https://cloudblue.com



Generic Offers Interface

This article has been generated from the online version of the documentation and might be out of date. Please, make sure to always refer to the online version of the documentation for the up-to-date information.

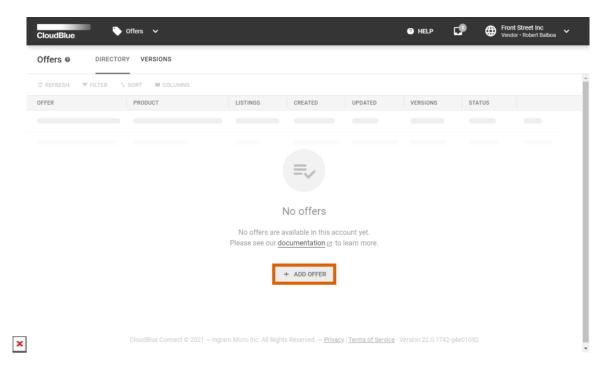
Auto-generated at December 1, 2025

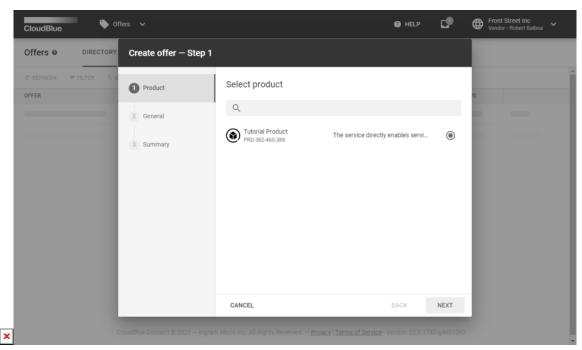


Creating Offers

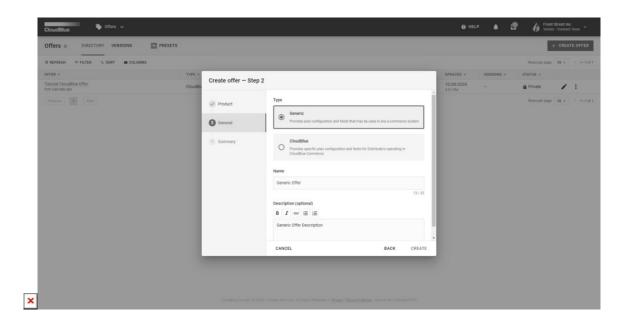
Navigate to the **Offers** module on the Vendor Portal. Created offers are displayed under the **Directory** section.

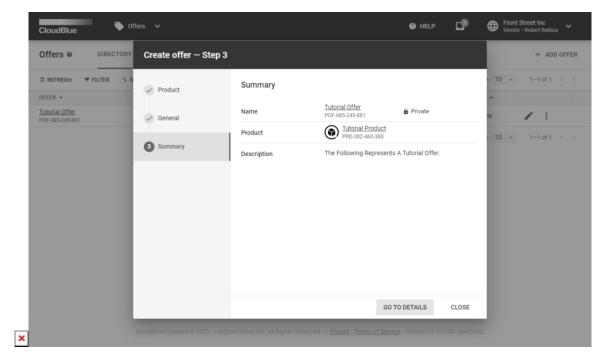
Click the Add Offer button to launch an offer creation wizard.











Follow the wizard steps to successfully configure a new offer:

- 1. Select a product from the provided list.
- 2. Specify the following general properties:
 - ∘ **Type**: Select Generic Offer type
 - $\circ \ \ \textbf{Name} \hbox{: Enter your offer name}.$
 - o **Description**: Provide a description of your offer (optional). Note that this description will be displayed within the





Details tab from your offer details screen.

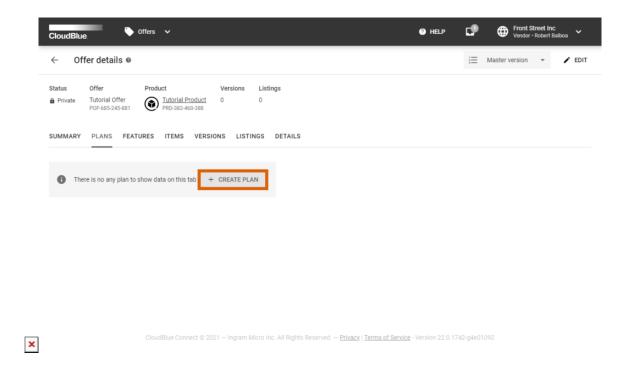
3. Click **Create** to finalize your offer creation.

As a result, the system provides your created offer object summary. Click the **Go to Details** button to access the offer details screen. Otherwise, click **Close** to return to the Directory tab.

Creating Plans

Proceed to the Plans tab from the offer details screen. This tab allows accessing your created plans.

Click the Create Plan button to launch a plan creation wizard.

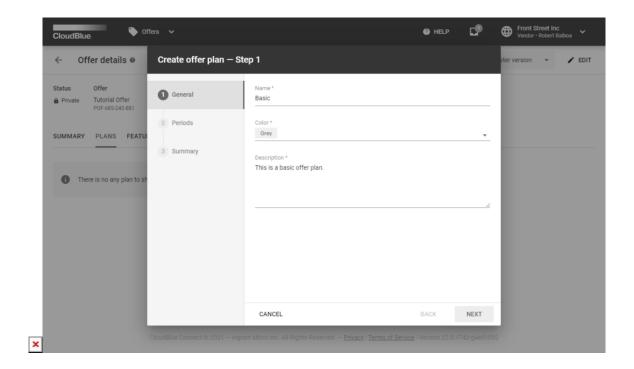


Follow the steps below to successfully configure a new plan.

1. Specify general properties

Fill out the following general properties form:

- Name: Enter your plan name.
- Color: Select a color for your plan.
- **Description**: Provide a description for your plan.



Click Next to continue.

2. Select a period for your plan

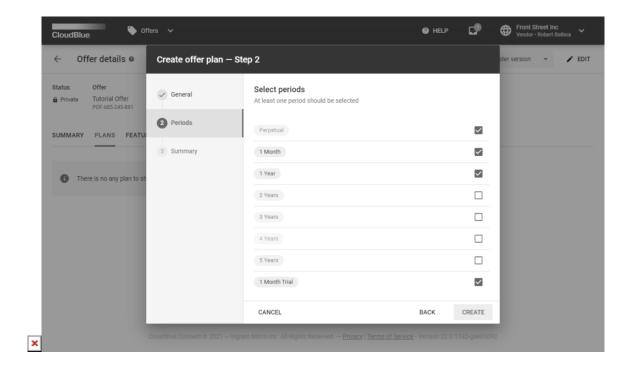
At least one of the following periods should be selected: Perpetual, 1 Month, 1 year - 5 years, or 1 Month Trial.



1 Month Trial

Note that the 1 Month Trial period can only be selected for one of your offer plans.

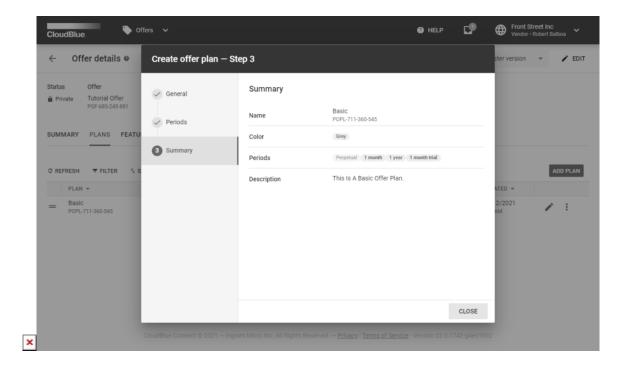




Click the **Create** button to continue.

3. Review your summary

The wizard will provide plan creation summary.

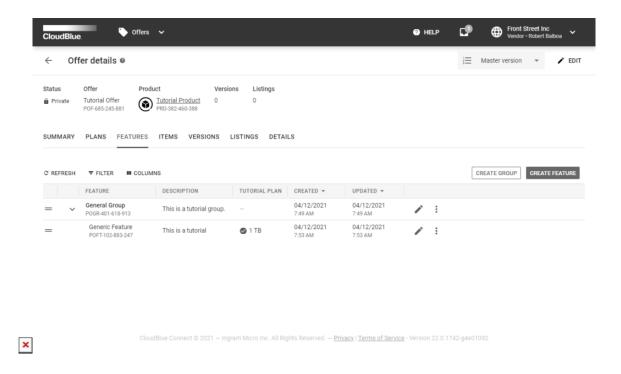


Click the Go to Details button to access the plan details. Otherwise, click Close to close the wizard.



Groups and Features

Navigate to the **Features** tab from the **offer details** screen. Your created groups and features will be displayed within the *Features* tab.

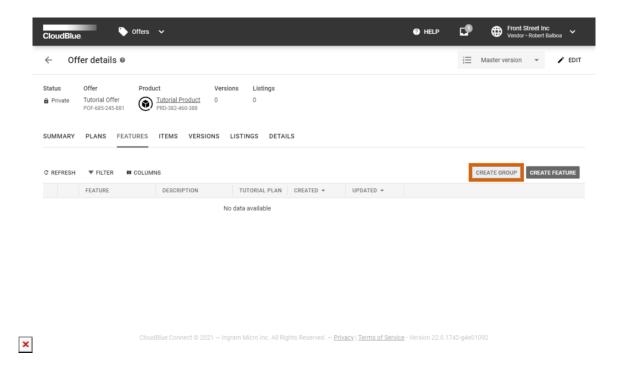


The following steps showcase how to create a group and a feature on the Connect platform.

1. Create a new Group

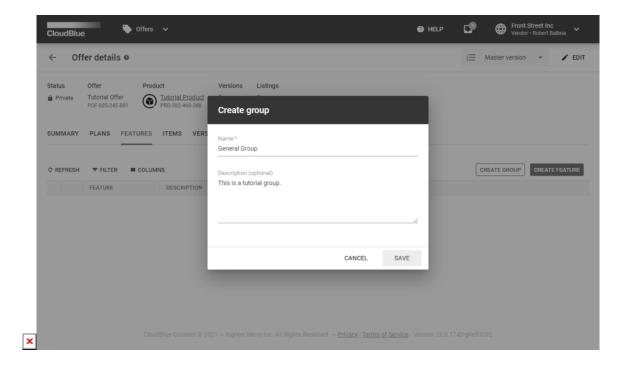
Click the **Create Group** button to specify a new group for your features.





2. Enter a name and description

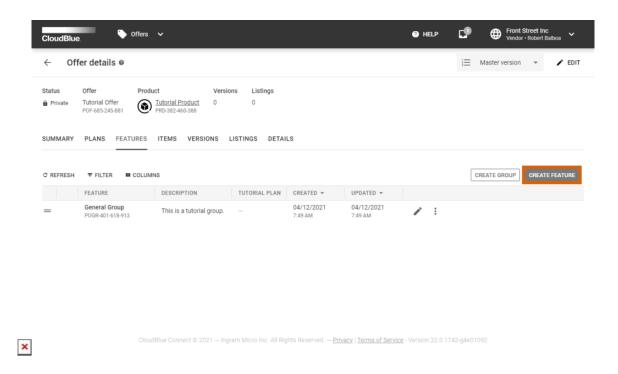
Provide a name and a description for your group.



Click **Save** to successfully configure your feature group.

3. Create a new feature

Click the **Create Feature** button to specify a new feature.

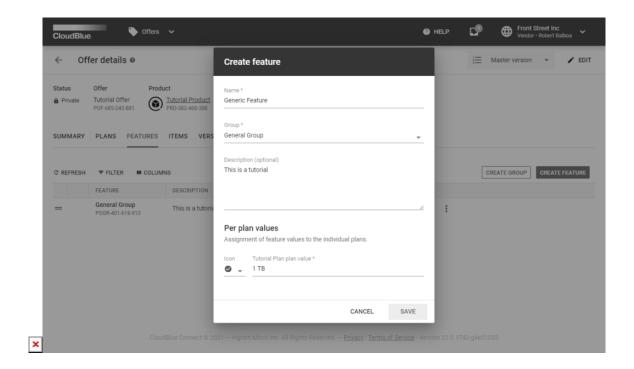


4. Specify feature properties

Fill out the following form:

- Name: Enter your feature name in this field.
- **Group**: Select a group for your feature.
- **Description**: Provide a description for your feature (optional).
- Per plan values: Specify values and select an icon for your configured plan.





Click the **Save** button to finalize your feature creation.

Adding Items

Proceed to the **Items** tab from the **offer details** screen. This tab displays your defined items for each of your configured plans and selected periods.

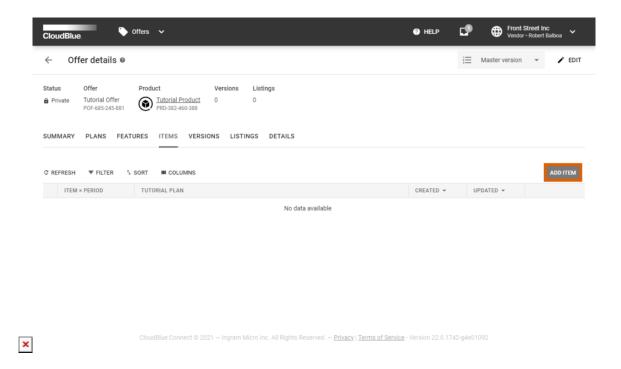


Items

Define your items via Reservation Items or Pay-as-you-go Items sections from the product profile page.

Click the **Add Item** button to launch an item configuration wizard.

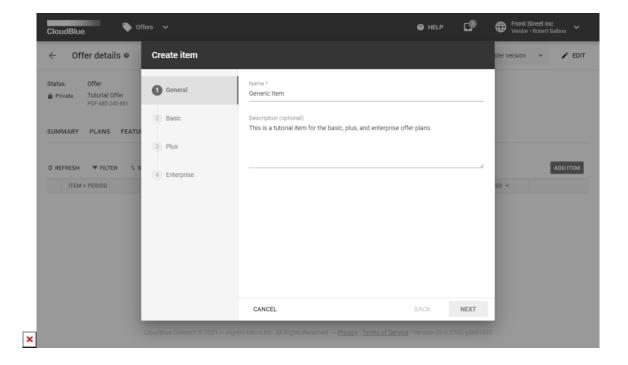




Follow the steps of this wizard to configure your items.

1. Fill out general properties

Provide a name for your item configuration. Optionally, enter a description for this configuration.



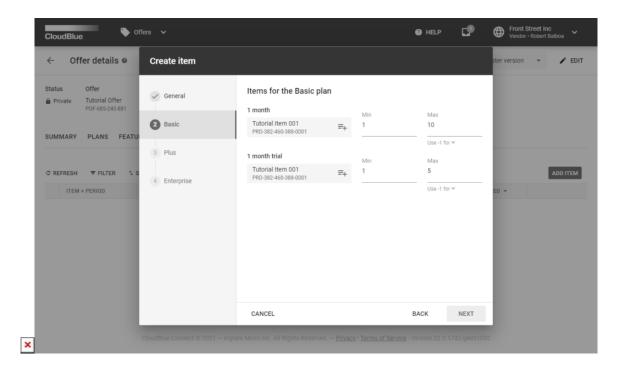
Click **Create** to continue.



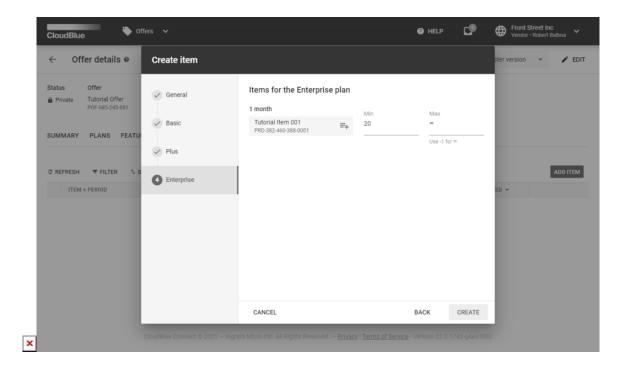


2. Specify your items

Add your defined items to each of your selected periods by clicking the corresponding buttons. In addition, select minimum and maximum item quantity



Keep adding items for each of your plans and selected periods. Once all of your plans will be filled with required data, click the **Add** button to finish.





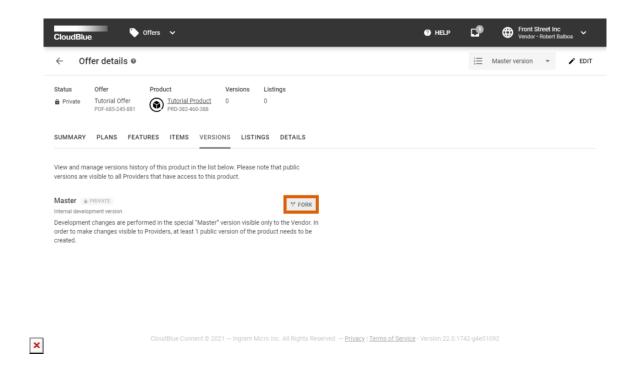
Thus, your item configuration will be successfully completed.

Activating Offer Versions

Navigate to the **Versions** tab from your **offer details** screen. The Versions tab will display created versions of your configured offers. Follow the steps below to successfully activate your offer version.

1. Fork your master version

Click the **Fork** button to create a new version of your offer.



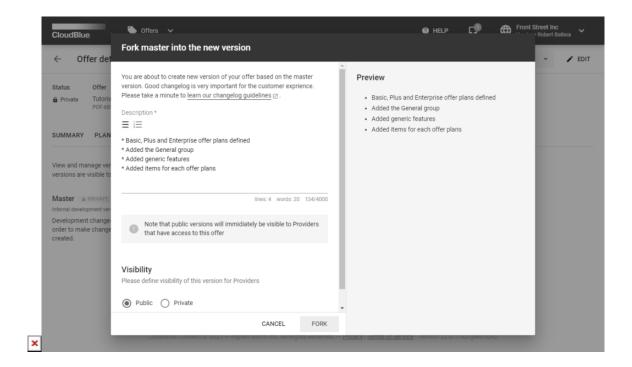
2. Fill out the required form

Fill out the following form that is required to save your version.

Description: Provide a description for your offer version. In general, this description contains release notes and update information.

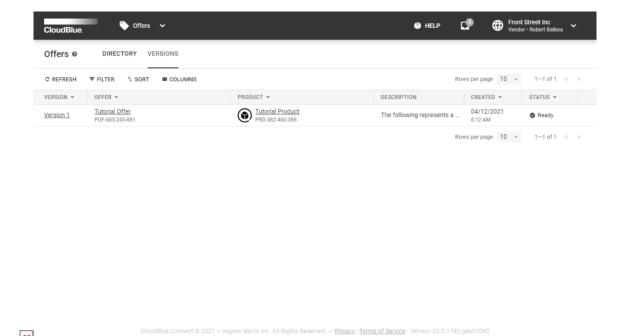
Visibility: Select **Public** or **Private** versions. Note that public versions are instantly visible for Distributors that have access to this offer.





Click the **Save** button to successfully configure a new version of your offer. Once your offer version is activated, it can be listed within a product listing.

Navigate to the Versions section of the Offers module to access and manage a specific version of your offers.



Associate Offers with your Listing

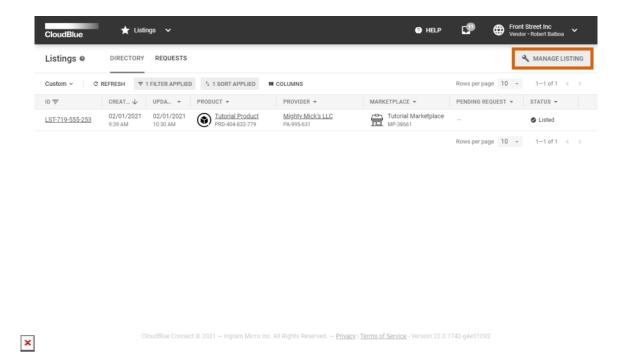
Make your configured offers visible to your Distributor by including this offer to your Listing. The following steps demonstrate

×

how to associate your offers with your listings.

1. Launch the listing wizard

Click the **Manage Listing** button to launch the listing management wizard.

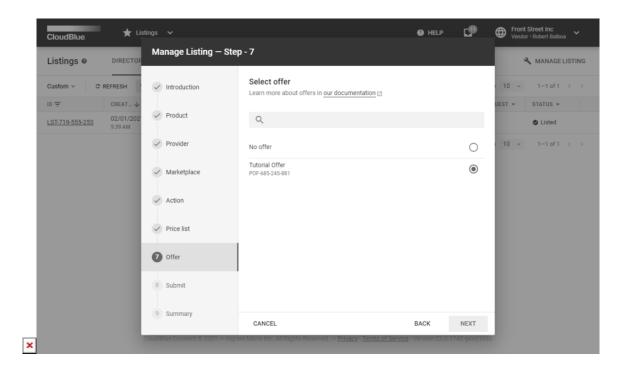


Create a new listing or edit your existing listing from the listings management wizard.

2. Include your offer

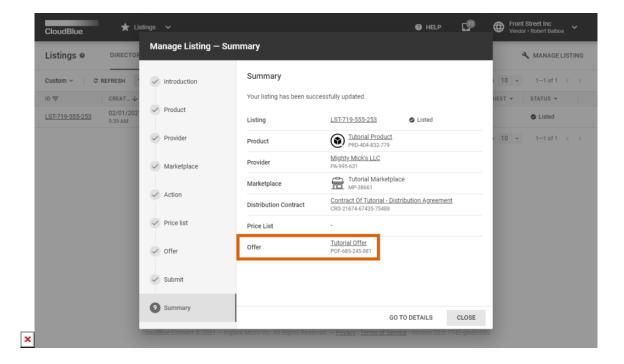
Select your offer within the **Select offer** step.





3. Save your listing

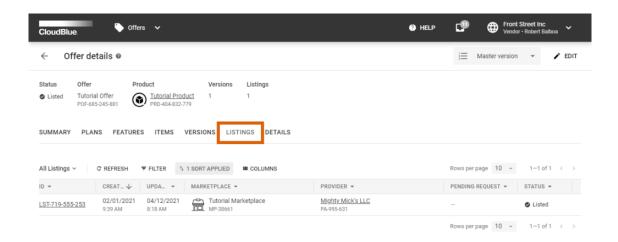
Click the **Add** button to finish. The wizard will provide your listing summary with your included offer.



Therefore, your offer will be successfully associated with your configured listing.

Access the Listings tab from your offer details screen to view the listings that include your offer.







 $\textbf{CloudBlue Connect} @ 2021 - \textbf{Ingram Micro Inc. All Rights Reserved.} - \underline{\textbf{Privacy}} \\ | \underline{\textbf{Terms of Service}} \\ - \underline{\textbf{Version } 22.0.1742 - g4e01092} \\ | \underline{\textbf{Service}} \\ - \underline{\textbf{Version } 22.0.1742 - g4e01092} \\ | \underline{\textbf{Service}} \\ - \underline{\textbf{Version } 22.0.1742 - g4e01092} \\ | \underline{\textbf{Service}} \\ - \underline{\textbf{Version } 22.0.1742 - g4e01092} \\ | \underline{\textbf{Service}} \\ - \underline{\textbf{Version } 22.0.1742 - g4e01092} \\ | \underline{\textbf{Service}} \\ - \underline{\textbf{Version } 22.0.1742 - g4e01092} \\ | \underline{\textbf{Service}} \\ - \underline{\textbf{Version } 22.0.1742 - g4e01092} \\ | \underline{\textbf{Service}} \\ - \underline{\textbf{Version } 22.0.1742 - g4e01092} \\ | \underline{\textbf{Service}} \\ - \underline{\textbf{Version } 22.0.1742 - g4e01092} \\ | \underline{\textbf{Service}} \\ - \underline{\textbf{Version } 22.0.1742 - g4e01092} \\ | \underline{\textbf{Service}} \\ - \underline{\textbf{Service}}$