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Catalog Management



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Auto-generated at June 2, 2025

The following article describes available Catalog management operations that are available only for the Distributor accounts on the CloudBlue Connect platform. Namely, this article demonstrates how to manage your product groups that are required for the product catalog, how to manage the product group visibility for your business partners, and how to switch on the automated activation of your syndication contracts for your Catalog.

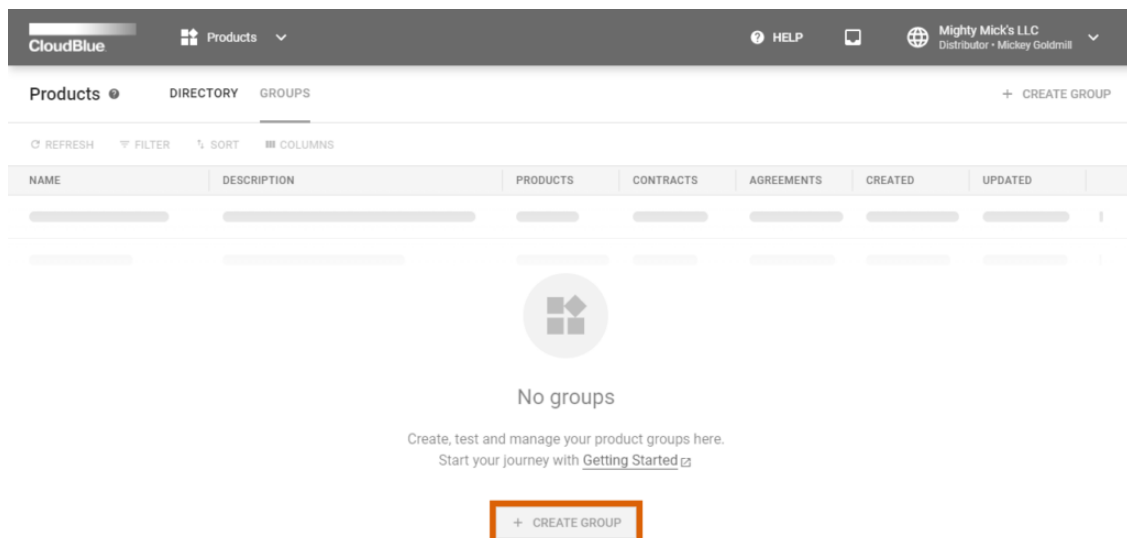
Product Groups

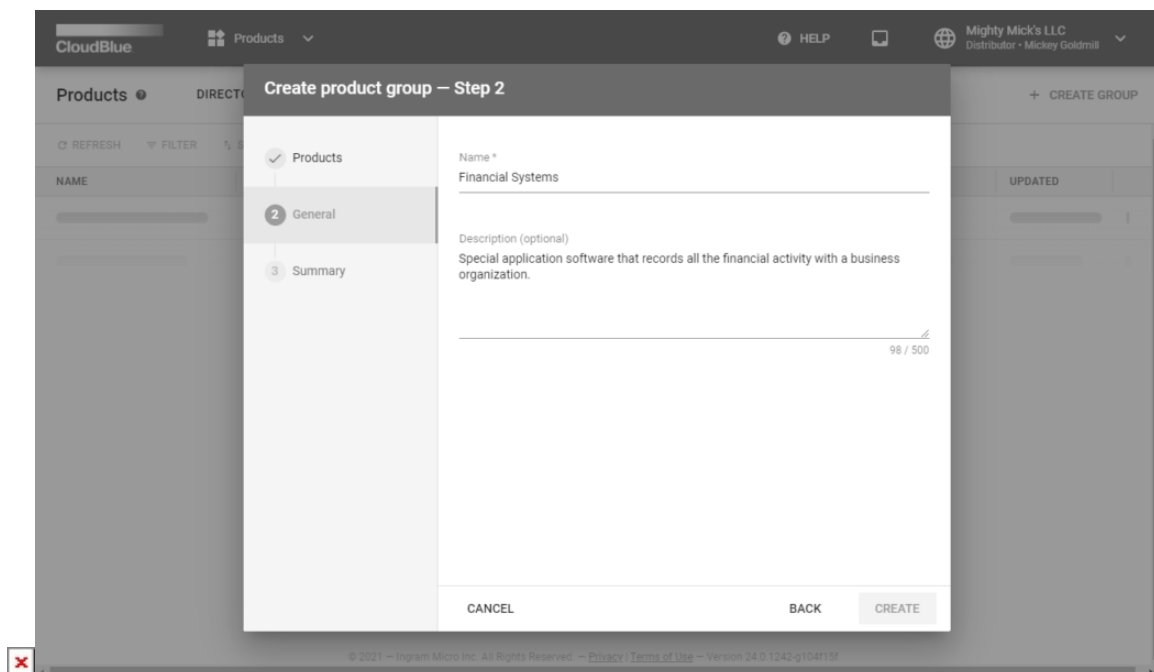
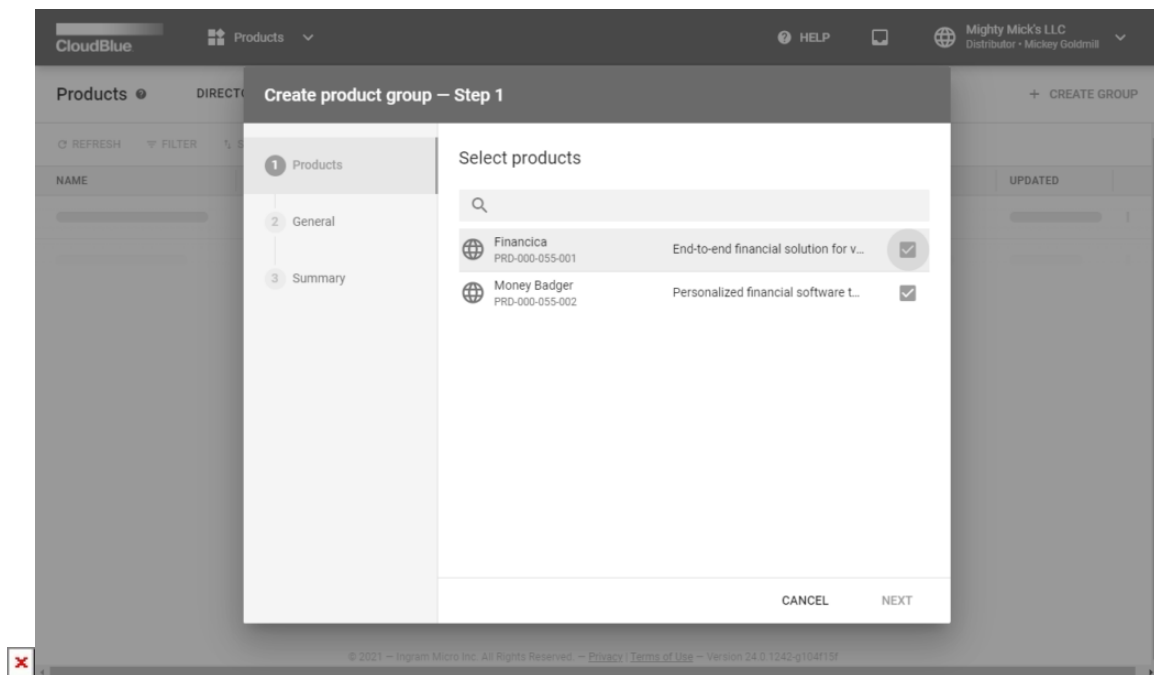
Product groups, as the name implies, are used to group products of a single or multiple Vendors. Namely, products can be grouped to represent a specific product category, target audience, products of specific Vendors, products that should be available for specific Resellers/Distributors or to indicate any other product differentiation.

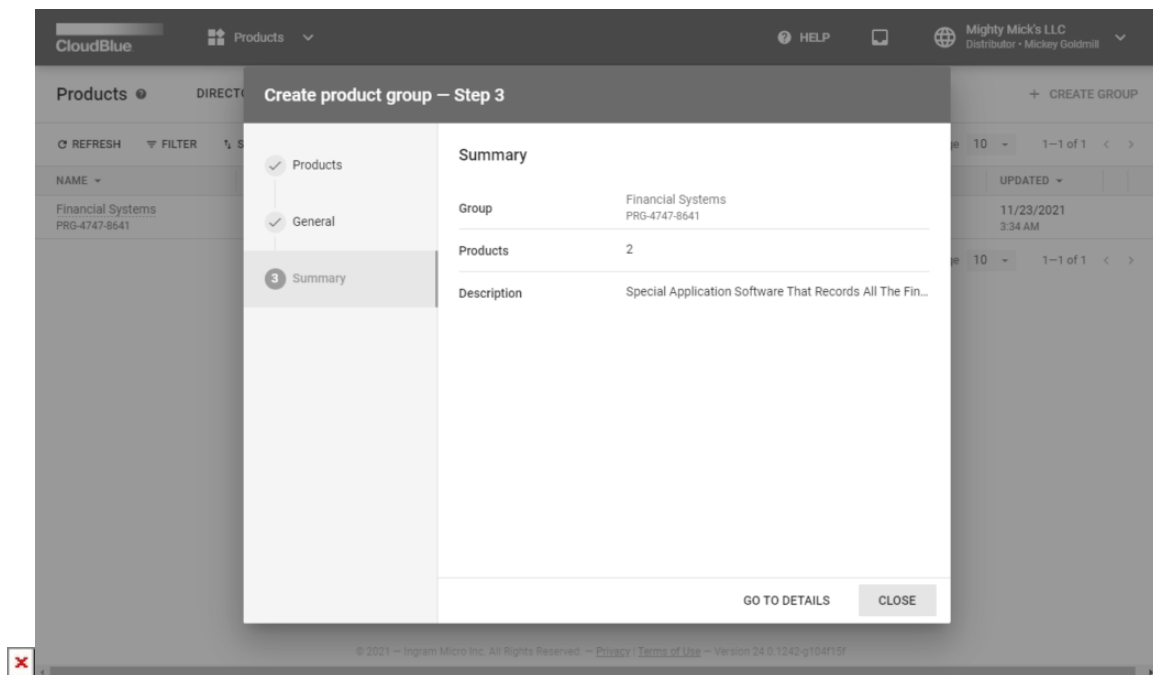
Note that configuring your product groups is an essential operation to define products that will be available within your Catalog. Create a new product group and manage your configured groups as described below:

Group Creation

Access the **Groups** tab of the **Products** module and click the **Create Group** button to launch a group creation wizard.







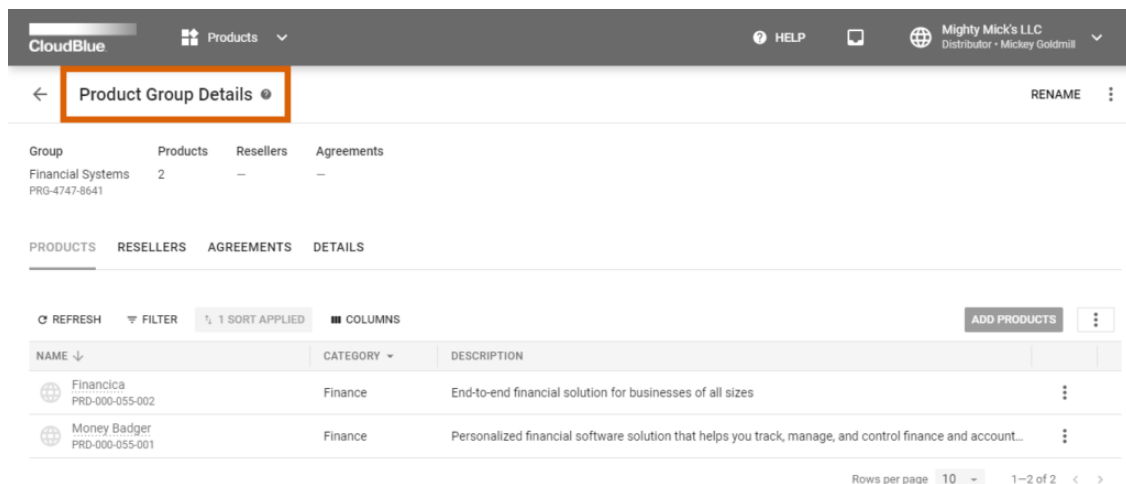
Follow the wizard steps to successfully configure your new product group:

1. **Products:** Select required products for your new group.
2. **General:** Specify your group name and provide its description if necessary. Click *Create* to generate your new group.
3. **Summary:** As a result, your product group will be successfully configured. The system will also provide your created group summary.

Once your product group is configured successfully, it can be used for the subsequent the Catalog module operations. It is also possible to access the *Product Group Details* screen as described below.

Group Details

Once your product group is successfully created and configured, click on your group object name to access the **Product Group Details** screen:



CloudBlue Products

Product Group Details

Group: Financial Systems, PRG-4747-8641

Products: 2, Resellers: —, Agreements: —


PRODUCTS | RESELLERS | AGREEMENTS | DETAILS

REFRESH | FILTER | 1 SORT APPLIED | COLUMNS | ADD PRODUCTS

NAME	CATEGORY	DESCRIPTION
Financia PRD-000-055-002	Finance	End-to-end financial solution for businesses of all sizes
Money Badger PRD-000-055-001	Finance	Personalized financial software solution that helps you track, manage, and control finance and account...

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Rename your product groups by using the corresponding button at the top-right corner of the *Groups Details* screen. Click the vertical ellipsis icon () and select the **Delete** option in case you want to delete your product group.

The Product Groups Details screen also provides the following tabs that contains various data and allows performing various operations:

- **Products:** A list of your included products and their category, description and statuses. Click the *Add Products* button to add more products to your group.
- **Resellers:** This tab is used to access reseller accounts that are associated with your product group. It also provides corresponding partner accounts, agreements, contracts, and statuses.
- **Agreements:** Contains a list of agreements that are associated with your product group. This tab also provides agreement description and the number of interconnected contracts.
- **Details:** Provides update and creation date and allows changing specified group description.

Note that your product groups can also be selected for your individual Reseller partners as described below.

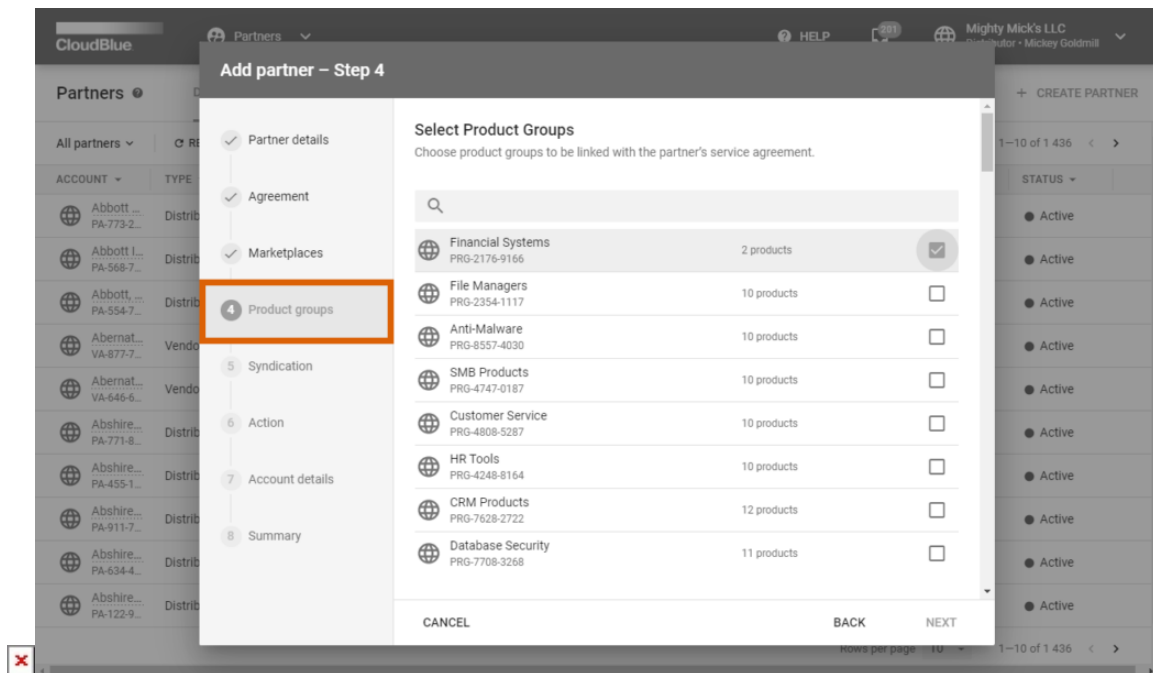
Catalog Visibility

The following describes how to edit your service and sourcing agreements and consequently manage the visibility of your product groups for your new added business partners as well as for your existing partners on the CloudBlue Connect platform.

New Partner Creation

Specify required product groups while inviting a new Reseller/ Distributor partner on the CloudBlue Connect platform. Access the **Partners** module to launch the Add Partner wizard. Select the *Reseller/Distributor* partner type and follow the wizard steps.

The wizard prompts you to include existing product groups that should be available for your new business partner on Connect.



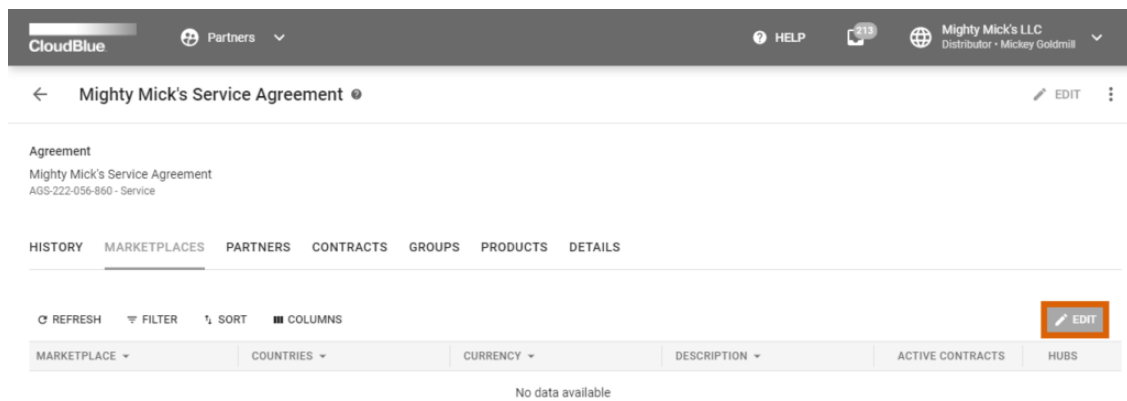
Therefore, your selected product groups will be available for your added partner within the *Catalog* module. Note that it is also possible to edit product groups that will be available for your specific partners by updating your service agreements as described below.

Service Agreement Configuration

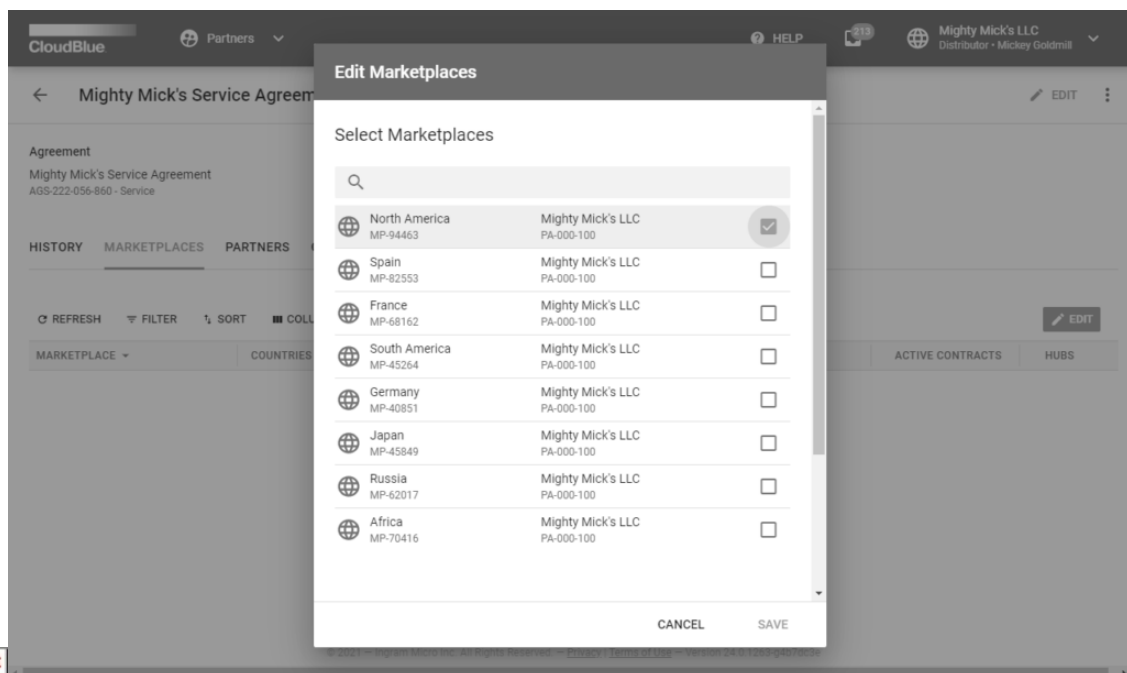
The system also allows managing the Catalog visibility for your invited business partners by updating their corresponding service agreements. Proceed to the **Agreements** section of the **Partners** module to access a service agreement that should be configured or updated. Thereafter, access the *agreement details* screen to manage required product groups, edit marketplaces, and select associated sourcing agreement.

Editing Marketplaces

The **Marketplace** tab indicates source marketplaces that are associated with the service agreement. Namely, your business partners (that establish business relationship based on your service agreement) will be able to enroll a sourcing agreement only in case at least one source marketplace is attached to the service agreement. Click the **Edit** button to include or exclude your marketplaces.



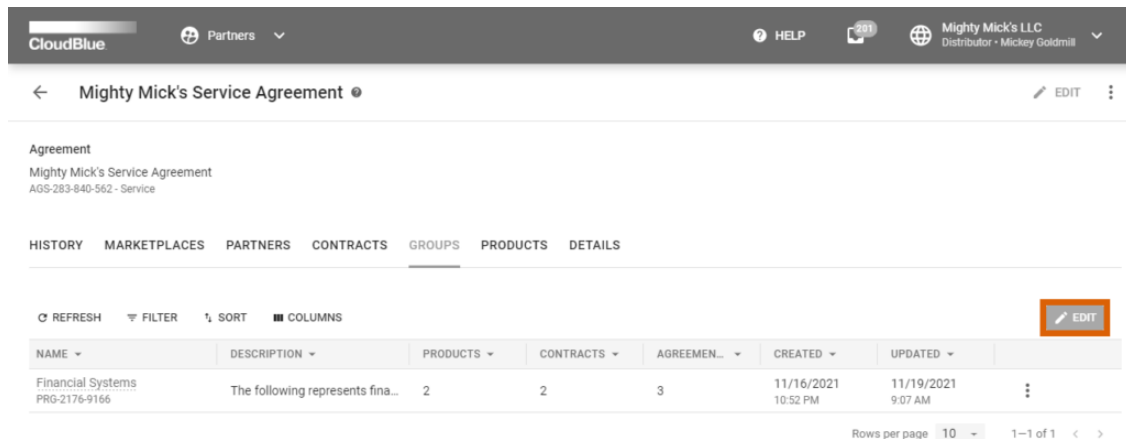
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Once your required marketplaces are selected, click **Save** to confirm your changes. Thus, your business partners will be able to select your specified source marketplaces and successfully enroll their sourcing contract.

Linking Product Groups

The **Groups** tab displays all groups that are associated with your selected service agreement. Click the **Edit** button to exclude irrelevant product groups or include the product groups that should be available for your selected service agreement and consequently for your business partners within the Catalog module.

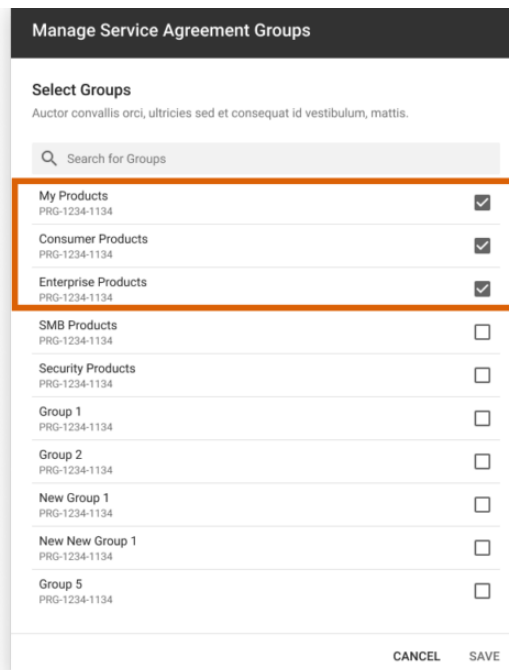


The screenshot shows the CloudBlue interface for 'Mighty Mick's Service Agreement'. The 'Groups' tab is selected, displaying a table of product groups. An 'EDIT' button is highlighted in the top right corner of the table area.

NAME	DESCRIPTION	PRODUCTS	CONTRACTS	AGREEMENTS	CREATED	UPDATED	
Financial Systems PRG-2176-9166	The following represents fina...	2	2	3	11/16/2021 10:52 PM	11/19/2021 9:07 AM	

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The 'Manage Service Agreement Groups' dialog box is shown. It contains a 'Select Groups' section with a search bar and a list of product groups. The first three groups are checked, and the last three are unchecked. 'CANCEL' and 'SAVE' buttons are at the bottom.

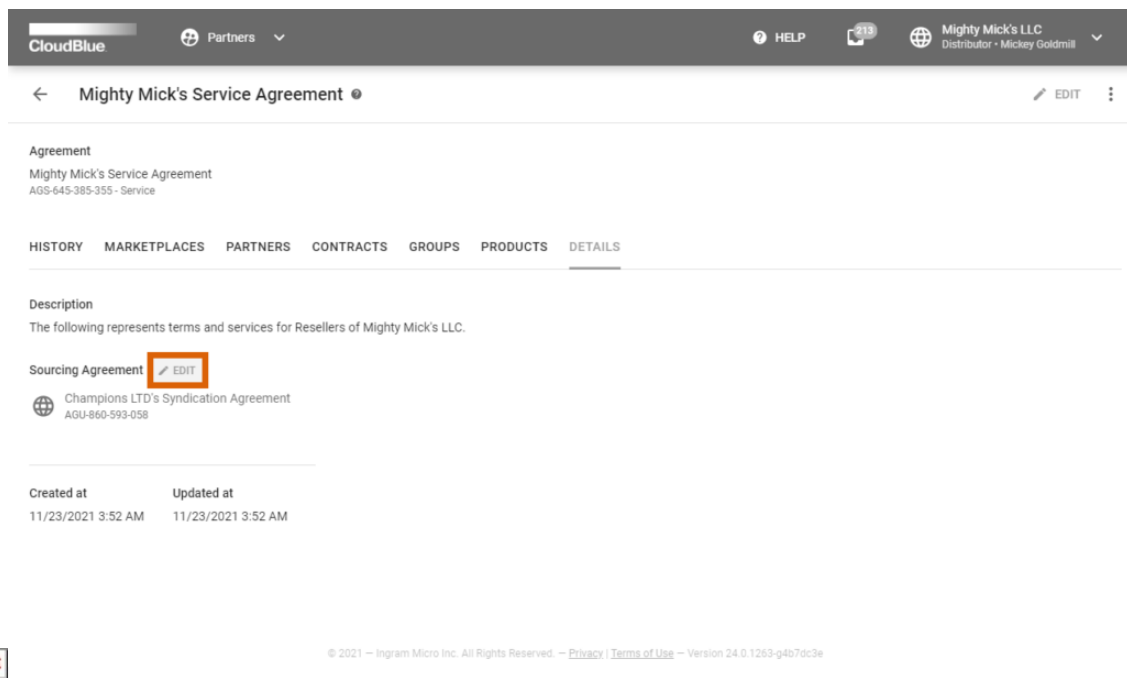
Group Name	PRG-ID	Selected
My Products	PRG-1234-1134	<input checked="" type="checkbox"/>
Consumer Products	PRG-1234-1134	<input checked="" type="checkbox"/>
Enterprise Products	PRG-1234-1134	<input checked="" type="checkbox"/>
SMB Products	PRG-1234-1134	<input type="checkbox"/>
Security Products	PRG-1234-1134	<input type="checkbox"/>
Group 1	PRG-1234-1134	<input type="checkbox"/>
Group 2	PRG-1234-1134	<input type="checkbox"/>
New Group 1	PRG-1234-1134	<input type="checkbox"/>
New New Group 1	PRG-1234-1134	<input type="checkbox"/>
Group 5	PRG-1234-1134	<input type="checkbox"/>

Check or uncheck the provided checkboxes to include or exclude corresponding product groups. Confirm your changes by clicking the **Save** button. Therefore, your selected products will be available for all service contracts that are based on this

service agreement.

Attaching Sourcing Agreements

Access the **Details** tab to select your associated sourcing agreement for your service agreement. Click the **Edit** button under *Sourcing Agreement* to open a list of your available syndication and referral agreements. Thereafter, use the corresponding radio button to choose a required sourcing agreement from the list.



CloudBlue Partners HELP 213 Mighty Mick's LLC Distributor - Mickey Goldmill

← Mighty Mick's Service Agreement EDIT

Agreement
Mighty Mick's Service Agreement
AGS-645-385-355 - Service

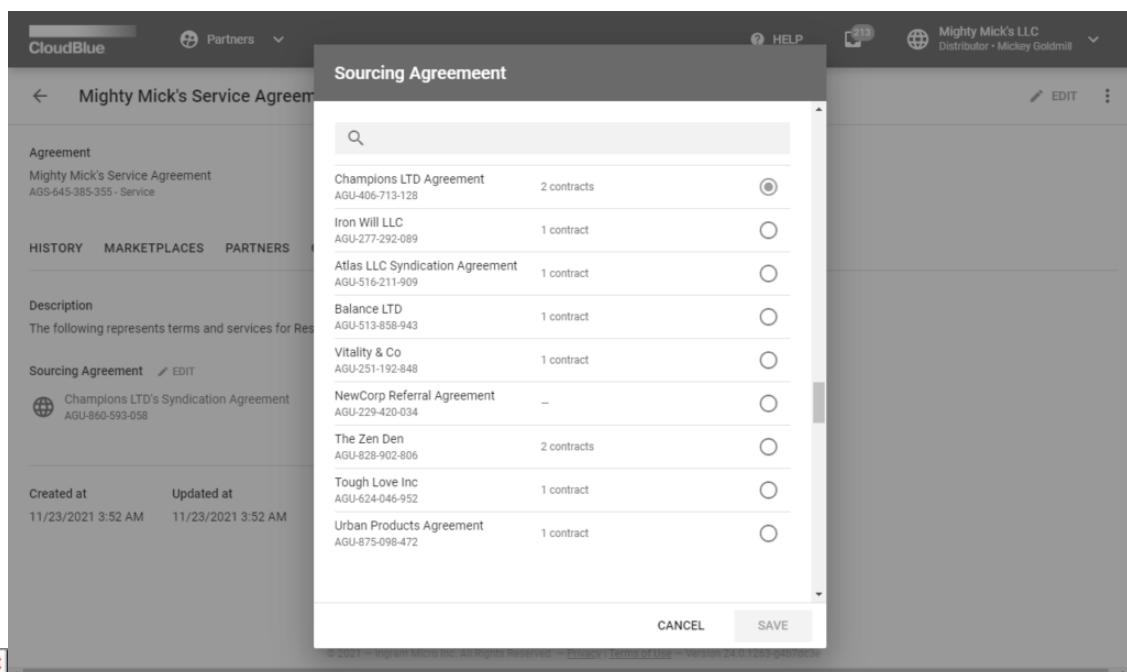
HISTORY MARKETPLACES PARTNERS CONTRACTS GROUPS PRODUCTS **DETAILS**

Description
The following represents terms and services for Resellers of Mighty Mick's LLC.

Sourcing Agreement EDIT
Champions LTD's Syndication Agreement
AGU-860-593-058

Created at 11/23/2021 3:52 AM **Updated at** 11/23/2021 3:52 AM

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Champions LTD's Syndication Agreement
AGU-860-593-058

Created at 11/23/2021 3:52 AM **Updated at** 11/23/2021 3:52 AM

Sourcing Agreement

Agreement	Contracts	Select
Champions LTD Agreement AGU-406-713-128	2 contracts	<input checked="" type="radio"/>
Iron Will LLC AGU-277-292-089	1 contract	<input type="radio"/>
Atlas LLC Syndication Agreement AGU-516-211-909	1 contract	<input type="radio"/>
Balance LTD AGU-513-858-943	1 contract	<input type="radio"/>
Vitality & Co AGU-251-192-848	1 contract	<input type="radio"/>
NewCorp Referral Agreement AGU-229-420-034	—	<input type="radio"/>
The Zen Den AGU-828-902-806	2 contracts	<input type="radio"/>
Tough Love Inc AGU-624-046-952	1 contract	<input type="radio"/>
Urban Products Agreement AGU-875-098-472	1 contract	<input type="radio"/>

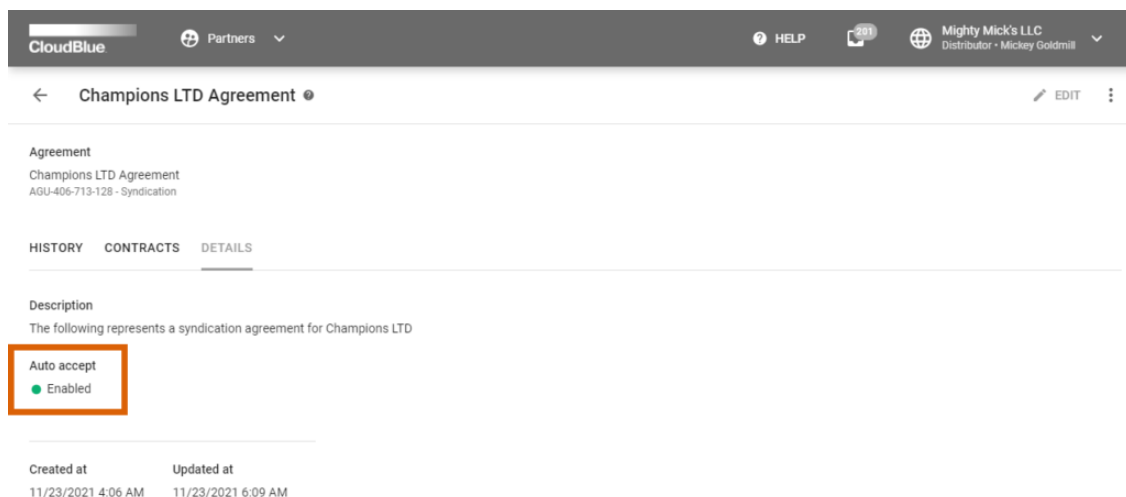
CANCEL SAVE

Once your required syndication or referral agreement is selected, confirm your decision by clicking the **Save** button. As a result, your selected sourcing contracts will be generated based on your attached sourcing agreement.

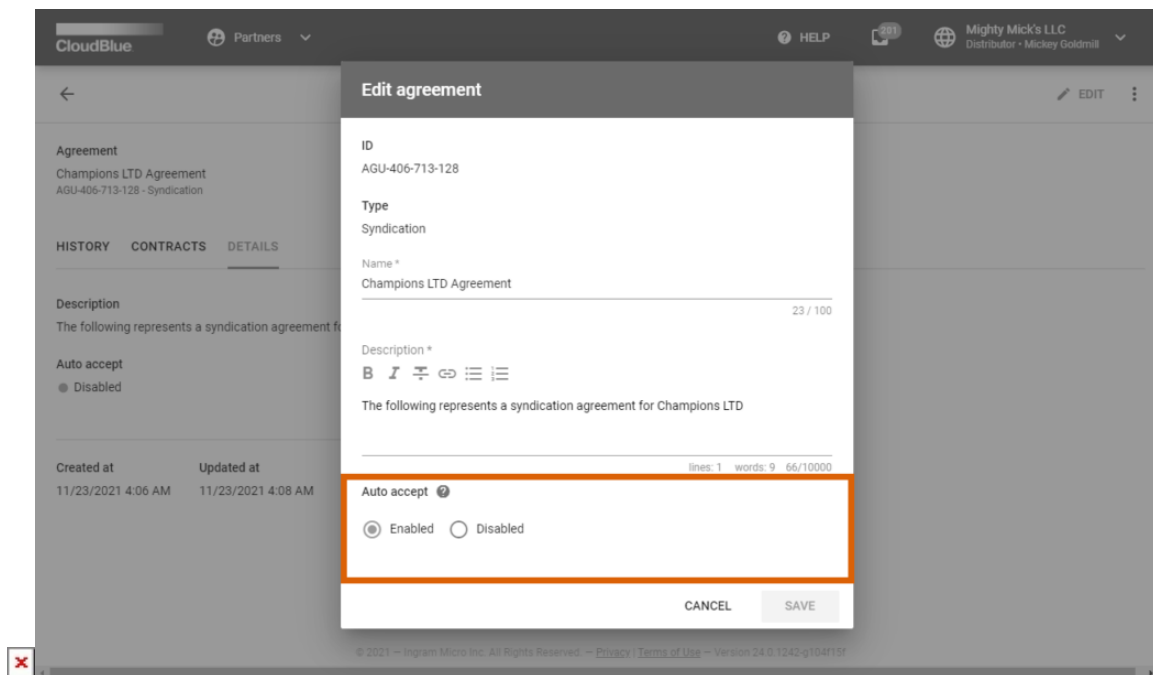
Syndication Contracts Auto-Accept

Once Resellers activate their service contract and select product for provisioning, the system allows Resellers to enroll a syndication contract that should consequently be activated by their Distributors. The Connect platform allows Distributors to enable the automated activation of sourcing contracts. Therefore, all enrolled sourcing contracts will be activated automatically.

Navigate to the **Agreements** section of the **Partners** module and access a syndication agreement that should (or should not) feature the contract auto-accept feature.



The screenshot shows the CloudBlue interface for the 'Partners' module. The top navigation bar includes the CloudBlue logo, a 'Partners' dropdown, a 'HELP' icon, a notification bell with '201', and the user profile 'Mighty Mick's LLC' with the role 'Distributor - Mickey Goldmill'. The main header shows a back arrow, the title 'Champions LTD Agreement', and an 'EDIT' button. Below the header, the 'Agreement' section displays 'Champions LTD Agreement' and 'AGU-406-713-128 - Syndication'. The 'DETAILS' tab is selected, showing a 'Description' that reads: 'The following represents a syndication agreement for Champions LTD'. A red box highlights the 'Auto accept' status, which is 'Enabled' with a green dot. At the bottom, the 'Created at' and 'Updated at' timestamps are shown: '11/23/2021 4:06 AM' and '11/23/2021 6:09 AM'.



The **Details** tab of your selected agreement displays if the auto-accept feature is *enabled* or *disabled* for your contracts based on this agreement. Click the **Edit** button at the top-right corner of the agreement details screen to activate or deactivate this feature.