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Multi-Account Installation Extensions



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Once your multi-account extension is created and deployed, CloudBlue Connect allows installing your service within multiple external systems and managing such installations via the *Extension Details* interface. In addition, the Connect platform enables your organization to invite your business partners to install your deployed service and also publish your extension in the Showroom Catalog. In case your extension is published in the Catalog, the platform helps various organizations quickly and easily find and deploy your business solution.



Your extension should be deployed!

Make sure that your multi-account extension is deployed before following the guidelines below. For more details on how to deploy and configure your extension, refer to the Extension Project documentation.

This article provides instructions on how to publish your service, how invite your partners to install your service, and how to manage your installation objects on Connect.

Extension Publication

Before publishing your extension, it is required to provide an overview for your business solution. Your added overview will be displayed within the Showroom Catalog to help organizations to learn more about your extension. Extension publication also requires your organization to accept the terms and conditions that are provided by CloudBlue.

Provide Your Overview

An extension overview contains a description with introduction and detailed information, short description of your extension, and any other additional information (e.g., category, website, and so on). Navigate to the Extension Details screen of your service and access the **Overview** tab. Thereafter, provide required information on your extension by using the following interface:





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Extension Details

Notification Automation with Zapier

PUBLISH

EDIT

ID

Type

Package ID

Extension ID

Catalog Status

SRVC-1233-7841

Multi-Account Installation

zapier.connect.extension

EXT-523-486

Private

OVERVIEW

DEV

TEST

PRODUCTION

INSTALLATIONS

INVITES

Overview

EDIT

A text description of the extension. This text will be seen by other users.

The first sentence (about 3-4 lines) of this description counts the most. So please start with an attention-grabbing sentence that pitches users and clearly sets out what the extension is intended for.

Take into account the following recommendations regarding the description:

- Keep it concise, informative and easy-to-understand
- Stick to the tone of your brand
- Avoid specific terms, keep it simple
- Make sure to describe target audience for this extension
- Outline key features and key differentiators

Short Description

EDIT

Specify here short description of the extension

Additional Information

EDIT

Category

ERP

Website

<https://www.example.com>



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Extension Details

Notification Automation with Zapier

PUBLISH

EDIT

OVERVIEW

DEV

TEST


PRODUCTION

INSTALLATIONS

INVITES

Overview

Stay Connected with Your Business



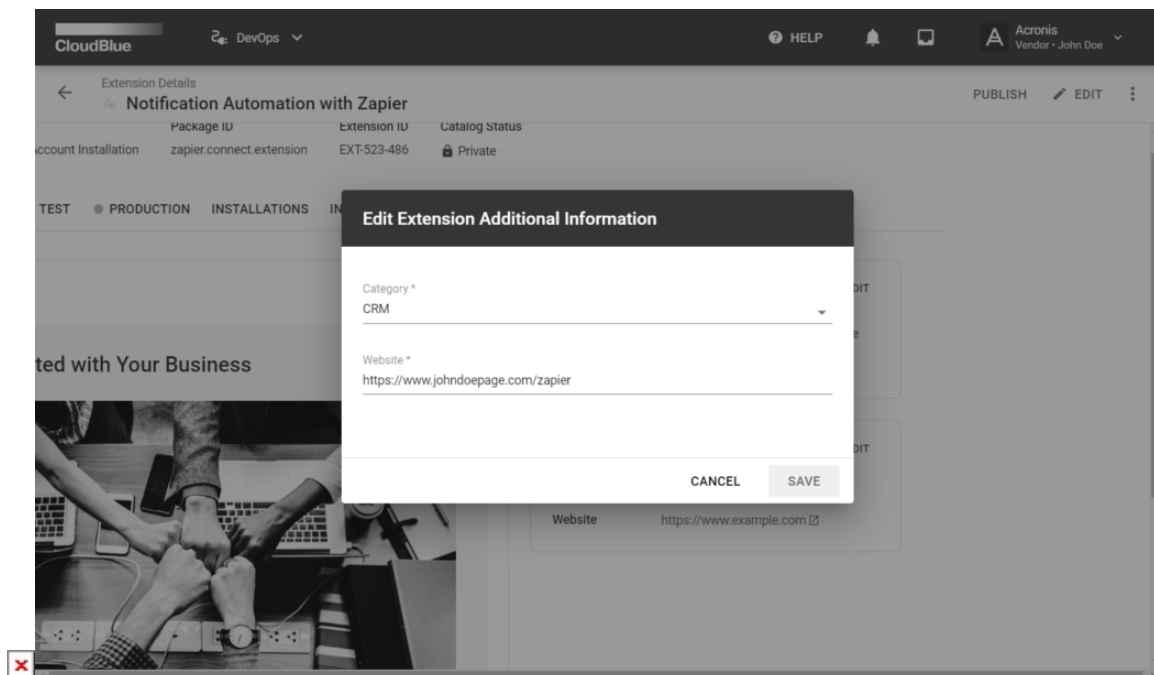
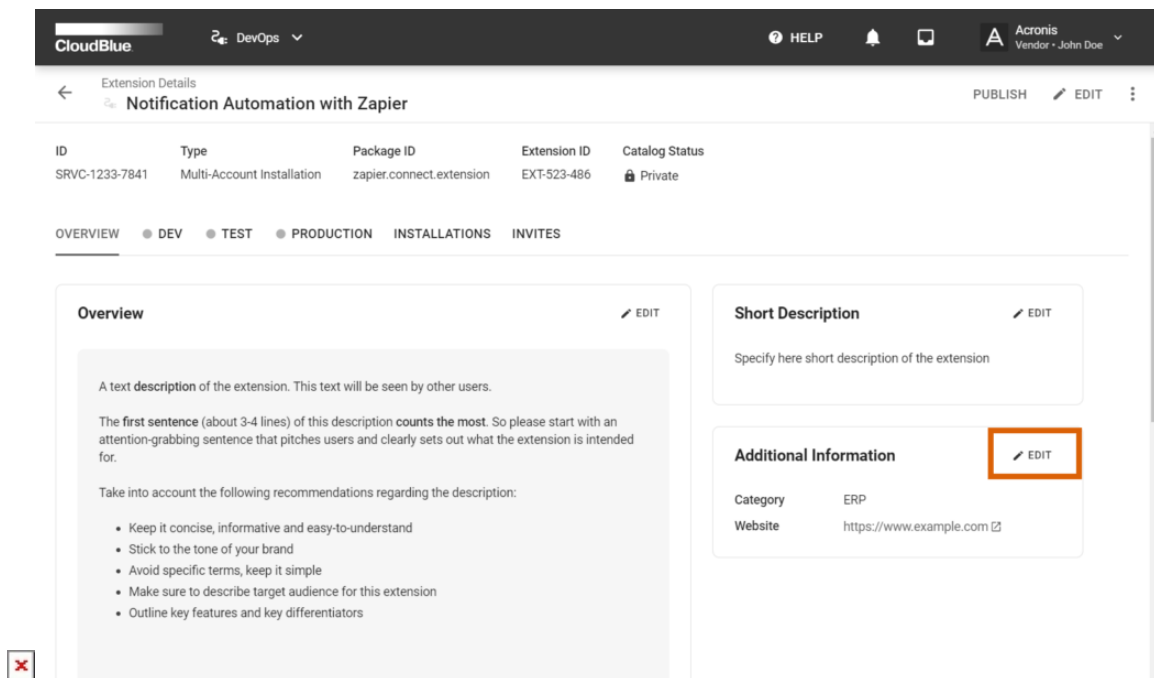
Edit Extension Short Description

Specify a short description for your extension by using this form.

CANCEL

SAVE





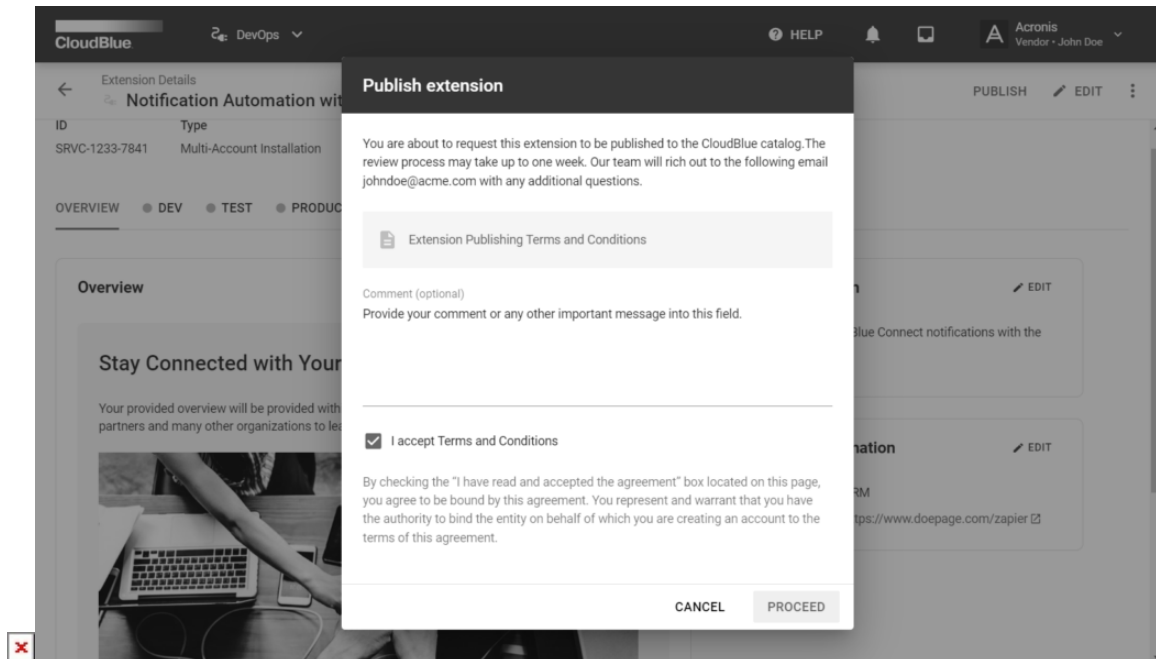
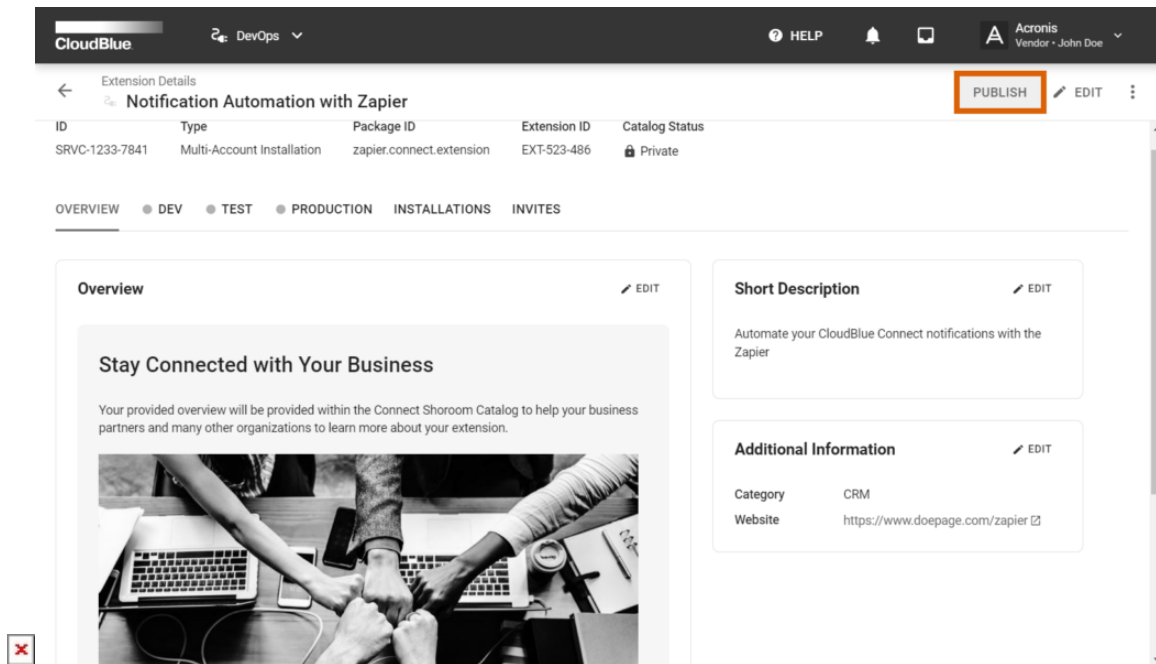
1. Provide a compelling description of your service by clicking **Edit** within the *Overview* field. Use the editor interface to enter your text, add lists, attach images, and specify links. The editor also allows previewing your extension overview.
2. Add a short description for your extension by using the corresponding field. It is recommended to keep your text concise and clear. Effective short descriptions can help readers determine whether your extension is pertinent to their business needs.
3. Specify more details via the *Additional Information* field. In general, the system prompts to select a category for your



extension and specify your website.

Publish Your Extension

In case your extension overview, description, and additional details are specified successfully, your extension can be published in the Showroom Catalog. Publish your extension by accessing the *Extension Details* screen and following the steps below:



1. Click the **Publish** button at the top-right corner of the screen.
2. The system prompts you to review the terms and conditions of publishing your extension in the Showroom Catalog. Thereafter, check the **Accept Terms and Conditions** checkbox. Leave your message by using the *Comment* field if



necessary.

- 3. Send a request to publish your extension by clicking **Proceed**.

Therefore, the Connect team will start processing your publication request. Note that the publication request processing may take up to a week. The Connect team will also reach out to your email address with any additional questions.

Invitation Creation

CloudBlue Connect allows inviting your business partners and other organizations that are registered on the Connect platform to install your deployed and published extension. Therefore, users can immediately start using your extension by redeeming your generated code.

The system also allows inviting organizations to different environments and revoking invitations if necessary. Follow the steps below to create a new invitation code:

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Extension Details

Notification Automation with Zapier

PUBLISH

EDIT

ID	Type	Package ID	Extension ID	Catalog Status
SRVC-1233-7841	Multi-Account Installation	zapier.connect.extension	EXT-523-486	Private

OVERVIEW

DEV

TEST

PRODUCTION

INSTALLATIONS

INVITES

REFRESH

FILTER

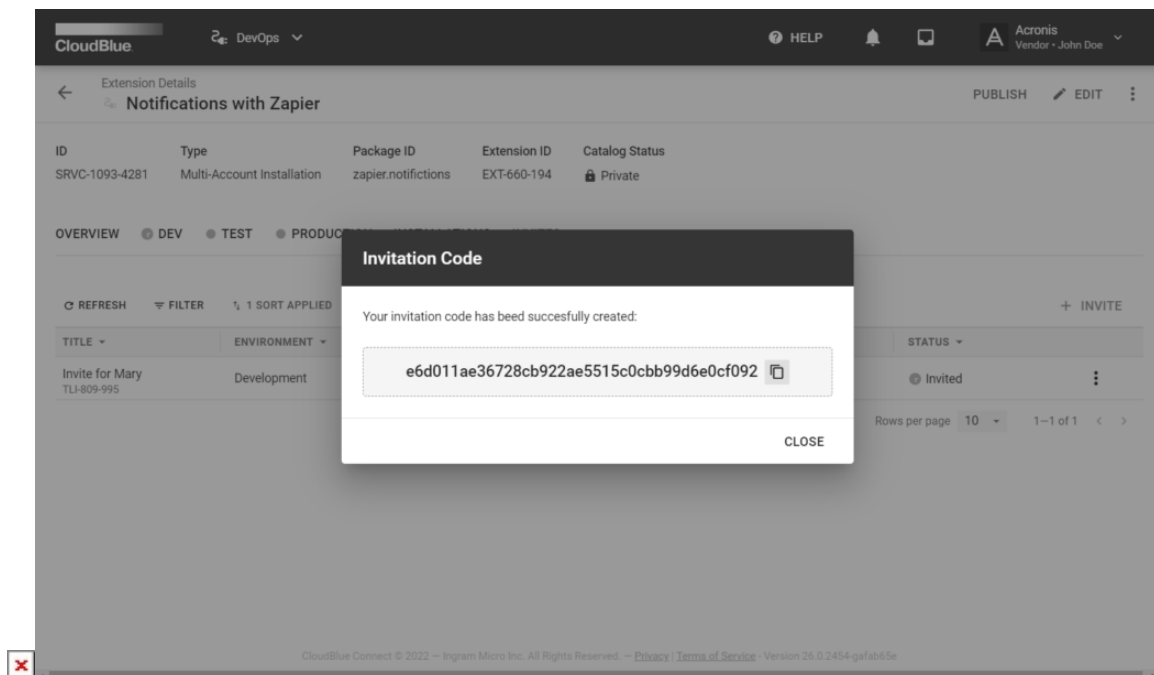
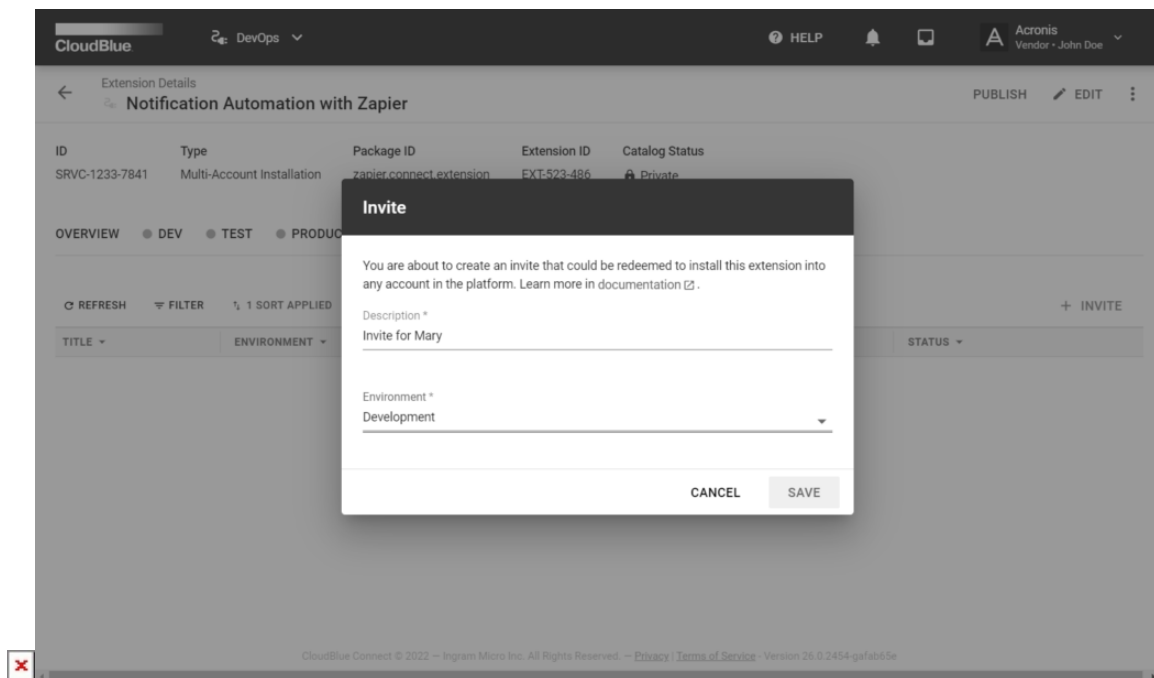
1 SORT APPLIED

COLUMNS

+ INVITE

TITLE	ENVIRONMENT	CREATED	ACCEPTED	INSTALLATION ID	STATUS
No data available					






1. Access a list of your invitations by accessing the **Invites** tab.
2. Click the **Invite** button to start creating a new invitation.
3. The system will prompt you to fill out the following form:
 - **Title:** Enter a name for your new invitation.
 - **Environment:** Select an environment that you want to invite your business partner to.
4. Click **Create** to finalize your invite creation.



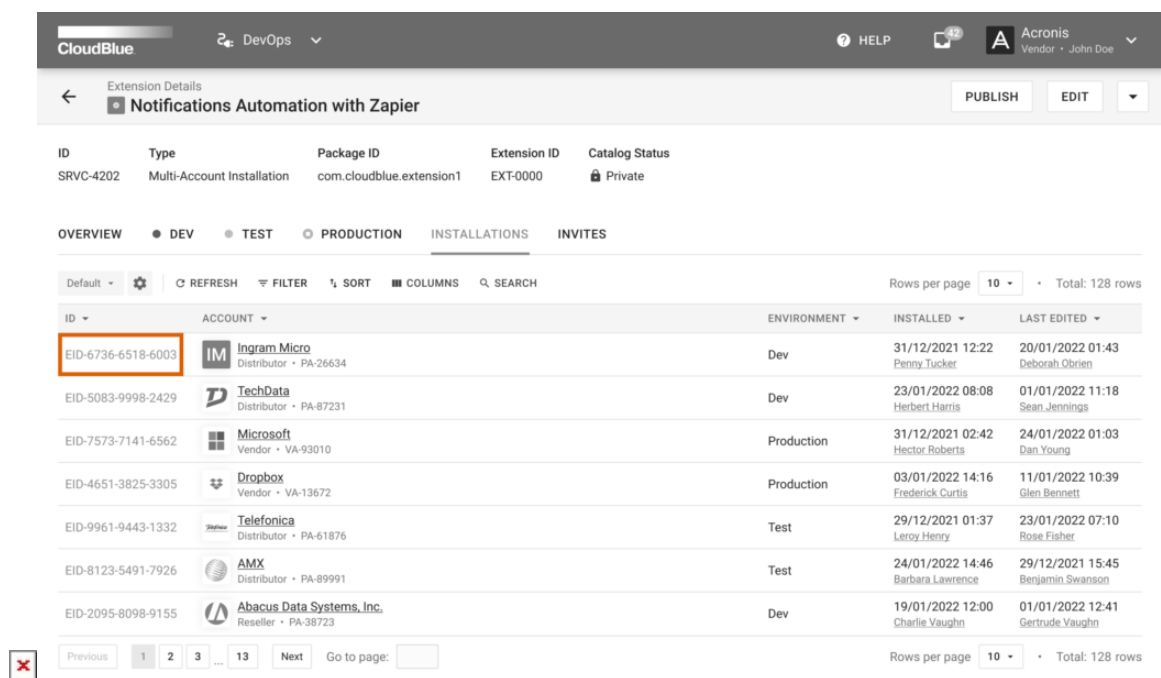
- When your new invitation is created, pass the provided *Invitation Code* to your business partners. Therefore, users will be able to install your extension by using this code.

The system will display your created invite objects, their statuses, creation date, associated environment, and so on. Your invitation can also be revoked unless it is already accepted within the system. Open the additional menu by clicking on the vertical ellipsis () to revoke your invite or copy the invitation code.

Installation Details

In case your extension is installed via your invitation via the Showroom Catalog, the system will provide a list of your installations. This list is displayed in the *Installations* tab, which provides detailed information on each installation object. The following describes provided details and available operations within this tab.


Access the *Installations* tab via Extension Details. Select an installation object from the list and click on its installation identifier to access the *Installation Details* screen.





The screenshot displays the CloudBlue interface for the 'Notifications Automation with Zapier' extension. The 'INSTALLATIONS' tab is active, showing a table of installed instances. The first row is highlighted with a red box, indicating the selected installation with ID EID-6736-6518-6003.


ID	ACCOUNT	ENVIRONMENT	INSTALLED	LAST EDITED
EID-6736-6518-6003	IM Ingram Micro Distributor • PA-26634	Dev	31/12/2021 12:22 Penny Tucker	20/01/2022 01:43 Deborah Obrien
EID-5083-9998-2429	PD TechData Distributor • PA-87231	Dev	23/01/2022 08:08 Herbert Harris	01/01/2022 11:18 Sean Jennings
EID-7573-7141-6562	MS Microsoft Vendor • VA-93010	Production	31/12/2021 02:42 Hector Roberts	24/01/2022 01:03 Dan Young
EID-4651-3825-3305	Dropbox Vendor • VA-13672	Production	03/01/2022 14:16 Frederick Curtis	11/01/2022 10:39 Glen Bennett
EID-9961-9443-1332	Telefonica Distributor • PA-61876	Test	29/12/2021 01:37 Leroy Henry	23/01/2022 07:10 Rose Fisher
EID-8123-5491-7926	AMX Distributor • PA-89991	Test	24/01/2022 14:46 Barbara Lawrence	29/12/2021 15:45 Benjamin Swanson
EID-2095-8098-9155	Abacus Data Systems, Inc. Reseller • PA-38723	Dev	19/01/2022 12:00 Charlie Vaughn	01/01/2022 12:41 Gertrude Vaughn

Navigation controls at the bottom include 'Previous', 'Next', and 'Go to page:'. The table shows 13 rows per page and a total of 128 rows.



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Installation Details
EID-6736-6518-6003 EDIT

Account  **Environment**


Ingram Micro **Dev**
Distributor • PA-26634

ACCOUNT SETTINGS SERVICE MENU **INSTALLATION DATA**

Actions + ADD

ACT-924 

Filter requests for this product


 **Dropbox**
PRD-374-384-381



In the following status

☒ Inquiring


And perform the following action

Approve Request



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Installation Details
EID-6736-6518-6003 EDIT

Account  **Environment**

Ingram Micro **Dev**
Distributor • PA-26634

ACCOUNT SETTINGS SERVICE MENU **INSTALLATION DATA**

Raw installation data EDIT

```
{ "web-app": {  
  "servlet": [  
    {  
      "servlet-name": "cofaxCDS",  
      "servlet-class": "org.cofax.cds.CDSServlet",  
      "init-param": {  
        "configGlossary:installationAt": "Philadelphia, PA",  
        "configGlossary:adminEmail": "ksm@pobox.com",  
        "configGlossary:poweredBy": "Cofax",  
        "configGlossary:poweredByIcon": "/images/cofax.gif",  
        "configGlossary:staticPath": "/content/static",  
        "templateProcessorClass": "org.cofax.WysiwygTemplate",  
        "templateLoaderClass": "org.cofax.FilesTemplateLoader",  
        "templatePath": "templates",  
        "templateOverridePath": "",  
        "defaultListTemplate": "listTemplate.htm",  
        "defaultFileTemplate": "articleTemplate.htm",  
        "useJSP": false,  
      }  
    }  
  ]  
}
```

Use the **Edit** button at the top-right corner of the Installation Details screen to change the environment for your selected installation object.

The **Account Settings** tab is used to access a list of your specified actions executed by your extension. Namely, the system provides a list that summarizes the functionality of your extension and outlines associated object on the Connect platform, its



status, parameter values and your specified action. The system also allows adding or editing actions by using corresponding buttons on the interface.

The system also displays your extension interface by using the **Service Menu** tab. The provided interface varies depending on the capabilities of your extension.

The **Installation Data** tab displays your extension code. The system also allows editing your raw installation data by using the corresponding button on the screen.