GetPromotionsById API to get more details about the promotion.
- **PriceAdjustmentDescription** includes an explanation about the price adjustment.
- **UnitPrice** is the price per unit for the purchase.
- **EffectiveUnitPrice** is the price that the partner was charged. This reflects the difference between the UnitPrice and the percentage discount for the promotion.

Traditional license-based purchases include different details because reconciliation files are completely different.

Cross-channel considerations

If a partner purchases seats for a product SKU in Enterprise Agreement (EA), CSP promotions aren't related. The constraints for promotions aren't enforced across channels. If a partner purchases 3,000 seats of E5 in EA and the partner goes to CSP Partner Center and purchases 2,000 seats of E5, they will get the promotion price.

Subscription management features

- Upgrades
 - Full upgrade
 - Partial upgrade
 - Midterm upgrade policy with cancellation
 - Upgrade activity
- Toggle autorenew
- Cancellation
- Pause service (Suspend) and resume (reactivate) service
- Decreasing seat count inside cancellation window
- Schedule changes
- Subscription ownership enforcement
- Grace period on expiration

Upgrades

For new commerce, upgrading means going from one paid subscription to another paid subscription. New commerce paid-to-paid upgrades allow the customer to immediately upgrade from their current SKU to one with added services. Upgrades can be of two types: Full upgrade and partial upgrade.

NOTE

Subscription downgrades are **NOT** supported. The alternative to downgrading a subscription is to either cancel or let the existing subscription expire and then purchase a new “lower” subscription.

Full upgrade

A full upgrade is an in-place upgrade, which means that **all the seats are being upgraded**. In this case, the subscription ID remains the same, and seats are automatically assigned. However, in the case where the customer has already purchased the destination SKU from another partner or channel across legacy, manual assignment will be needed. If manual assignment is necessary, the partner will see a warning message in the UX stating that the seats need to be assigned.

Subscriptions

Order history

Software

Azure reservations

Devices

Users and licenses

Admin relationships

Service management

Service requests

Account

Indirect resellers

Choose an eligible upgrade

Select a new offer to upgrade the current subscription. This will upgrade your subscription and provision any services.

Important

Before upgrading be sure to backup all data.

During the upgrade, avoid changing any part of the original subscription or the customer's accounts. This will create a new subscription, provision any services, and reassign user licenses to the new subscription. These changes cannot be undone. [Learn more](#)

Current subscription

Current subscription: Project Plan 3

Current license quantity: 30

Term duration: Annual

Billing frequency: Monthly

Choose an eligible upgrade for your subscription

☒ Project Plan 5

Destination subscription

New Subscription

Term duration

No change

Billing frequency

Annually

Quantity *

30

Licenses

Seat reassignment

Submit

Cancel

Subscriptions

- Order history
- Software
- Azure reservations
- Devices
- Users and licenses
- Admin relationships
- Service management
- Service requests
- Account
- Indirect resellers

Details

Subscription nickname *

Project Plan 3

Quantity *

30 Licenses

Status

☒ Active
Renews on Wednesday, October 5, 2022, 5:00 PM PDT

☒ Auto-renew

☐ Manage renewal ⓘ

☐ Suspended

☐ Cancel subscription

Term duration

Annual

Billing frequency

Monthly

☐ Manage billing frequency ⓘ

Reseller (MPN ID)

No indirect reseller

Transition activity

Date	Activity	Status
10/7/21 1:54 PM	Upgrade from Project Plan 3 to Project Plan 5	Upgrade completed

Partial upgrade

A partial upgrade is defined as going from a paid SKU to a different paid SKU where only **some of the seats are being upgraded**. In this case, a new subscription ID gets generated, and seats need to be manually assigned.

Partial upgrades have an end date that's **coterminous** with the original subscription end date. Any scheduled changes will be deleted with a midterm upgrade, and only subscriptions that are in an **"active state"** (not suspended or cancelled) can be upgraded.

License reassignment will have to be **manual**, and the UX will warn the user about this. However, it's important to note that the API doesn't give any warning for manual reassignments. If license reassignment doesn't happen in time, the original subscription could be over provisioned, and your customer will be at risk of being **out of compliance** until users are reassigned to the new subscription.

The following UX shows that when the license quantity on an upgrade doesn't match the current license quantity, seat assignment will have to be manual, as displayed by the yellow warning icon:

Subscriptions
Order history
Software
Azure reservations
Devices
Users and licenses
Admin relationships
Service management
Service requests
Account
Indirect resellers

Choose an eligible upgrade

Select a new offer to upgrade the current subscription. This will upgrade your subscription and provision any services.

Important

Before upgrading be sure to backup all data.

During the upgrade, avoid changing any part of the original subscription or the customer's accounts. This will create a new subscription, provision any services, and reassign user licenses to the new subscription. These changes cannot be undone. [Learn more](#)

Current subscription

Current subscription: Project Plan 5

Current license quantity: 30

Term duration: Annual

Billing frequency: Monthly

Choose an eligible upgrade for your subscription

☒ Project Plan 5

Destination subscription
New Subscription

Term duration
No change

Billing frequency
Annually

Quantity *
12 Licenses

Seat reassignment
Manual

Submit Cancel

Midterm upgrade policy with cancellation

The scenarios listed explain when customers can cancel their subscriptions and when they can't:

- Upgrading to the existing subscription if the existing subscription is within the cancellation window and the source subscription isn't within the cancellation window, isn't allowed.
- The customer is allowed to upgrade to the new subscription but not to the existing subscription that's within the cancellation window.
- When upgrading to the existing subscription if the source subscription is within the cancellation window but target subscription isn't within the cancellation window, then after upgrade, the newly added seats won't inherit the cancellation policy of the source subscription.
- If a new subscription is created when upgrading:
 - If the source isn't within the cancellation, then the new E5 won't get 72 hours cancellation.

- If the source is within the cancellation, then the newly created E5 will inherit from the source.

Upgrade activity table

Partners can track the status of an upgrade in the Upgrade activity table. The table captures all of the upgrade activity with the corresponding timestamp of when the upgrade began and was completed, along with the original and upgraded SKUs.

Subscriptions | Project Plan 5 New Commerce Experience

Subscription ID: 6192e783-256c-49e4-cc21-6172566e42e7

You can upgrade this subscription to one with more services.

Upgrade now

Details

Subscription nickname *

Project Plan 5

Quantity *

30 Licenses

Status

☒ Active

Renews on Wednesday, October 5, 2022, 5:00 PM PDT

☒ Auto-renew

Manage renewal

☐ Suspended

Cancel subscription

Term duration

Annual

Billing frequency

Monthly

☐ Manage billing frequency

Reseller (MPN ID)

No indirect reseller

Submit

Cancel

Transition activity

Date	Activity	Status
10/7/21 1:54 PM	Upgrade from Project Plan 3 to Project Plan 5	Upgrade completed
10/7/21 1:53 PM	Upgrade from Project Plan 3 to Project Plan 5	Upgrade started
10/6/21 12:20 PM	Conversion from Project Plan 1 Trial to Project Plan 3	Conversion completed
10/6/21 12:18 PM	Conversion from Project Plan 1 Trial to Project Plan 3	Conversion started

Toggle autorenew and expired states

Partners can toggle autorenewal. This feature allows for easier and more efficient subscription management for larger customers. When autorenew is toggled on, the subscription will renew into the same subscription, and when autorenew is toggled off, the subscription will expire at the end of the term. Autorenew is toggled on by default and must be turned on when scheduling changes to occur at renewal.

Cancellation

For new commerce offers, partners can cancel their subscription with a **prorated refund** within the first **72 hours** for any term (**proration calculated daily**) and on renewal of the subscription.

After 72 hours, cancellation is no longer available, and the partner will be billed for the full term, even if the customer stops paying for or using the subscription (applicable to any billing plan).

When a cancellation is complete, the customer will immediately lose access to the service, and the service can't be restored. The state for the subscription will be nonrecoverable.

Upon renewal of the subscription, partners will get another 72-hour cancellation window in which they can cancel their subscription for a prorated refund.

Cancellation UX flow

Partners will see the following cancellation information for their subscription included in the UI in Partner Center.

The screenshot displays the 'Subscriptions' page for 'Microsoft 365 E5 Compliance' in the Partner Center. The left sidebar contains navigation links: Subscriptions, Order history, Software, Azure reservations, Devices, Users and licenses, Admin relationships, Service management, Service requests, Account, and Indirect resellers. The main content area is titled 'Subscriptions | Microsoft 365 E5 Compliance' with a 'New Commerce Experience' badge. Below the title, the subscription ID is shown: 'Subscription Id: 5effd77c-d229-4a6c-cafa-1cd8e4fcb2'. The 'Details' section includes a 'Subscription nickname' field with the value 'Microsoft 365 E5 Compliance'. The 'Quantity' is set to '5 Licenses'. The 'Status' section shows 'Active' as the selected state, with a note 'Renews on Monday, September 26, 2022, 5:00 PM PDT'. There are checkboxes for 'Auto-renew' (checked) and 'Manage renewal'. Below these, the 'Cancel subscription' option is highlighted with a red box; it is currently unselected, and the text below it reads 'Cancel until Thursday, September 30, 2021, 4:59 PM PDT'. The 'Term duration' is set to 'Annual'. The 'Billing frequency' is 'Monthly', with a 'Manage billing frequency' link. The 'Reseller (MPN ID)' is set to 'No indirect reseller'. At the bottom, there are 'Submit' and 'Cancel' buttons.

When the **Cancel subscription** radio button is selected, the following message will be displayed in the UX. When a cancellation is complete, the customer will immediately lose access to the service, and it can't be restored. The state for the subscription will be nonrecoverable.

The screenshot shows the Microsoft Partner Center interface. The left sidebar contains navigation links: Subscriptions, Order history, Software, Azure reservations, Devices, Users and licenses, Admin relationships, Service management, Service requests, Account, and Indirect resellers. The main content area is titled 'Subscriptions | Microsoft 365 E5 Compliance' with a 'New Commerce Experience' badge. Below the title, the subscription ID is '5ef9d77c-d229-4a6c-cafa-1cd8e4fccbc2'. The 'Details' section includes a 'Subscription nickname' field with the value 'Microsoft 365 E5 Compliance', a 'Quantity' field with '5 Licenses', and a 'Status' section with radio buttons for 'Active', 'Auto-renew', 'Manage renewal', 'Suspended', and 'Cancel subscription' (which is selected). Below the status are fields for 'Term duration' (Annual), 'Billing frequency' (Monthly), and 'Reseller (MPN ID)' (No indirect reseller). At the bottom are 'Submit' and 'Cancel' buttons. A modal dialog titled 'Cancel subscription' is overlaid on the form. The dialog text reads: 'To receive a refund, you must cancel subscriptions within 3 days of purchase or renewal. **PLEASE NOTE:** The customer will lose access to this subscription immediately upon cancellation and access can't be restored after cancellation. If you cancel the subscription within 3 days, you'll be refunded for any time you've not used. A credit will appear in your next monthly invoice. [Learn more.](#)' The dialog has two buttons: 'Yes, cancel' and 'No, don't cancel'.

If the partner tries to cancel outside of the allowed 72-hour window, the following message will be displayed:

Microsoft Partner Center

Search

Home > Customers > Customer list > test_test aruna office > Subscriptions

Subscriptions

Order history

Software

Azure reservations

Devices

Users and licenses

Admin relationships

Service management

Service requests

Account

Indirect resellers

Subscriptions | Microsoft 365 E5

New Commerce Experience

Subscription Id: e1bed858-513d-4811-c60e-c42c08521a1f

Details

Subscription nickname *

Microsoft 365 E5

Quantity *

1

Licenses

Status

☐ Active

☒ Auto-renew

Manage renewal ⓘ

☐ Suspended

☒ Cancel subscription

Term duration

Monthly

Billing frequency

Monthly

Manage billing frequency ⓘ

Reseller (MPN ID)

No indirect reseller

Submit

Cancel

Cancel subscription

Your 3-day cancellation window has closed. We are unable to cancel your subscription.
[Learn more.](#)

Close

Pause service (suspend) and resume (reactivate) service

Partners can pause and resume a subscription at any time without a cancellation. However, partner billing continues during suspension.

All data related to the subscription will be deleted unless the subscription is reactivated within 90 days or 90 days plus the number of days between the time that the account was opened and the first billing period (a maximum of 120 days).

In the UX, the partner can simply select the "Suspended" radio button to suspend their subscription. When doing so, a pop-up window will appear stating that the service will be paused, but billing will continue.

Subscriptions | Project Plan 5 New Commerce Experience

Subscription Id: 59ba22ed-3a6a-4659-c235-884214e962a3

Details

Subscription nickname *

Project Plan 5

Quantity *

16 Licenses

Status

☐ Active
Renews on Tuesday, October 4, 2022, 5:00 PM PDT

☒ Auto-renew

☒ Suspended

☐ Cancel subscription
Cancel until Friday, October 8, 2021, 4:59 PM PDT

Term duration

Annual

Billing frequency

Monthly

Reseller (MPN ID)

No indirect reseller

Pause customer's access to service

Although pausing customer access to service immediately blocks customer's ability to use services, this doesn't impact your invoice. You'll continue to be billed as normal. Pausing will turn off and disable auto-renew and will delete any scheduled changes.

In the case of nonpayment from customers, you can use the suspension capability to immediately block the customer's access. After suspension, the customers can't sign in to nor access Microsoft 365 services, files, or applications. However, the partner will continue to be billed, unlike in legacy, and the services can be resumed later on.

Decreasing seat count while in cancellation window

The license count on a subscriptions can be **increased** at any point in time with billing adjustments reflected on the next invoice and recon file.

The license count on a subscription can be **decreased**:

- Only within the first **72 hours** of when the subscription order was **first placed or renewed**.
- Through customer support within **72 hours** for licenses added at **midterm**.

A license-count decrease within the first 72 hours of a subscription term (**after initial purchase or renewal**) can be made via self-service in Partner Center or through the API.

A license-count decrease for licenses added at **midterm** can only be done through customer support within the first 72 hours.

In both cases of license reduction, you'll be refunded the full amount minus the **prorated amount** for the days when you used the subscription (**proration calculated daily**).

If **more than 72 hours** have elapsed since the subscription order was placed or additional licenses were added, the license count **can't be decreased** until the next cancellation window at renewal.

NOTE: Microsoft will enable self-service functionality via Partner Center or API for seat-count reductions at midterm (from the number of seats added midterm), instead of this reduction requiring a support request. Testing of this self-serve capability will begin in the integrated sandbox environment on December 10, 2021.

Schedule changes

It's possible to schedule changes to a subscription if the autorenew toggle has been enabled, the subscription is active, and the SKU is eligible for scheduled upgrades. All scheduled changes are executed at subscription renewal.

In order to schedule changes, you can go to the subscription details page in the UX and select **Manage renewal**. This will open a side panel with different options for change SKU, updating quantity, changing billing term, and frequency. Once you make your changes and select **Okay**, these changes will be scheduled to take place on renewal.

The screenshot displays the 'Subscriptions' page for 'Project Plan 5'. The main panel shows subscription details: 'Subscription nickname' is 'Project Plan 5', 'Quantity' is '15 Licenses', 'Status' is 'Active' (with options for 'Suspended' and 'Cancel subscription'), 'Term duration' is 'Annual', 'Billing frequency' is 'Monthly', and 'Reseller (MPN ID)' is 'No indirect reseller'. A 'Manage renewal' link is visible. A side panel titled 'Manage renewal' is open, showing options to change the SKU (currently 'Project Plan 5'), Quantity (currently '16 Licenses'), Term (currently 'Annual'), and Billing frequency (currently 'Monthly'). Each option has a 'Change to:' dropdown menu with 'No change' selected. At the bottom of the side panel are 'Okay' and 'Cancel' buttons.

Note: Any changes made to the subscription at midterm will delete existing scheduled changes. The UX will display a pop-up window with a warning to let partners know that their action will result in scheduled changes being deleted.

Midterm conversion enhancements

With midterm conversion enhancements, customers now have more flexibility in managing their subscriptions and can make midterm changes on their subscriptions that go into effect immediately. These enhancements allow both midterm “free to paid” and “paid to paid” subscription changes that include quantity changes, SKU changes, billing plan, and term changes.

There are some restrictions on the changes that can be made on a subscription. The following are the **Term** restrictions:

Term restrictions
Going from 1 month to 1 year (allowed)
1 month to 3 years (allowed)
1 year to 3 years (allowed)
1 year to 1 month (not allowed)
3 years to 1 month (not allowed)
3 years to 1 year (not allowed)

Further, most of the midterm changes go into effect immediately except for a few specific scenarios with changes to the **Billing plan**. Examples of when changes go into effect immediately versus as a scheduled change are described in the following table:

Scenario	Description	Go into effect:
Midterm conversion from a trial to paid SKU with more than one change in one go.	Customers can perform an immediate conversion of a trial to paid product for a different P/S and/or term and/or billing plan and/or quantity.	Immediately

Example: Going from an E3 Trial - > E5 Paid + 2 or more changes		
Midterm conversion from trial to the same paid SKU with more than one change Example: Going from an E3 Trial - > E3 Paid	Customers can perform immediate conversion from a trial to paid product with quantity change and/or upgrade and/or term and/or billing plan change.	Immediately
Midterm conversion from paid to paid Example: E3 Paid to E5 Paid + increase seats + billing plan change	The SKU upgrade and seat changes will happen immediately, but the billing plan change will be scheduled at the next billing cycle.	Immediately except for Billing plan which will be a scheduled change
Billing plan + SKU change	The SKU upgrade and billing plan changes are effective immediately.	Immediately
Billing plan + add seats	Adding seats is effective immediately but billing plan change is effective at the next billing cycle.	Immediately except for Billing plan which will be a scheduled change

To summarize, if a billing plan change is part of multiple changes, then it goes into effect immediately, but if it's a standalone change, that is, if only billing plan change is initiated, then it's considered a scheduled change and goes into effect in the next charge cycle.

Finally, the following is a list of supported and unsupported operations that can be performed for a midterm conversion:

Operations	Allowed? Y/N
SKU upgrade + add seats + billing plan change + term change	Y
SKU upgrade + add seats + billing plan change	Y
SKU upgrade + add seats + term change	Y
SKU upgrade + billing plan change + term change	Y
add seats + billing plan change + term change	Y
add seats + billing plan change	N
add seats + term change	Y
billing plan change + term change	Y
SKU upgrade + add seats	Y
SKU upgrade + term change	Y
SKU upgrade + billing plan change	Y
SKU downgrade + add seats (during cancellation window)	N
SKU upgrade + reduce seats (during cancellation window)	N
Decrease seats + billing plan change	N
Trial to paid upgrade + reduce seats (Example: E3 trial 25 seats -> E5 paid 10 seats)	N
Trial to paid downgrade + reduce seats (Example: E3 trial 25 seats -> E1 paid 10 seats)	N
Trial to paid downgrade + add seats (Example: E3 trial 25 seats -> E1 paid 30 seats)	N
Trial to paid upgrade + add seats (Example: E3 trial 25 seats -> E5 paid 30 seats)	Y
Term change to the higher version (Monthly -> Annual or Triennial or Annual -> Triennial)	Y

Small business seat limits

Existing license-based subscriptions enforced ownership limits on the number of subscriptions that a partner could purchase for a customer. These typically were "small business" SKUs or offers with less than a 300-seat maximum. In **traditional license-based** subscriptions, partners could see the limits in the offer-list matrix for existing seat-based products as "Concurrent", describing the number of subscriptions that the partner could have. **New commerce** implements a seat constraint across the purchased product SKUs. New commerce small business subscriptions with less than a 300 maximum will apply the maximum at the product SKU level. So a partner could have multiple small business subscriptions for a customer as long as the aggregate of the seat counts stays under the declared maximum. The maximum for small business applies regardless of where the customer's product SKU came from, so they can have multiple partners or channels.

Traditional license-based included a "Concurrent" setting with a limit value, usually 2. This meant that a customer could have a maximum of two subscriptions for the offer from a given partner.

Microsoft 365 Business Premium
Offer ID: 61795cab-2abd-43f6-88e9-c9adae5746e0
Offer limit scope: Concurrent
Offer limit: 2

New commerce license-based uses a maximum seat count with a value to enforce these small business limits. The product SKUs enforce this limit on any purchased subscriptions for the product SKU. So, a given customer could have four subscriptions from four different partners if the total number of seats from all subscriptions was less than 300. The limit is on the number of aggregate licenses purchased for the product SKU, not on the number of subscriptions. Partners can view these values in the offer matrix for new commerce and get these values in the SKU using the catalog APIs.

Microsoft 365 Business Premium
Product ID: CFQ7TTC0LCHC
SKU ID: 0002
Max seat count: 300

Grace period on subscription expiration

When an **annual or a multi-year term** subscription expires, customers have a **30-day** grace period after the expiration date in which they can still access the subscription.

When a **monthly term subscription** expires, customers have a **7-day** grace period after the expiration date in which they can still access the subscription.

Microsoft 365 admin center customer experience

Review the information on the [Microsoft 365 admin center help page](#) to learn more about setting up your subscription and email, adding users, and installing apps.

[Learn more](#) about how to buy and manage business subscriptions, perform license management tasks, and manage billing and payments for your business accounts with Microsoft.

Billing, invoicing, and reconciliation files

Recon files, which provide itemized details of your charges, are available for download along with the invoice PDF. The recon files include customer identifiers and subscription identifiers that you can use to create customer invoices. For more information about recon files, additional options have been included to accommodate customers' payment preferences. Partners can now be billed annually for multi-year subscriptions as well as monthly or upfront.

You can download your recon files from Partner Center for a detailed, line-item view of each charge in a billing cycle. Line-item details include charges for each customer's subscriptions and detailed events (such as a midterm addition of licenses to a subscription).

Recon files have also been upgraded, and now all subscriptions have been consolidated into a single customizable recon file. Estimates of charges accrued during the month are provided and updated hourly.

Review the [Recon file definitions to see the definition of the field values](#).

Billing experience updates

Billing Experience updates

Billing date alignment (calendar month)
(estimated recon / daily usage)

A new date for your calendar month bills – may impact your internal processes.

Billing in partner currency

Same as legacy.

Pricing in partner currency for license-based products, but Azure products are priced in USD.

Same as legacy for license-based products. But Azure products in legacy are also priced in partner currency.

Monthly subscription terms

New business option. May require investment.

Invoice Sandbox support

Enable you to test billing & reconciliation.

*Billing API updates (**invoices, reconciliation & estimates**). No changes in the request parameters, but new attributes are added in the API response.

Existing experience vs. new commerce invoices and recon files

Legacy vs. Modern Invoices & Recon Files

	Legacy	Azure NCE	M365 / D365 NCE
Offers	- M365, D365, Power Platform - Consumption offers, such as Azure (145P)	- Azure plan - Azure reservations - Server subscriptions - Marketplace offers	M365, D365, Power Platform
Invoice date	Varies based on each partner's CSP account billing date	By the end of the 8th calendar day (UTC) - Same date across partners	By the end of the 8th calendar day (UTC) - Same date across partners
Billing Period/Cycle	Varies. (ex) Dec 15 - Jan 14 billing cycle for a partner with Jan 15 invoice date.	Calendar month: 1st to the end of month	Calendar month: 1st to the end of month
Invoice files	- One invoice - Partner billing date + 3 days (SLA) - Partner currency	- One invoice in partner currency - By the end of the 8th calendar day (UTC)	- One invoice in partner currency - By the end of the 8th calendar day (UTC)
Reconciliation files	- One license-based recon file - One usage-based recon file	One recon file for all modern offers for both open and closed periods	One recon file for all modern offers for both open and closed periods
Daily rated usage files	Only closed period	- Open (daily unbilled) and Closed (billed per billing cycle) periods - Open period data is wiped out after the invoices are generated	N/A

How NCE reconciliation works

The billing cycle for NCE is a calendar month. Invoices and recon files are available in the Partner Center portal or via APIs between the 6th and 8th of the following month. For example, the billing cycle for the month of January runs from January 1 to 31. Between February 6 and 8, you'll be able to access your January invoice and recon file.

What are the different charge types?

Go to [Recon file charge types](#).

How one-time and recurring charges are calculated

Let's say you buy a new Microsoft 365 Business Standard subscription with 10 licenses (seats) on June 18 for EUR 10.08 per month unit price with a monthly term and monthly billing. The following billing line will appear on the recon file for the June billing cycle that you'll receive in July. If the subscription isn't renewed, then you'll never see this transaction again.

Important attributes to note while reconciling the billing lines are Charge start date, Charge end date, Effective unit price, Billable quantity, Billing frequency, Subscription start date, Subscription end date, and Amount. You can find the explanation of these attributes in the following link.

[Recon file fields for CSP one-time purchases](#)

Charge start date	Charge end date	Charge type	Effective unit price	Billable quantity	Amount
June 18, 2021	July 17, 2021	new	10.08	10	100.8

Suppose you renew it. In that case, you'll see a new transaction with "ChargeType" set to "renew," and the "ChargeStartDate" and "ChargeEndDate" set to "7/18/2021" and "8/17/2021", respectively.

Assume that you purchase the same subscription with a one-year term and a monthly billing plan. In that case, until the June 2022 billing cycle, you'll see EUR100.8 charges with the same values as above, but the "ChargeType" will change to "cycleCharge".

Assume, however, that you pay for the same subscription in advance. Here, only one billing line will appear on the recon file for the June billing cycle, which you'll receive in July.

Charge start date	Charge end date	Charge type	Effective unit price	Billable quantity	Total
June 18, 2021	June 17, 2022	new	120.96	10	1209.6

How to identify one-time or recurring payments in the recon file?

The Charge start date and Charge end date for a one-time payment or billing plan will be the same as the Subscription start date and Subscription end date. The Billing frequency attributes will be empty. For a recurring or billing plan payment, the Charge start date and Charge end date will be separated by one month or one year, respectively. The Billing frequency attribute will have a text as "Monthly" or "Annual."

How do I find the billing term in a recon file?

The difference between the Subscription start date and Subscription end date explains the billing term. You can also look into the "TermAndBillingCycle" attribute to find a suitable description.

See some the following examples:

TermAndBillingCycle	SubscriptionStartDate	SubscriptionEndDate
---------------------	-----------------------	---------------------

One-Year commitment for monthly or yearly billing	April 15, 2021	April 14, 2022
One-year term duration	April 22, 2021	April 21, 2022
One-Month commitment for monthly billing	April 14, 2021	May 13, 2021
Three-3 years commitment for monthly or yearly billing	May 25, 2021	May 24, 2024

Monthly term billing

The number of days that are in the monthly term billing depends on the purchase date.

For purchases made on the last day of a month that has 31 days, the subscription will end one day prior to the end of following month.

- For months that have 31 days, the subscription end date will be on the 30th.
- For months that have 30 days, the subscription end date will be on the 29th.
- For the month of February which has 28 days, the subscription end date will be on the 27th in non-leap years. For a leap year, the subscription would end on the 28th.

For purchases made on the second to the last day of a month that has 30 days, the subscription will end one day prior to the end of following month.

- For months that have 31 days, the subscription end date will be on the 29th.
- For months that have 30 days, the subscription end date will be on the 29th.

For the month of February which has 28 days, the subscription end date will be on the 27th in non-leap years. For a leap year, the subscription would end on the 28th.

For any purchase made on any other day of the month, for example the 10th of the month, the subscription end date will be the 9th.

Review the following two scenarios:

Billing term	Purchase date	Subscription start date	Subscription end date	Charge start date	Charge end date	Notes
--------------	---------------	-------------------------	-----------------------	-------------------	-----------------	-------

Monthly	1/31/2021	1/31/2021	2/27/2021	1/31/2021	2/27/2021	The year 2021 is not a leap year. February month has 28 days. For a leap year, the subscription and charge end dates will change to February 28.
Monthly	2/28/2021	2/28/2021	3/27/2021	2/28/2021	3/27/2021	The year 2021 is not a leap year. February month has 28 days. For a leap year, the subscription and charge start dates will change to February 29.
Monthly	3/31/2021	3/31/2021	4/29/2021	3/31/2021	4/29/2021	
Monthly	4/30/2021	4/30/2021	5/29/2021	4/30/2021	5/29/2021	
Monthly	5/31/2021	5/31/2021	6/29/2021	5/31/2021	6/29/2021	
Monthly	6/30/2021	6/30/2021	7/29/2021	6/30/2021	7/29/2021	
Monthly	7/31/2021	7/31/2021	8/30/2021	7/31/2021	8/30/2021	
Monthly	8/31/2021	8/31/2021	9/29/2021	8/31/2021	9/29/2021	
Monthly	9/30/2021	9/30/2021	10/29/2021	9/30/2021	10/29/2021	
Monthly	10/31/2021	10/31/2021	11/29/2021	10/31/2021	11/29/2021	
Monthly	11/30/2021	11/30/2021	12/29/2021	11/30/2021	12/29/2021	
Monthly	12/31/2021	12/31/2021	1/30/2022	12/31/2021	1/30/2022	
Monthly	1/30/2021	1/30/2021	2/27/2021	1/30/2021	2/27/2021	The year 2021 is not a leap year. February month has 28 days. For a leap year, the subscription and charge end dates will change to February 28.
Monthly	2/27/2021	2/27/2021	3/26/2021	2/27/2021	3/26/2021	The year 2021 is not a leap year. February month has 28 days. For a leap year, the subscription and charge

start dates will change to February 29.

Monthly	3/30/2021	3/30/2021	4/29/2021	3/30/2021	4/29/2021
Monthly	4/29/2021	4/29/2021	5/28/2021	4/29/2021	5/28/2021
Monthly	5/30/2021	5/30/2021	6/29/2021	5/30/2021	6/29/2021
Monthly	6/29/2021	6/29/2021	7/28/2021	6/29/2021	7/28/2021
Monthly	7/30/2021	7/30/2021	8/29/2021	7/30/2021	8/29/2021
Monthly	8/30/2021	8/30/2021	9/29/2021	8/30/2021	9/29/2021
Monthly	9/29/2021	9/29/2021	10/28/2021	9/29/2021	10/28/2021
Monthly	10/30/2021	10/30/2021	11/29/2021	10/30/2021	11/29/2021
Monthly	11/29/2021	11/29/2021	12/28/2021	11/29/2021	12/28/2021
Monthly	12/30/2021	12/30/2021	1/29/2022	12/30/2021	1/29/2022

Switching billing plans

Partners have the flexibility of switching billing plans midterm without resetting the billing term altogether. The following are the different scenarios that show how the customer will be charged once they have switched their billing plan.

Example 1 – Switching from annual to monthly

Customer Contoso has purchased a **three-year subscription** for \$360 on January 1, 2020 with an **annual billing plan** (\$120 per year charged at January 1, 2020, 2021, and 2022). On March 15, 2020, Contoso wants to change to a monthly billing cycle. The change will need to be scheduled to happen on January 1, 2021 to start charging at \$10 per month till the end of the term on December 31, 2022. Upon renewal on January 1, 2023, the customer will be charged with monthly billing cycle.

3 Year subscription with yearly pay at \$120 per year -> Switch to \$10 monthly pay													
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
\$120												\$10	\$10

In March, customer switches from annual to monthly pay. Starting January, the following year, the customer will pay \$10 per month.

Example 2 – Switching from monthly to annual

Customer Contoso has purchased a **3-year subscription** for \$360 on January 1, 2020 with a monthly billing plan (\$10 per month charged at the first day of each month). On March 15, 2022, Contoso wants to change to annual billing cycle. The change will need to be scheduled to happen on April 1, 2022. On April 1, 2022, Contoso will be charged for a prorated annual amount of \$90 for April 1, 2022 to December 31, 2022. Contoso has already paid till March 31, 2022. Upon renewal on January 1, 2023, the customer will be charged with annual billing cycle

3 Year subscription with monthly pay at \$10 per month -> Switch to \$120 yearly pay												
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan 1, 2021
\$10	\$10	\$10	\$90									\$120
In March, customer switches from monthly to annual pay. Starting April, the customer will be charged a prorated amount of \$90 for the remainder of the year, followed by autorenew on January 1, 2021. The customer will pay \$120 for rest of the term on January 1, 2021.												

You can change the billing plan through the UX as shown in the following screenshots:

Microsoft Partner Center

Home > Customers > Customer list > Demo Customer > Subscriptions

Subscriptions

Order history

Software

Azure reservations

Devices

Users and licenses

Admin relationships

Service management

Service requests

Account

Indirect resellers

Subscriptions | Office 365 E5 without Audio Conferencing New Commerce Experience

Subscription Id: ef5b6e3a-cbf3-40f1-dcea-06a96350e801

i You can upgrade this subscription to one with more services.

Details

Subscription nickname *

Office 365 E5 without Audio Conferencing

Quantity *

27 Licenses

Status

☒ Active
Renews on Thursday, September 1, 2022, 5:00 PM PDT

☒ Auto-renew

☐ Manage renewal ⓘ

☐ Suspended

☐ Cancel subscription

Term duration

Annual

Billing frequency

Monthly

☐ Manage billing frequency ⓘ

Reseller (MPN ID)

No indirect reseller

Submit Cancel

Manage renewal



Changes take effect upon subscription renewal date: Thursday, September 1, 2022. For SKU upgrades, if the quantity doesn't change, licenses will be assigned automatically. Otherwise, you will need to manually assign licenses.

SKU: Current: Office 365 E5 without Audio Conferencing

Change to:

No change

Quantity: Current: 27

Change to:

27 Licenses

Term: Current: Annual

Change to:

No change

Billing frequency: Current: Monthly

Change to:

No change

Okay

Cancel

Manage billing frequency



Changes take effect at the start of the next billing cycle. [Learn more about managing billing changes.](#)

Billing frequency: Current: Monthly

Change to:

No change

Changes will take place on next billing cycle

Okay

Cancel

Usual subscription purchase scenarios

NCE Scenario 1 – usual subscription purchase

Product Name: Microsoft 365 Business Standard
 Purchase Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: Off

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Month commitment for monthly billing	10.08	10		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	

LEGACY Scenario 1 - usual subscription purchase

Product Name: Microsoft 365 Business Standard
 Purchase Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: Off

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 2 – usual subscription purchase

Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: On

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Month commitment for monthly billing	10.08	10		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/18/2021	Microsoft 365 Business Standard	renew	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/18/2021	8/17/2021	One-Month commitment for monthly billing	10.08	10		7/18/2021	8/17/2021	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	

LEGACY Scenario 2 – usual subscription purchase

Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: On

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 3 – usual subscription purchase/w price change

Renew and change of the Catalog price
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 June Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: On
 July 2021 - Unit Price: 11.00 €

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Month commitment for monthly billing	10.08	10		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/18/2021	Microsoft 365 Business Standard	renew	11	10	110	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/18/2021	8/17/2021	One-Month commitment for monthly billing	11	10		7/18/2021	8/17/2021	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	

LEGACY Scenario 3 – usual subscription purchase/w price change

Renew and change of the Catalog price
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 June Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: On
 July 2021 - Unit Price: 11.00 €

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Monthly term not supported.												

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Monthly term not supported.												

Add or remove seats scenarios

How adding or removing seats (licenses) affects reconciliation

Let's say you buy a new Microsoft 365 Business Standard subscription with 10 licenses (seats) on June 18 for EUR 10.08 per month unit price with a monthly term and monthly billing. Later on June 20, you add two more licenses or seats. The following billing line will appear on the recon file for the June billing cycle that you'll receive in July.

Order date	Charge type	Unit price	Total	Charge start date	Charge end date	Effective unit price	Billable quantity	Total
6/18/2021 1	new	10.08	100.8	6/18/2021	7/17/2021	10.08	10	100.8
6/20/2021 1	addQuantity	10.08	-94	6/20/2021	7/17/2021	-9.4	10	-94
6/20/2021 1	addQuantity	10.08	112.8	6/20/2021	7/17/2021	9.4	12	112.8

The monthly unit price is 10.08 EUR, translating into a daily effective unit price of **0.335 (10.08/30)**. However, the actual charges are calculated using the following formula based on the Effective Unit Price:

Effective Unit Price = Unit Price / the total number of days in the charge cycle

Note that the billable days in a monthly charge cycle depend on the number of days in the purchase month. For example, the billable days are 30 for June but 31 for August. The billable days in an annual charge cycle are 365 or 366 (for a leap year).

Total = Effective Unit Price x the number of billing days in the charge cycle x billable quantity.

We create two transactions when adding or removing licenses. One with a refund for the unused portion of the charge cycle for the first quantity. Another with the cost adjusted for the remaining days of the charge cycle for the adjusted quantity.

Therefore, the first transaction shows a refund for **28 days, from June 20, 2021, to July 17, 2021**. Therefore, the refund amount is $0.335 \times 28 \times 10 = 94$.

The adjusted transaction shows the cost of two licenses for **28 days from June 20, 2021, to July 17, 2021**, and the cost in the charge cycle is $(0.335 \times 28 \times 8) = 112.8$.

Now let's say you remove four seats or licenses on June 22. Again, we'll follow the above method to refund and recalculate charges based on the revised seat count. You'll see the following billing lines again in the recon file.

Order date	Charge type	Unit price	Total	Charge start date	Charge end date	Effective unit price	Billable quantity	Total
6/22/2021	removeQuantity	10.08	-104.52	6/22/2021	7/17/2021	-8.7	12	104.52
6/22/2021	removeQuantity	10.08	69.68	6/22/2021	7/17/2021	8.7	8	69.68

The first transaction shows a refund of twelve licenses for **26 days, from June 22, 2021, to July 17, 2021**. Therefore, the refund amount is $0.335 \times 26 \times 12 = 104.52$.

The adjusted transaction shows the cost of eight licenses for **26 days from June 22, 2021, to July 17, 2021**, and the cost in the charge cycle is $(0.335 \times 26 \times 8) = 69.68$.

NCE Scenario 4 – add/remove seats

Renew and Increase seat /w monthly term
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: On
 Increase seat: 2021-06-20 (+ 2 seats)
 From 2021-06-20 Total Quantity: 12 seats

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Month commitment for monthly billing	10.08	10		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	
Contoso	6/20/2021	Microsoft 365 Business Standard	addQuantity	10.08	10	-94	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/20/2021	7/17/2021	One-Month commitment for monthly billing	-9.4	10		6/18/2021	7/17/2021	621f3ce1-55a1-4da9-bc8c-cfc5d815347a	
Contoso	6/20/2021	Microsoft 365 Business Standard	addQuantity	10.08	12	112.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/20/2021	7/17/2021	One-Month commitment for monthly billing	9.4	12		6/18/2021	7/17/2021	621f3ce1-55a1-4da9-bc8c-cfc5d815347a	

Seat addition/removal triggers the wipe and recreate processes.

NCE Scenario 4 – add/remove seats

Renew and Increase seat /w monthly term
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: On
 Increase seat: 2021-06-20 (+ 2 seats)
 From 2021-06-20 Total Quantity: 12 seats

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/18/2021	Microsoft 365 Business Standard	renew	10.08	12	120.96	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/18/2021	8/17/2021	One-Month commitment for monthly billing	10.08	12		7/18/2021	8/17/2021	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	

LEGACY Scenario 4 – add/remove seats

Renew and Increase seat /w monthly term
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: On
 Increase seat: 2021-06-20 (+ 2 seats)
 From 2021-06-20 Total Quantity: 12 seats

June/July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 5 – add/remove seats

Renew and Increase seat /w monthly term
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: On
 Increase seat: 2021-07-18 (+ 4 seats)
 From 2021-07-18 Total Quantity: 14 seats

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Month commitment for monthly billing	10.08	10		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	

Added seats will show up in the next charge cycle because the seat increment date falls in the next cycle.

NCE Scenario 5 – add/remove seats

Renew and Increase seat /w monthly term
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: On
 Increase seat: 2021-07-18 (+ 4 seats)
 From 2021-07-18 Total Quantity: 14 seats

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/18/2021	Microsoft 365 Business Standard	renew	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/18/2021	8/17/2021	One-Month commitment for monthly billing	10.08	10		7/18/2021	8/17/2021	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	
Contoso	7/18/2021	Microsoft 365 Business Standard	addQuantity	10.08	10	-100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/18/2021	8/17/2021	One-Month commitment for monthly billing	-10.08	10		7/18/2021	8/17/2021	8006dec0-5732-4931-94bd-ab97928731c3	
Contoso	7/18/2021	Microsoft 365 Business Standard	addQuantity	10.08	14	141.12	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/18/2021	8/17/2021	One-Month commitment for monthly billing	10.08	14		7/18/2021	8/17/2021	8006dec0-5732-4931-94bd-ab97928731c3	

Seat addition/removal triggers the wipe and recreate processes.

LEGACY Scenario 5 – add/remove seats

Renew and Increase seat /w monthly term
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: On
 Increase seat: 2021-07-18 (+ 4 seats)
 From 2021-07-18 Total Quantity: 14 seats

June/July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 6 – add/remove seats

Renew and Decrease seat /w monthly term
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: On
 Decrease seat (Scheduled Changes): 2021-07-18 (- 2 seats)
 From 2021-07-18 Total Quantity: 8 seats

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Month commitment for monthly billing	10.08	10		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	

Added seats will show up in the next charge cycle because the seat reduction date falls in the next cycle.

NCE Scenario 6 – add/remove seats

Renew and Decrease seat /w monthly term
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: On
 Decrease seat (Scheduled Changes): 2021-06-20 (- 2 seats)
 From 2021-06-20 Total Quantity: 8 seats

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Month commitment for monthly billing	10.08	10		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	
Contoso	6/20/2021	Microsoft 365 Business Standard	removeQuantity	10.08	10	-94	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/20/2021	7/17/2021	One-Month commitment for monthly billing	-9.4	10		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	
Contoso	6/20/2021	Microsoft 365 Business Standard	removeQuantity	10.08	8	75.2	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/20/2021	7/17/2021	One-Month commitment for monthly billing	9.4	8		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	

Seat addition/removal triggers the wipe and recreate processes.

LEGACY Scenario 6 – add/remove seats

Renew and Decrease seat /w monthly term
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: On
 Decrease seat (Scheduled Changes): 2021-07-18 (- 2 seats)
 From 2021-07-18 Total Quantity: 8 seats

June/July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 7 – add/remove seats

Increase seat /w annual term & monthly payment
Product Name: Microsoft 365 Business Standard

Order Date: 2021-06-18

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 100.08 €

Quantity: 10 seats

Renew: On

Increase seat: 2021-06-20 (+ 2 seats)

From 2021-06-20 Total Quantity: 12 seats

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	8.34	10	83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Year commitment for monthly/yearly billing	8.34	10	Monthly	6/18/2021	6/17/2022	361e51df-316f-4bab-8a87-8b67a32b5fe0	
Contoso	6/20/2021	Microsoft 365 Business Standard	addQuantity	8.34	10	-77.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/20/2021	7/17/2021	One-Year commitment for monthly/yearly billing	-7.78	10	Monthly	6/18/2021	6/17/2022	621f3ce1-55a1-4da9-bc8c-cfc5d815347a	
Contoso	6/20/2021	Microsoft 365 Business Standard	addQuantity	8.34	12	93.36	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/20/2021	7/17/2021	One-Year commitment for monthly/yearly billing	7.78	12	Monthly	6/18/2021	6/17/2022	621f3ce1-55a1-4da9-bc8c-cfc5d815347a	

The annual unit price has been prorated over a 12-month period. Seat addition/removal triggers the wipe and recreate processes.

LEGACY Scenario 7 – add/remove seats

Increase seat /w annual term & monthly payment

Product Name: Microsoft 365 Business Standard

Order Date: 2021-06-18

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 100.08 €

Quantity: 10 seats

Renew: On

Increase seat: 2021-06-20 (+ 2 seats)

From 2021-06-20 Total Quantity: 12 seats

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Microsoft 365 Business Standard	Prorate fees when purchase	8.34	10	83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	Monthly	6/18/2021	6/17/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorated	-8.34	10	-83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	Monthly	6/18/2021	6/17/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorated	0.83	10	8.34	EUR	7d38057c-688d-4f25-d673-8eac527a9332	6/18/2021	6/20/2021	Monthly	6/18/2021	6/17/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorated	7.51	12	90.07	EUR	7d38057c-688d-4f25-d673-8eac527a9333	6/20/2021	7/17/2021	Monthly	6/18/2021	6/17/2022

The annual unit price has been prorated for 12 months. Seat add/remove goes through the wipe & recreate processes.

NCE Scenario 7 – add/remove seats

Increase seat /w annual term & monthly payment

Product Name: Microsoft 365 Business Standard

Order Date: 2021-06-18

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 100.08 €

Quantity: 10 seats

Renew: On

Increase seat: 2021-06-20 (+ 2 seats)

From 2021-06-20 Total Quantity: 12 seats

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/18/2021	Microsoft 365 Business Standard	cycleCharge	8.34	12	100.08	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/18/2021	8/17/2021	One-Year commitment for monthly/ yearly billing	8.34	12	Monthly	6/18/2021	6/17/2022	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	

LEGACY Scenario 7 – add/remove seats

Increase seat /w annual term & monthly payment

Product Name: Microsoft 365 Business Standard

Order Date: 2021-06-18

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 100.08 €

Quantity: 10 seats

Renew: On

Increase seat: 2021-06-20 (+ 2 seats)

From 2021-06-20 Total Quantity: 12 seats

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Microsoft 365 Business Standard	Cycle fee	8.34	12	100.08	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/18/2021	8/17/2021	Monthly	6/18/2021	6/17/2022

The annual unit price has been prorated for 12 months.

NCE Scenario 8 – add/remove seats

Increase seat /w annual term and monthly payment and change of the Catalog Price

Product Name: Microsoft 365 Business Standard

Order Date: 2021-06-18

Term Duration: One Year (PTY)

Billing Plan: Monthly

Unit Price: 100.08 €

Quantity: 10 seats

Renew: On

Increase seat: 2021-07-01 (+ 2 seats)

From 2021-07-01 Total Quantity: 12 seats

July 2021- Unit Price: 101.00 €

June 2022 - Unit Price: 102.00 €

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	8.34	10	83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Year commitment for monthly/ yearly billing	8.34	10	Monthly	6/18/2021	6/17/2022	361e51df-316f-4bab-8a87-8b67a32b5fe0	

The annual unit price has been prorated for 12 months. Added seats will show up in July because the seat increment date falls in the next cycle.

LEGACY Scenario 8 – add/remove seats

Increase seat /w annual term and monthly payment and change of the Catalog Price

Product Name: Microsoft 365 Business Standard

Order Date: 2021-06-18

Term Duration: One Year (PTY)

Billing Plan: Monthly

Unit Price: 100.08 €

Quantity: 10 seats

Renew: On

Increase seat: 2021-07-01 (+ 2 seats)

From 2021-07-01 Total Quantity: 12 seats

July 2021- Unit Price: 101.00 €

June 2022 - Unit Price: 102.00 €

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Microsoft 365 Business Standard	Prorate fees when purchase	8.34	10	83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	Monthly	6/18/2021	6/17/2022

The annual unit price has been prorated for 12 months.

NCE Scenario 8 – add/remove seats

Increase seat /w annual term and monthly payment and change of the Catalog Price

Product Name: Microsoft 365 Business Standard

Order Date: 2021-06-18

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 100.08 €

Quantity: 10 seats

Renew: On

Increase seat: 2021-07-01 (+ 2 seats)

From 2021-07-01 Total Quantity: 12 seats

July 2021- Unit Price: 101.00 €

June 2022 - Unit Price: 102.00 €

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/18/2021	Microsoft 365 Business Standard	cycleCharge	8.34	10	83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/18/2021	8/17/2021	One-Month commitment for monthly billing	8.34	10	Monthly	6/18/2021	6/17/2022	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	
Contoso	7/1/2021	Microsoft 365 Business Standard	addQuantity	8.34	10	-133.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/1/2021	8/17/2021	One-Month commitment for monthly billing	-13.34	10	Monthly	6/18/2021	6/17/2022	8006dec0-5732-4931-94bd-ab97928731c3	
Contoso	7/1/2021	Microsoft 365 Business Standard	addQuantity	8.34	12	154.92	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/1/2021	8/17/2021	One-Month commitment for monthly billing	12.91	12	Monthly	6/18/2021	6/17/2022	8006dec0-5732-4931-94bd-ab97928731c3	

Seat addition/removal triggers the wipe and recreate processes. Price didn't rise in July because of the annual contract.

LEGACY Scenario 8 – add/remove seats

Increase seat /w annual term and monthly payment and change of the Catalog Price

Product Name: Microsoft 365 Business Standard

Order Date: 2021-06-18

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 100.08 €

Quantity: 10 seats

Renew: On

Increase seat: 2021-07-01 (+ 2 seats)

From 2021-07-01 Total Quantity: 12 seats

July 2021- Unit Price: 101.00 €

June 2022 - Unit Price: 102.00 €

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	-8.34	10	-83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9333	6/18/2021	7/17/2021	Monthly	6/18/2021	6/17/2022
Contoso	Microsoft 365 Business Standard	Prorate fees when purchase	8.34	10	83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/18/2021	8/17/2021	Monthly	6/18/2021	6/17/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	-4.84	10	-48.43	EUR	7d38057c-688d-4f25-d673-8eac527a9333	7/1/2021	7/17/2021	Monthly	6/18/2021	6/17/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	4.84	12	58.11	EUR	7d38057c-688d-4f25-d673-8eac527a9333	7/1/2021	7/17/2021	Monthly	6/18/2021	6/17/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	8.34	12	100.08	EUR	7d38057c-688d-4f25-d673-8eac527a9333	7/18/2021	8/17/2021	Monthly	6/18/2021	6/17/2022

Seat add/remove goes through the wipe & recreate processes. Price hasn't increased in July because of the annual contract.

NCE Scenario 8 – add/remove seats

Increase seat /w annual term and monthly payment and change of the Catalog Price

Product Name: Microsoft 365 Business Standard

Order Date: 2021-06-18

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 100.08 €

Quantity: 10 seats

Renew: On

Increase seat: 2021-07-01 (+ 2 seats)

From 2021-07-01 Total Quantity: 12 seats

July 2021- Unit Price: 101.00 €

June 2022 - Unit Price: 102.00 €

June 2022 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2022	Microsoft 365 Business Standard	renew	8.5	12	102	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2022	7/17/2022	One-Year commitment for monthly/yearly billing	8.5	12	Monthly	6/18/2022	6/17/2023	0074fd16-a230-4135-8927-28d31d89a1b2	

The updated unit price is prorated for 12 months during renewal.

LEGACY Scenario 8 – add/remove seats

Increase seat /w annual term and monthly payment and change of the Catalog Price

Product Name: Microsoft 365 Business Standard

Order Date: 2021-06-18

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 100.08 €

Quantity: 10 seats

Renew: On

Increase seat: 2021-07-01 (+ 2 seats)

From 2021-07-01 Total Quantity: 12 seats

July 2021- Unit Price: 101.00 €

June 2022 - Unit Price: 102.00 €

June 2022 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Microsoft 365 Business Standard	Prorate fees when purchase	8.5	12	102	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2022	7/17/2022	Monthly	6/18/2022	6/17/2023

The updated unit price is prorated for 12 months during renewal.

NCE Scenario 9 – add/remove seats

Renew and Decrease seat /w monthly term within and after the first 30 days
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: On

Decrease seat (Scheduled Changes): 2021-07-16 (- 2 seats)

From 2021-07-16 Total Quantity: 8 seats and

Decrease seat (Scheduled Changes): 2021-07-25 (- 2 seats)

From 2021-07-25 Total Quantity: 6 seats

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/15/2021	Microsoft 365 Business Standard	new	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	8/14/2021	One-Month commitment for monthly billing	10.08	10		7/15/2021	8/14/2021	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	
Contoso	7/16/2021	Microsoft 365 Business Standard	removeQuantity	10.08	10	-97.5	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/16/2021	8/14/2021	One-Month commitment for monthly billing	-9.75	10		7/15/2021	8/14/2021	8006dec0-5732-4931-94bd-ab97928731c3	
Contoso	7/16/2021	Microsoft 365 Business Standard	removeQuantity	10.08	8	78	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/16/2021	8/14/2021	One-Month commitment for monthly billing	9.75	8		7/15/2021	8/14/2021	8006dec0-5732-4931-94bd-ab97928731c3	

Seat addition/removal triggers the wipe and recreate processes. Seats can be reduced after 72 hours by submitting a support ticket.

LEGACY Scenario 9 – add/remove seats

Renew and Decrease seat /w monthly term within and after the first 30 days
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: On

Decrease seat (Scheduled Changes): 2021-07-25 (- 2 seats)

From 2021-07-25 Total Quantity: 8 seats and

Decrease seat (Scheduled Changes): 2021-08-13 (- 2 seats)

From 2021-08-13 Total Quantity: 6 seats and

Decrease seat (Scheduled Changes): 2021-08-14 (- 2 seats)

From 2021-08-14 Total Quantity: 4 seats and

Decrease seat (Scheduled Changes): 2021-08-15 (- 2 seats)

From 2021-08-15 Total Quantity: 2 seats

June/July/September 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 10 – add/remove seats

Renew and Decrease seat /w annual term and monthly payment within and after the first 30 days
 Product Name: Microsoft 365 Business Standard
 Purchase: 2021-07-15
 Term Duration: One Year (P1Y)
 Billing Plan: Monthly
 Unit Price: 100.08 €
 Quantity: 10 seats
 Renew: On

Decrease seat (Scheduled Changes): 2021-07-16 (- 2 seats)

From 2021-07-16 Total Quantity: 8 seats and

Decrease seat (Scheduled Changes): 2021-07-25 (- 2 seats)

From 2021-07-25 Total Quantity: 6 seats

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/15/2021	Microsoft 365 Business Standard	new	8.34	10	83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	8/14/2021	One-Year commitment for monthly/yearly billing	8.34	10	Monthly	7/15/2021	7/14/2022	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	
Contoso	7/16/2021	Microsoft 365 Business Standard	removeQuantity	8.34	10	-80.7	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/16/2021	8/14/2021	One-Year commitment for monthly/yearly billing	-8.07	10	Monthly	7/15/2021	7/14/2022	8006dec0-5732-4931-9abd-ab97928731c3	
Contoso	7/16/2021	Microsoft 365 Business Standard	removeQuantity	8.34	8	64.56	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/16/2021	8/14/2021	One-Year commitment for monthly/yearly billing	8.07	8	Monthly	7/15/2021	7/14/2022	8006dec0-5732-4931-9abd-ab97928731c3	

The unit price has been prorated over a 12-month period. Seat addition/removal triggers the wipe and recreate processes and seats can be reduced after 72 hours by submitting a support ticket.

LEGACY Scenario 10 – add/remove seats

Renew and Decrease seat /w annual term and monthly payment within and after the first 30 days
 Product Name: Microsoft 365 Business Standard
 Purchase: 2021-07-15
 Term Duration: One Year (P1Y)
 Billing Plan: Monthly
 Unit Price: 100.08 €
 Quantity: 10 seats
 Renew: On

Decrease seat (Scheduled Changes): 2021-07-25 (- 2 seats)

From 2021-07-25 Total Quantity: 8 seats and

Decrease seat (Scheduled Changes): 2021-08-13 (- 2 seats)

From 2021-08-13 Total Quantity: 6 seats and

Decrease seat (Scheduled Changes): 2021-08-14 (- 2 seats)

From 2021-08-14 Total Quantity: 4 seats and

Decrease seat (Scheduled Changes): 2021-08-15 (- 2 seats)

From 2021-08-15 Total Quantity: 2 seats

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Microsoft 365 Business Standard	Prorate fees when purchase	8.34	10	83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	8/14/2021	Monthly	7/15/2021	7/14/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorated	-8.34	10	-83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9333	7/15/2021	8/14/2021	Monthly	7/15/2021	7/14/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorated	2.69	10	26.90	EUR	7d38057c-688d-4f25-d673-8eac527a9333	7/15/2021	7/24/2021	Monthly	7/15/2021	7/14/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorated	5.64	8	45.12	EUR	7d38057c-688d-4f25-d673-8eac527a9333	7/25/2021	8/14/2021	Monthly	7/15/2021	7/14/2022

The unit price has been prorated for 12 months. Seat add/remove goes through the wipe & recreate processes.

LEGACY Scenario 10 – add/remove seats

Renew and Decrease seat /w annual term and monthly payment within and after the first 30 days

Product Name: Microsoft 365 Business Standard

Purchase: 2021-07-15

Term Duration: One Year (PTY)

Billing Plan: Monthly

Unit Price: 100.08 €

Quantity: 10 seats

Renew: On

Decrease seat (Scheduled Changes): 2021-07-25 (- 2 seats)

From 2021-07-25 Total Quantity: 8 seats

and

Decrease seat (Scheduled Changes): 2021-08-13 (- 2 seats)

From 2021-08-13 Total Quantity: 6 seats

and

Decrease seat (Scheduled Changes): 2021-08-14 (- 2 seats)

From 2021-08-14 Total Quantity: 4 seats

and

Decrease seat (Scheduled Changes): 2021-08-15 (- 2 seats)

From 2021-08-15 Total Quantity: 2 seats

August 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	-8.34	8	-66.72	EUR	7d38057c-688d-4f25-d673-8eac527a9333	7/15/2021	8/14/2021	Monthly	7/15/2021	7/14/2022
Contoso	Microsoft 365 Business Standard	Prorate fees when purchase	8.34	8	66.72	EUR	7d38057c-688d-4f25-d673-8eac527a9333	8/15/2021	9/14/2021	Monthly	7/15/2021	7/14/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	0.27	6	1.61	EUR	7d38057c-688d-4f25-d673-8eac527a9333	8/13/2021	8/13/2021	Monthly	7/15/2021	7/14/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	0.27	4	1.08	EUR	7d38057c-688d-4f25-d673-8eac527a9333	8/14/2021	8/14/2021	Monthly	7/15/2021	7/14/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	8.34	2	16.68	EUR	7d38057c-688d-4f25-d673-8eac527a9333	8/15/2021	9/14/2021	Monthly	7/15/2021	7/14/2022

LEGACY Scenario 10 – add/remove seats

Renew and Decrease seat /w annual term and monthly payment within and after the first 30 days

Product Name: Microsoft 365 Business Standard

Purchase: 2021-07-15

Term Duration: One Year (PTY)

Billing Plan: Monthly

Unit Price: 100.08 €

Quantity: 10 seats

Renew: On

Decrease seat (Scheduled Changes): 2021-07-25 (- 2 seats)

From 2021-07-25 Total Quantity: 8 seats

and

Decrease seat (Scheduled Changes): 2021-08-13 (- 2 seats)

From 2021-08-13 Total Quantity: 6 seats

and

Decrease seat (Scheduled Changes): 2021-08-14 (- 2 seats)

From 2021-08-14 Total Quantity: 4 seats

and

Decrease seat (Scheduled Changes): 2021-08-15 (- 2 seats)

From 2021-08-15 Total Quantity: 2 seats

September 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Microsoft 365 Business Standard	Prorate fees when purchase	8.34	2	16.68	EUR	7d38057c-688d-4f25-d673-8eac527a9333	9/15/2021	10/14/2021	Monthly	7/15/2021	7/14/2022

NCE Scenario 11 – add/remove seats

Renew and Decrease seat /w annual term and upfront payment within and after the first 30 days
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Year (P1Y)
 Billing Plan: Annual
 Unit Price: 100.08 €
 Quantity: 10 seats
 Renew: On

Decrease seat (Scheduled Changes): 2021-07-16 (- 2 seats)

From 2021-07-16 Total Quantity: 8 seats and

Decrease seat (Scheduled Changes): 2021-07-25 (- 2 seats)

From 2021-07-25 Total Quantity: 6 seats

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/15/2021	Microsoft 365 Business Standard	new	100.08	10	1000.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	7/14/2022	One-Year commitment for monthly/yearly billing	100.08	10		7/15/2021	7/14/2022	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	
Contoso	7/16/2021	Microsoft 365 Business Standard	removeQuantity	100.08	10	-998	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/16/2021	7/14/2022	One-Year commitment for monthly/yearly billing	-99.80	10		7/15/2021	7/14/2022	8006dec0-5732-4931-94bd-ab97928731c3	
Contoso	7/16/2021	Microsoft 365 Business Standard	removeQuantity	100.08	8	798.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/16/2021	7/14/2022	One-Year commitment for monthly/yearly billing	99.80	8		7/15/2021	7/14/2022	8006dec0-5732-4931-94bd-ab97928731c3	

Seat addition/removal triggers the wipe and recreate processes. Seats can be reduced after 72 hours by submitting a support ticket.

LEGACY Scenario 11 – add/remove seats

Renew and Decrease seat /w annual term and upfront payment within and after the first 30 days
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Year (P1Y)
 Billing Plan: Annual
 Unit Price: 100.08 €
 Quantity: 10 seats
 Renew: On

Decrease seat (Scheduled Changes): 2021-07-25 (- 2 seats)

From 2021-07-25 Total Quantity: 8 seats and

Decrease seat (Scheduled Changes): 2021-08-13 (- 2 seats)

From 2021-08-13 Total Quantity: 6 seats and

Decrease seat (Scheduled Changes): 2021-08-14 (- 2 seats)

From 2021-08-14 Total Quantity: 4 seats and

Decrease seat (Scheduled Changes): 2021-08-15 (- 2 seats)

From 2021-08-15 Total Quantity: 2 seats

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Microsoft 365 Business Standard	Prorate fees when purchase	100.08	10	1000.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	7/14/2022	Annually	7/15/2021	7/14/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	-100.08	10	-1000.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	7/14/2022	Annually	7/15/2021	7/14/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	2.74	10	27.42	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	7/24/2021	Annually	7/15/2021	7/14/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	97.34	8	778.70	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/25/2021	7/14/2022	Annually	7/15/2021	7/14/2022

Seat add/remove goes through the wipe & recreate processes.

LEGACY Scenario 11 – add/remove seats

Renew and Decrease seat /w annual term and upfront payment within and after the first 30 days

Product Name: Microsoft 365 Business Standard

Order Date: 2021-07-15

Term Duration: One Year (P1Y)

Billing Plan: Annual

Unit Price: 100.08 €

Quantity: 10 seats

Renew: On

Decrease seat (Scheduled Changes): 2021-07-25 (- 2 seats)

From 2021-07-25 Total Quantity: 8 seats

and

Decrease seat (Scheduled Changes): 2021-08-13 (- 2 seats)

From 2021-08-13 Total Quantity: 6 seats

and

Decrease seat (Scheduled Changes): 2021-08-14 (- 2 seats)

From 2021-08-14 Total Quantity: 4 seats

and

Decrease seat (Scheduled Changes): 2021-08-15 (- 2 seats)

From 2021-08-15 Total Quantity: 2 seats

August 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	-100.08	8	-800.64	EUR	7d38057c-688d-4f25-d673-8eac527a9333	7/15/2021	7/14/2022	Annually	8/15/2021	7/14/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	0.27	6	1.65	EUR	7d38057c-688d-4f25-d673-8eac527a9333	8/13/2021	8/13/2021	Annually	8/15/2021	7/14/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	0.27	4	1.08	EUR	7d38057c-688d-4f25-d673-8eac527a9333	8/14/2021	8/14/2021	Annually	8/15/2021	7/14/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	91.85	2	183.70	EUR	7d38057c-688d-4f25-d673-8eac527a9333	8/15/2021	7/14/2022	Annually	8/15/2021	7/14/2022

LEGACY Scenario 11 – add/remove seats

Renew and Decrease seat /w annual term and upfront payment within and after the first 30 days

Product Name: Microsoft 365 Business Standard

Order Date: 2021-07-15

Term Duration: One Year (P1Y)

Billing Plan: Annual

Unit Price: 100.08 €

Quantity: 10 seats

Renew: On

Decrease seat (Scheduled Changes): 2021-07-25 (- 2 seats)

From 2021-07-25 Total Quantity: 8 seats

and

Decrease seat (Scheduled Changes): 2021-08-13 (- 2 seats)

From 2021-08-13 Total Quantity: 6 seats

and

Decrease seat (Scheduled Changes): 2021-08-14 (- 2 seats)

From 2021-08-14 Total Quantity: 4 seats

and

Decrease seat (Scheduled Changes): 2021-08-15 (- 2 seats)

From 2021-08-15 Total Quantity: 2 seats

September 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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No transactions in September because of upfront payment.

Suspend subscription scenarios

NCE Scenario 12 – suspend subscription

Suspension
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: Off
 Suspension date: 2021-08-13

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/15/2021	Microsoft 365 Business Standard	new	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	8/14/2021	One-Month commitment for monthly billing	10.08	10		7/15/2021	8/14/2021	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	

Suspended subscriptions are not canceled but incur regular charges.

LEGACY Scenario 12 – suspend subscription

Suspension
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: Off
 Suspension date: 2021-08-13

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 12 – suspend subscription

Suspension
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: Off
 Suspension date: 2021-08-13

August 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
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No transactions because the renewal is OFF.

NCE Scenario 13 – suspend subscription

Suspension
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: Off
 Suspension date: 2021-08-14

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/15/2021	Microsoft 365 Business Standard	new	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	8/14/2021	One-Month commitment for monthly billing	10.08	10		7/15/2021	8/14/2021	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	

Suspended subscriptions are not canceled but incur regular charges.

LEGACY Scenario 13 – suspend subscription

Suspension

Product Name: Microsoft 365 Business Standard

Order Date: 2021-07-15

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 10.08 €

Quantity: 10 seats

Renew: Off

Suspension date: 2021-08-14

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
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No transactions because the renewal is OFF.

NCE Scenario 13 – suspend subscription

Suspension

Product Name: Microsoft 365 Business Standard

Order Date: 2021-07-15

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 10.08 €

Quantity: 10 seats

Renew: Off

Suspension date: 2021-08-14

August 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
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No transactions because the renewal is OFF.

NCE Scenario 14 – suspend subscription

Suspension
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Year (P1Y)
 Billing Plan: Monthly
 Unit Price: 100.08 €
 Quantity: 10 seats
 Renew: Off
 Suspension date: 2021-08-14

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/15/2021	Microsoft 365 Business Standard	new	8.34	10	83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	8/14/2021	One-Year commitment for monthly/yearly billing	8.34	10	Monthly	7/15/2021	7/14/2022	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	

Suspended subscriptions are not canceled but incur regular charges.

LEGACY Scenario 14 – suspend subscription

Suspension
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Year (P1Y)
 Billing Plan: Monthly
 Unit Price: 100.08 €
 Quantity: 10 seats
 Renew: Off
 Suspension date: 2021-08-14

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Microsoft 365 Business Standard	Prorate fees when purchase	8.34	10	83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	8/14/2021	Monthly	7/15/2021	7/14/2022

Suspended subscriptions are not canceled but incur regular charges.

NCE Scenario 14 – suspend subscription

Suspension
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Year (P1Y)
 Billing Plan: Monthly
 Unit Price: 100.08 €
 Quantity: 10 seats
 Renew: Off
 Suspension date: 2021-08-14

August 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	8/15/2021	Microsoft 365 Business Standard	cycleCharge	8.34	10	83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	8/15/2021	9/14/2021	One-Year commitment for monthly/yearly billing	8.34	10		7/15/2021	7/14/2022	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	

Suspended subscriptions are not canceled but incur regular charges.

LEGACY Scenario 14 – suspend subscription

Suspension
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Year (P1Y)
 Billing Plan: Monthly
 Unit Price: 100.08 €
 Quantity: 10 seats
 Renew: Off
 Suspension date: 2021-08-14

August 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Microsoft 365 Business Standard	Prorate fees when purchase	-8.34	10	-83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	8/14/2021	Monthly	7/15/2021	7/14/2022

In legacy CSP, suspended subscriptions are canceled.

Cancel subscription scenarios

How do we prorate refunds if you cancel within the first 72 hours of purchase?

Let's say you buy a new Microsoft 365 Business Standard subscription with 10 licenses (seats) on July 15 for EUR 10.08 per month unit price with a monthly term and monthly billing. Later on July 17, you cancel the subscription. The following billing line will appear on the recon file for the July billing cycle that you'll receive in August.

Order date	Charge type	Unit price	Total	Charge start date	Charge end date	Effective unit price	Billable quantity	Total
7/15/2021	new	10.08	100.8	6/22/2021	8/14/2021	10.08	10	100.8
7/17/2021	cancellation	10.08	-94.2	6/22/2021	8/14/2021	-9.42	10	94.2

When you cancel a subscription within the first 72 hours, we prorate the refund based on the unused portion of the charge cycle. The first transaction shows the cost of the transaction if you used it throughout the month.

The monthly unit price is 10.08 EUR, translating into a daily effective unit price of **0.32 (10.08/31)**. However, the actual charges are calculated using the following formula based on the Effective Unit Price:

Effective Unit Price = Unit Price / the total number of days in the charge cycle

Note that the billable days in a monthly charge cycle depend on the number of days in the purchase month. For example, the billable days are 30 for June but 31 for August. The billable days in an annual charge cycle are 365 or 366 (for a leap year).

Total = Effective Unit Price * the number of billing days in the charge cycle * Billable quantity.

The second transaction shows a refund for **29 days from July 17, 2021 to August 14, 2021**, and the amount in the charge cycle is $(0.32 \times 29 \times 10) = 94.2$.

NCE Scenario 15 – cancel subscription

Cancellation
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: Off
 Cancellation date: 2021-07-17

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/15/2021	Microsoft 365 Business Standard	new	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	8/14/2021	One-Month commitment for monthly billing	10.08	10		7/15/2021	8/14/2021	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	
Contoso	7/17/2021	Microsoft 365 Business Standard	cancellmm ediate	10.08	10	-94.2	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/17/2021	8/14/2021	One-Month commitment for monthly billing	-9.42	10		7/15/2021	8/14/2021	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	

NCE Scenario 15 – cancel subscription

Cancellation
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 10 seats
 Renew: Off
 Cancellation date: 2021-08-13

August 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	8/13/2021	Microsoft 365 Business Standard	cancellmm ediate	10.08	10	-6.5	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	8/14/2021	One-Month commitment for monthly billing	-0.65	10		7/15/2021	8/14/2021	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	

Subscriptions canceled within 30 days of purchase are refunded on a prorated basis.

NCE Scenario 16 – cancel subscription

Cancellation

Product Name: Microsoft 365 Business Standard

Order Date: 2021-07-15

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 10.08 €

Quantity: 10 seats

Renew: Off

Cancellation date: 2021-08-14

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/15/2021	Microsoft 365 Business Standard	new	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	8/14/2021	One-Month commitment for monthly billing	10.08	10		7/15/2021	8/14/2021	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	

Canceled transactions will show up in August because the cancellation date falls into the next cycle. Subscriptions canceled within 30 days of purchase are refunded on a prorated basis.

NCE Scenario 16 – cancel subscription

Cancellation

Product Name: Microsoft 365 Business Standard

Order Date: 2021-07-15

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 10.08 €

Quantity: 10 seats

Renew: Off

Cancellation date: 2021-08-14

August 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	8/14/2021	Microsoft 365 Business Standard	cancellation mediate	10.08	10	-3.2	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	8/14/2021	One-Month commitment for monthly billing	-0.32	10		7/15/2021	8/14/2021	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	

Subscriptions canceled within 30 days of purchase are refunded on a prorated basis.

NCE Scenario 17 – cancel subscription

Cancellation
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Year (P1Y)
 Billing Plan: Monthly
 Unit Price: 100.08 €
 Quantity: 10 seats
 Renew: Off
 Cancellation date: 2021-07-17

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/15/2021	Microsoft 365 Business Standard	new	8.34	10	83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/15/2021	8/14/2021	One-Year commitment for monthly/yearly billing	8.34	10	Monthly	7/15/2021	7/14/2022	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	
Contoso	7/17/2021	Microsoft 365 Business Standard	cancel immediate	8.34	10	-78	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/17/2021	8/14/2021	One-Year commitment for monthly/yearly billing	-7.8	10	Monthly	7/15/2021	7/14/2022	78e195aa-3f9a-4ae5-9ba0-4c8696133e5b	

LEGACY Scenario 17 – cancel subscription

Cancellation
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-07-15
 Term Duration: One Year (P1Y)
 Billing Plan: Monthly
 Unit Price: 100.08 €
 Quantity: 10 seats
 Renew: Off
 Cancellation date: 2021-08-14

June/July/August 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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In legacy, canceling a subscription is not an option. The equivalent is suspending a subscription.

Trial subscription scenarios

How to reconcile when you convert a trial version to a paid subscription?

Let's say you buy a new Dynamics 365 Guides subscription with 25 licenses (seats) on June 25 as a free trial. Usually, trial products are valid for a month. Later on the same day, you upgrade it to a paid version for EUR 52.61 per month unit price. The following billing line will appear on the recon file for the June billing cycle that you'll receive in July.

Order date	Charge type	Unit price	Total	Charge start date	Charge end date	Effective unit price	Billable quantity	Total	Product qualifier
6/25/2021	new	0	0	6/25/2021	7/24/2021	0	25	0	["Trial"]
6/25/2021	convert	0	0	6/25/2021	7/24/2021	0	25	0	["Trial"]
6/25/2021	convert	52.61	1315.25	6/25/2021	7/24/2021	52.61	25	131.25	

The process of converting a trial product to a paid product is similar to an upgrade.

The first line item shows zero charges for the Dynamics subscription as a trial product. You can verify it using the "ProductQualifier" attribute. On the same day, you converted it to a paid version. If it wasn't a trial version, the second line should show the refund. However, because it's a trial version, the cost and refund are both zero.

The third line shows the charges for the paid version for the remainder of the charge cycle. The prorated calculation always follows this logic:

Effective Unit Price = Unit Price / the total number of days in the charge cycle.

Note that the billable days in a monthly charge cycle depend on the number of days in the purchase month. For example, the billable days are 30 for June but 31 for August. The billable days in an annual charge cycle are 365 or 366 (for a leap year).

Total = Effective Unit Price x the number of billing days in the charge cycle x billable quantity

Therefore, the paid subscription cost in the charge cycle is $1.73 \times 30 \times 25 = 1315.25$.

NCE Scenario 18 – trial subscription

Trial without Scheduled Changes
 Product Name: Dynamics 365 Guides
 Order Date: 2021-06-25
 Quantity: 25 seats
 Unit Price: 0.00 €
 Renew: On

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/25/2021	Dynamics 365 Guides	new	0	25	0	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	One-Month commitment for trial	0	25	Monthly	6/25/2021	7/24/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	["Trial"]

We have assumed that the trial is valid for a month from the purchase date.

LEGACY Scenario 18 – trial subscription

Trial without Scheduled Changes
 Product Name: Dynamics 365 Guides
 Order Date: 2021-06-25
 Quantity: 25 seats
 Unit Price: 0.00 €
 Renew: On

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Dynamics 365 Guides	Prorate fees when purchase	0	25	0	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	Monthly	6/18/2021	7/17/2021

We have assumed that the trial is valid for a month from the purchase date.

NCE Scenario 18 – trial subscription

Trial without Scheduled Changes
 Product Name: Dynamics 365 Guides
 Order Date: 2021-06-25
 Quantity: 25 seats
 Unit Price: 0.00 €
 Renew: On

Auto converted to paid
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Quantity: 25 seats
 Unit Price: 52.61 €

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/25/2021	Dynamics 365 Guides	renew	52.16	25	1304	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/25/2021	8/24/2021	One-Month commitment for monthly billing	52.16	25		7/25/2021	8/24/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	

Auto converted to paid subscription.

LEGACY Scenario 18 – trial subscription

Trial without Scheduled Changes
 Product Name: Dynamics 365 Guides
 Order Date: 2021-06-25
 Quantity: 25 seats
 Unit Price: 0.00 €
 Renew: On

Auto converted to paid
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Quantity: 25 seats
 Unit Price: 52.61 €

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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No auto-conversion from trial to paid.

NCE Scenario 19 – trial subscription

Trial with conversion
Product Name: Dynamics 365 Guides
Order Date: 2021-06-25
Quantity: 25 seats
Unit Price: 0.00 €
Renew: On

Scheduled Changes
Term Duration: One Month (P1M)
Billing Plan: Monthly
Quantity: 5 seats (decrease of 20 seats)
Unit Price: 52.61 €

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/25/2021	Dynamics 365 Guides	new	0	25	0	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	One-Month commitment for trial	0	25		6/25/2021	7/24/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	["Trial"]
Contoso	6/25/2021	Dynamics 365 Guides	convert	0	25	0	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	One-Month commitment for trial	0	25		6/25/2021	7/24/2021	23396992-9421-4db8-95ed-1f9be843f7d0	["Trial"]
Contoso	6/25/2021	Dynamics 365 Guides	convert	52.16	25	1304	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	One-Month commitment for monthly billing	52.16	25		6/25/2021	7/24/2021	23396992-9421-4db8-95ed-1f9be843f7d0	
Contoso	6/25/2021	Dynamics 365 Guides	removeQuantity	52.16	25	-1304	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	One-Month commitment for monthly billing	-52.16	25		6/25/2021	7/24/2021	23396992-9421-4db8-95ed-1f9be843f7d0	
Contoso	6/25/2021	Dynamics 365 Guides	removeQuantity	52.16	5	260.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	One-Month commitment for monthly billing	52.16	5		6/25/2021	7/24/2021	23396992-9421-4db8-95ed-1f9be843f7d0	

Trial to paid conversions go through the wipe & recreate processes. The annual unit price has been prorated for 12 months. Seat add/remove goes through the wipe & recreate processes.

LEGACY Scenario 19 – trial subscription

Trial with conversion
Product Name: Dynamics 365 Guides
Order Date: 2021-06-25
Quantity: 25 seats
Unit Price: 0.00 €
Renew: On

Scheduled Changes
Term Duration: One Month (P1M)
Billing Plan: Monthly
Quantity: 5 seats (decrease of 20 seats)
Unit Price: 52.61 €

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported for paid subscription.

NCE Scenario 19 – trial subscription

Trial with conversion
Product Name: Dynamics 365 Guides
Order Date: 2021-06-25
Quantity: 25 seats
Unit Price: 0.00 €
Renew: On

Scheduled Changes
Term Duration: One Month (P1M)
Billing Plan: Monthly
Quantity: 5 seats (decrease of 20 seats)
Unit Price: 52.61 €

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/25/2021	Dynamics 365 Guides	renew	52.16	5	260.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/25/2021	8/24/2021	One-Month commitment for monthly billing	52.16	5		7/25/2021	8/24/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	

LEGACY Scenario 19 – trial subscription

Trial with conversion
Product Name: Dynamics 365 Guides
Order Date: 2021-06-25
Quantity: 25 seats
Unit Price: 0.00 €
Renew: On

Scheduled Changes
Term Duration: One Month (P1M)
Billing Plan: Monthly
Quantity: 5 seats (decrease of 20 seats)
Unit Price: 52.61 €

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 20 – trial subscription

Trial with conversion
Product Name: Dynamics 365 Guides
Order Date: 2021-06-25
Quantity: 25 seats
Unit Price: 0.00 €
Renew: On

Scheduled Changes
Term Duration: One Year (P1Y)
Billing Plan: Monthly
Quantity: 5 seats (decrease of 20 seats)
Unit Price: 526.08 €

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/25/2021	Dynamics 365 Guides	new	0	25	0	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	One-Month commitment for trial	0	25		6/25/2021	7/24/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	["Trial"]
Contoso	6/25/2021	Dynamics 365 Guides	convert	0	25	0	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	One-Month commitment for trial	0	25		6/25/2021	7/24/2021	23396992-9421-4db8-95ed-1f9be843f7d0	["Trial"]
Contoso	6/25/2021	Dynamics 365 Guides	convert	43.84	25	1096	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	One-Year commitment for monthly/ yearly billing	43.84	25	Monthly	6/25/2021	6/24/2022	23396992-9421-4db8-95ed-1f9be843f7d0	
Contoso	6/25/2021	Dynamics 365 Guides	removeQuantity	43.84	25	-1096	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	One-Year commitment for monthly/ yearly billing	-43.84	25	Monthly	6/25/2021	6/24/2022	23396992-9421-4db8-95ed-1f9be843f7d0	
Contoso	6/25/2021	Dynamics 365 Guides	removeQuantity	43.84	5	219.2	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	One-Year commitment for monthly/ yearly billing	43.84	5	Monthly	6/25/2021	6/24/2022	23396992-9421-4db8-95ed-1f9be843f7d0	

Trial to paid conversions go through the wipe & recreate processes. The annual unit price has been prorated for 12 months. Seat add/remove goes through the wipe & recreate processes.

LEGACY Scenario 20 – trial subscription

Trial with conversion
Product Name: Dynamics 365 Guides
Order Date: 2021-06-25
Quantity: 25 seats
Unit Price: 0.00 €
Renew: On

Scheduled Changes
Term Duration: One Year (P1Y)
Billing Plan: Monthly
Quantity: 5 seats (decrease of 20 seats)
Unit Price: 526.08 €

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Dynamics 365 Guides	Cycle instance prorate	43.84	25	1096	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	Monthly	6/25/2021	6/24/2022
Contoso	Dynamics 365 Guides	Cycle instance prorate	-43.84	25	-1096	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	Monthly	6/25/2021	6/24/2022
Contoso	Dynamics 365 Guides	Cycle instance prorate	43.84	5	219.2	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	Monthly	6/25/2021	6/24/2022

Trial to paid conversions go through the wipe & recreate processes. The annual unit price has been prorated for 12 months. Seat add/remove goes through the wipe & recreate processes.

NCE Scenario 20 – trial subscription

Trial with conversion
Product Name: Dynamics 365 Guides
Order Date: 2021-06-25
Quantity: 25 seats
Unit Price: 0.00 €
Renew: On

Scheduled Changes
Term Duration: One Month (P1M)
Billing Plan: Monthly
Quantity: 5 seats (decrease of 20 seats)
Unit Price: 52.61 €

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/25/2021	Dynamics 365 Guides	renew	43.84	5	219.2	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/25/2021	8/24/2021	One-Month commitment for monthly billing	43.84	5	One-Year commitment for monthly/early billing	7/25/2021	6/24/2022	361e51df-316f-4bab-8a87-8b67a32b5fe0	

Annual unit price has been prorated for 12 months.

LEGACY Scenario 20 – trial subscription

Trial with conversion
Product Name: Dynamics 365 Guides
Order Date: 2021-06-25
Quantity: 25 seats
Unit Price: 0.00 €
Renew: On

Scheduled Changes
Term Duration: One Month (P1M)
Billing Plan: Monthly
Quantity: 5 seats (decrease of 20 seats)
Unit Price: 52.61 €

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Dynamics 365 Guides	Prorate fees when purchase	43.84	5	219.2	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/25/2021	8/24/2021	Monthly	7/25/2021	6/24/2022

Annual unit price has been prorated for 12 months.

NCE Scenario 21 – trial subscription

Trial with conversion
Product Name: Dynamics 365 Guides
Order Date: 2021-06-25
Quantity: 25 seats
Unit Price: 0.00 €
Renew: On

Scheduled Changes (2021-07-24)

Term Duration: One Year (P1Y)

Billing Plan: Annual

Quantity: 25 seats

Unit Price: 526.08 €

Scheduled Changes (2021-07-25)

Quantity: 5 seats. (decrease of 20 seats)

Scheduled Changes (2021-07-26)

Quantity: 4 seats (total decrease of 21 seats)

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/25/2021	Dynamics 365 Guides	new	0	25	0	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	One-Month commitment for trial	0	25		6/25/2021	7/24/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	["Trial"]
Contoso	7/24/2021	Dynamics 365 Guides	convert	0	25	0	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/24/2021	7/24/2021	One-Month commitment for trial	0	25		6/25/2021	7/24/2021	23396992-9421-4db8-95ed-1f9be843f7d0	["Trial"]
Contoso	7/24/2021	Dynamics 365 Guides	convert	526.08	25	13152	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/24/2021	7/23/2022	One-Year commitment for monthly/yearly billing	526.08	25		7/24/2021	6/23/2022	23396992-9421-4db8-95ed-1f9be843f7d0	

The seat removal will appear in the next cycle because the removal date falls into the next billing period. Trial to paid conversion triggers wipe and recreate processes.

LEGACY Scenario 21 – trial subscription

Trial with conversion
Product Name: Dynamics 365 Guides
Order Date: 2021-06-25
Quantity: 25 seats
Unit Price: 0.00 €
Renew: On

Scheduled Changes (2021-07-24)

Term Duration: One Year (P1Y)

Billing Plan: Annual

Quantity: 25 seats

Unit Price: 526.08 €

Scheduled Changes (2021-07-25)

Quantity: 5 seats. (decrease of 20 seats)

Scheduled Changes (2021-07-26)

Quantity: 4 seats (total decrease of 21 seats)

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Dynamics 365 Guides	Prorate fees when purchase	0	25	0	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	Monthly	6/25/2021	7/24/2021
Contoso	Dynamics 365 Guides	Prorate fees when purchase	526.08	25	13152	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	6/23/2022	Annually	7/24/2021	6/23/2022

NCE Scenario 21 – trial subscription

Trial with conversion
Product Name: Dynamics 365 Guides
Order Date: 2021-06-25
Quantity: 25 seats
Unit Price: 0.00 €
Renew: On

Scheduled Changes (2021-07-24)

Term Duration: One Year (P1Y)

Billing Plan: Annual

Quantity: 25 seats

Unit Price: 526.08 €

Scheduled Changes (2021-07-25)

Quantity: 5 seats. (decrease of 20 seats)

Scheduled Changes (2021-07-26)

Quantity: 4 seats (total decrease of 21 seats)

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/25/2021	Dynamics 365 Guides	removeQuantity	526.08	25	-12071	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/25/2021	6/24/2022	One-Year commitment for monthly/yearly billing	-482.84	25		6/25/2021	6/24/2022	361e51df-316f-4bab-8a87-8b67a32b5fe0	
Contoso	7/25/2021	Dynamics 365 Guides	removeQuantity	526.08	5	2414.2	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/25/2021	6/24/2022	One-Year commitment for monthly/yearly billing	482.84	5		6/25/2021	6/24/2022	361e51df-316f-4bab-8a87-8b67a32b5fe0	
Contoso	7/26/2021	Dynamics 365 Guides	removeQuantity	526.08	5	-2406.95	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/26/2021	6/24/2022	One-Year commitment for monthly/yearly billing	-481.39	5		6/25/2021	6/24/2022	2c505562-6801-40fc-916f-8fc9bb8ad126	
Contoso	7/26/2021	Dynamics 365 Guides	removeQuantity	526.08	4	1925.56	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/26/2021	6/24/2022	One-Year commitment for monthly/yearly billing	481.39	4		6/25/2021	6/24/2022	2c505562-6801-40fc-916f-8fc9bb8ad126	

Seat addition/removal triggers the wipe and recreate processes.

LEGACY Scenario 21 – trial subscription

Trial with conversion
Product Name: Dynamics 365 Guides
Order Date: 2021-06-25
Quantity: 25 seats
Unit Price: 0.00 €
Renew: On

Scheduled Changes (2021-07-24)

Term Duration: One Year (P1Y)

Billing Plan: Annual

Quantity: 25 seats

Unit Price: 526.08 €

Scheduled Changes (2021-07-25)

Quantity: 5 seats. (decrease of 20 seats)

Scheduled Changes (2021-07-26)

Quantity: 4 seats (total decrease of 21 seats)

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Dynamics 365 Guides	Cycle instance prorata	-526.08	25	-13152	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	6/24/2022	Annually	6/25/2021	6/24/2022
Contoso	Dynamics 365 Guides	Cycle instance prorata	43.24	25	1080.99	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/24/2021	Annually	6/25/2021	6/24/2022
Contoso	Dynamics 365 Guides	Cycle instance prorata	1.44	5	7.21	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/25/2021	7/26/2021	Annually	6/25/2021	6/24/2022
Contoso	Dynamics 365 Guides	Cycle instance prorata	481.39	4	1925.56	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/26/2021	6/24/2022	Annually	6/25/2021	6/24/2022

Seat add/remove goes through the wipe & recreate processes.

Add-on subscription scenarios

NCE Scenario 22 – Add-On subscription

Add-on with quantity not aligned with the base product

Base Product: No prerequisites

Order Date: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 15 €

Quantity: 10 seats

Renew: Off

Add-on

Product Name: Power Apps Portals login capacity add-on Tier 3 (50 unit min)

Order Date: 2021-06-20

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 531 €

Quantity: 50 seats (Min Licenses)

Renew: On

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/20/2021	Power Apps Portals login capacity add-on Tier 3	new	44.25	50	2212.5	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/20/2021	7/19/2021	One-Year commitment for monthly/yearly billing	44.25	50	Monthly	6/20/2021	6/19/2022	361e51df-316f-4bab-8a87-8b67a32b5fe0	["AddOn"]

Since the Add-On purchases are not dependent on prerequisites, they're not linked to the base product. However, the unit price is prorated for 12 months.

LEGACY Scenario 22 – Add-On subscription

Add-on with quantity not aligned with the base product

Base Product: No prerequisites

Order Date: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 15 €

Quantity: 10 seats

Renew: Off

Add-on

Product Name: Power Apps Portals login capacity add-on Tier 3 (50 unit min)

Order Date: 2021-06-20

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 531 €

Quantity: 50 seats (Min Licenses)

Renew: On

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Dynamics 365 Guides	Prorate fees when purchase	44.25	50	2212.5	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/20/2021	7/19/2021	Monthly	6/20/2021	6/19/2022

NCE Scenario 23 – Add-On subscription

Add-on with quantity and Term Duration not aligned with the base product

Base Product: No prerequisites

Order Date: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 15 €

Quantity: 10 seats

Renew: Off

Add-on

Product Name: Power Apps Portals login capacity add-on Tier 3 (50 unit min)

Order Date: 2021-06-20

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 531 €

Quantity: 50 seats (Min Licenses)

Renew: On

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/20/2021	Power Apps Portals login capacity add-on Tier 3	new	44.25	50	2212.5	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/20/2021	6/19/2022	One-Year commitment for monthly/yearly billing	44.25	50	Monthly	6/20/2021	6/19/2022	361e51df-316f-4bab-8a87-8b67a32b5fe0	["AddOn"]

Since the Add-On purchases are not dependent on prerequisites, they're not linked to the base product. However, the unit price is prorated for 12 months.

LEGACY Scenario 23 – Add-On subscription

Add-on with quantity and Term Duration not aligned with the base product

Base Product: No prerequisites

Order Date: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 15 €

Quantity: 10 seats

Renew: Off

Add-on

Product Name: Power Apps Portals login capacity add-on Tier 3 (50 unit min)

Order Date: 2021-06-20

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 531 €

Quantity: 50 seats (Min Licenses)

Renew: On

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Dynamics 365 Guides	Prorate fees when purchase	44.25	50	2212.5	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/20/2021	7/19/2021	Monthly	6/20/2021	6/19/2022

NCE Scenario 24 – Add-On subscription

Add-on with quantity and Term Duration not aligned with the base product

Base Product: No prerequisites

Order Date: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 15 €

Quantity: 10 seats

Renew: Off

Add-on

Product Name: Power Apps Portals login capacity add-on Tier 3 (50 unit min)

Order Date: 2021-06-20

Term Duration: One Year (P1Y)

Billing Plan: Annual

Unit Price: 531 €

Quantity: 50 seats (Min Licenses)

Renew: On

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/20/2021	Power Apps Portals login capacity add-on Tier 3	new	531	50	26550	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/20/2021	6/19/2022	One-Year commitment for monthly/yearly billing	531.00	50		6/20/2021	6/19/2022	361e51df-316f-4bab-8a87-8b67a32b5fe0	["AddOn"]

Since the Add-On purchases are not dependent on prerequisites, they're not linked to the base product. However, the unit price is prorated for 12 months.

LEGACY Scenario 24 – Add-On subscription

Add-on with quantity and Term Duration not aligned with the base product

Base Product: No prerequisites

Order Date: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 15 €

Quantity: 10 seats

Renew: Off

Add-on

Product Name: Power Apps Portals login capacity add-on Tier 3 (50 unit min)

Order Date: 2021-06-20

Term Duration: One Year (P1Y)

Billing Plan: Annual

Unit Price: 531 €

Quantity: 50 seats (Min Licenses)

Renew: On

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Power Apps Portals login capacity add-on Tier 3	Prorate fees when purchase	531	50	26550	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/20/2021	6/19/2022	Annually	6/20/2021	6/19/2022

NCE Scenario 25 – Add-On subscription

Add-on with Increase seats and Base Product stopped

Base Product: No prerequisites

Order Date: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 15 €

Quantity: 10 seats

Renew: Off

Add-on

Product Name: Power Apps Portals login capacity add-on Tier 3 (50 unit min)

Order Date: 2021-06-20

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 531 €

Quantity: 50 seats (Min Licenses)

Renew: On

Scheduled Changes (2021-07-24)

Quantity: 55 seats. (increase of 5 seats)

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/20/2021	Power Apps Portals login capacity add-on Tier 3	new	44.25	50	2212.5	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/20/2021	7/19/2021	One-Year commitment for monthly/yearly billing	44.25	50	Monthly	6/20/2021	6/19/2022	361e51df-316f-4bab-8a87-8b67a32b5fe0	["AddOn"]

Since the Add-On purchases are not dependent on prerequisites, they're not linked to the base product. However, the unit price is prorated for 12 months.

LEGACY Scenario 25 – Add-On subscription

Add-on with Increase seats and Base Product stopped

Base Product: No prerequisites

Order Date: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 15 €

Quantity: 10 seats

Renew: Off

Add-on

Product Name: Power Apps Portals login capacity add-on Tier 3 (50 unit min)

Order Date: 2021-06-20

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 531 €

Quantity: 50 seats (Min Licenses)

Renew: On

Scheduled Changes (2021-07-24)

Quantity: 55 seats. (increase of 5 seats)

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Power Apps Portals login capacity add-on Tier 3	Prorate fees when purchase	44.25	50	2212.5	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/20/2021	7/19/2021	Monthly	6/20/2021	6/19/2022

NCE Scenario 25 – Add-On subscription

Add-on with Increase seats and Base Product stopped

Base Product: No prerequisites

Order Date: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 15 €

Quantity: 10 seats

Renew: Off

Add-on

Product Name: Power Apps Portals login capacity add-on Tier 3 (50- unit min)

Order Date: 2021-06-20

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 531 €

Quantity: 50 seats (Min Licenses)

Renew: On

Scheduled Changes (2021-07-24)

Quantity: 55 seats. (increase of 5 seats)

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/20/2021	Power Apps Portals login capacity add-on Tier 3	new	44.25	50	2212.5	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/20/2021	8/19/2021	One-Year commitment for monthly/yearly billing	44.25	50	Monthly	6/20/2021	6/19/2022	361e51df-316f-4bab-8a87-8b67a32b5fe0	["AddOn"]
Contoso	7/24/2021	Power Apps Portals login capacity add-on Tier 3	addQuantity	44.25	50	-1927	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/24/2021	8/19/2021	One-Year commitment for monthly/yearly billing	-38.54	50	Monthly	6/20/2021	6/19/2022	08f9fe3f-37b6-4685-bedc-54bfdd97be3	["AddOn"]
Contoso	7/24/2021	Power Apps Portals login capacity add-on Tier 3	addQuantity	44.25	55	2119.7	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/24/2021	8/19/2021	One-Year commitment for monthly/yearly billing	38.54	55	Monthly	6/20/2021	6/19/2022	08f9fe3f-37b6-4685-bedc-54bfdd97be3	["AddOn"]

Add-On purchases are not linked to the base product because they are not dependent on prerequisites. The unit price is prorated over a 12-month period. Seat addition/removal triggers the wipe and recreate processes.

LEGACY Scenario 25 – Add-On subscription

Add-on with Increase seats and Base Product stopped

Base Product: No prerequisites

Order Date: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 15 €

Quantity: 10 seats

Renew: Off

Add-on

Product Name: Power Apps Portals login capacity add-on Tier 3 (50 unit min)

Order Date: 2021-06-20

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 531 €

Quantity: 50 seats (Min Licenses)

Renew: On

Scheduled Changes (2021-07-24)

Quantity: 55 seats. (increase of 5 seats)

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Power Apps Portals login capacity add-on Tier 3	Prorate fees when purchase	-44.25	50	-2212.5	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/20/2021	7/19/2021	Monthly	6/20/2021	6/19/2022
Contoso	Power Apps Portals login capacity add-on Tier 3	Prorate fees when purchase	44.25	50	2212.5	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/20/2021	8/19/2021	Monthly	6/20/2021	6/19/2022
Contoso	Power Apps Portals login capacity add-on Tier 3	Prorate fees when purchase	5.71	50	285.48	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/20/2021	7/24/2021	Monthly	6/20/2021	6/19/2022
Contoso	Power Apps Portals login capacity add-on Tier 3	Prorate fees when purchase	38.54	55	2119.70	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/25/2021	8/14/2021	Monthly	6/20/2021	6/19/2022

The unit price is prorated for 12 months. Seat add/remove goes through the wipe & recreate processes.

Upgrade subscription scenarios

How should you reconcile and link upgraded transactions?

There are two types of upgrades—Full (upgrade the subscription to an advanced one) and partial (upgrade a few licenses to an advanced subscription). Following the [upgrading, you can correlate transactions that have occurred during the upgrade](#) in your recon file.

Full upgrade:

Let's say you buy a new Microsoft 365 Business Standard subscription with 300 licenses (seats) on June 18 for EUR 10.08 per month unit price with a monthly term and monthly billing. Later on June 25, you upgrade the subscription to Office 365 E1 for EUR 6.43 per month unit price. The following billing line will appear on the recon file for the June billing cycle that you'll receive in July.

Order date	Charge type	Unit price	Total	Charge start date	Charge end date	Effective unit price	Billable quantity	Total
6/18/2021	new	10.08	3024	6/18/2021	7/17/2021	10.08	300	3024
6/25/2021	convert	10.08	-2316	6/25/2021	7/17/2021	-7.72	300	-2316
6/25/2021	convert	6.43	1476	6/25/2021	7/17/2021	4.92	300	1476

The first line item shows charges for the Microsoft 365 Business Standard subscription if you used it for the whole month. The second line shows the prorated refund of the same subscription because you haven't used it but upgraded to a higher version. The prorated calculation always follows this logic:

Effective Unit Price = Unit Price / the total number of days in the charge cycle

Note that the billable days in a monthly charge cycle depend on the number of days in the purchase month. For example, the billable days are 30 for June but 31 for August. The billable days in an annual charge cycle are 365 or 366 (for a leap year).

Total = Effective Unit Price $\times$ the number of billing days in the charge cycle $\times$ billable quantity

Therefore, the refund amount is $0.32 \times 24 \times 300 = 2306.0$.

The third line shows the cost of the upgraded subscription for the remainder of the charge cycle, and the amount in the charge cycle is $0.2 \times 24 \times 300 = 1486.0$

Partial upgrade:

Let's say you buy a new Microsoft 365 Business Standard subscription with 300 licenses (seats) on June 18 for EUR 10.08 per month unit price with a monthly term and monthly billing. Later on June 25, you upgraded only 100 seats or licenses to Office 365 E1 for EUR 6.43 per month unit price. The following billing line will appear on the recon file for the June billing cycle that you'll receive in July.

Order date	Charge type	Unit price	Total	Charge start date	Charge end date	Effective unit price	Billable quantity	Total
6/18/2021	new	10.08	3024	6/18/2021	7/17/2021	10.08	300	3024
6/25/2021	convert	10.08	-772	6/25/2021	7/17/2021	-7.72	100	-772
6/25/2021	convert	6.43	492	6/25/2021	7/17/2021	4.92	100	492

The first line item shows charges for the Microsoft 365 Business Standard subscription if you used it for the whole month. You've upgraded 100 seats to a higher version on June 25. The second line shows the prorated refund of only 100 seats or licenses. The prorated calculation always follows this logic:

Effective Unit Price = Unit Price / the total number of days in the charge cycle

Note that the billable days in a monthly charge cycle depend on the number of days in the purchase month. For example, the billable days are 30 for June but 31 for August. The billable days in an annual charge cycle are 365 or 366 (for a leap year).

Total = Effective Unit Price x the number of billing days in the charge cycle x billable quantity

Therefore, the refund amount is $0.32 \times 24 \times 100 = 772.0$.

The third line shows the cost of the upgraded subscription for the remainder of the charge cycle, and the amount in the charge cycle is $0.2 \times 24 \times 100 = 492.0$

How to link upgraded transactions

You should use the base product's "SubscriptionID" to find the corresponding "ReferenceID" and use them to retrieve all the associated transactions. Combined with the "SubscriptionID" and "ReferenceID," you can connect all transactions that occurred in a single upgrade event.

The most important thing is to link the transactions together that have occurred during a single event. The "ReferenceID" and "SubscriptionID" attributes tie all the transactions that occurred together during upgrades.

NCE Scenario 26 – full upgrade subscription

Full upgrade
Product Name: Microsoft 365 Business Standard
Order Date: 2021-06-18
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 10.08 €
Quantity: 300 seats
Renew: On

Upgrade
Product Name: Office 365 E1
Upgrade Date: 2021-06-25
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 6.43 €
Quantity: 300 seats
Renew: On

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	10.08	300	3024	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Month commitment for monthly billing	10.08	300		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	
Contoso	6/25/2021	Microsoft 365 Business Standard	convert	10.08	300	-2316	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/17/2021	One-Month commitment for monthly billing	-7.72	300		6/18/2021	7/17/2021	3cae454-219f-4092-a2b0-3ece97f8463a	
Contoso	6/25/2021	Office 365 E1	convert	6.43	300	1476	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/17/2021	One-Month commitment for monthly billing	4.92	300		6/25/2021	7/17/2021	3cae454-219f-4092-a2b0-3ece97f8463a	

Upgrades are not subjected to the wipe and recreate processes. Instead, we replace the upgraded seats with the base product. You can use the "ReferenceID" and "SubscriptionID" attributes to connect the based and upgraded subscriptions.

LEGACY Scenario 26 – full upgrade subscription

Full upgrade
Product Name: Microsoft 365 Business Standard
Order Date: 2021-06-18
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 10.08 €
Quantity: 300 seats
Renew: On

Upgrade
Product Name: Office 365 E1
Upgrade Date: 2021-06-25
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 6.43 €
Quantity: 300 seats
Renew: On

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 26 – full upgrade subscription

Full upgrade
Product Name: Microsoft 365 Business Standard
Order Date: 2021-06-18
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 10.08 €
Quantity: 300 seats
Renew: On

Upgrade
Product Name: Office 365 E1
Upgrade Date: 2021-06-25
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 6.43 €
Quantity: 300 seats
Renew: On

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/18/2021	Office 365 E1	renew	6.43	300	1929	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/18/2021	8/17/2021	One-Month commitment for monthly billing	6.43	300		7/18/2021	8/17/2021	3caee454-219f-4092-a2b0-3ece97f8463a	

Trial to paid conversions go through the wipe & recreate processes. The seat removal will occur in the next cycle because the removal date falls into the next cycle.

LEGACY Scenario 26 – full upgrade subscription

Full upgrade
Product Name: Microsoft 365 Business Standard
Order Date: 2021-06-18
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 10.08 €
Quantity: 300 seats
Renew: On

Upgrade
Product Name: Office 365 E1
Upgrade Date: 2021-06-25
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 6.43 €
Quantity: 300 seats
Renew: On

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 27 – full upgrade subscription

Full upgrade
Product Name: Microsoft 365 Business Standard
Order Date: 2021-06-18
Term Duration: One Year (P1Y)
Billing Plan: Annual
Unit Price: 100.08 €
Quantity: 300 seats
Renew: On

Upgrade
Product Name: Office 365 E1
Upgrade Date: 2021-06-25
Term Duration: One Year (P1Y)
Billing Plan: Annual
Unit Price: 64.32 €
Quantity: 300 seats
Renew: On

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	100.08	300	30024	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	6/17/2022	One-Year commitment for monthly/yearly billing	100.08	300		6/18/2021	6/17/2022	361e51df-316f-4ab-8a87-8b67a32b5fe0	
Contoso	6/25/2021	Microsoft 365 Business Standard	convert	100.08	300	-29448	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	6/17/2022	One-Year commitment for monthly/yearly billing	-98.16	300		6/18/2021	6/17/2022	3cae454-219f-4092-a2b0-3ece97f8463a	
Contoso	6/25/2021	Office 365 E1	convert	64.32	300	18924	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	6/17/2022	One-Year commitment for monthly/yearly billing	63.08	300		6/25/2021	6/17/2022	3cae454-219f-4092-a2b0-3ece97f8463a	

Upgrades are not subjected to the wipe and recreate processes. Instead, we replace the upgraded seats with the base product. You can use the "ReferenceID" and "SubscriptionID" attributes to connect the based and upgraded subscriptions.

LEGACY Scenario 27 – full upgrade subscription

Full upgrade
Product Name: Microsoft 365 Business Standard
Order Date: 2021-06-18
Term Duration: One Year (P1Y)
Billing Plan: Annual
Unit Price: 100.08 €
Quantity: 300 seats
Renew: On

Upgrade
Product Name: Office 365 E1
Upgrade Date: 2021-06-25
Term Duration: One Year (P1Y)
Billing Plan: Annual
Unit Price: 64.32 €
Quantity: 300 seats
Renew: On

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Contoso	Microsoft 365 Business Standard	Prorate fees when purchase	100.08	300	30024	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	6/17/2022	Annually	6/18/2021	6/17/2022
Contoso	Microsoft 365 Business Standard	Cancel fee	-100.08	300	-30024	EUR	7d38057c-688d-4f25-d673-8eac527a9332	6/18/2021	6/17/2022	Annually	6/18/2021	6/17/2022
Contoso	Microsoft 365 Business Standard	Cycle instance prorate	1.92	300	575.80	EUR	7d38057c-688d-4f25-d673-8eac527a9333	6/18/2021	6/24/2021	Annually	6/18/2021	6/17/2022
Contoso	Office 365 E1	Cycle instance prorate	64.32	300	19296	EUR	7d38057c-688d-4f25-d673-8eac527a9333	6/25/2021	6/24/2022	Annually	6/25/2021	6/24/2022

NCE Scenario 27 – full upgrade subscription

Full upgrade

Product Name: Microsoft 365 Business Standard

Order Date: 2021-06-18

Term Duration: One Year (P1Y)

Billing Plan: Annual

Unit Price: 100.08 €

Quantity: 300 seats

Renew: On

Upgrade

Product Name: Office 365 E1

Upgrade Date: 2021-06-25

Term Duration: One Year (P1Y)

Billing Plan: Annual

Unit Price: 64.32 €

Quantity: 300 seats

Renew: On

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
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No transaction in July because of upfront payment.

LEGACY Scenario 27 – full upgrade subscription

Full upgrade

Product Name: Microsoft 365 Business Standard

Order Date: 2021-06-18

Term Duration: One Year (P1Y)

Billing Plan: Annual

Unit Price: 100.08 €

Quantity: 300 seats

Renew: On

Upgrade

Product Name: Office 365 E1

Upgrade Date: 2021-06-25

Term Duration: One Year (P1Y)

Billing Plan: Annual

Unit Price: 64.32 €

Quantity: 300 seats

Renew: On

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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No transaction in July because of upfront payment.

NCE Scenario 28 – partial upgrade subscription

Partial upgrade
Product Name: Microsoft 365 Business Standard
Order Date: 2021-06-18
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 10.08 €
Quantity: 300 seats
Renew: On

Upgrade
Product Name: Office 365 E1
Upgrade Date: 2021-06-25
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 6.43 €
Quantity: 100 seats
Renew: On

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	10.08	300	3024	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Month commitment for monthly billing	10.08	300		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	
Contoso	6/25/2021	Microsoft 365 Business Standard	convert	10.08	100	-772	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/17/2021	One-Month commitment for monthly billing	-7.72	100		6/18/2021	7/17/2021	3caee454-219f-4092-a2b0-3ece97f8463a	
Contoso	6/25/2021	Office 365 E1	convert	6.43	100	492	EUR	59c3e280-a725-495d-c5c1-90ad9913d6fd	6/25/2021	7/17/2021	One-Month commitment for monthly billing	4.92	100		6/25/2021	7/17/2021	3caee454-219f-4092-a2b0-3ece97f8463a	

Upgrades are not subjected to the wipe and recreate processes. Instead, we replace the upgraded seats with the base product. You can use the "ReferenceID" and "SubscriptionID" attributes to connect the based and upgraded subscriptions.

LEGACY Scenario 28 – partial upgrade subscription

Partial upgrade
Product Name: Microsoft 365 Business Standard
Order Date: 2021-06-18
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 10.08 €
Quantity: 300 seats
Renew: On

Upgrade
Product Name: Office 365 E1
Upgrade Date: 2021-06-25
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 6.43 €
Quantity: 100 seats
Renew: On

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 28 – partial upgrade subscription

Partial upgrade
Product Name: Microsoft 365 Business Standard
Order Date: 2021-06-18
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 10.08 €
Quantity: 300 seats
Renew: On

Upgrade
Product Name: Office 365 E1
Upgrade Date: 2021-06-25
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 6.43 €
Quantity: 100 seats
Renew: On

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/18/2021	Microsoft 365 Business Standard	renew	10.08	200	2016	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/18/2021	8/17/2021	One-Month commitment for monthly billing	10.08	200		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	
Contoso	7/18/2021	Office 365 E1	renew	6.43	100	643	EUR	59c3e280-a725-495d-c5c1-90ad9913d6fd	7/18/2021	8/17/2021	One-Month commitment for monthly billing	6.43	100		7/18/2021	8/17/2021	3caee454-219f-4092-a2b0-3ece97f8463a	

LEGACY Scenario 28 – partial upgrade subscription

Partial upgrade
Product Name: Microsoft 365 Business Standard
Order Date: 2021-06-18
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 10.08 €
Quantity: 300 seats
Renew: On

Upgrade
Product Name: Office 365 E1
Upgrade Date: 2021-06-25
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 6.43 €
Quantity: 100 seats
Renew: On

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 29 – full upgrade subscription

Full upgrade with Term Change
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 300 seats
 Renew: On

Upgrade
 Product Name: Office 365 E1
 Upgrade Date: 2021-06-25
 Term Duration: One Year (P1Y)
 Billing Plan: Monthly
 Unit Price: 64.32 €
 Quantity: 300 seats
 Renew: On

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	10.08	300	3024	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Month commitment for monthly billing	10.08	300		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	
Contoso	6/25/2021	Microsoft 365 Business Standard	convert	10.08	300	-2316	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/17/2021	One-Month commitment for monthly billing	-7.72	300		6/18/2021	7/17/2021	3caee454-219f-4092-a2b0-3ece97f8463a	
Contoso	6/25/2021	Office 365 E1	convert	5.36	300	1230	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/17/2021	One-Year commitment for monthly/yearly billing	4.1	300	Monthly	6/25/2021	6/24/2022	3caee454-219f-4092-a2b0-3ece97f8463a	

Upgrades are not subjected to the wipe and recreate processes. Instead, we replace the upgraded seats with the base product. You can use the "ReferenceID" and "SubscriptionID" attributes to connect the based and upgraded subscriptions.

LEGACY Scenario 29 – full upgrade subscription

Full upgrade with Term Change
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 300 seats
 Renew: On

Upgrade
 Product Name: Office 365 E1
 Upgrade Date: 2021-06-25
 Term Duration: One Year (P1Y)
 Billing Plan: Monthly
 Unit Price: 64.32 €
 Quantity: 300 seats
 Renew: On

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 29 – full upgrade subscription

Full upgrade with Term Change
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 300 seats
 Renew: On

Upgrade
 Product Name: Office 365 E1
 Upgrade Date: 2021-06-25
 Term Duration: One Year (P1Y)
 Billing Plan: Monthly
 Unit Price: 64.32 €
 Quantity: 300 seats
 Renew: On

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/25/2021	Office 365 E1	cycleCharge	5.36	300	1608	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/25/2021	8/24/2021	One-Year commitment for monthly/yearly billing	5.36	300	Monthly	6/25/2021	6/24/2022	3caee454-219f-4092-a2b0-3ece97f8463a	

Annual unit price is prorated for 12 months.

LEGACY Scenario 29 – full upgrade subscription

Full upgrade with Term Change
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 300 seats
 Renew: On

Upgrade
 Product Name: Office 365 E1
 Upgrade Date: 2021-06-25
 Term Duration: One Year (P1Y)
 Billing Plan: Monthly
 Unit Price: 64.32 €
 Quantity: 300 seats
 Renew: On

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 30 – partial upgrade subscription

Partial upgrade with Term Change
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 300 seats
 Renew: On

Upgrade
 Product Name: Office 365 E1
 Upgrade Date: 2021-06-25
 Term Duration: One Year (P1Y)
 Billing Plan: Monthly
 Unit Price: 64.32 €
 Quantity: 100 seats
 Renew: On

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	10.08	300	3024	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Month commitment for monthly billing	10.08	300		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	
Contoso	6/25/2021	Microsoft 365 Business Standard	convert	10.08	100	-772	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/25/2021	7/17/2021	One-Month commitment for monthly billing	-7.72	100		6/18/2021	7/17/2021	3cae454-219f-4092-a2b0-3ece97f8463a	
Contoso	6/25/2021	Office 365 E1	convert	5.36	100	536	EUR	59c3e280-a725-495d-c5c1-90ad9913d6fd	6/25/2021	7/24/2021	One-Year commitment for monthly/yearly billing	5.36	100	Monthly	6/25/2021	6/24/2022	3cae454-219f-4092-a2b0-3ece97f8463a	

Upgrades are not subjected to the wipe and recreate processes. Instead, we replace the upgraded seats with the base product. You can use the "ReferenceID" and "SubscriptionID" attributes to connect the based and upgraded subscriptions.

LEGACY Scenario 30 – partial upgrade subscription

Partial upgrade with Term Change
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 300 seats
 Renew: On

Upgrade
 Product Name: Office 365 E1
 Upgrade Date: 2021-06-25
 Term Duration: One Year (P1Y)
 Billing Plan: Monthly
 Unit Price: 64.32 €
 Quantity: 100 seats
 Renew: On

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 30 – partial upgrade subscription

Partial upgrade with Term Change
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 300 seats
 Renew: On

Upgrade
 Product Name: Office 365 E1
 Upgrade Date: 2021-06-25
 Term Duration: One Year (PT1Y)
 Billing Plan: Monthly
 Unit Price: 64.32 €
 Quantity: 100 seats
 Renew: On

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/18/2021	Microsoft 365 Business Standard	renew	10.08	200	2016	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/18/2021	8/17/2021	One-Month commitment for monthly billing	10.08	200		7/18/2021	8/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	
Contoso	7/25/2021	Office 365 E1	cycleCharge	5.36	100	536	EUR	59c3e280-a725-495d-c5c1-90ad9913d6fd	7/25/2021	8/24/2021	One-Year commitment for monthly/yearly billing	5.36	100	Monthly	6/25/2021	6/24/2022	3caee454-219f-4092-a2b0-3ece97f8463a	

Upgrades don't go through wipe & recreate processes. Instead, we swap the upgraded seats directly with the base product. However, you can link the based and upgraded subscriptions using the "Reference ID" & "Subscription ID" attributes.

LEGACY Scenario 30 – partial upgrade subscription

Partial upgrade with Term Change
 Product Name: Microsoft 365 Business Standard
 Order Date: 2021-06-18
 Term Duration: One Month (P1M)
 Billing Plan: Monthly
 Unit Price: 10.08 €
 Quantity: 300 seats
 Renew: On

Upgrade
 Product Name: Office 365 E1
 Upgrade Date: 2021-06-25
 Term Duration: One Year (PT1Y)
 Billing Plan: Monthly
 Unit Price: 64.32 €
 Quantity: 100 seats
 Renew: On

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
Monthly term not supported.												

Term change scenarios

NCE Scenario 31 – term change

Term Change

Product Name: Microsoft 365 Business Standard

Purchase: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 10.08 €

Quantity: 10 seats.

Renew: On

Scheduled Changes (2021-07-24)

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 100.08 €

Quantity: 10 seats.

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Month commitment for monthly billing	10.08	10		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	

Term changes will occur in the next cycle because the term change date falls in the next cycle.

LEGACY Scenario 31 – term change

Term Change

Product Name: Microsoft 365 Business Standard

Purchase: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 10.08 €

Quantity: 10 seats.

Renew: On

Scheduled Changes (2021-07-24)

Term Duration: One Year (P1Y)

Billing Plan: Monthly

Unit Price: 100.08 €

Quantity: 10 seats.

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 31 – term change

Term Change
Product Name: Microsoft 365 Business Standard
Purchase: 2021-06-18
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 10.08 €
Quantity: 10 seats.
Renew: On

Scheduled Changes (2021-07-24)
Term Duration: One Year (P1Y)
Billing Plan: Monthly
Unit Price: 100.08 €
Quantity: 10 seats.

July 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	7/18/2021	Microsoft 365 Business Standard	renew	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/18/2021	8/17/2021	One-Month commitment for monthly billing	10.08	10		7/18/2021	8/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	
Contoso	7/24/2021	Microsoft 365 Business Standard	convert	10.08	10	-81.2	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/24/2021	8/17/2021	One-Month commitment for monthly billing	-8.12	10		7/18/2021	8/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	
Contoso	7/24/2021	Microsoft 365 Business Standard	convert	8.34	10	83.4	EUR	7d38057c-688d-4f25-d673-8eac527a9331	7/24/2021	8/23/2021	One-Year commitment for monthly/yearly billing	8.34	10	Monthly	7/24/2021	7/23/2022	361e51df-316f-4bab-8a87-8b67a32b5fe0	

Changes in terms delete the existing term and start a new one from the order date that will last until the end of the term's duration.

LEGACY Scenario 31 – term change

Term Change
Product Name: Microsoft 365 Business Standard
Purchase: 2021-06-18
Term Duration: One Month (P1M)
Billing Plan: Monthly
Unit Price: 10.08 €
Quantity: 10 seats.
Renew: On

Scheduled Changes (2021-07-24)
Term Duration: One Year (P1Y)
Billing Plan: Monthly
Unit Price: 100.08 €
Quantity: 10 seats.

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 32 – term change

Term Change

Product Name: Microsoft 365 Business Standard

Purchase: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 10.08 €

Quantity: 10 seats.

Renew: On

Scheduled Changes (2021-07-24)

Term Duration: One Year (P1Y)

Billing Plan: Annual

Unit Price: 100.08 €

Quantity: 10 seats.

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Month commitment for monthly billing	10.08	10		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	

Term changes will occur in the next cycle because the term change date falls in the next cycle.

LEGACY Scenario 32 – term change

Term Change

Product Name: Microsoft 365 Business Standard

Purchase: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 10.08 €

Quantity: 10 seats.

Renew: On

Scheduled Changes (2021-07-24)

Term Duration: One Year (P1Y)

Billing Plan: Annual

Unit Price: 100.08 €

Quantity: 10 seats.

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 32 – term change

Term Change

Product Name: Microsoft 365 Business Standard

Purchase: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 10.08 €

Quantity: 10 seats.

Renew: On

Scheduled Changes (2021-07-24)

Term Duration: One Year (P1Y)

Billing Plan: Annual

Unit Price: 100.08 €

Quantity: 10 seats.

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
Contoso	6/18/2021	Microsoft 365 Business Standard	new	10.08	10	100.8	EUR	7d38057c-688d-4f25-d673-8eac527a9331	6/18/2021	7/17/2021	One-Month commitment for monthly billing	10.08	10		6/18/2021	7/17/2021	361e51df-316f-4bab-8a87-8b67a32b5fe0	

Term changes will occur in the next cycle because the term change date falls in the next cycle.

LEGACY Scenario 32 – term change

Term Change

Product Name: Microsoft 365 Business Standard

Purchase: 2021-06-18

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 10.08 €

Quantity: 10 seats.

Renew: On

Scheduled Changes (2021-07-24)

Term Duration: One Year (P1Y)

Billing Plan: Annual

Unit Price: 100.08 €

Quantity: 10 seats.

July 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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Monthly term not supported.

NCE Scenario 33 – term change

Term Change

Product Name: Microsoft 365 Business Standard

Purchase: 2021-06-18

Term Duration: One Year (P1Y)

Billing Plan: Annual

Unit Price: 100.08 €

Quantity: 10 seats.

Renew: On

Scheduled Changes (2021-07-24)

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 10.08 €

Quantity: 10 seats.

June 2021 Recon File

Customer Name	Order Date	Product Name	Charge Type	Unit Price	Quantity	Total	Currency	Subscription Id	Charge Start Date	Charge End Date	Term And Billing Cycle	Effective Unit Price	Billable Quantity	Billing Frequency	Subscription Start Date	Subscription End Date	Reference Id	Product Qualifiers
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This scenario is not possible.

LEGACY Scenario 33 – term change

Term Change

Product Name: Microsoft 365 Business Standard

Purchase: 2021-06-18

Term Duration: One Year (P1Y)

Billing Plan: Annual

Unit Price: 100.08 €

Quantity: 10 seats.

Renew: On

Scheduled Changes (2021-07-24)

Term Duration: One Month (P1M)

Billing Plan: Monthly

Unit Price: 10.08 €

Quantity: 10 seats.

June 2021 Recon File

Customer Name	Offer Name	Charge Type	Unit Price	Quantity	Sub Total	Currency	Syndication Partner Subscription Number	Charge Start Date	Charge End Date	Billing Cycle	Subscription Start Date	Subscription End Date
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This scenario is not possible.

Promotion scenarios

How to identify promotions in the NCE recon file

- The Partner Center recon file has an **identifier** called **PromotionID** to help you determine whether a product was sold as a promotion at the time of purchase. You can use this identifier to look up additional information about the promotion, such as its **name**, **validity**, and **discount percentage**. Using this information, you can generate customer invoices and pass the benefit on to them.
- In addition to the PromotionID, you must pay attention to other attributes to verify the prices and discount description. The **UnitPrice** column shows the **pre-promotion** price, and

the **EffectiveUnitPrice** column shows the **post-promotion** price. Furthermore, the **PriceAdjustmentDescription** column indicates that the specific transaction has a discounted price.

Customer	Product Name	Order Date	Quantity	Unit Price	Effective Unit Price	Total	Charge Start Date	Charge End Date	Price Adjustment Description	Promotion ID
Contoso	M365 Office E1	September 20, 2021	1	10	5	5	Sep 20, 2021	Oct 19, 2021	["The price includes a discount."]	DZH318Z0BQ35:018P:DZH318XZNVWD

NCE vs. legacy promotions in the reconciliation file

- The **NCE recon** file has a specific attribute, **PromotionID**, for identifying the promotion and looking up additional information about it. Furthermore, the file includes attributes for distinguishing between the pre- and post-promotion prices and descriptions. The **legacy recon** file provides the **TotalOtherDiscount** attribute containing the total discount amount to track promotions.

NCE

Customer	Product Name	Order Date	Quantity	Unit Price	Effective Unit Price	Total	Charge Start Date	Charge End Date	Billing Frequency	Price Adjustment Description	Promotion ID
Contoso	M365 Office E1	September 20, 2021	1	10	5	5	Sep 20, 2021	Oct 19, 2021	Monthly	["The price includes a discount."]	DZH318Z0BQ35:018P:DZH318XZNVWD

Legacy

Customer	Offer Name	Quantity	Unit Price	Amount	Total Other Discount	Subtotal	Charge Start Date	Charge End Date	Billing Cycle
Contoso	M365 Office E1	1	0	5	5	0	Sep 20, 2021	Oct 19, 2021	Monthly

- Unlike legacy, NCE promotions aren't separated by billing plans. In **legacy**, only the **monthly billing plan** is eligible for promotions. However, regardless of your **billing plan**, you'll receive a **discount** from NCE.

NCE

Customer	Product Name	Order Date	Quantity	Unit Price	Effective Unit Price	Total	Charge Start Date	Charge End Date	Billing Frequency	Price Adjustment Description	Promotion ID
Contoso	M365 Office E1	September 20, 2021	1	10	5	5	Sep 20, 2021	Oct 19, 2021	Monthly	["The price includes a discount."]	DZH318Z0BQ35:018P:DZH318XZNVWD

Customer	Offer Name	Order Date	Quantity	Unit Price	Effective Unit Price	Total	Charge Start Date	Charge End Date	Billing Frequency	Price Adjustment Description	Promotion ID
Contoso	M365 Office E1	September 20, 2021	1	100	50	50	Sep 20, 2021	Sep 19, 2022	Annual	["The price includes a discount."]	DZH318Z0BQ35:018P:DZH318XZNVWD

Legacy

Customer	Product Name	Quantity	Unit Price	Amount	Total Other Discount	Subtotal	Charge Start Date	Charge End Date	Billing Cycle
Contoso	M365 Office E1	1	0	5	5	0	Sep 20, 2021	Oct 19, 2021	Monthly

Customer	Offer Name	Quantity	Unit Price	Amount	Total Other Discount	Subtotal	Charge Start Date	Charge End Date	Billing Cycle
Contoso	M365 Office E1	1	100	100	0	0	Sep 20, 2021	Sep 19, 2022	Annual

Trials

New commerce trials offer 25 licenses and last for 30 days. Trials can be converted to a paid subscription at any time during the trial, but trials can't be canceled. By default, autorenew is turned on and trials will autorenew to paid offers after 30 days. This behavior can be toggled on or off by the partner, and if toggled off, the trial will simply expire after 30 days without any renewals. It's also not possible to convert a few seats to a paid subscription while leaving the other seats in the trial.

When converting from a trial to a new paid subscription, at minimum, **all 25 seats** need to be converted to the new paid subscription. Partners can add more than 25 seats on conversion, but reducing the number of seats isn't allowed.

When converting a trial to a new paid subscription, partners can choose to convert to the same paid SKU or upgrade to a higher SKU.

Partners can also convert trials to existing paid subscriptions. In this scenario, the existing subscription must be a subscription that's eligible for the trial conversion. If so, the trial seats will be added to the existing subscription, and the end date will remain the same for the existing paid subscription.

NOTE: Existing paid SKU's end date must occur on the same day or after the trial's end date in order to do a conversion from the trial to an existing paid subscription.

Upon converting from a trial to a new or existing paid subscription, the 72-hour cancellation window opens up. This is when the partner can modify the number of seats, increasing or decreasing as needed.

On conversion to a new subscription, "term duration" defaults to one year and "billing cycle" defaults to a monthly plan. Partners can modify the term duration and billing plan if they decide to manually convert the trial instead of having it automatically renew with the default term and billing cycle.

Customers **can't** go from a trial to a paid subscription using a promotion. If customers want to use a promotion, they must allow the trial to expire (toggling off the autorenew) and then create a new purchase using the promotion.

Trial conversions need to be managed by the partner. There are no subscription-based alerting in Partner Center to let partners know a trial is expiring.

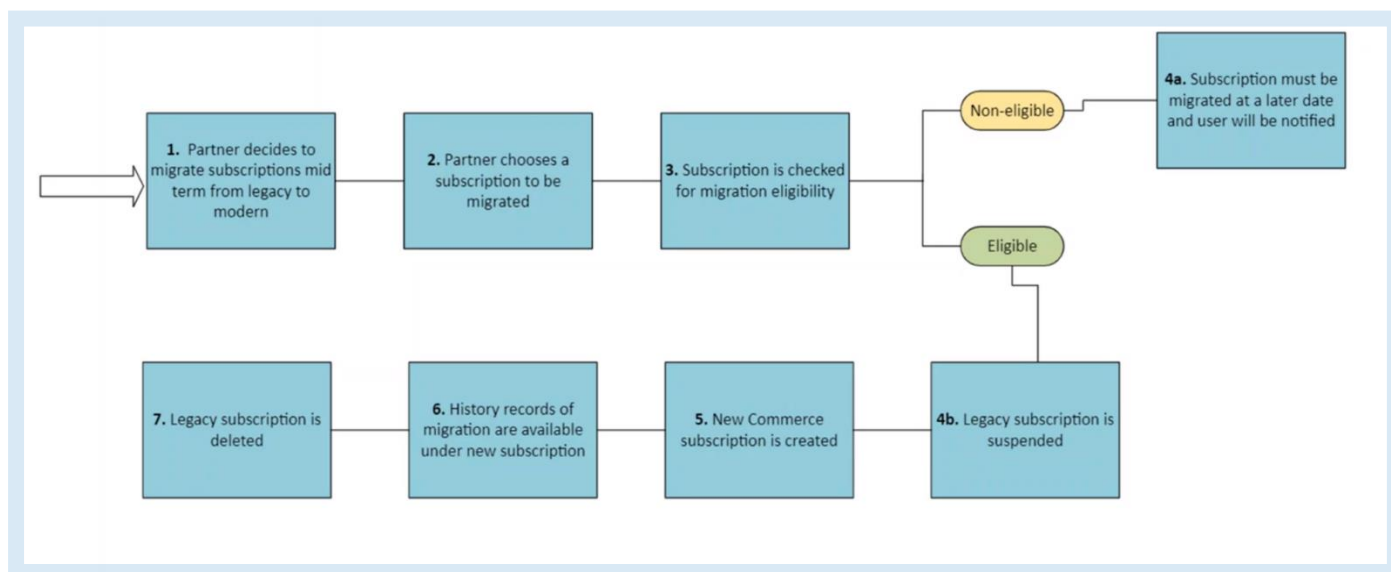
Migrations

Like-to-like migration for midterm subscriptions was made available on October 14, 2021 for both API and UX components of Partner Center. Like-to-like migration refers to the migration of legacy subscriptions that have a corresponding new commerce equivalent. Partners will have the ability to migrate customer subscriptions.

Not all subscriptions will be eligible for migration at this time. The following categories of subscriptions are currently ineligible:

- Subscriptions within the first month of service since purchase
- Inactive subscriptions (No changes in service will occur if a subscription is inactive.)
- Trial subscriptions (There will be no monetary benefit or implications; expectation will be to let trials run their course in legacy.)
- Subscriptions with promotions (Promotions in NCE are independent of those in Legacy.)
- Subscriptions with add-ons (Migrating subscriptions with add-ons aren't supported at this time and will be supported later.)
- Subscriptions for Government, Education, or nonprofit audiences (The mapping of qualified offers from legacy to NCE isn't supported at this time.)
- Retired or obsolete subscriptions (For these subscriptions, there won't be a like-to-like offer existing in new commerce.)

Migration of the aforementioned subscriptions are out of scope for this feature at this time. Additionally, a single subscription will be the unit of migration, rather than batches of subscriptions.



The migration steps are displayed on the flow chart.

Suspending a Legacy subscription during migration

A Legacy subscription will only be suspended once a successful path to new commerce is provisioned for the subscription. This will prevent loss of service if there are any blockers following a partner initiating migration of a subscription. Additionally, no double billing will occur for both the Legacy and new commerce subscription. Once migration has been initiated, billing for the Legacy subscription will be stopped to prevent any overlap with billing for the NCE subscription.

Billing term and frequency

The billing term and billing frequency for the migrated subscription will remain the same as the billing term and billing frequency for the legacy subscription unless otherwise specified using enhanced capabilities. This also applies for term end date. Enhanced capabilities allow partners to change the term and frequency.

Cancellation policy

The cancellation policy for newly migrated subscriptions will be the same as the cancellation policy for new commerce subscription purchases, outlined in this guide.

Migration history

Via the APIs, migration history details, such as start and completion time of migration, can be accessed using the new GetMigration API and MigrationID field. On the UX, the Subscription ID from which the new NCE subscription migrated from will be visible at the top of the Details

page, which can be accessed when selecting the subscription on the customer's Subscriptions page.

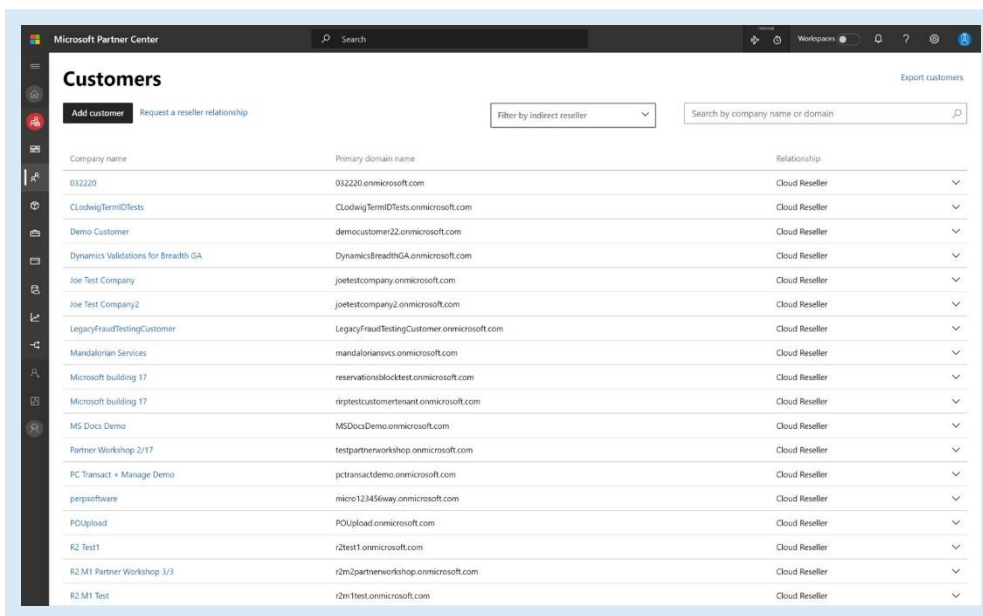
APIs

For the migration of subscriptions, there are three Rest APIs released. The first ValidateMigration API will check migration eligibility for a subscription. The second CreateMigration API will create the migration if the subscription is eligible. Lastly, the third GetMigration API will allow partners to check migration status.

Partner Center UI

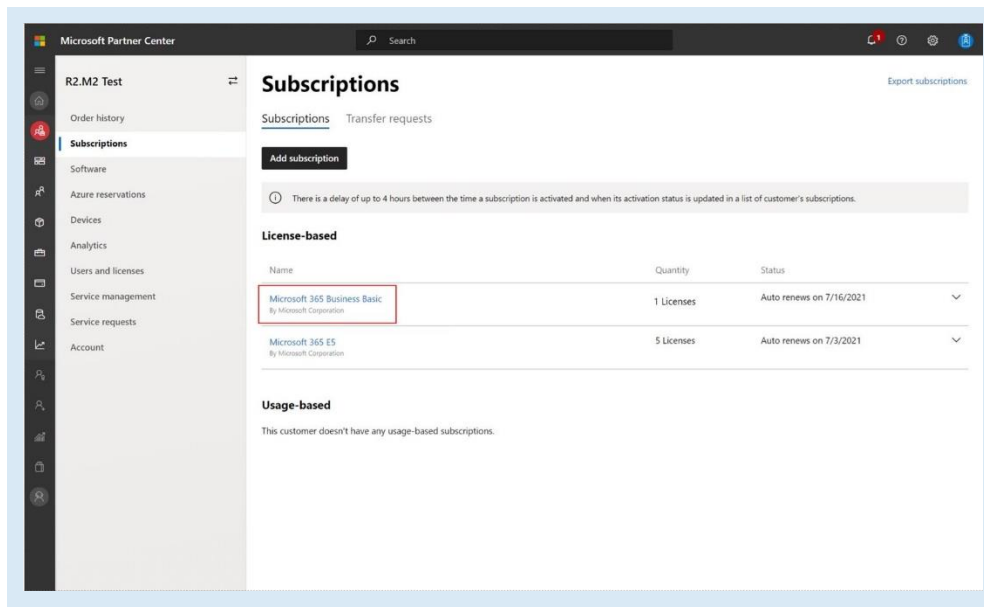
Partners will be able to begin the migration process by first selecting the customer that they want to migrate subscriptions for.

Partners will be able to select a customer for whom they want to migrate a subscription.

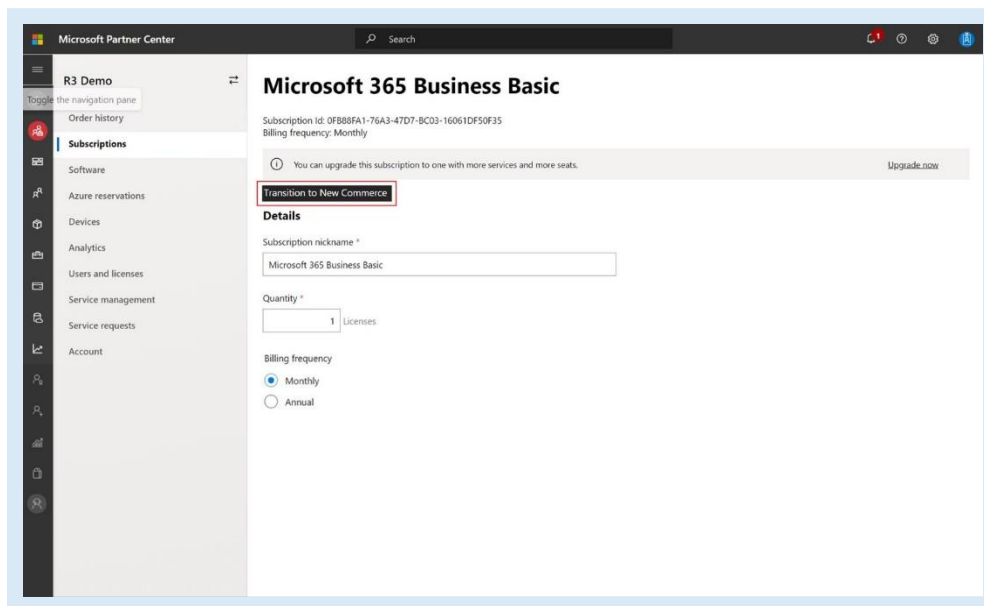


Company name	Primary domain name	Relationship
032220	032220.onmicrosoft.com	Cloud Reseller
ClodwigTermIDTests	ClodwigTermIDTests.onmicrosoft.com	Cloud Reseller
Demo Customer	democustomer22.onmicrosoft.com	Cloud Reseller
Dynamics Validations for Breadth GA	DynamicsBreadthGA.onmicrosoft.com	Cloud Reseller
Joe Test Company	joetestcompany.onmicrosoft.com	Cloud Reseller
Joe Test Company2	joetestcompany2.onmicrosoft.com	Cloud Reseller
LegacyFraudTestingCustomer	LegacyFraudTestingCustomer.onmicrosoft.com	Cloud Reseller
Mandalorian Services	mandaloriancs.onmicrosoft.com	Cloud Reseller
Microsoft building 17	reservationsblocktest.onmicrosoft.com	Cloud Reseller
Microsoft building 17	riptestcustomertenant.onmicrosoft.com	Cloud Reseller
MS Docs Demo	MSDocsDemo.onmicrosoft.com	Cloud Reseller
Partner Workshop 2/17	testpartnerworkshop.onmicrosoft.com	Cloud Reseller
PC Transact + Manage Demo	pctransactdemo.onmicrosoft.com	Cloud Reseller
perpssoftware	micro123456way.onmicrosoft.com	Cloud Reseller
POUpload	POUpload.onmicrosoft.com	Cloud Reseller
R2 Test1	r2test1.onmicrosoft.com	Cloud Reseller
R2.M1 Partner Workshop 3/3	r2m2partnerworkshop.onmicrosoft.com	Cloud Reseller
R2.M1 Test	r2m1test.onmicrosoft.com	Cloud Reseller

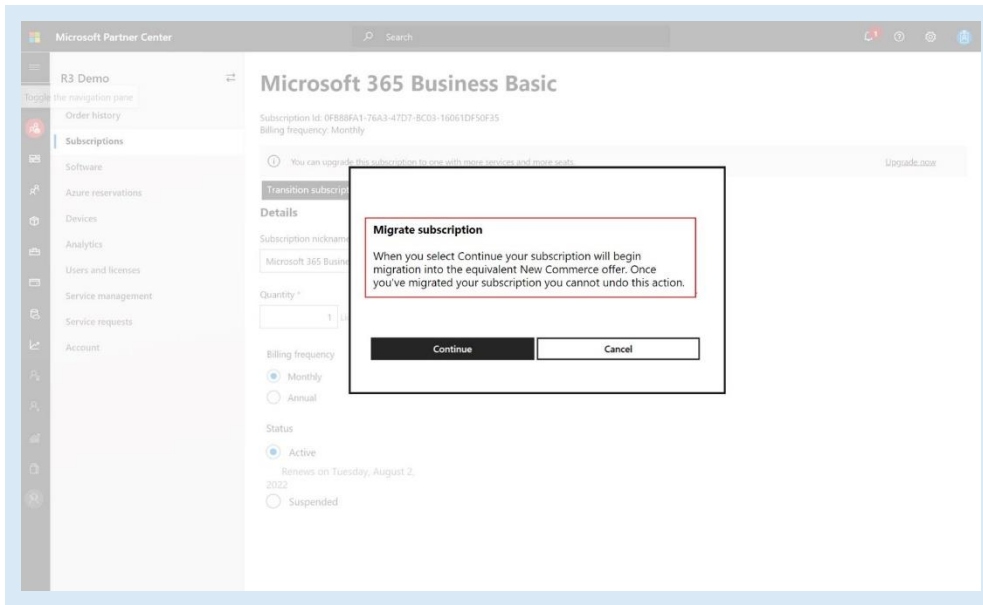
Partners will be able to select subscriptions that they wish to migrate.



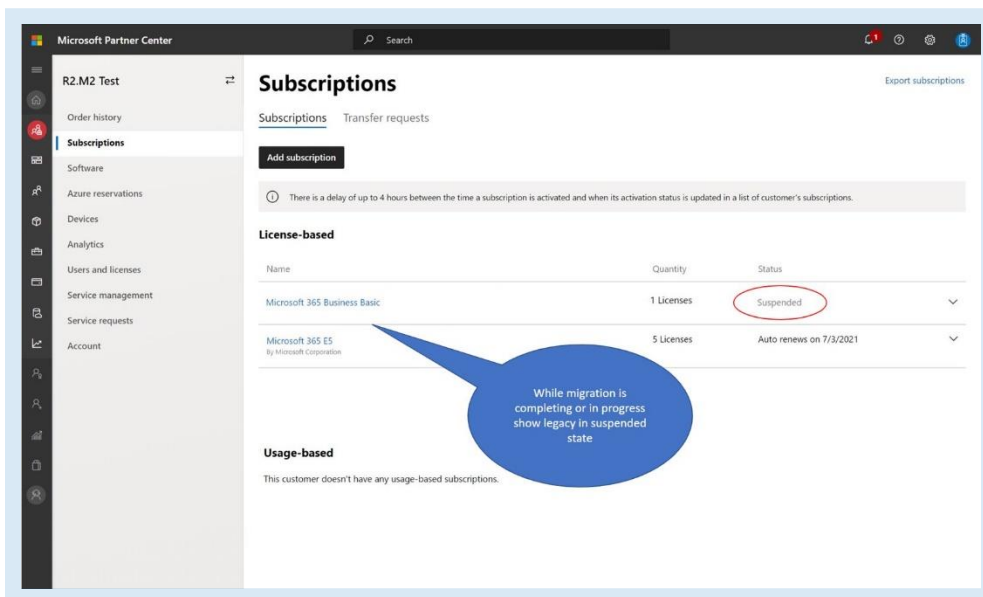
Partners can select the **Transition to New Commerce** button. If the selected subscription can't be migrated, the button will be grayed out. For ineligible subscriptions, partners can hover on an icon for ineligibility reasons.

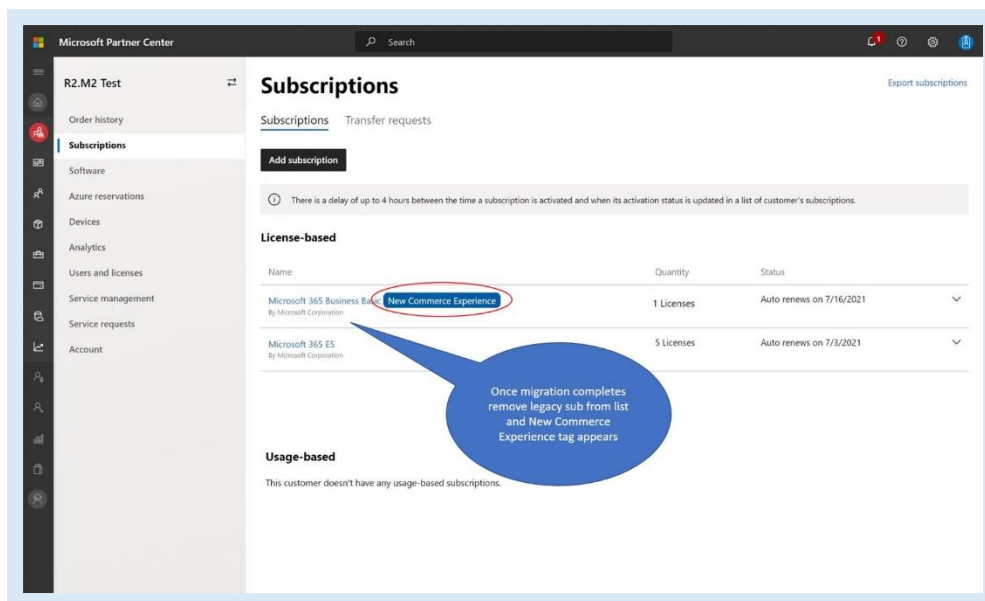


Partners must confirm migration. After confirmation, the migration isn't reversible.

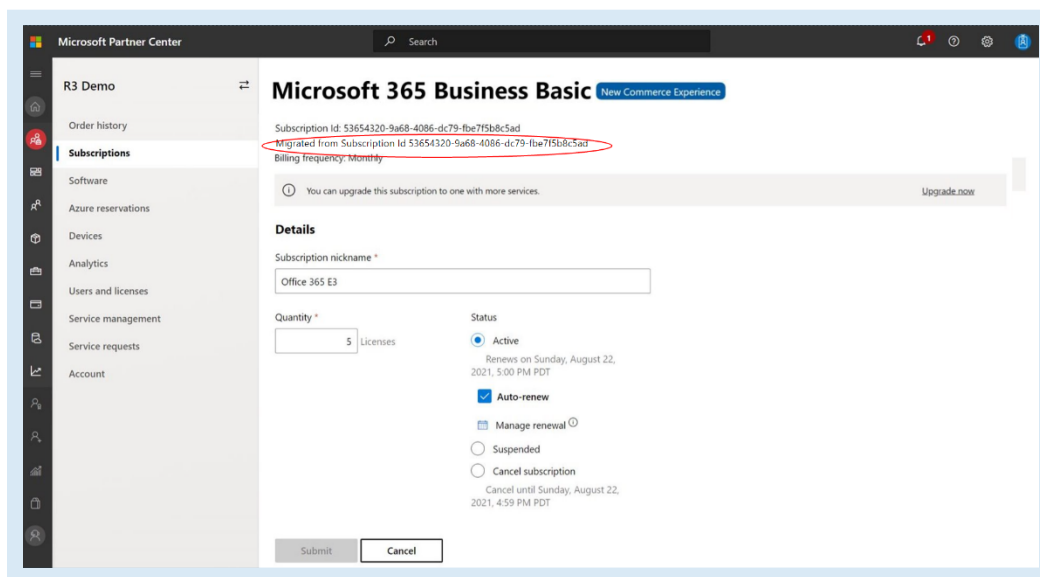


Once migration has begun, the Legacy subscription will appear suspended. On completion of the migration, the Legacy subscription will be deleted and replaced with the new commerce subscription.





The Legacy subscription ID from which the NCE subscription migrated from will be visible in the new subscription Details page.



Bulk migration

In the case where a partner is trying to migrate all of a customer's eligible subscriptions to NCE, the following steps can be taken:

- Select a customer to migrate subscriptions for.
- Call the GetSubscriptions API to receive a collection of the customer's subscriptions by customer-tenant-id.

- Go through the collection of subscriptions, calling the CreateMigration API with each subscription-id. This will check for migration eligibility and migrate the subscription if eligibility is validated.

Know what has and hasn't been migrated by calling GetSubscriptions again after going through the subscription collection. Subscriptions that have been successfully migrated will be populated with migratedFromSubscriptionID. The migration ID provided by the CreateMigration response will also facilitate tracking the progress of the migrations when used in the GetMigration API request. The unit of migration is a single subscription, but this can be scaled to meet requirements of bulk migration scenarios. Other supported scenarios that will follow a similar series of steps as listed include migrating all customer subscriptions of a particular SKU or migrating all subscriptions under an indirect reseller. A combination of the APIs that Microsoft offers can be used to organize a collection of subscriptions that a partner plans to migrate in a bulk migration scenario.

Enhanced capabilities

Following the Breadth GA technical release, as of November 2021, enhanced capabilities have been integrated into the migration feature. Enhanced capabilities will give partners the ability to configure the following components of a subscription upon migrating:

- Starting a new term
- Selecting a new term length (for example, monthly, and annual)
- Changing billing frequency
- Increasing or decreasing seat count

Changes can be configured for a subscription upon migrating using the CreateMigration API. Currently, these enhanced capabilities are only available to partners via API and not on the Partner Center UI.

Software subscriptions

Toggling autorenew

On October 14, Microsoft enabled autorenew capabilities for software subscriptions purchased in CSP new commerce (autorenew default set to "on"). The intent of this capability was to simplify the renewal process for partners and their customers, allowing for software subscriptions to autorenew at their designated renewal date by default. (Software subscriptions purchased prior to October 14, 2021 don't have the autorenew capability and will expire as indicated at the time of purchase.)

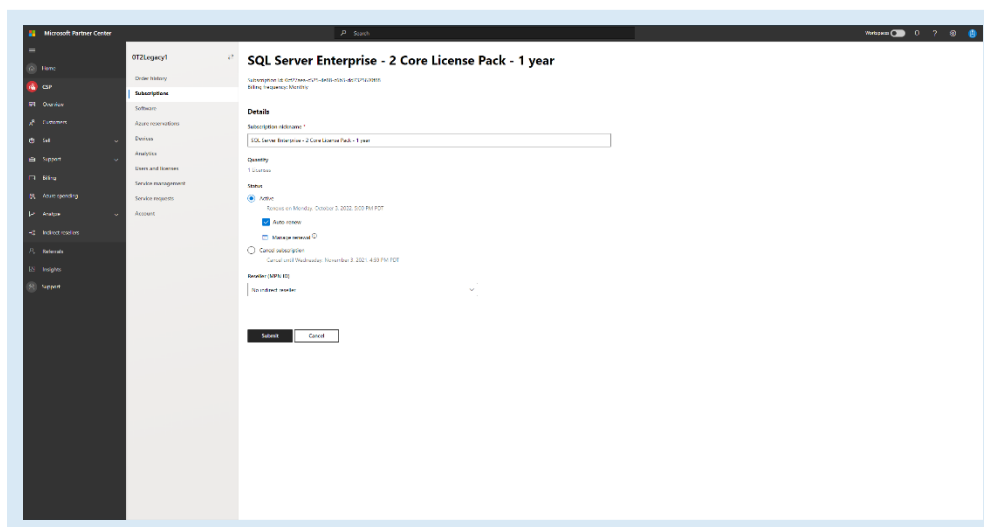
Based on partner feedback and to give partners more time to adapt to the change, Microsoft will revert the autorenew default setting to "off". The estimated date for this reversion is October 26, 2021. Microsoft anticipates moving the default autorenewal setting to "on" on **January 22, 2022**.

All software subscription purchases made between October 14, 2021 until the rollback date will have autorenew set to "off" by Microsoft. Autorenew capability will still be available, and partners will be able to toggle autorenew to "on" from the new default of "off".

Also, to reduce cash flow pressure and increase accessibility for customers, partners can now change billing frequency preferences for software subscriptions. They can split large payments into several charges over time, which will put more expensive services within reach of smaller businesses with limited cash flow. Previously, one-year and three-year product SKUs supported only one-time billing. Starting October 14, 2021, new billing plans are available, with one-year term product SKUs now supporting "annual", and three-year product SKUs supporting "triennial" and "annual". In cases where the term is the same as the billing plan, it will behave as a one-time payment per term. Currently there's one product that supports a monthly billing plan (Windows Remote Desktop Server CAL 2022).

Partners using the Partner Center catalog will see the available billing plans on the review screen prior to purchasing.

The following screenshot displays the autorenew component that can be toggled on or off.



Scheduling changes in billing frequency

New billing plans are supported for software subscriptions.

- Term: one-year; new billing plans: annual
- Term: three-year; new billing plans: annual, triennial, monthly (Windows Remote Desktop Server CAL 2022 only)
- On October 14, [Get subscriptions API](#) started returning software subscriptions.
- Billing plans: Partners previously passing billing cycles of "one-time" when they create cart line items should now pass the actual billing cycle value. Otherwise, their transactions will start failing on "one-time" after January 22, 2022. Until January 22, 2022, the "one-time" value for the billing cycle will be supported and will result in a software subscription's billing cycle being set to one payment for the full term. After this date, values such as "annual," "triennial," and "monthly" must be entered for the billing cycle, depending on partner needs and supported billing plans for the software subscriptions being purchased.
- Term duration: Beginning January 22, 2022, partners will need to specify a term for software subscriptions in addition to a billing plan. Until January 22, 2022, partners can purchase software subscriptions without including the term value. However, in alignment with the construction of new commerce transactions, starting January 22, 2022, partners will need to pass the term and billing cycle plan that they intend to purchase and avoid hard-coded values.

All billing changes will take effect on renewal.

Sandbox

Effective September 1, 2021, the integrated sandbox environment for CSP new commerce was made available for all CSP partners. This environment can be used to support your organization's testing of new commerce features, API, and billing prior to placing orders for new commerce subscriptions.

For information on how to set up and use the integrated sandbox environment for new commerce testing, review the sandbox documentation in the [collection](#) including materials in the API documentation [folder](#). Microsoft 365, Dynamics 365, Power Platform, and Windows 365 products can be purchased using Partner Center API or SDK.

Support requirements

Partners are required to be the first point of contact for customer support issues directly related to the procurement, license key access or activation, and product media or download fulfillment of products deemed to be Server Subscription offers. See the MPA for full details.

Incentives

Incentives information will be made available after September 1, 2021. You can review the updated fiscal year 2022 partner incentive guides on the [Partner Incentives portal](#).

Change log

August 2021

Original publication date

September 2021

Section	Date changed	Change made
Promotions in new commerce	September 9, 2021	Under Promotions in new commerce experience, added sections for promotion guidelines, supported promotions, and promotion examples. Additional context has been added to promotions section.
Subscription ownership enforcement	September 9, 2021	New section added with document.
Microsoft 365 admin center customer experience	September 9, 2021	New section added with document.
Trials	September 9, 2021	Added screenshot of the trial view and added a reference to conversation.

Cancellation policy	September 9, 2021	Updated the Key feature overview in the cancellation policy enforcement with the following verbiage: Cancellation for seat-based subscription in new commerce is limited to the first 72 hours of any term, with prorated refund. Updated the Subscription management features: Cancellation section with the following verbiage: Cancellation for seat-based subscription in new commerce is limited to the first 72 hours of any term, with prorated refund. Added API details and fields to validate cancellation window. Included the UX screenshot of what will be displayed within the UX when a partner chose to cancel.
Title page	September 29, 2021	Added a created date and last updated date reference.
Vision	September 29, 2021	Added reference to October launch being for commercial priced offers.
Billing, invoicing, and recon file	September 29, 2021	Change sentence from “consolidated into a single customizable recon file” to “consolidated into a single recon file”. Added Switching billings plans with examples
Key feature summary	September 29, 2021	Added a table of the timelines that the remaining features under development will be added to sandbox environment.
Key feature overview	September 29, 2021	Under Reconciliation file upgrades, changed sentence from “All subscriptions are consolidated into a single customized recon file” to “All subscriptions are consolidated into a single recon file”. Estimates of charges accrued during the month are provided and updated hourly. Under Add-on sold separately from base offers, updated the verbiage in the NCE column for clarity.

Upgrades (under Subscription management features)	September 29, 2021	Added additional content under the following sections: • Full upgrades • Partial upgrade • Upgrade activity table • Telco • European price list
Subscription management features:	September 29, 2021	New section called Midterm conversion enhancements and Grace period on Subscription expiration
Trials	September 29, 2021	Added additional content
Price lists	September 29, 2021	Added additional context to the following sections: • Difference in existing offer pricing and new commerce • European price lists
Cancellation	September 29, 2021	Added updated screenshots showing the timeline display for cancellation in the UI, the message that will be displayed at go-live for the 72-hour cancellation policy, and the message that will be displayed to partners when trying to cancel outside of the 72 hours.
Migrations	September 29, 2021	New section and subsections have been added.
Promotions	September 29, 2021	Removed the following reference at the top of the section "Feature is currently under development and will be made available soon" because this feature was made available on September 27, 2021 in the integrated sandbox environment.

October 2021

Section	Date changed	Change made
Billing, invoicing, and reconciliation	October 14, 2021	Updated the formatting of the slides in the scenarios sections. New sections added: • How NCE reconciliation works • How one-time and recurring charges are calculated • How add or remove seats affects reconciliation • Cancel subscription scenarios • Trial subscription scenarios • Suspend subscription scenario • Upgrade subscription scenarios Updated screenshots for the following scenarios: • Add or remove seats-scenarios 4 to 12 • Cancel subscription scenarios 21 to 24 • Add on subscription scenarios 25 • Full upgrade scenarios 26 to 27 • Partial upgrade scenario 28 to 30 • Term change scenario 31
Cancellation	October 14, 2021	Added the following reference for Software subscriptions to the cancellation section: The cancellation policy for software subscriptions won't change. Updated verbiage to provide clarity on the policy and proration details. Removed the previous policy available in the technical preview for 24 hours and replaced with the go-live policy of 72 hours and articulated the policy clearer. New section titled Cancellation UX flow
Add-ons in new commerce	October 14, 2021	New section added titled Multipartner overage
Add-on enforcement	October 14, 2021	Additional content added to section

Promotions in new commerce	October 14, 2021	Under verify eligibility additional content, added under the 'important' call out. New section under verify eligibility for seat count, term, and first purchase. New section titled cross-channel considerations Additional context has been added to the following sections: • Main promotions section • Verifying promotional eligibility (content, screenshots, and API links)
Sandbox	October 14, 2021	Updated the verbiage in the sandbox section
Multiple section update	October 14, 2021	"Feature is currently under development and will be made available soon" removed under: • Promotions new commerce • Price list preview • European regional customer pricing sheets • Telco and paygo offers • Add-on enforcement • Migration capabilities • Switch billing plans midterm without resetting term • Midterm conversion enhancements: Midterm "free to paid" and "paid to paid" with two plus intents (change quantity, SKU, term, and billing plan) • Partial upgrades Partial seats with other subscription property changes • Moving partial to existing subscriptions
Key feature summary	October 14, 2021	Updated the key feature summary table with all features that will be available at GA and in the integrated sandbox testing environment.
Key feature overview	October 14, 2021	Updated verbiage on cancellation policy enforcement to articulate the policy clearer.
Canceling full or partial upgrades	October 14, 2021	Section renamed to Midterm upgrade policy with cancellation.
Migration history	October 14, 2021	Additional content added to history section.

Software subscriptions	October 14, 2021	New section added.
Key feature overview	October 14, 2021	Added a * under monthly term subscriptions noting "Some commercial seat-based offers in new commerce won't have the monthly term option at launch; see the CSP catalog and pricing list to confirm monthly term availability".
Telco	October 14, 2021	Additional content added to section: • Note section • Telco overages The following new sections have been added: • Pricing and margins
Subscription management features	October 14, 2021	Full upgrades section • New screenshots Partial upgrades section • Compliance messaging • and screenshot

November 2021

Section	Date changed	Change made
Upgrades	November 1, 2021	NEW Note section added
Reconciliation	November 1, 2021	- NEW "What are the different charge types" section added. - Total column added to the following table in the following areas: Cancellation, Add/remove seats, Trial, Upgrades. - How to link upgraded transaction section updated - Updated verbiage in How NCE reconciliation works sections - Update to how one-time and recurring changes are calculated for one year and monthly cycle changes - Corrected the explanation under the Add or remove seats example to not that the first transaction shows the refund of 12 seats and the adjusted transaction shows the cost of 8 seats instead of 2 as previously documented. - The total calculation explanation has been updated to remove reference to billing cycle to charge cycle in the following areas: 1. Cancel subscription scenarios 2. Trial subscription scenarios 3. Add or remove seats scenarios 4. Upgrade subscription scenarios - Correction made to the following sentence to note from the 10th to the 9th: "For any purchase made on any other day of the month, for example the 10th of the month, the subscription end date will be the 9th."

Software subscription	November 1, 2021	- Added note illustrating to the toggle on or off feature in the screenshot - Updated section with the following timelines for the default implementation Based on partner feedback, and to give partners more time to adapt to the change, Microsoft will revert the autorenew default of "On" by setting the autorenew default to "Off." The estimated date for this reversion is October 26, 2021. Microsoft anticipates moving the default autorenewal setting to "On" on January 22, 2022. - Scheduling changes in billing frequency section updated with additional content
Key feature overview: Cancellation policy enforcement	November 15, 2021	Added the following: Note: Microsoft will enable self-service functionality via Partner Center or API for seat-count reductions at midterm (from the number of seats added midterm), instead of this reduction requiring a support request. Testing of this self-serve capability will begin in the integrated sandbox environment on December 10, 2021.
Cancellation: Decreasing seat count while in cancellation window	November 15, 2021	Added the following: Note: Microsoft will enable self-service functionality via Partner Center or API for seat-count reductions at midterm (from the number of seats added midterm), instead of this reduction requiring a support request. Testing of this self-serve capability will begin in the integrated sandbox environment on December 10, 2021.

Price lists	November 15, 2021	The following changes have been made within the price list sections: • How to access price lists Additional context added to the section by market and country with examples • Difference in existing offer pricing and new commerce Added last paragraph on pricing discrepancy on some offers • New commerce terms and billing frequency New section added • Monthly and annual terms New section added • European regional pricing Section has been rewritten to provide more context.
Add-ons in new commerce: Identifying add-ons	November 15, 2021	Clarity added to the column names for identifying add-ons
Billing, invoicing, and reconciliation: What are the different charge types?	November 15, 2021	Link added to the billing and reconciliation on docs.microsoft.com
Migrations	November 15, 2021	In the ineligible migration section, added migrations in the first month Like-for-like migrations updated to note available on October 14, 2021
Migrations: Bulk Migration	November 15, 2021	NEW section added
Migrations: Billing term and frequency	November 15, 2021	Verbiage updated within section
Migrations: Enhanced Capabilities	November 15, 2021	NEW section added

Purchasing in new commerce: Telco and paygo offers	November 15, 2021	Added the following under the section heading: <i>Note Canada Telco products will be available to test in the sandbox environment on December 15, 2021 and available for purchase on January 22, 2022.</i>
Available geographies	November 15, 2021	Updated the following for Canada Telco: Canada: Telco products will be available to test in the sandbox environment on December 15, 2021 and available for purchase on January 22, 2022.
Purchasing comparison chart	November 15, 2021	Updated slide 2 of the chart with the cancellation policy for CSP NCE
Promotions in new commerce: Pricing reconciliation for promotions	November 15, 2021	NEW section added
Cancellation: Small business seat limits	November 15, 2021	Section name changed from "Subscription ownership limits" to "Small business seat limits" Additional context with an example was added to the section.
Billing, invoicing, and reconciliation: Promotion scenarios	November 15, 2021	NEW section added