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Documentation Getting Started Vendor Tutorial

Product Definition

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Auto-generated at April 16, 2025

Overview

The following guidelines demonstrate how to define a *product* on the CloudBlue Connect platform. Note that products may represent physical goods as well as software or provided services.

The *product definition* operation is an essential part of the Product Flow and one of the most important procedures on the platform. For instance, Vendors can define product capabilities that drastically affect further subscription operations, such as renewal management, product usage reporting and more.

Therefore, the Products module includes a comprehensive list of options and settings that enable Vendors to specify every single feature of their product and customize product distribution operations with their partners.

Prerequisites

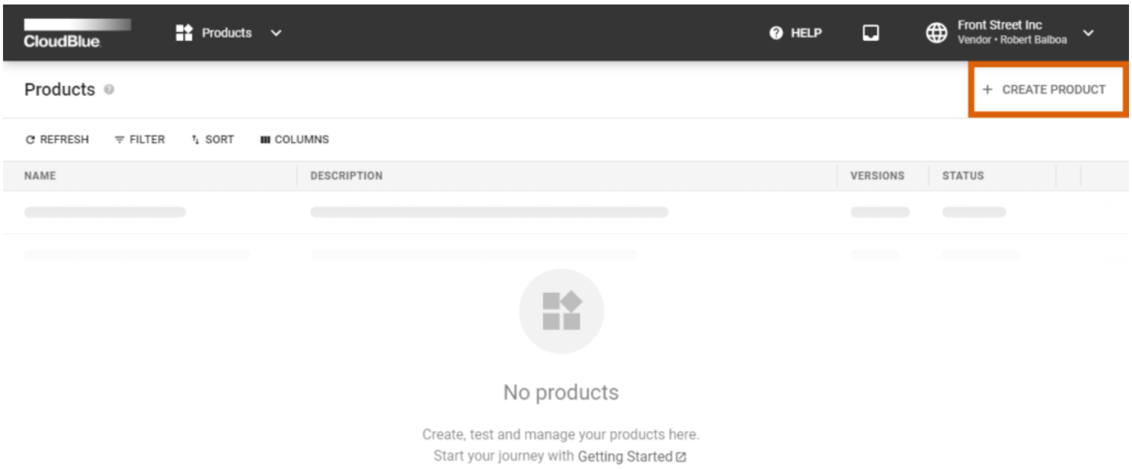
Before defining your product on the Connect platform, make sure that the following requirements are met:

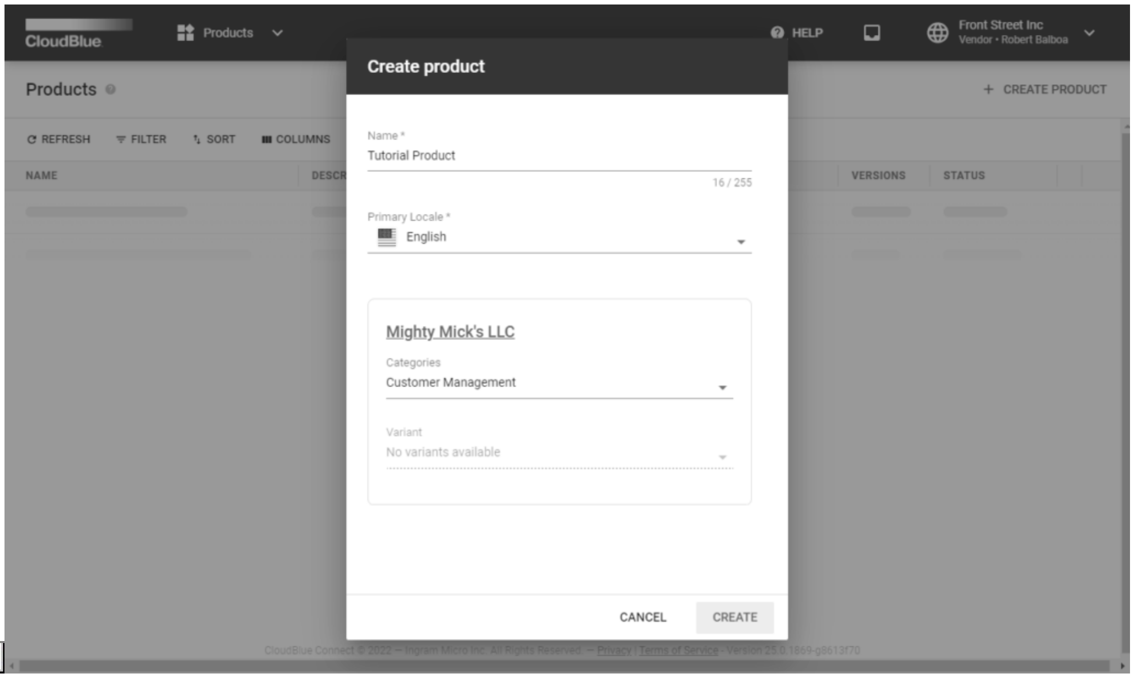
- Vendor Portal is successfully activated.
- Required agreements and contracts are signed.

Product Creation

The following scenario showcases *Front Street Inc* vendor organization that defines a product on the Connect platform. This product represents customer management software that requires a license and an activation key to work with. Use the instructions below and provided scenario to successfully define your product on the platform.

Access to the **Products** module and click the **Create Product** button to initiate the *product definition* process. Thereafter, the system prompts you to fill out the following form:





- **Name**: Enter your product name in this field.
- **Primary Locale**: Specify the language or locale that will be used for your product.
- **PIM Specifications**:
  - **Category**: Specify a category for your product that will be used within your business partner’s marketplace. Selecting right product category is increasingly important to reach out audience that is interested in your product.
  - **Variant**: In case your selected category includes attribute variations, select a combination of attributes that is

required for your product. Your selected *PIM category* might also not provide any variations, and thus you can leave this option intact.

Since Front Street Inc's product represents *customer management software*, the **Customer Management** category is selected.

Click the **Create** button to create a product object on the platform. Note that this product is not configured yet. Access your *product profile page* by clicking on your created instance. Thereafter, follow the guidelines below to continue with your product definition operation.

General

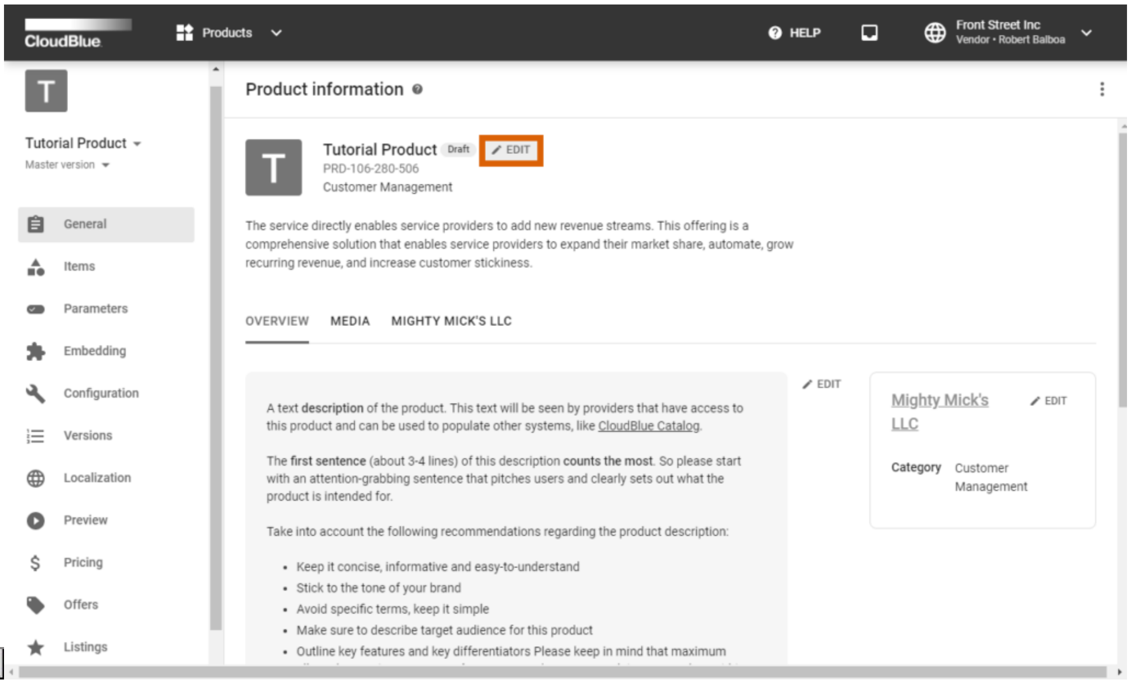
The **General** section within the product profile page provides general product attributes that define product name, category, logo, description, etc. In addition to these attributes, this section also contains the following tabs:

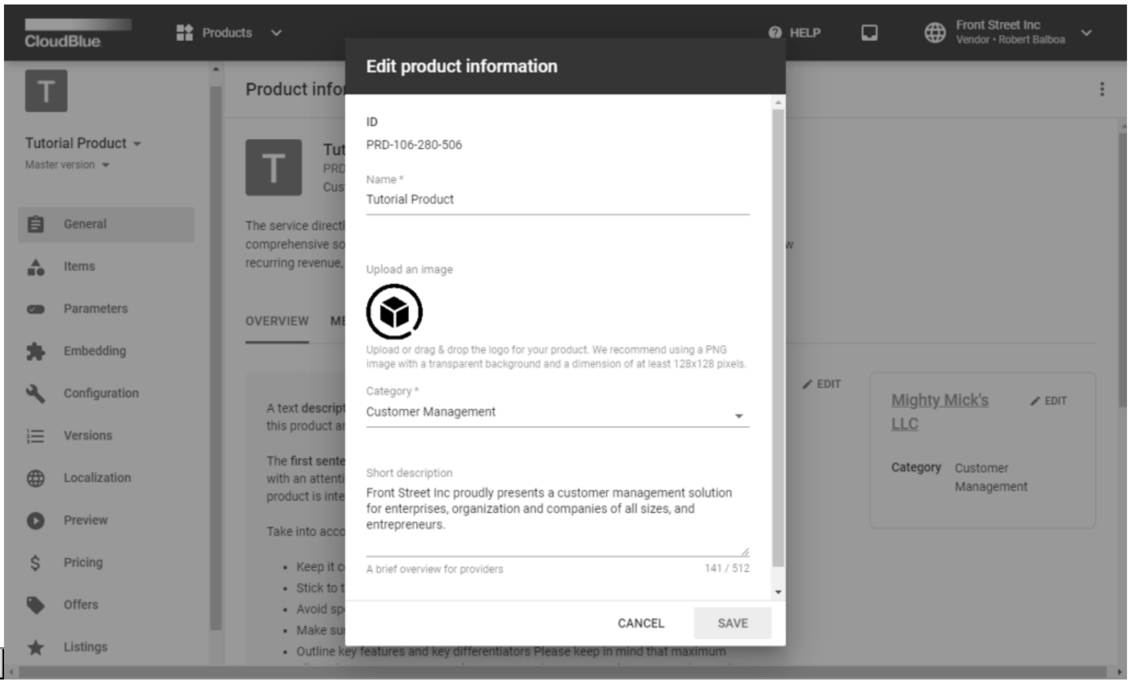
- **Overview**: This tab contains product description that usually introduces a product and provides details around its features.
- **Media**: Vendors can add one or more media files for marketing purposes via this tab.
- **Distributor – Attributes**: In case your business partner provide attribute templates for your selected category, the system displays an additional tab that allows configuring attributes for your product. Refer to Product Information for more details.

Front Street Inc can use the **General** section to add their logo, adjust description, provide required media and change other attributes.

Edit general information

Click the **Edit** button next to your product name to edit your **Product Information**.



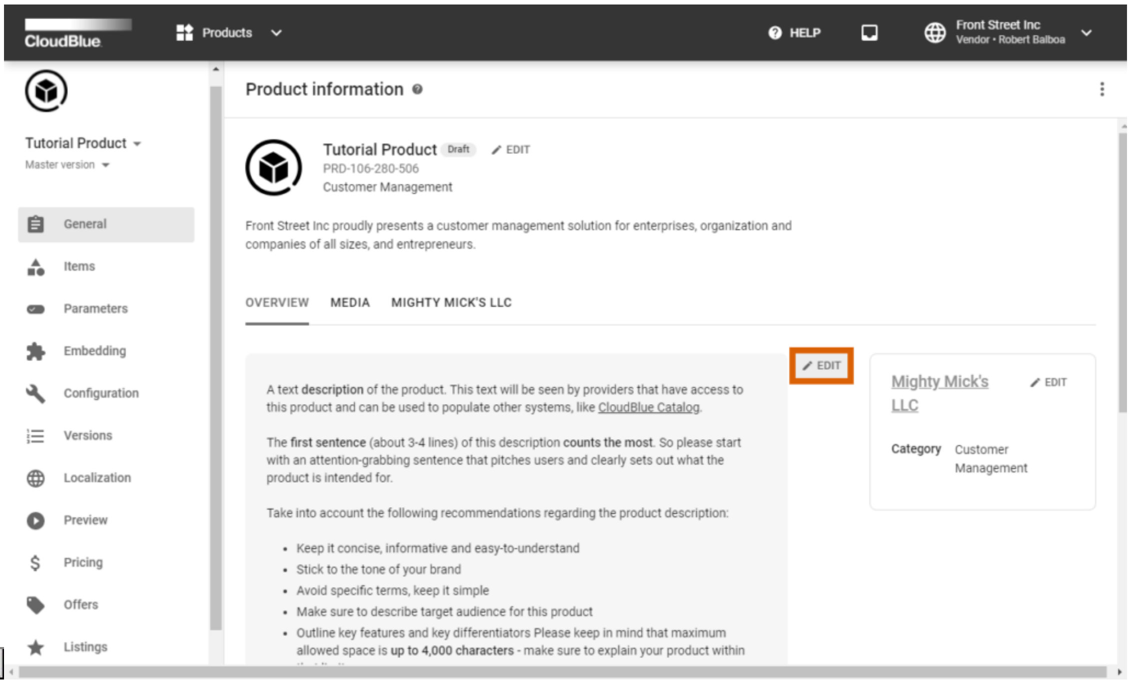


Therefore, Front Street Inc can enter required product description and upload their product icon.

It is recommended to use the PNG format with a transparent background for your icon.

Specify product overview

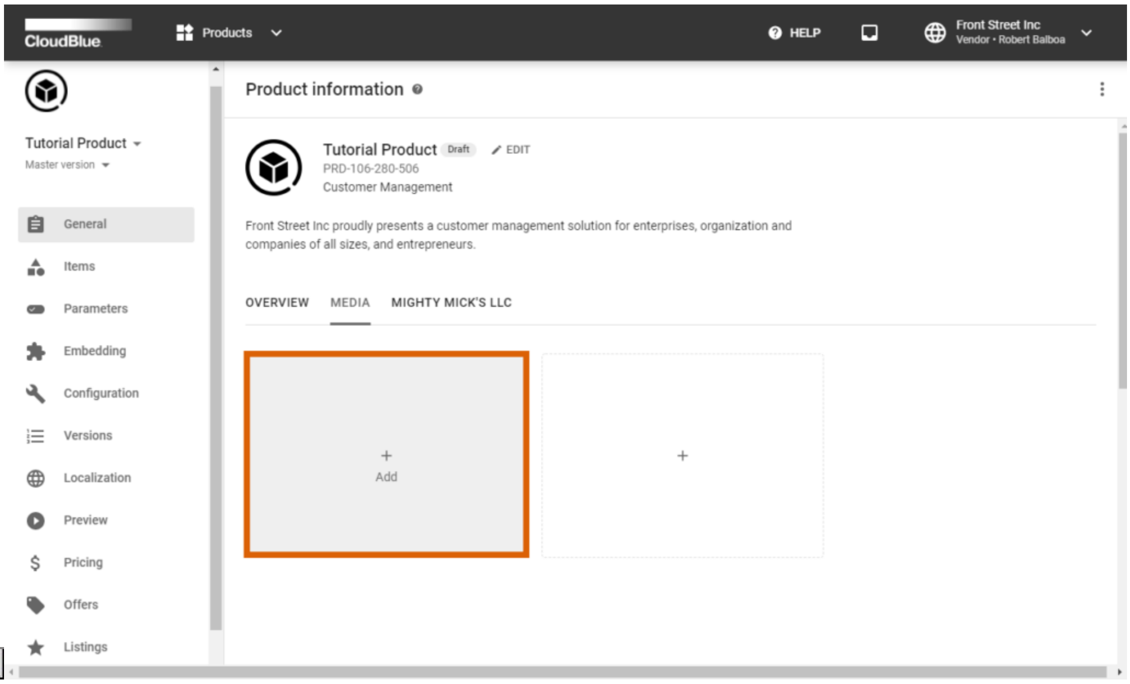
Click the **Edit** button next to your product overview and change it. Follow the provided instructions and replace the default overview with your own text.

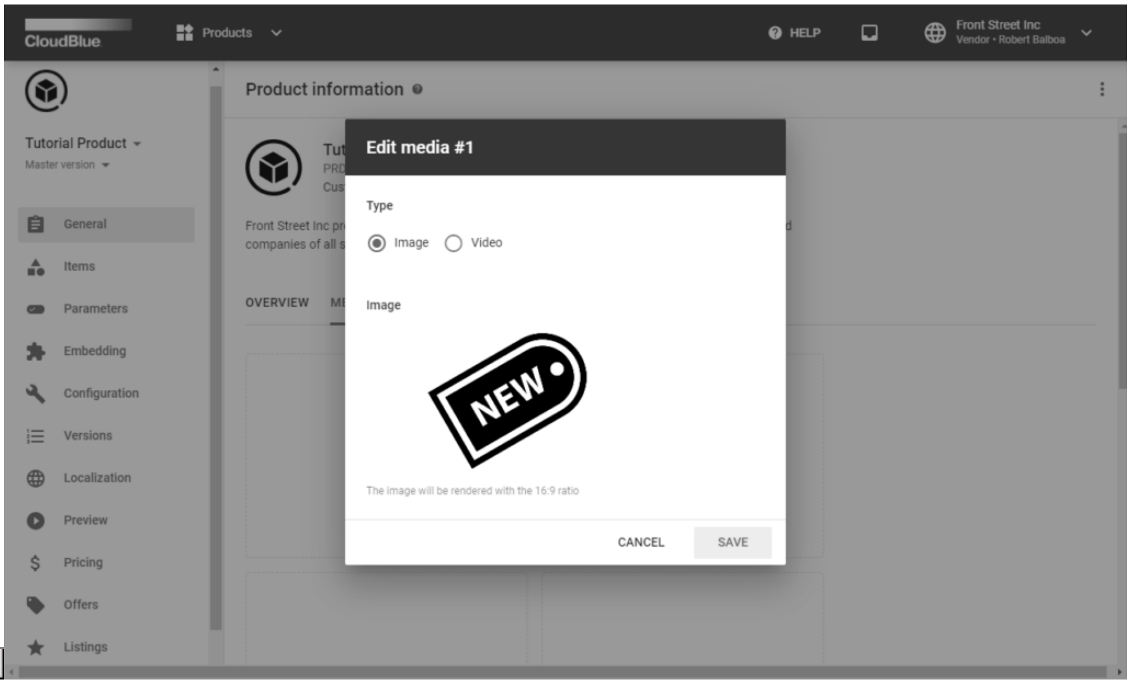


Note that provided description should support the markdown text formatting.

Add media content

Proceed to the **Media** tab to upload your images or videos. In general, uploaded media content files consist of images and videos describing the product..



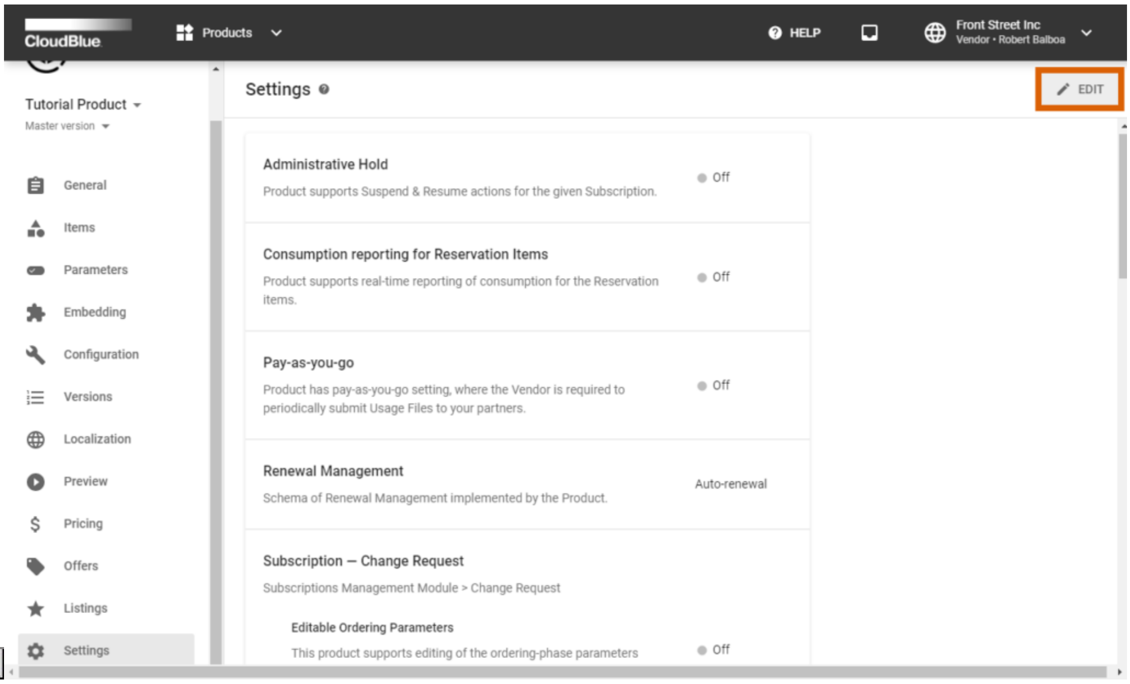


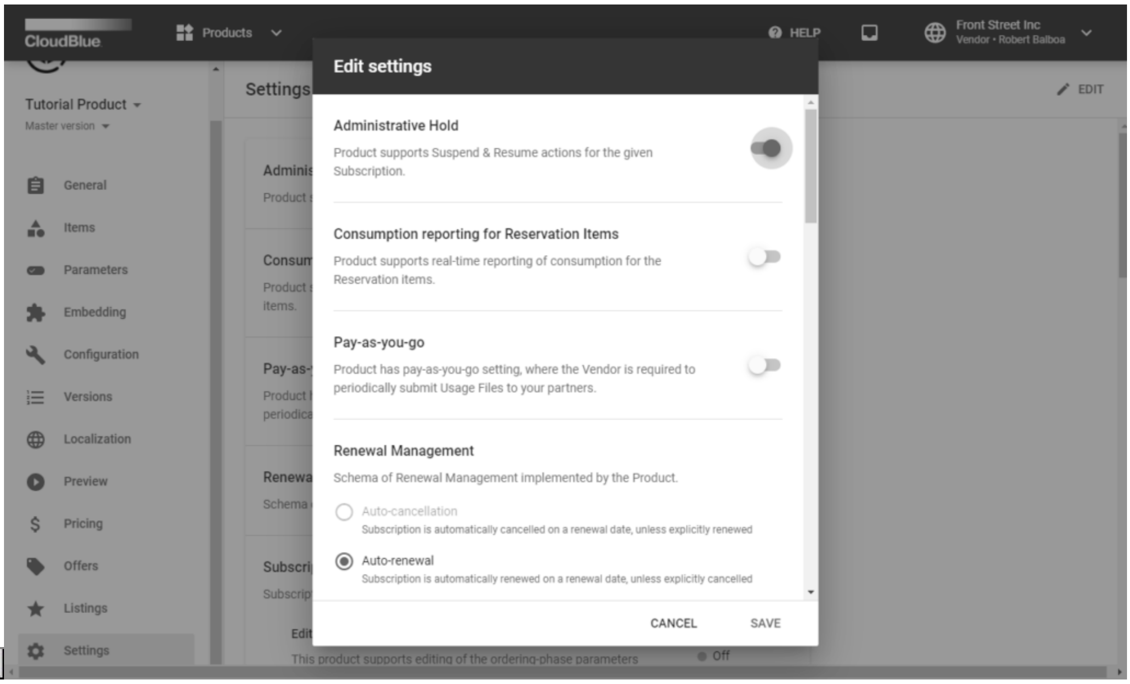
Note that the first uploaded media content serves as the main image or the main video of your product, meaning that it is used as a thumbnail image for your product within the system.

Settings

Settings represents one of the key section of the product profile page. This section is used to enable or disable various aspects of a product distribution and product ordering procedures. Note that certain options within the product profile page (e.g., the *Pay-as-you-go* items configuration) are not accessible until corresponding setting is switched on for your product.

Proceed to the **Settings** section and click the **Edit** button to enable or disable specified product attributes.





It is recommended to familiarize yourself with the Settings documentation before editing the settings list.

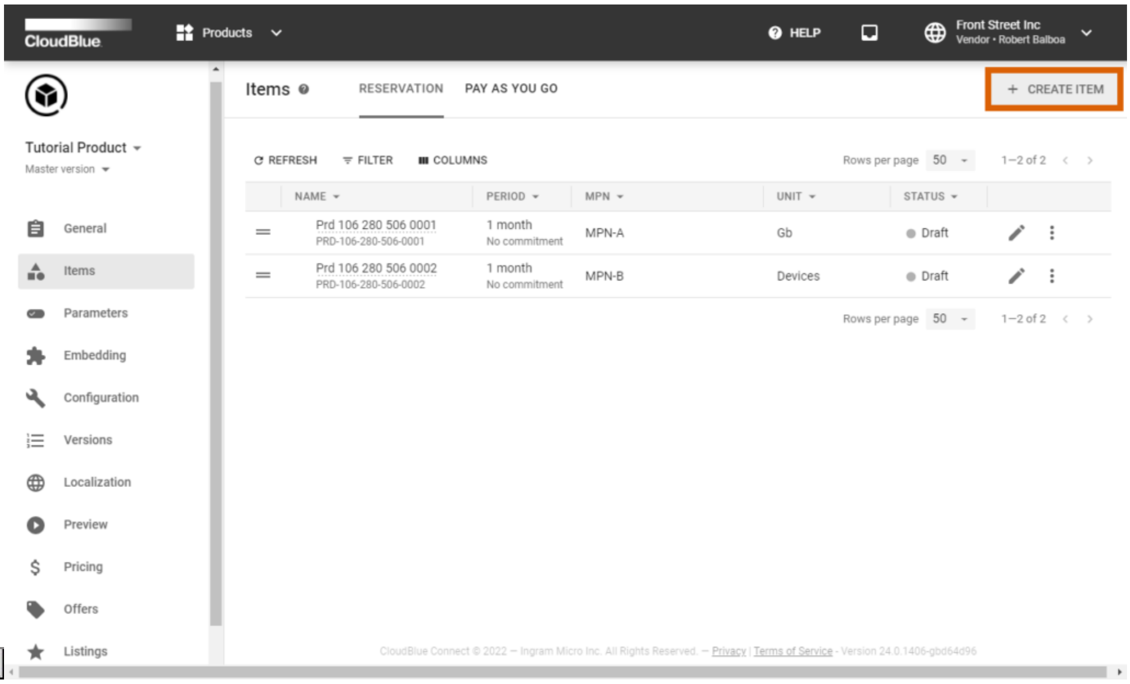
Items

A product that is defined on the CloudBlue Connect platform should include *items* (also called SKUs). Items represents individual atomic line items of the order (or the invoice). Namely, an item is a specific resource or service that customers order and pay for. In case more information on products and items difference is required, refer to the Product vs Items chapter.

In this scenario, *Front Street Inc* should create items for their software licenses within the product profile page. The following steps showcase how to define such items.

1. Navigate to the Items section

Proceed to the **Items** section to define your items.

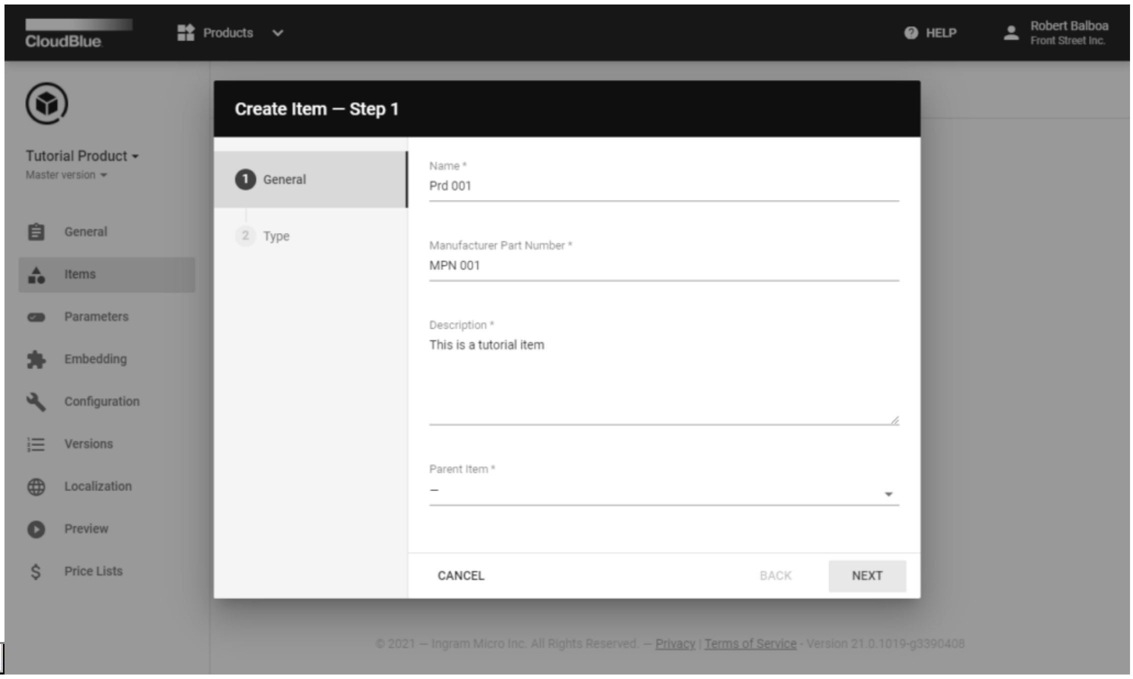


Click the **Create Item** button to create a new item. Alternatively, you can edit *default items* from the list.

2. Configure the item general properties

Configure the general item properties in the appeared form:

- **Name**: Enter your item name in this field.
- **Manufacturer Part Number**: Type your item MPN (e.g., “MPN-001”).
- **Description**: Provide a description of your item.

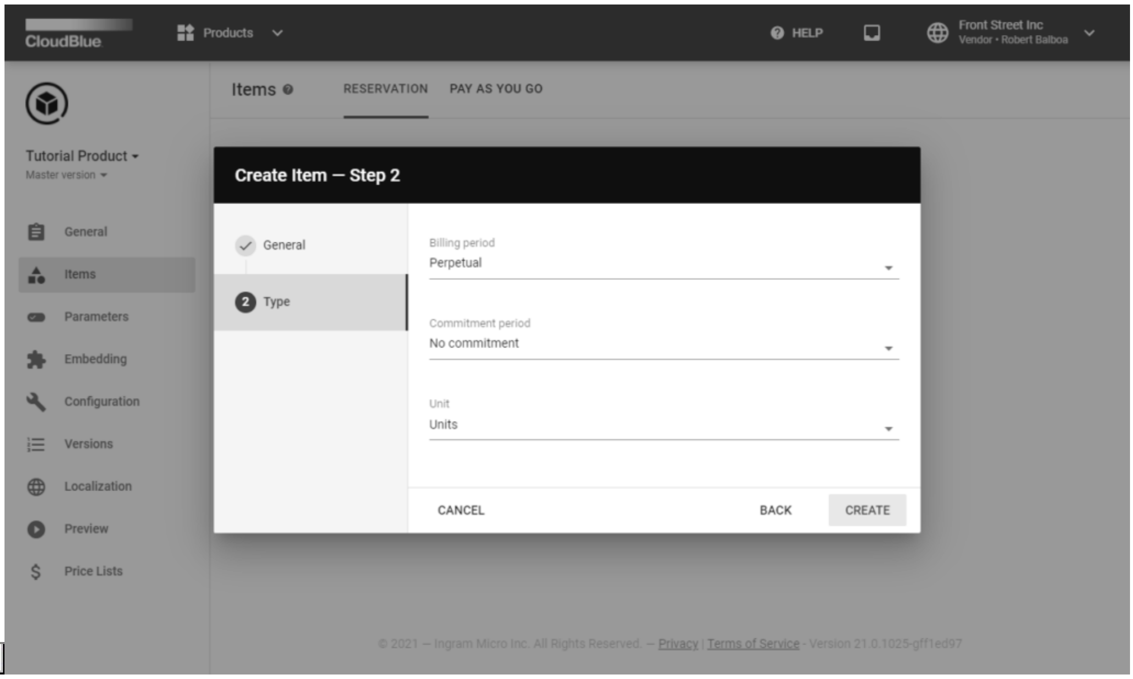


Click **Next** to continue.

3. Fill out the type form

The system prompts you to fill out the following form:

- **Billing Period** specifies the interval of time from the end of one billing statement date to the next billing statement date.
- **Commitment period** specifies whether a Vendor is committed to providing the service for a selected period and whether customers are committed to paying for the service during this period.
- **Unit** defines how service resources are accounted for, for example, per unit or per computer.



In this scenario, Front Street Inc selects *perpetual billing period*, specifies *units* that represent software licenses, and chooses *no commitment* in the corresponding field. Therefore, these licenses will be sold on a one-time basis.

Parameters

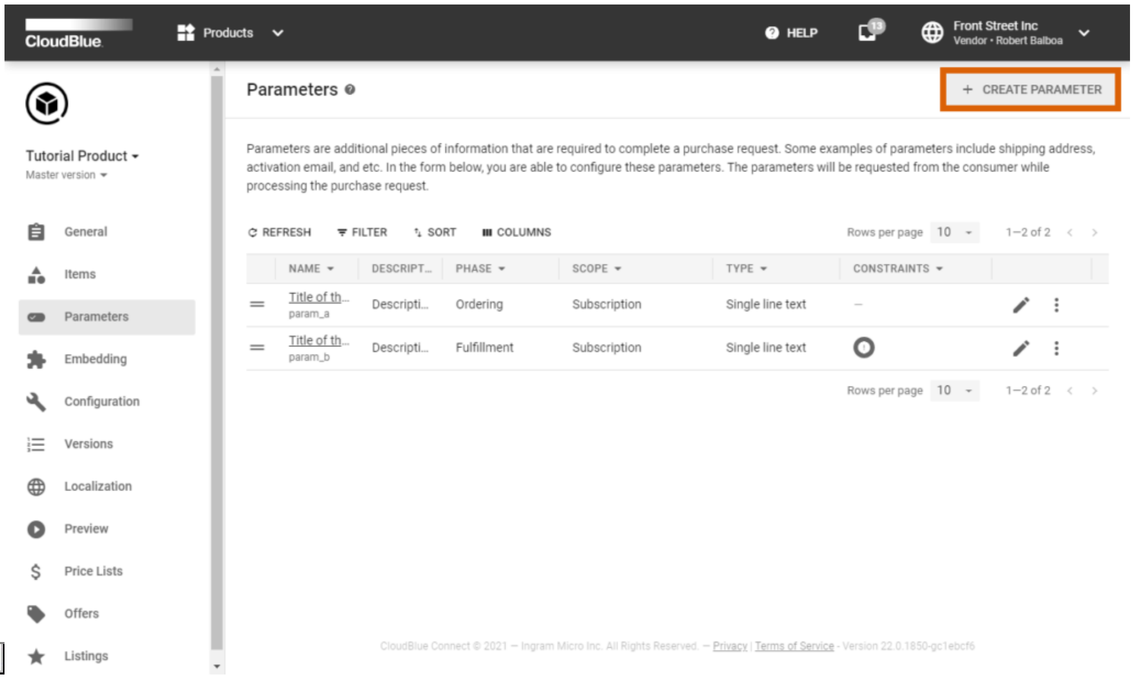
Your product can contain parameters that are used to create a product order and to fulfill a product request. There are three types of parameters on the Connect platform that are specified during the product *configuration* phase, during *ordering* phase and during the *fulfillment* phase. Learn more about parameter phases by accessing the Parameters documentation.

The following steps showcase how Front Street Inc creates a parameter for license activation key value. This value should be assigned by this Vendor during the fulfillment phase.

Launch Parameter Wizard

Access the **Parameters** section to define your parameters. Click **Create Parameter** to launch the parameter creation wizard. Alternatively, you can **edit** the provided parameters by clicking on the corresponding icon.

> Remove provided parameters
>
> In case you want to delete default parameters, it is necessary to delete corresponding metadata within the default *subscription activation template* from the Embedding section. Refer to Removing Default Parameters for more details.

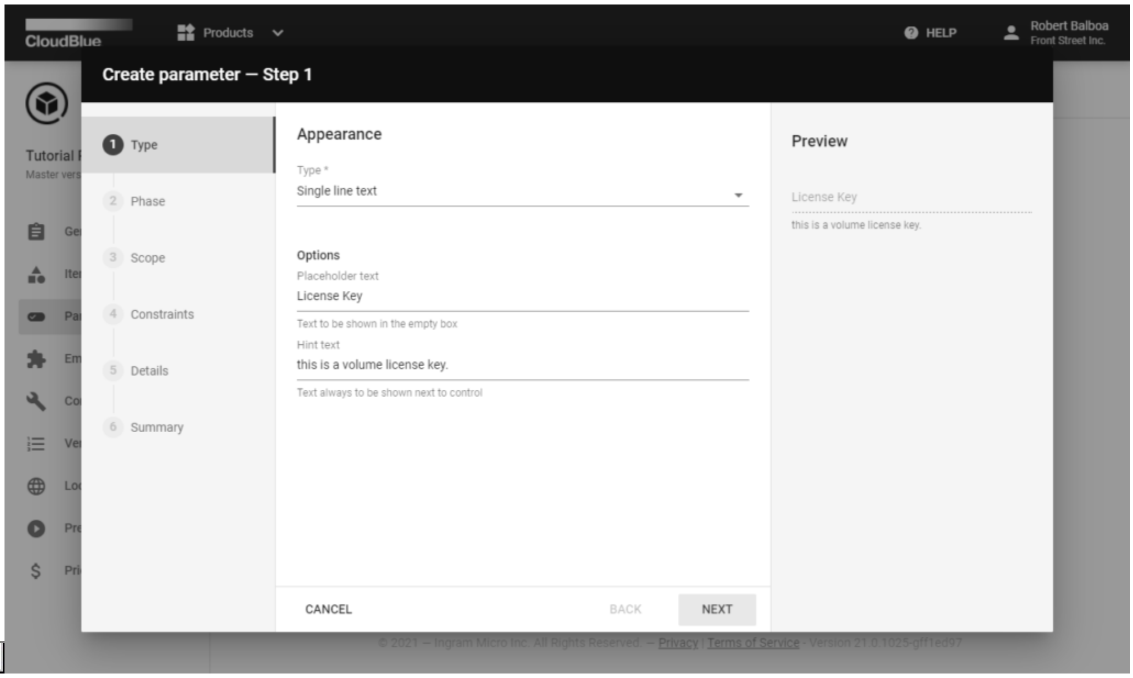


Front Street Inc decided to create new a parameter for license activation key values.

1. Type

Specify your parameter type and available options by using the following form

- **Type**: Select your parameter type.
- **Options**: Specify parameter options that vary depending on your selected parameter type.

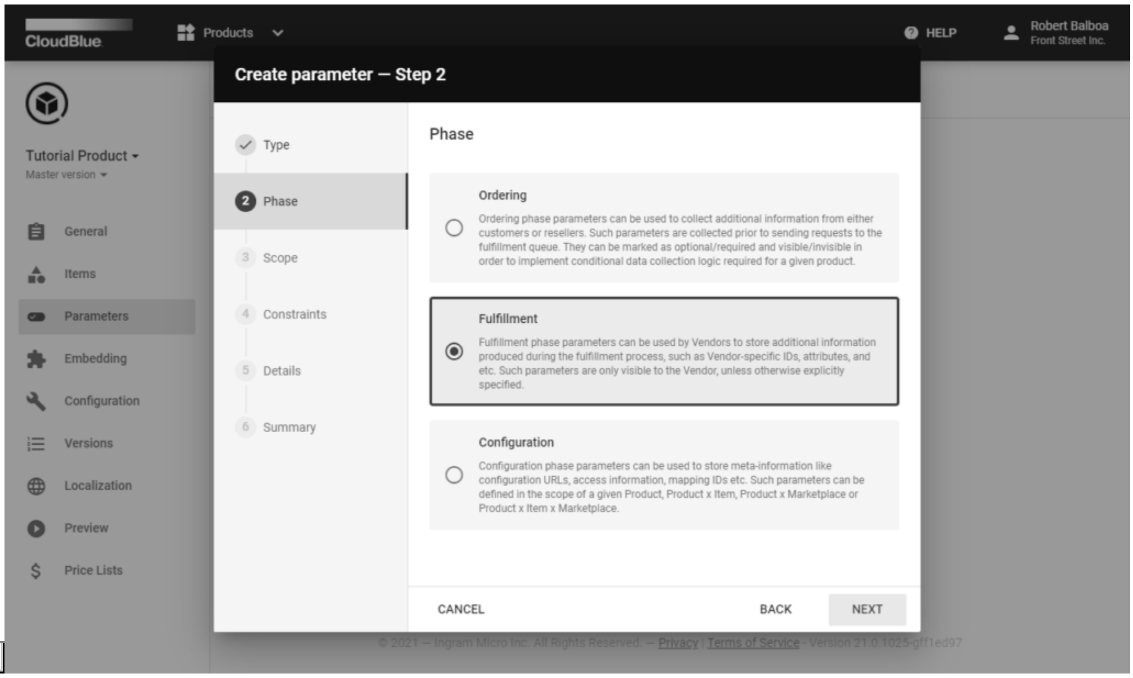


Since *Front Street Inc* requires license activation key parameter, the *single line text* type is selected. This Vendor also specifies *placeholder* and *hint* text.

Click **Next** to continue.

2. Phase

Choose your parameter phase in the following form.

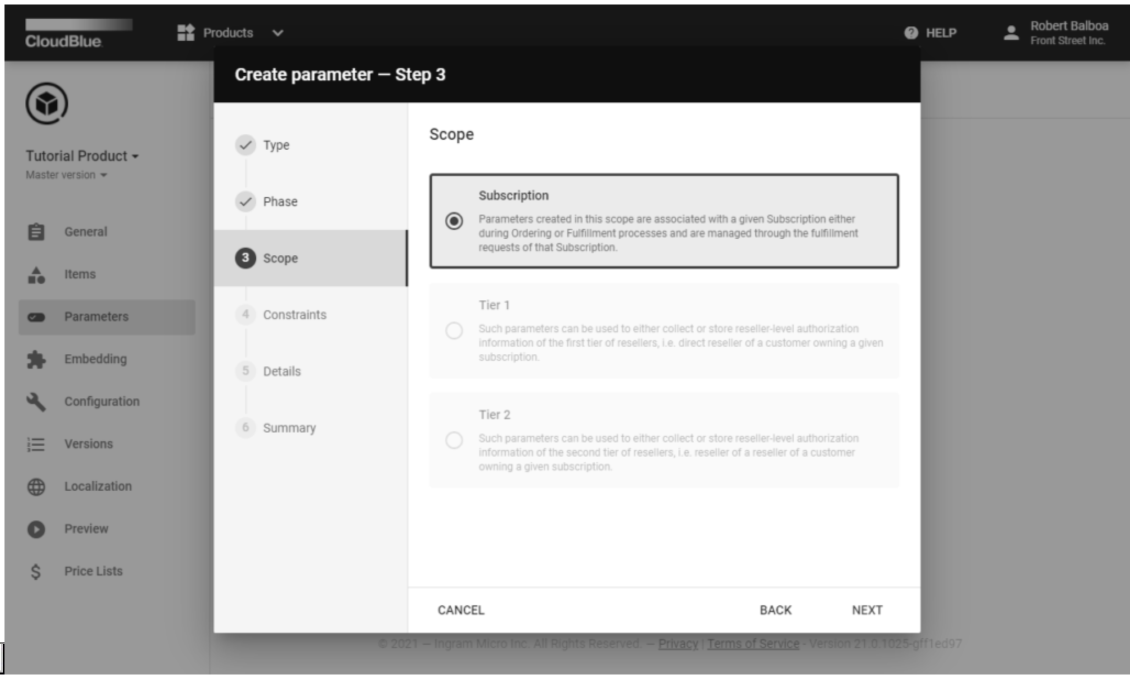


Since Front Street Inc will provide license key values during the fulfillment phase , the *Fulfillment* option is selected.

Click **Next** to continue.

3. Scope

Choose your parameter scope in the following form. Note that provided options vary depending on your selected phase.

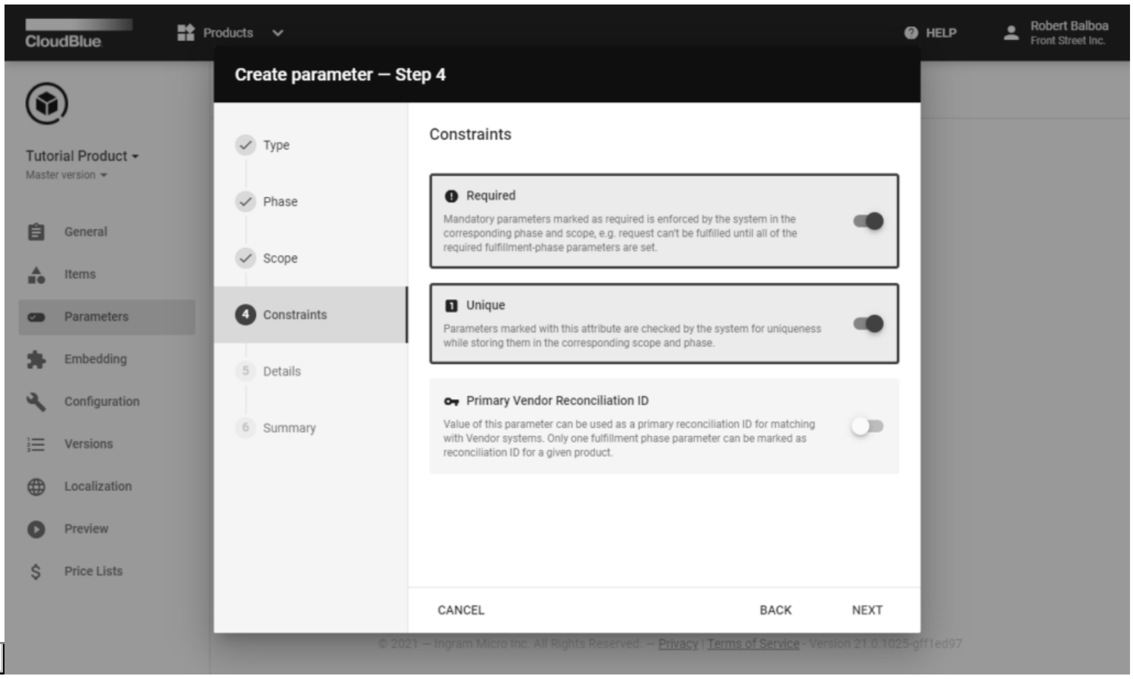


In this scenario, for example, the system allows Vendors to select only the *Subscription* scope.

Click **Next** to continue.

4. Constraints

Specify parameter constraints in the following form



In this scenario, the following constrains are selected:

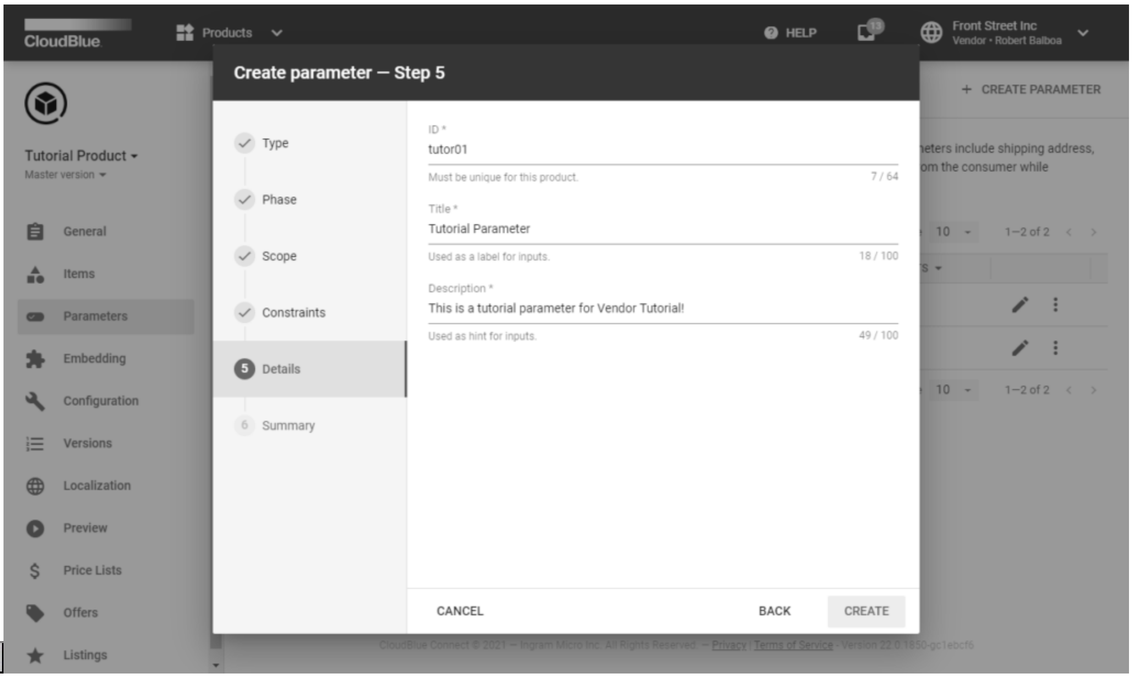
- **Required**: This option makes sure that providing value to the parameter cannot be missed during the fulfillment phase.
- **Unique**: This option makes sure that the assigned parameter value is unique to the Vendor system. A consumer will use this unique value as a key to activate a license.

Click **Next** to continue.

5. Details

Specify your parameter details in the following form:

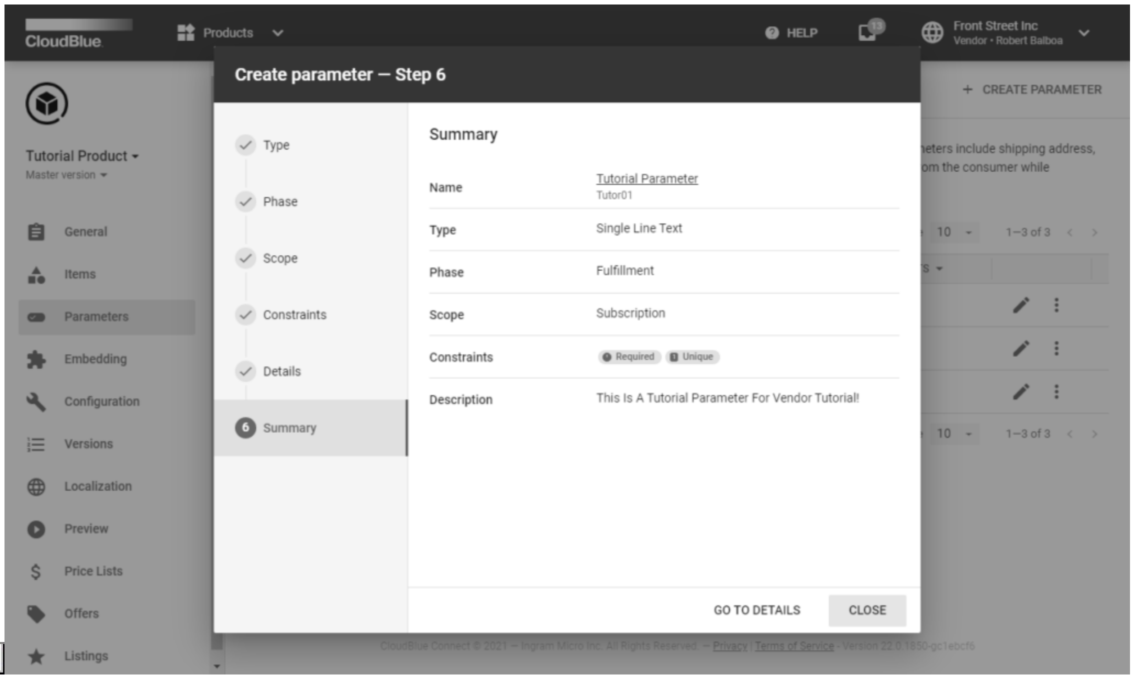
- **ID**: Enter a unique identifier for this parameter.
- **Title**: Type a title for your parameter.
- **Description**: Enter your parameter description in this field.



Click **Create** to finalize your parameter creation.

6. Summary

As a result, the system provides your parameter summary. Review your created parameter by clicking **Go to Details** or click the **Close** button.



Therefore, Front Street Inc successfully created required parameter to provide license activation keys for customers.

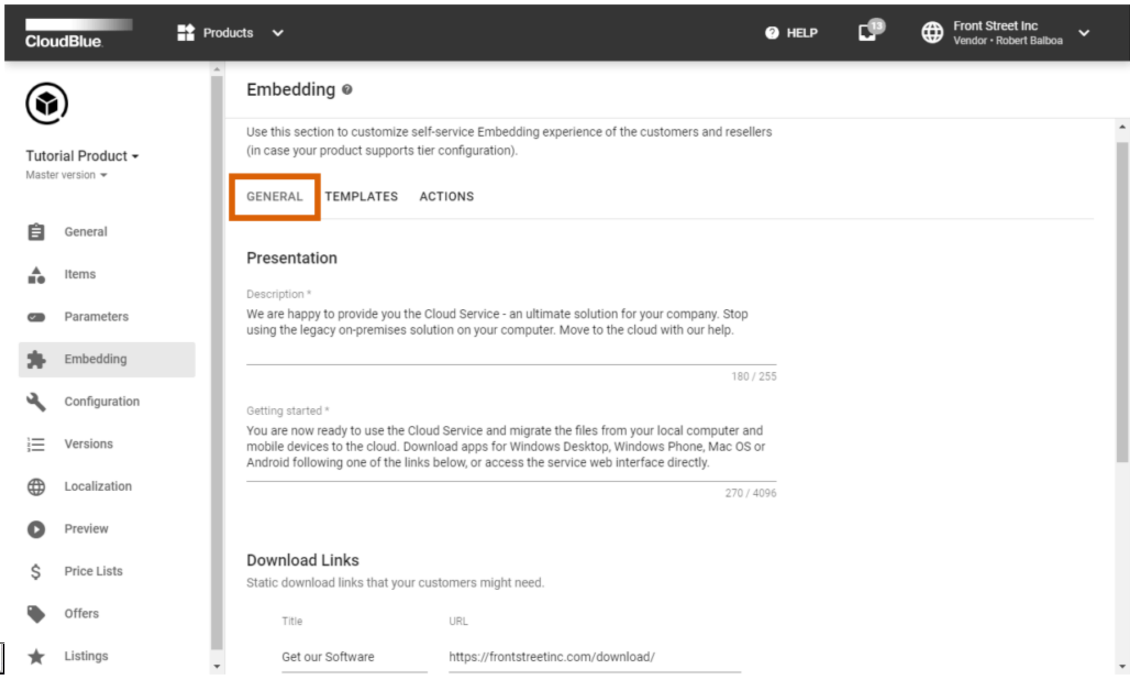
Additional Setup

The following provides outlines settings and option that could be skipped in case you want to create a test product on the Connect platform. Note, however, that the provided options and configurations can be increasingly important for your product and your real business cases.

Embedding

The **Embedding** section governs how end-customers in a commerce system can see the product properties and interact with the product. Access these product properties via the following tabs:

- **General**: This tab allows specifying description, getting started text, download links and documentation links.
- **Template**: Access this tab to customize messages that will be shown to users during various states. This includes a pending template, inquiring templates, and subscription approved templates.
- **Actions**: Access this tab to customize your action list (action buttons on the service screen in Customer Embedding), change your endpoint URL (redirect URL of this product API), and view or generate a JSON Web Token secret.


CloudBlue
Products
HELP
Front Street Inc
Vendor • Robert Balboa
Tutorial Product
Master version
General
Items
Parameters
Embedding
Configuration
Versions
Localization
Preview
Price Lists
Offers
Listings
Embedding
Use this section to customize self-service Embedding experience of the customers and resellers
(in case your product supports tier configuration).
GENERAL
TEMPLATES
ACTIONS
Presentation
Description *
We are happy to provide you the Cloud Service - an ultimate solution for your company. Stop
using the legacy on-premises solution on your computer. Move to the cloud with our help.
180 / 255
Getting started *
You are now ready to use the Cloud Service and migrate the files from your local computer and
mobile devices to the cloud. Download apps for Windows Desktop, Windows Phone, Mac OS or
Android following one of the links below, or access the service web interface directly.
270 / 4096
Download Links
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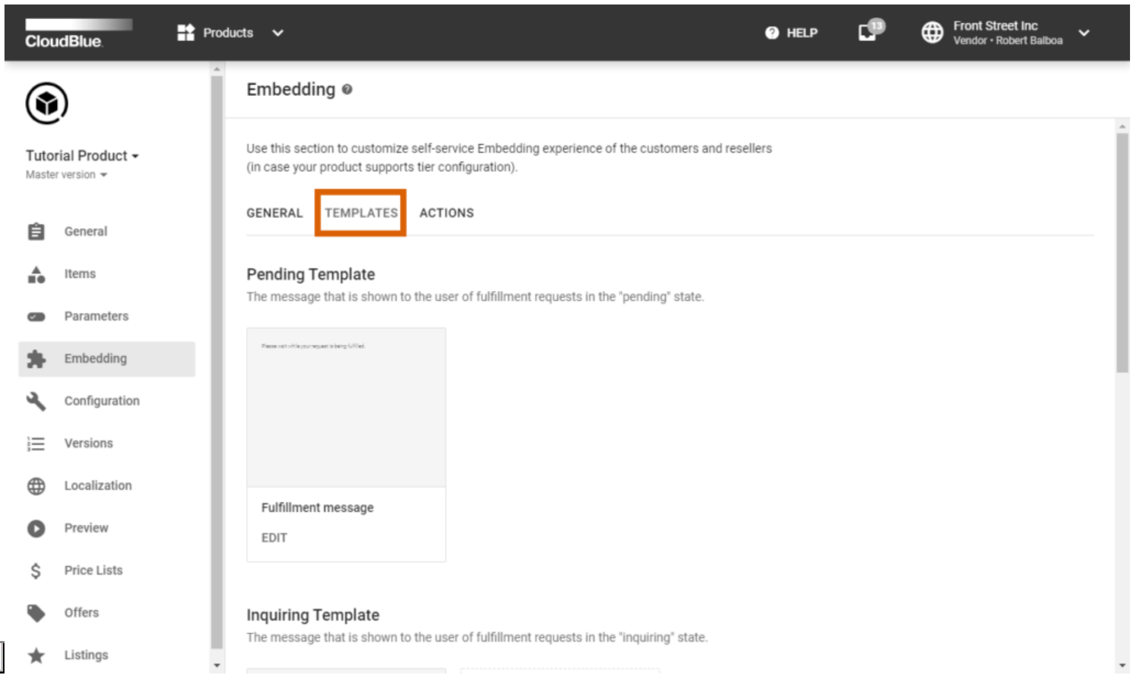
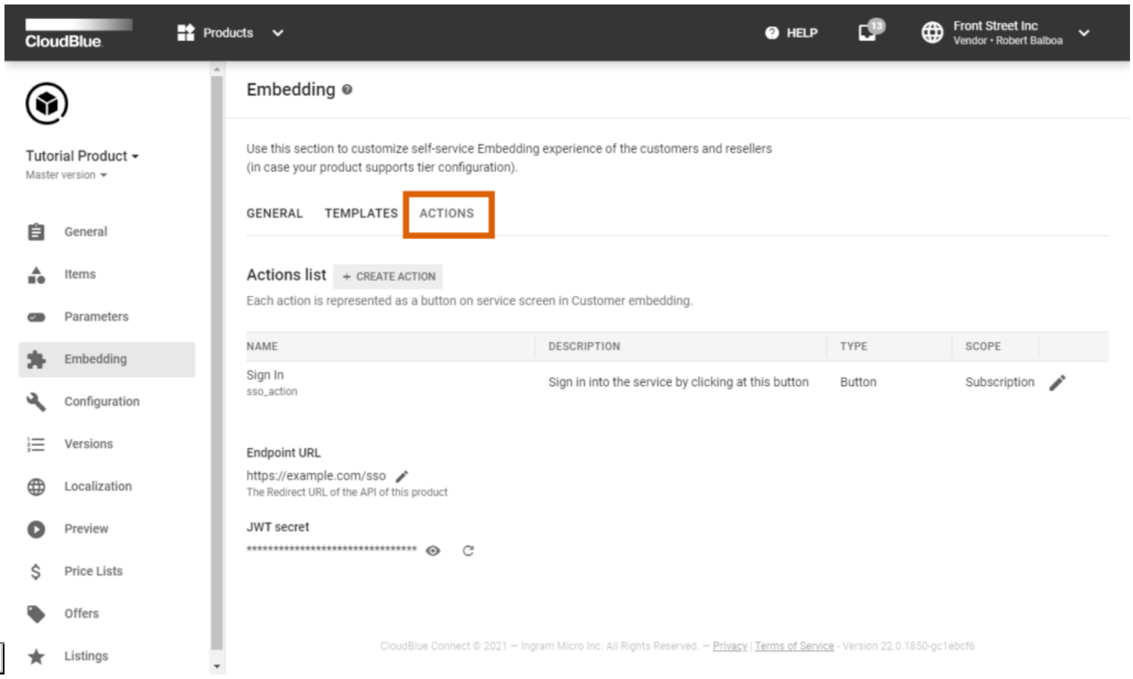

CloudBlue
Products
HELP
Front Street Inc
Vendor • Robert Balboa
Tutorial Product
Master version
General
Items
Parameters
Embedding
Configuration
Versions
Localization
Preview
Price Lists
Offers
Listings
Embedding
Use this section to customize self-service Embedding experience of the customers and resellers
(in case your product supports tier configuration).
GENERAL
TEMPLATES
ACTIONS
Pending Template
The message that is shown to the user of fulfillment requests in the "pending" state.
Fulfillment message
EDIT
Inquiring Template
The message that is shown to the user of fulfillment requests in the "inquiring" state.

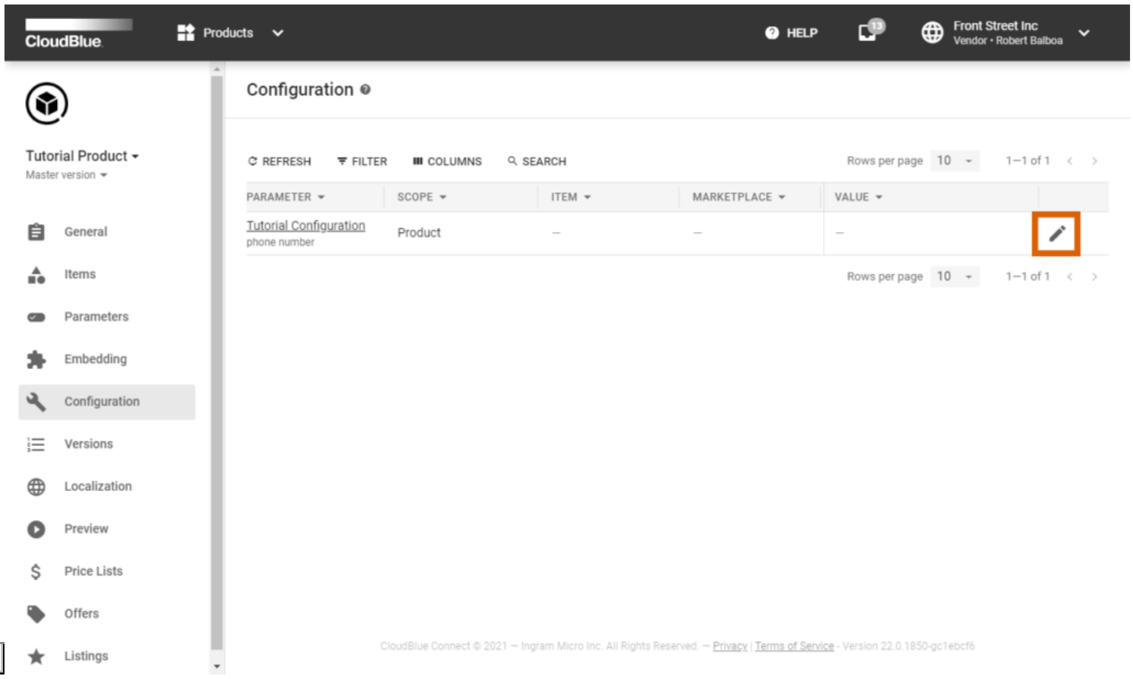


In case more information on any option or setting is required, refer to the Embedding documentation.

Configuration

The **Configuration** section allows Vendors to manage *parameters* associated with the *Configuration* phase. These parameters are vendor-specific and typically used in middleware extensions integrating Connect with the Vendor system.

Provide value for your created configuration parameter by clicking on the *edit* icon.

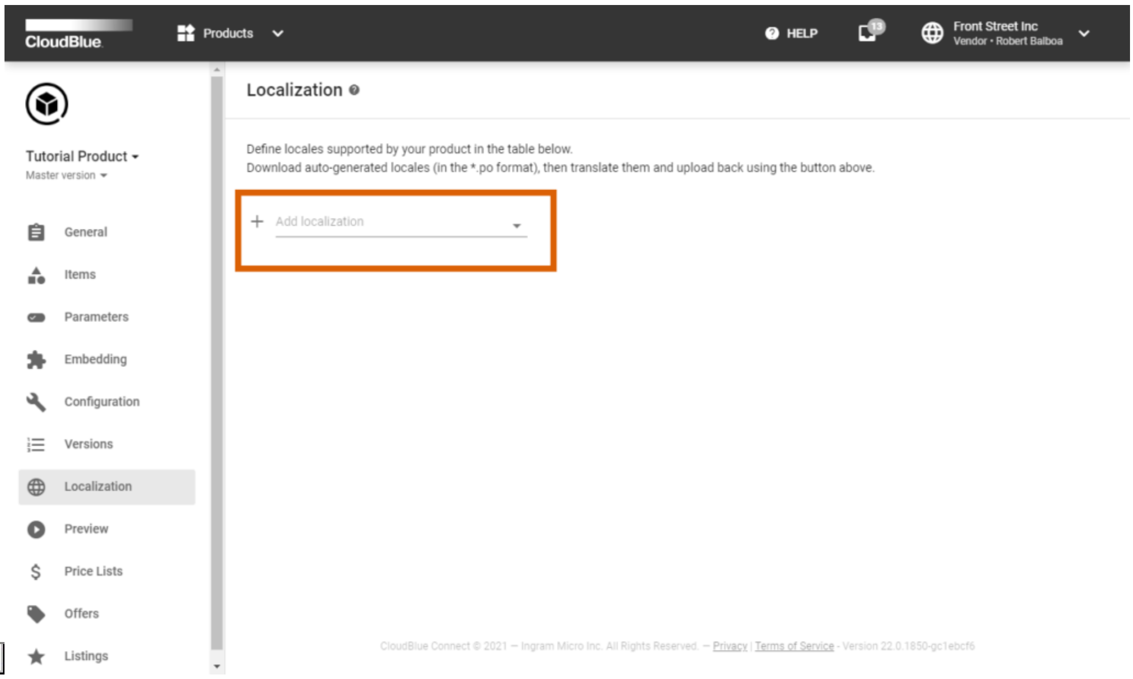


In case middleware integrations with the platform is not required for your organization, you can leave this section intact.

Localization

This section allows specifying localizations supported by your product ordering process. Connect provides localization template files in the PO format for translation. Use PO file editors (such as poedit.net) to open and edit these files.

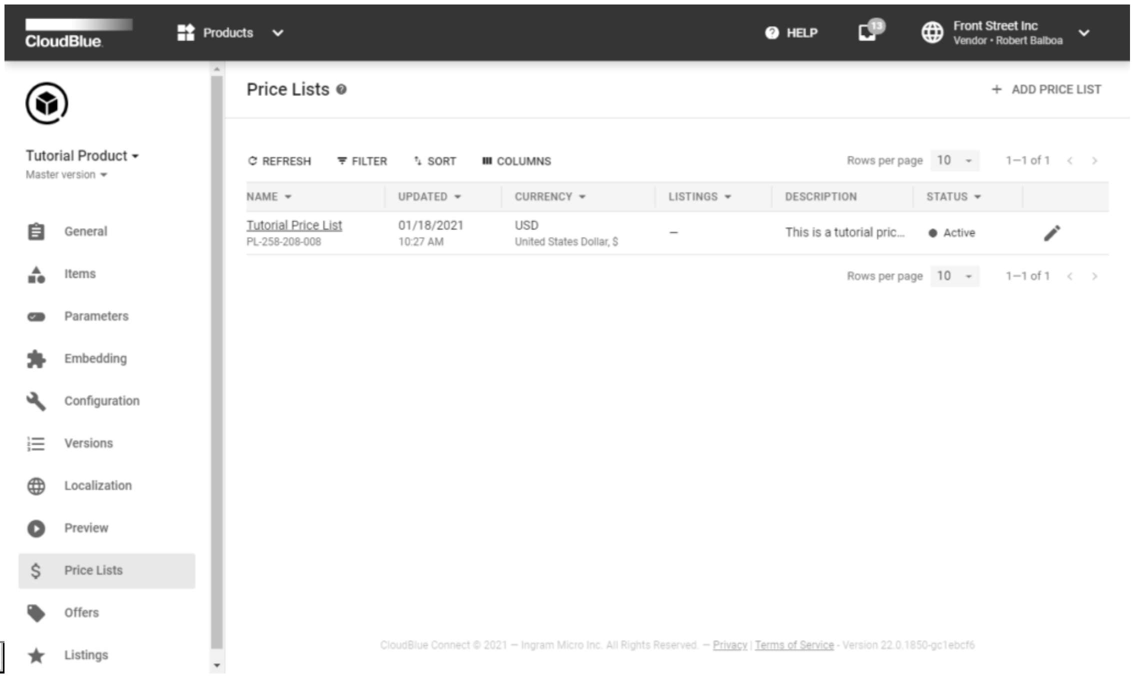
Add required localizations by using the **Add localization** field within the **Localization** section.



Refer to the Localization documentation if more detailed instructions are required.

Price Lists

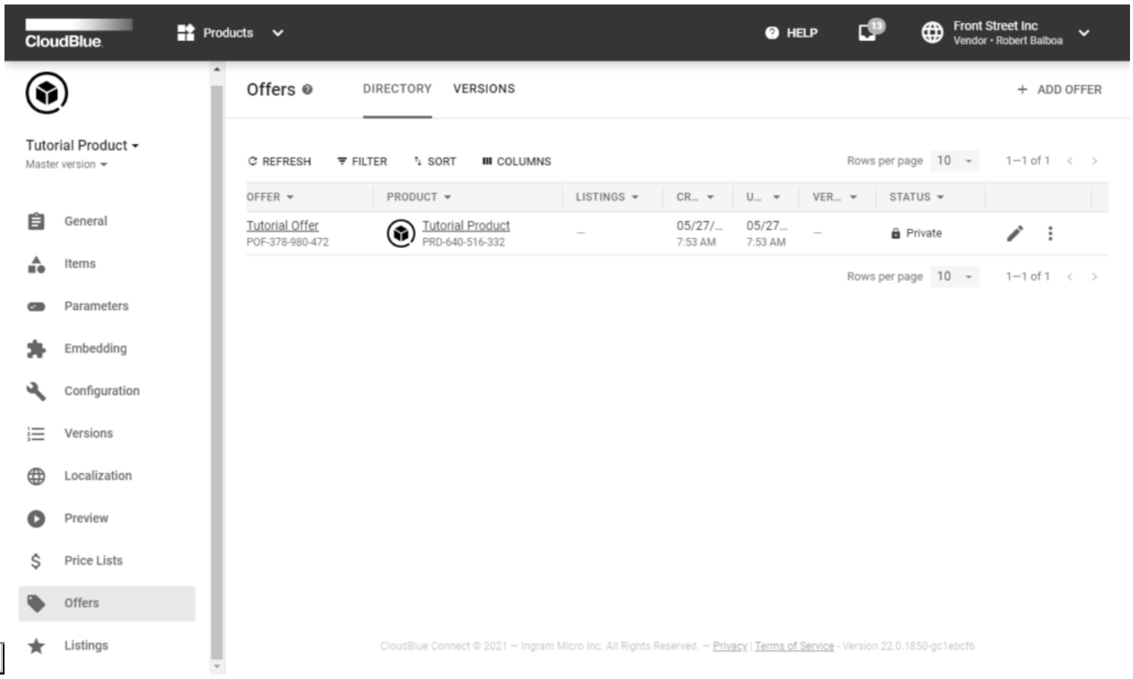
This section enables Vendors to define and manage product price lists. Vendors can also create and edit price lists via the **Pricing** module on the Connect platform.



In case more information on pricing lists is required, refer to the Pricing module documentation.

Offers

Offers represents logical grouping of one or multiple product plans (i.e., service levels that provide different item quantity, product features, etc.) Vendors can create offer instances from the Offers section. Note, however, that your offer instances should be properly configured within the *Offers* module.

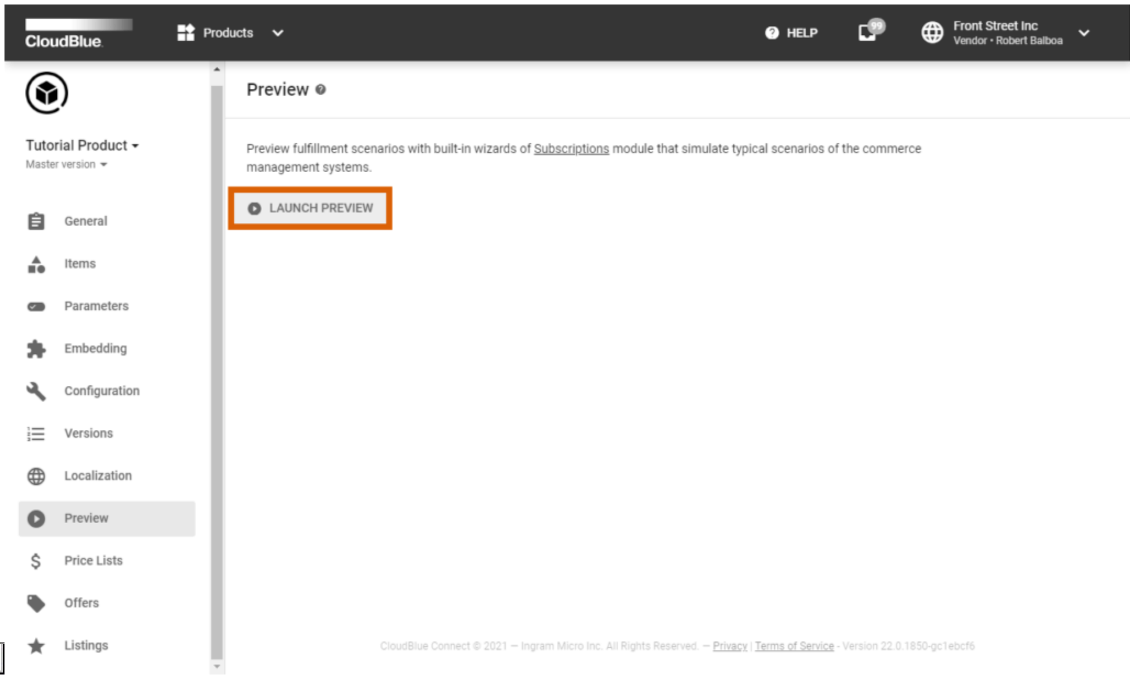


Refer to the Offers module documentation for more details.

Product Preview

Vendors can preview their product configuration by accessing the **Preview** section from the product profile page. It is recommended to launch this preview before assigning a version for a product. Therefore, Vendors can simulate their product ordering experience and ensure that provided settings and options are defined correctly.

> Preview Subscriptions
>
> Note that the system uses same steps to generate preview subscriptions as described in the Subscription Creation documentation. Vendors can also generate preview subscriptions via the *Subscriptions* module.



Once Vendors finalize their product preview procedure, the system generates a preview subscription and its fulfillment request. Vendors can approve or reject this request as described in the Subscription Processing tutorial article.

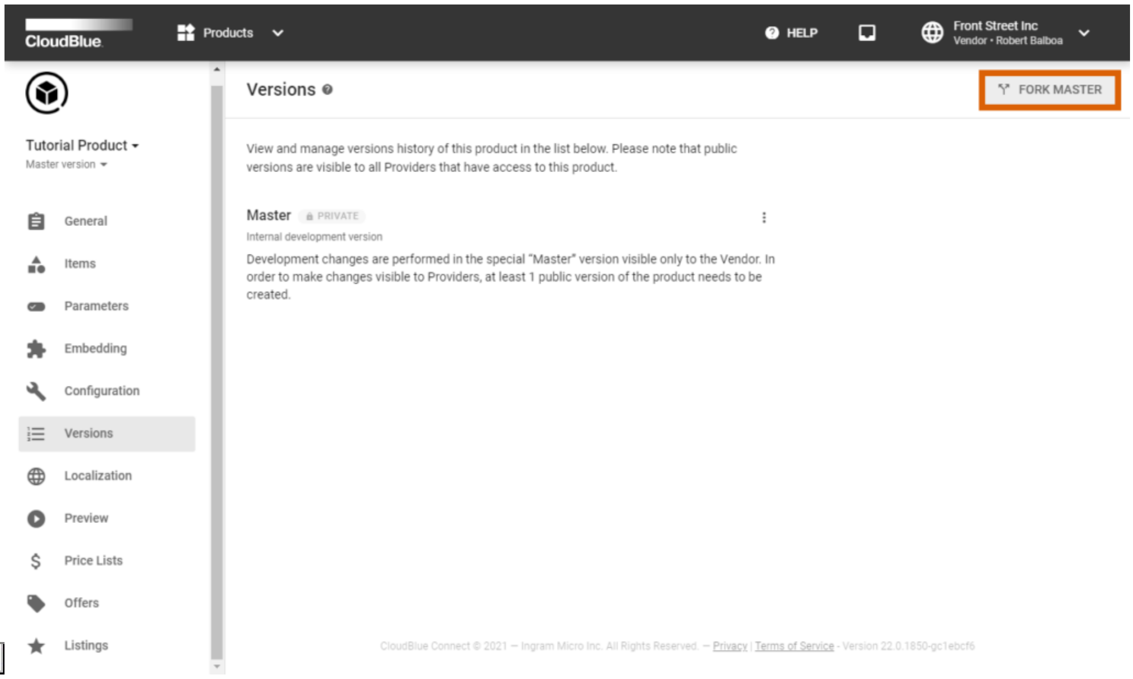
Product Versions

Once all necessary settings and options are specified, Vendors are required to save the product version. Vendors can create *public* or *private* versions of their product. Note that *public versions* are visible to Distributors and Resellers that have access to this product. Furthermore, public versions are displayed within the *Catalog* in case your product is listed there. On contrast, *private versions* are visible only to the product owner.

Front Street Inc finalized the product definition operation. Therefore, this Vendor decided to save this version and make this product publicly available. Follow the provided scenario and instructions below to successfully save your product version.

1. Fork Master

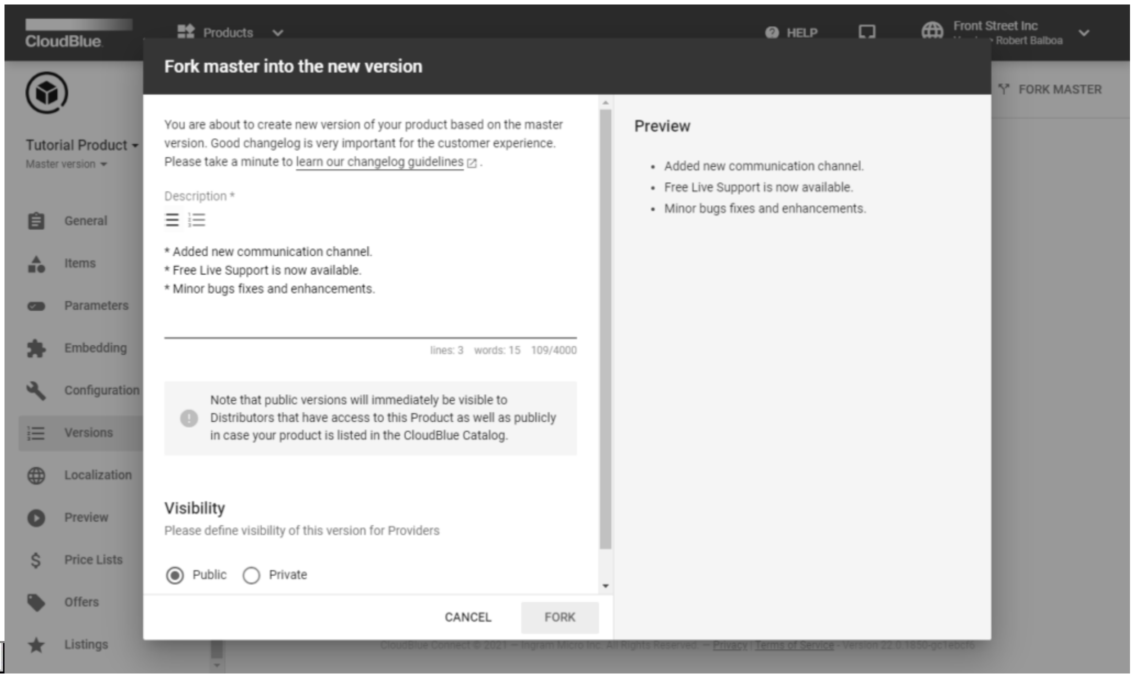
Access to the **Versions** section from your product profile page and click the **Fork Master** button.



2. Product Version Details

The system prompts you to fill out the following form:

- **Description**: Provide changelog information for this version.
- **Visibility**: Define visibility of this version for Distributors and Resellers.



Click the **Fork** button to create your product version.
As a result, *Front Street Inc* provided the version description and created a public version for the product.

Your Next Step

Once Vendors finalized the *product definition* operation and saved *public version* of their product, the Connect platform enables such Vendors to create a product listing request. By creating these requests, Vendors can expose their products on required marketplaces. Access the Product Listing Creation to proceed with the Vendor Tutorial.

In case more information on any provided setting from the Products module is required, access the Products module documentation for more details.

