

[Documentation](#) → [Modules](#) → [Offers](#) →

User Interface



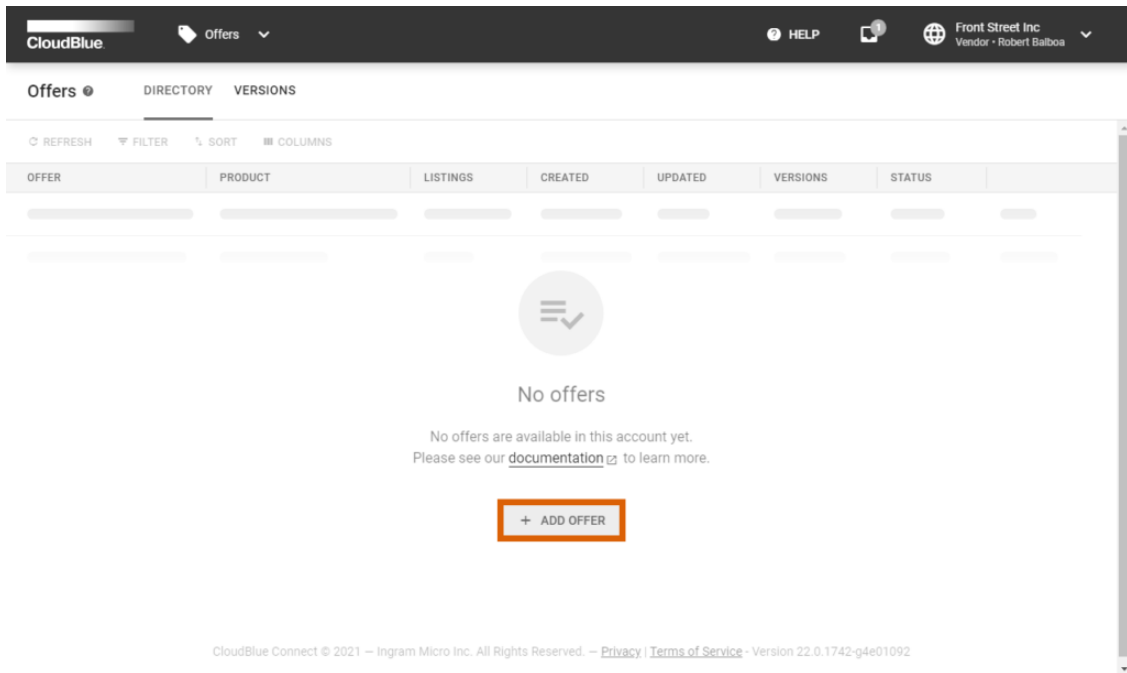
This article has been generated from the online version of the documentation and might be out of date. Please, make sure to always refer to the online version of the documentation for the up-to-date information.

Auto-generated at October 27, 2021

Creating Offers

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

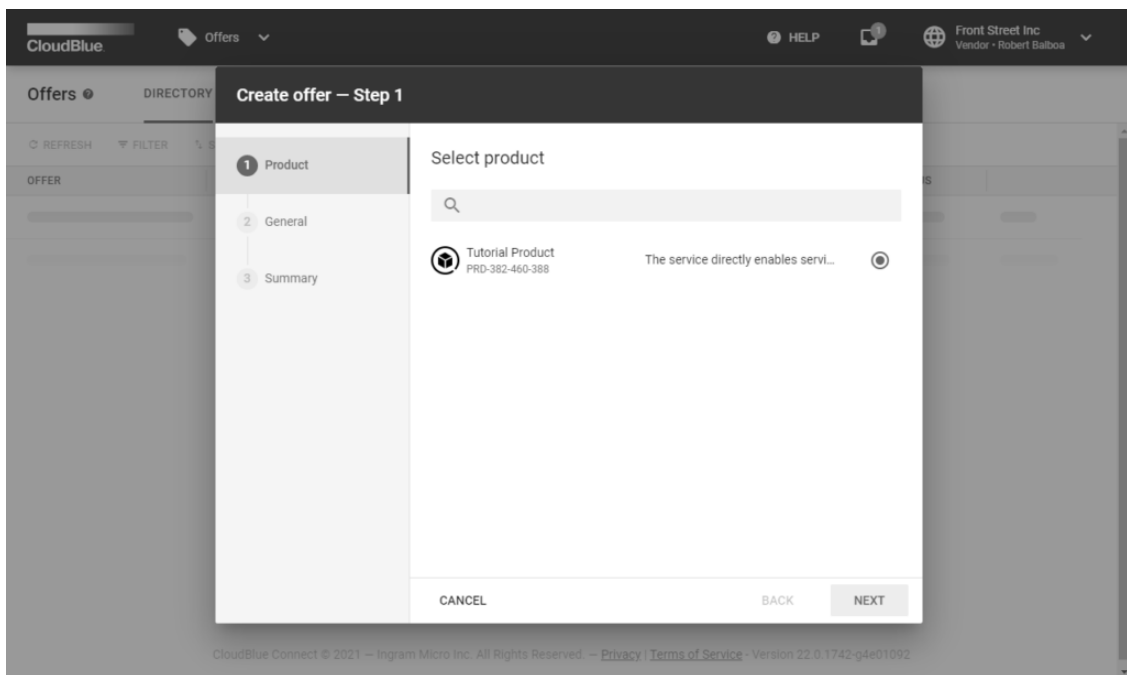
Click the **Add Offer** button to launch an offer creation wizard.



Follow the steps of this wizard to successfully configure a new offer.

1. Select a product

Choose your product from the list.

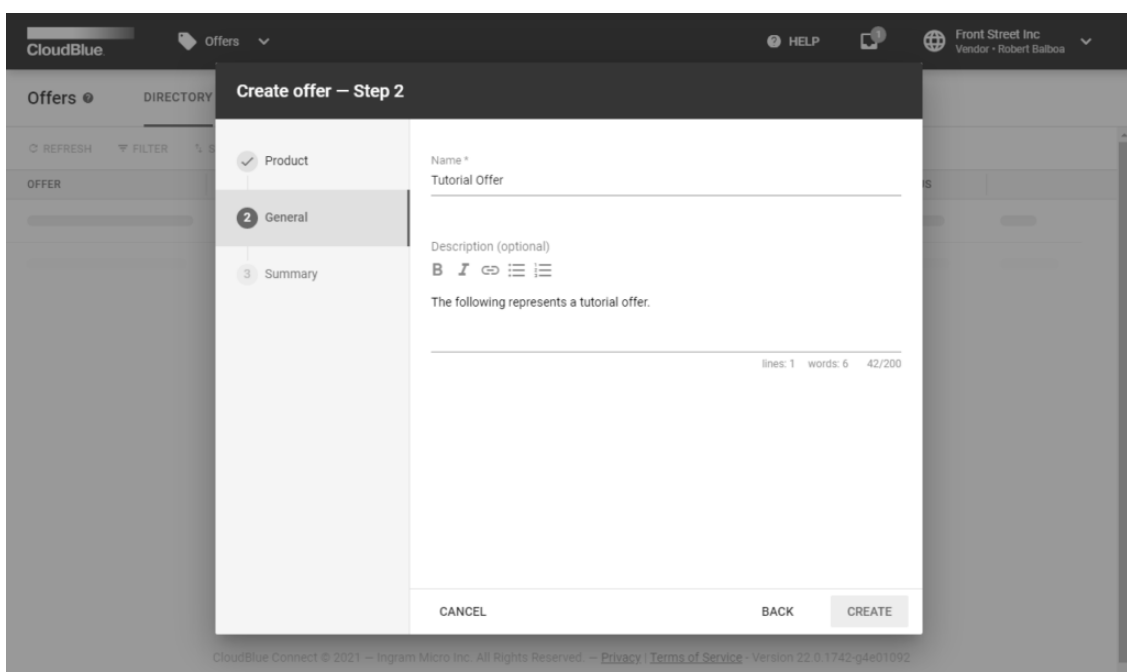


Click **Next** to continue.

2. Specify general properties

Fill out the following form:

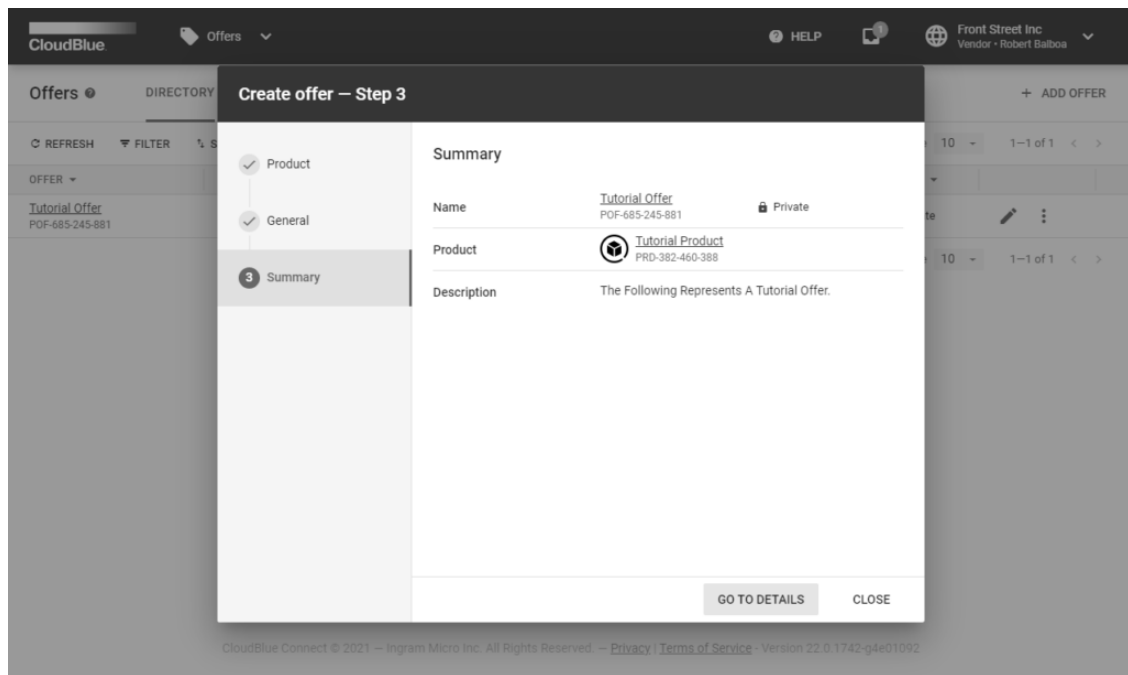
- **Name:** Enter your offer name.
- **Description:** Provide a description of your offer (optional). Note that this description will be displayed within the **Details** tab from your offer details screen.



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

3. Review your summary

The wizard will provide offer creation summary.

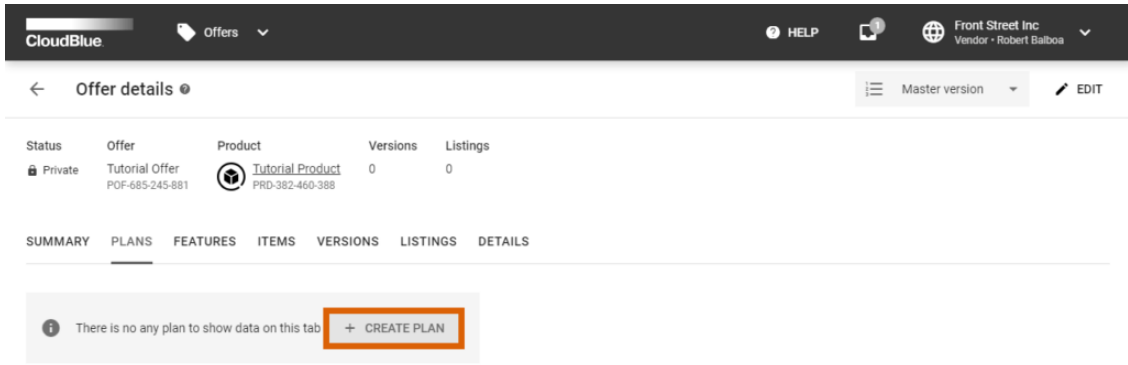


Click the **Go to Details** button to access the offer details screen. Otherwise, click **Close** to return to the Directory tab.

Creating Plans

Proceed to the **Plans** tab from the **offer details** screen. This tab displays your created plans.

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



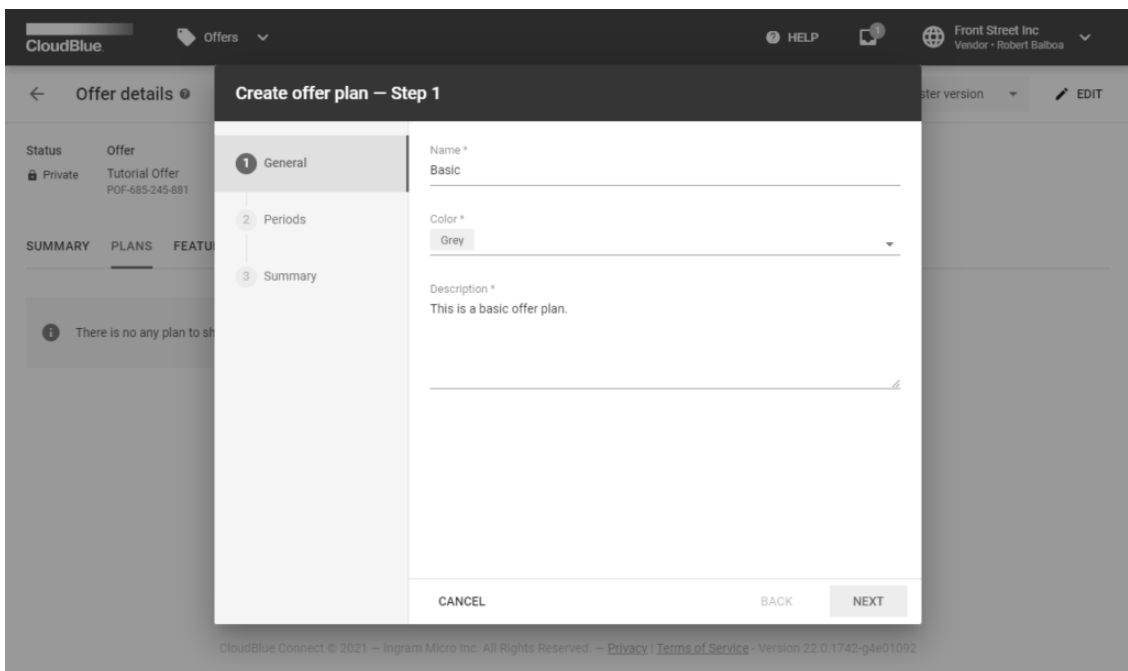
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Follow the steps below to successfully configure a new plan.

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.



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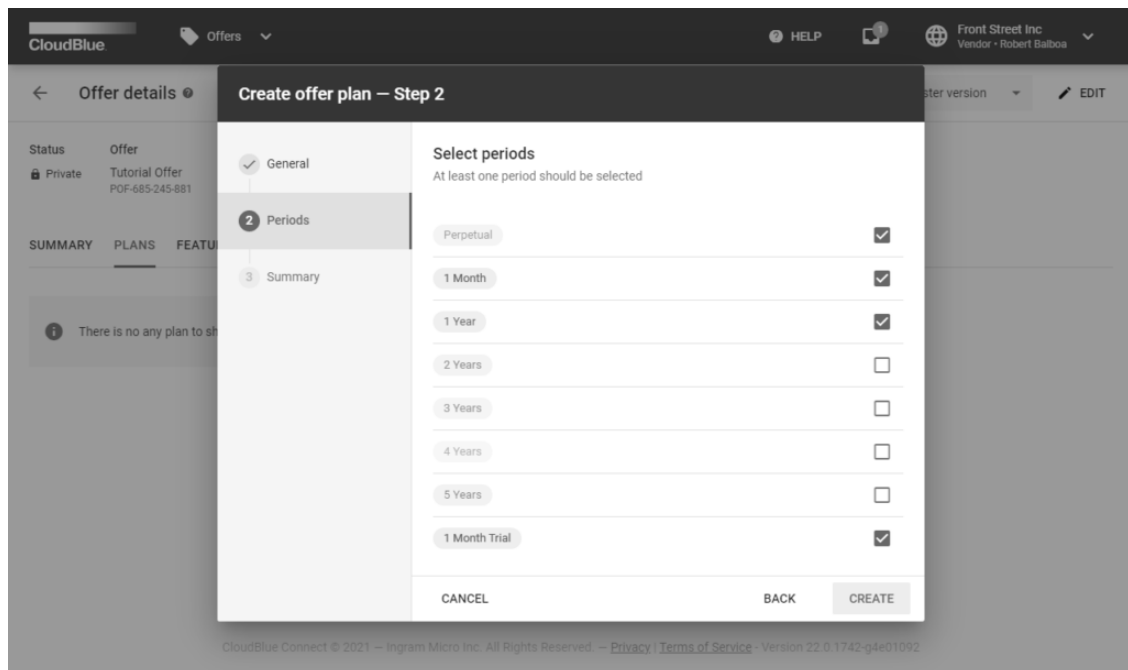
Click **Next** to continue.

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

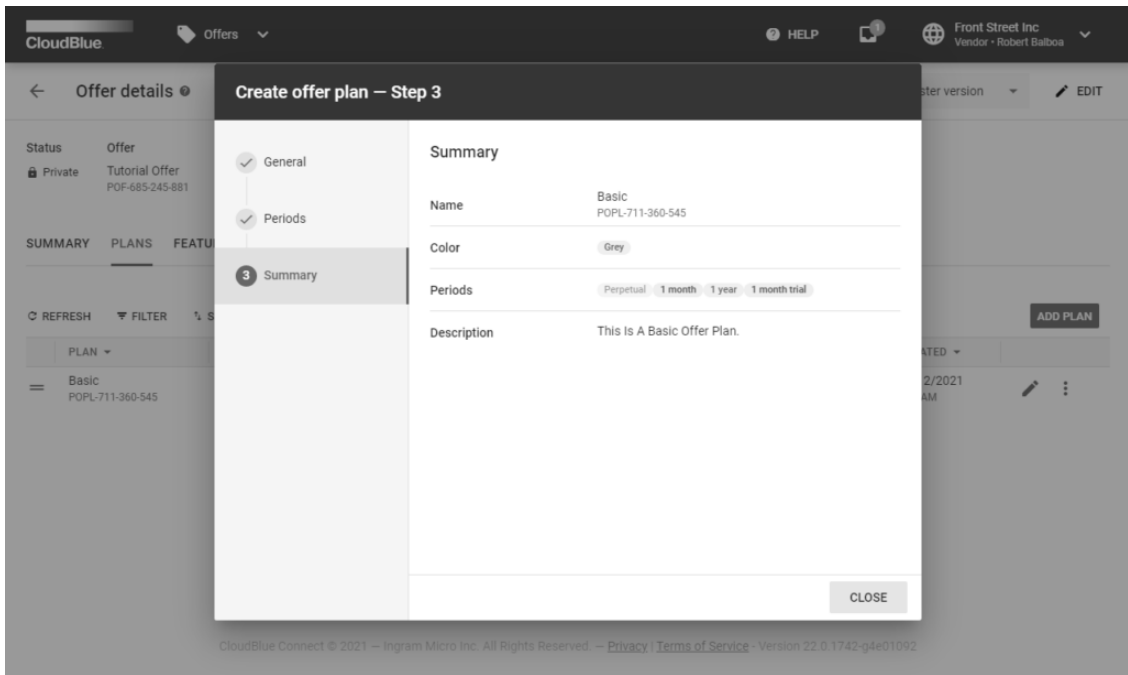
Note that the **1 Month Trial** period can only be selected for one of your offer plans.



Click the **Create** button to continue.

3. Review your summary

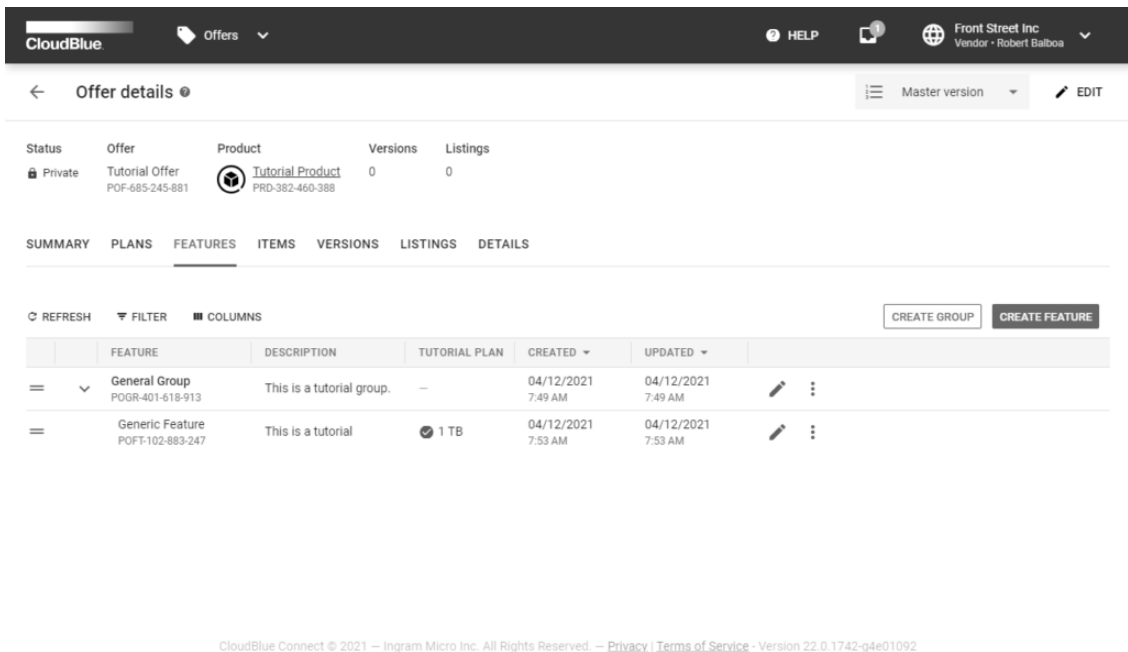
The wizard will provide plan creation summary.



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

Groups and Features

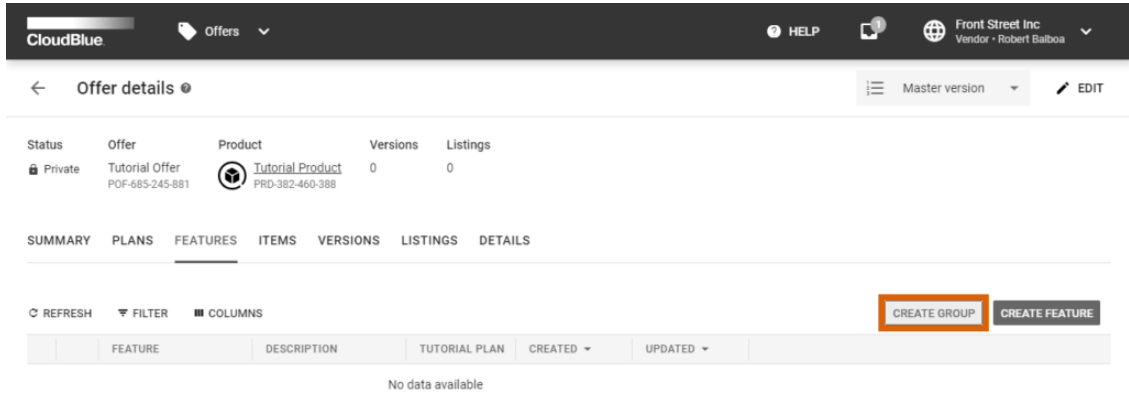
Navigate to the **Features** tab from the **offer details** screen. Your created groups and features will be displayed within the *Features* tab.



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

1. Create a new Group

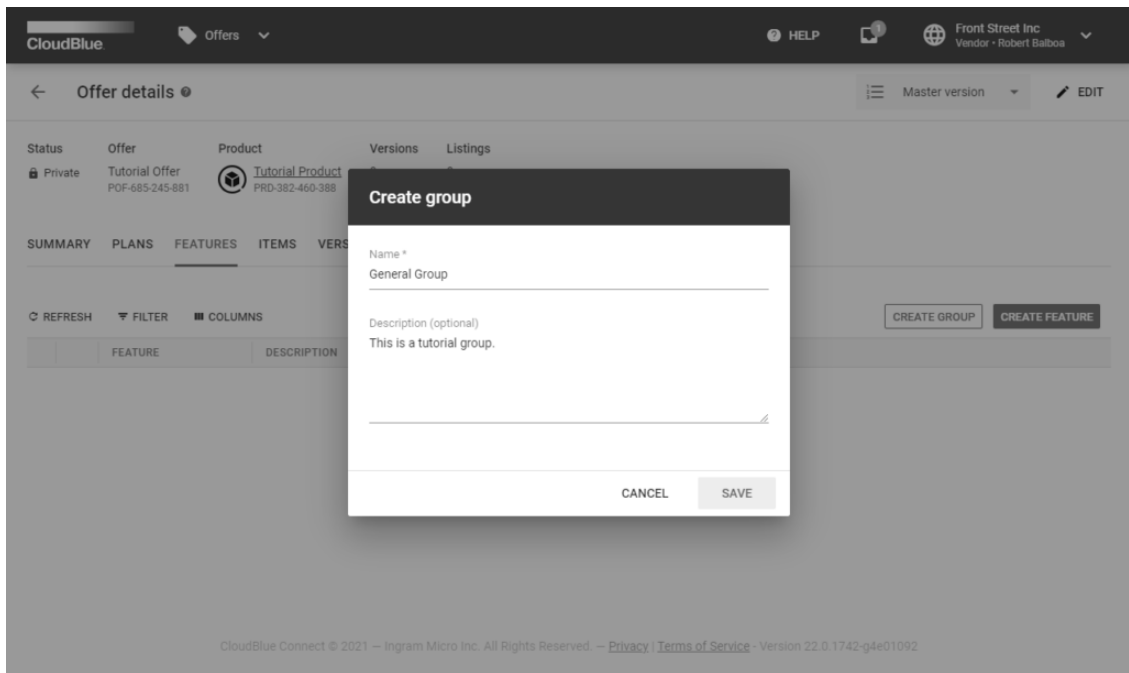
Click the **Create Group** button to specify a new group for your features.



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2. Enter a name and description

Provide a name and a description for your group.

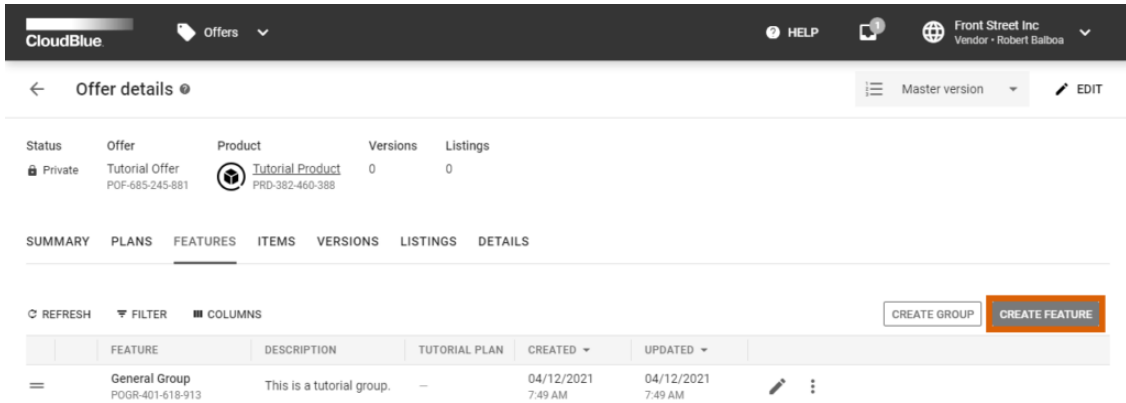


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Click **Save** to successfully configure your feature group.

3. Create a new feature

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



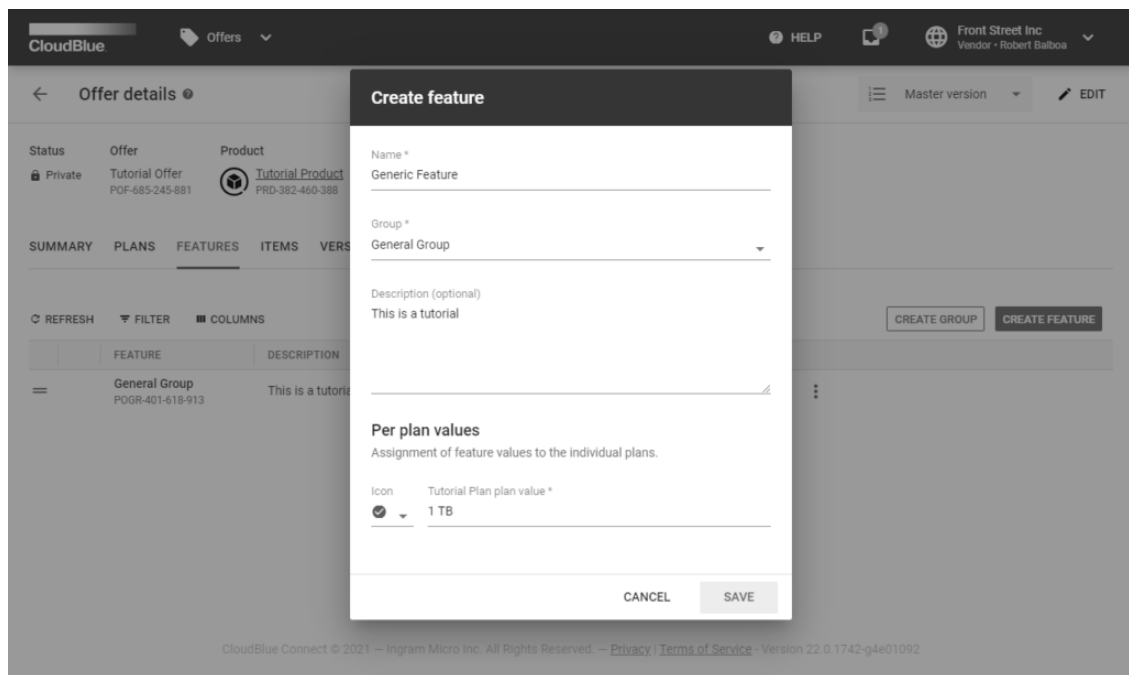
The screenshot shows the 'Offer details' page in CloudBlue. At the top, there's a navigation bar with 'CloudBlue', 'Offers', 'HELP', and 'Front Street Inc Vendor - Robert Balboa'. Below that, a breadcrumb shows 'Offer details'. A summary card displays 'Status: Private', 'Offer: Tutorial Offer (POF-685-245-881)', 'Product: Tutorial Product (PRD-382-460-388)', 'Versions: 0', and 'Listings: 0'. A tabbed interface includes 'SUMMARY', 'PLANS', 'FEATURES' (selected), 'ITEMS', 'VERSIONS', 'LISTINGS', and 'DETAILS'. Below the tabs, there are controls for 'REFRESH', 'FILTER', and 'COLUMNS'. A table lists features with columns for 'FEATURE', 'DESCRIPTION', 'TUTORIAL PLAN', 'CREATED', and 'UPDATED'. One feature is listed: 'General Group (POGR-401-618-913)' with description 'This is a tutorial group.', 'TUTORIAL PLAN' '-', 'CREATED' '04/12/2021 7:49 AM', and 'UPDATED' '04/12/2021 7:49 AM'. Two buttons are visible: 'CREATE GROUP' and 'CREATE FEATURE' (highlighted in orange).

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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

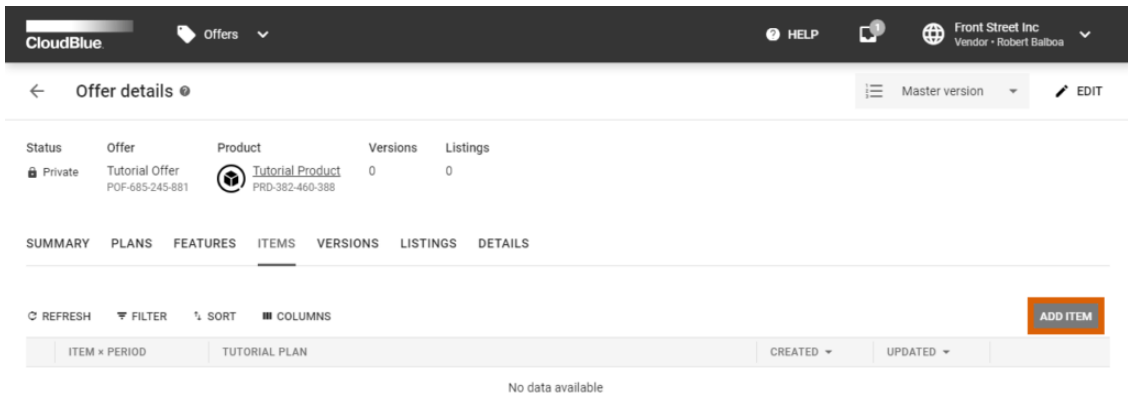
Proceed to the **Items** tab from the **offer details** screen. This tab displays your defined items for each of your configured plans and selected periods.



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.

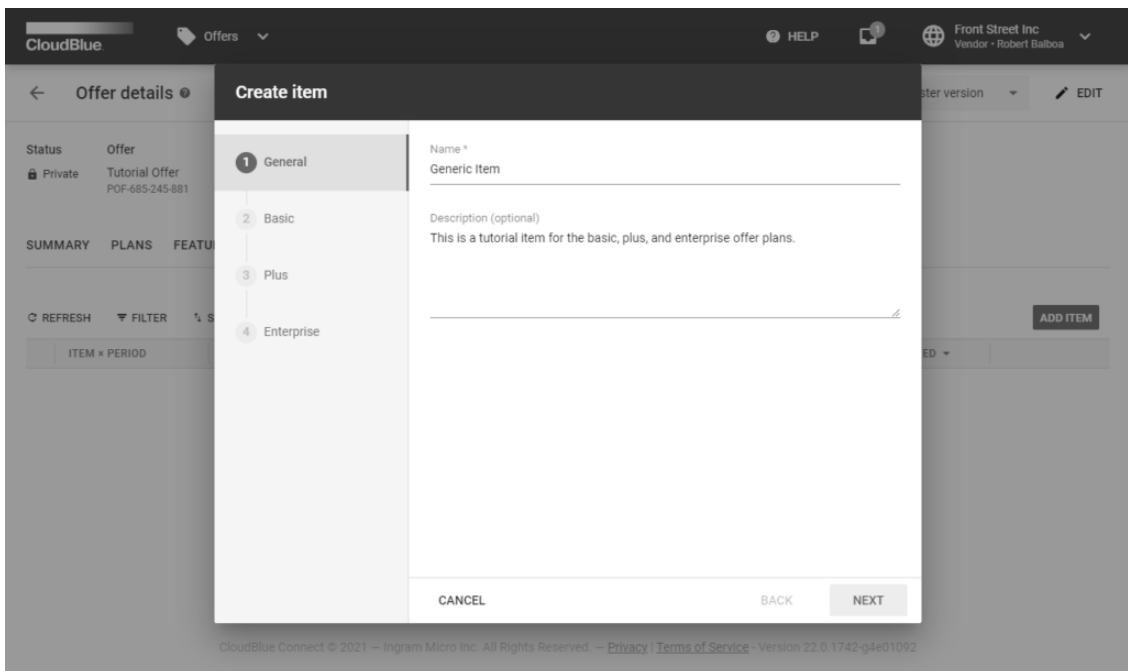


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Follow the steps of this wizard to configure your items.

1. Fill out general properties

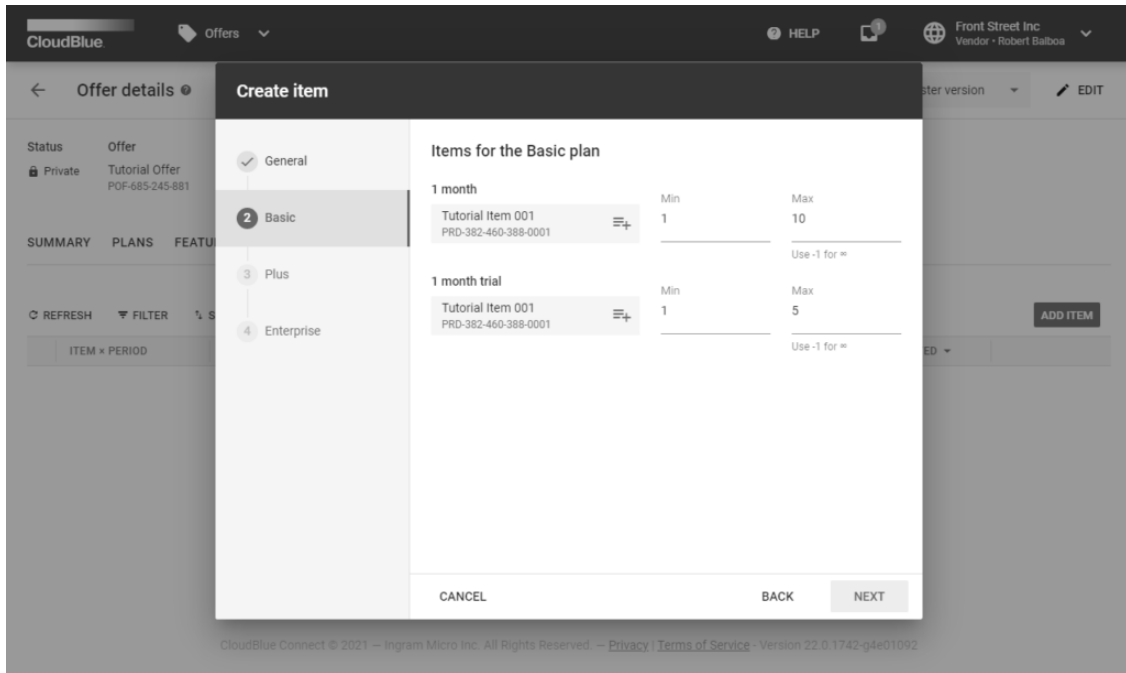
Provide a name for your item configuration. Optionally, enter a description for this configuration.



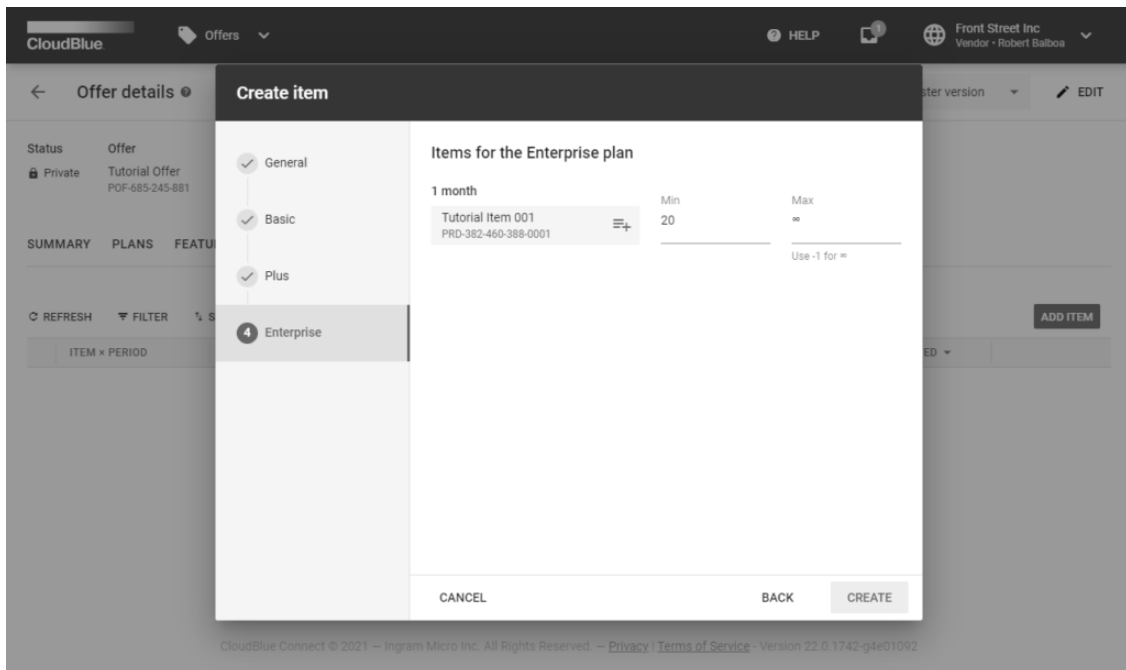
Click **Create** to continue.

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.



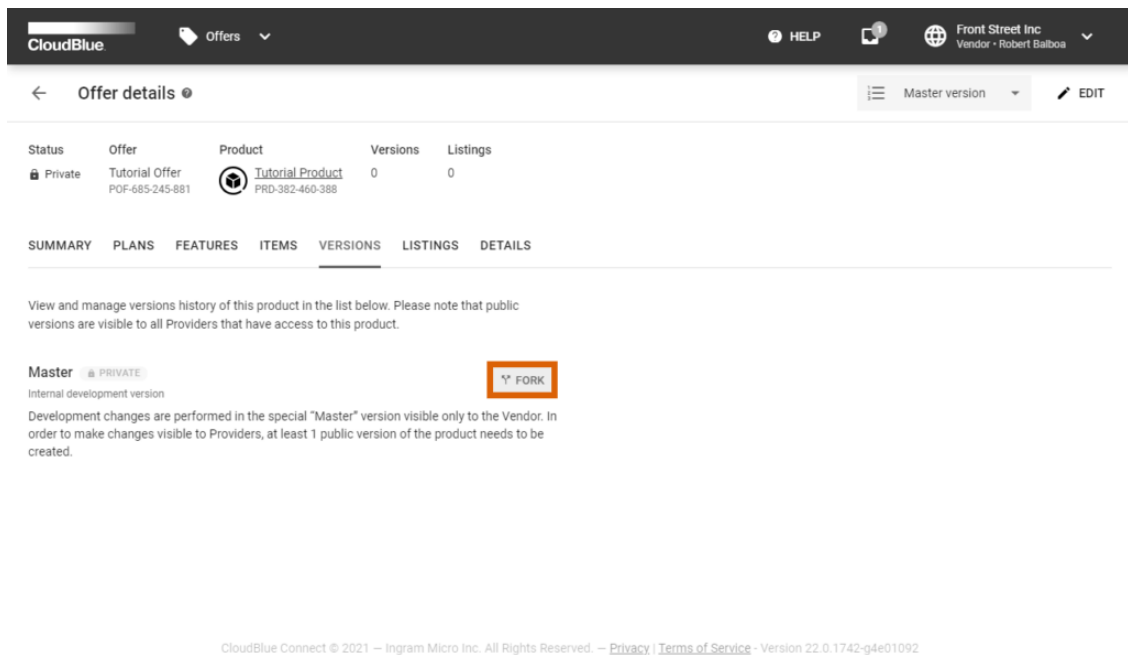
Thus, your item configuration will be successfully completed.

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.



The screenshot shows the CloudBlue interface for 'Offer details'. The top navigation bar includes 'CloudBlue', 'Offers', 'HELP', and 'Front Street Inc Vendor - Robert Balboa'. The page title is 'Offer details' with a back arrow and a 'Master version' dropdown menu. Below the title is a table with columns: Status, Offer, Product, Versions, and Listings. The table contains one row: Status: Private, Offer: Tutorial Offer (POF-685-245-881), Product: Tutorial Product (PRD-382-460-388), Versions: 0, Listings: 0. Below the table are tabs: SUMMARY, PLANS, FEATURES, ITEMS, VERSIONS (selected), LISTINGS, and DETAILS. A message states: 'View and manage versions history of this product in the list below. Please note that public versions are visible to all Providers that have access to this product.' Under the 'VERSIONS' tab, there is a section for 'Master' (PRIVATE) with a 'FORK' button highlighted in a red box. Below the 'FORK' button, it says 'Internal development version' and 'Development changes are performed in the special "Master" version visible only to the Vendor. In order to make changes visible to Providers, at least 1 public version of the product needs to be created.'

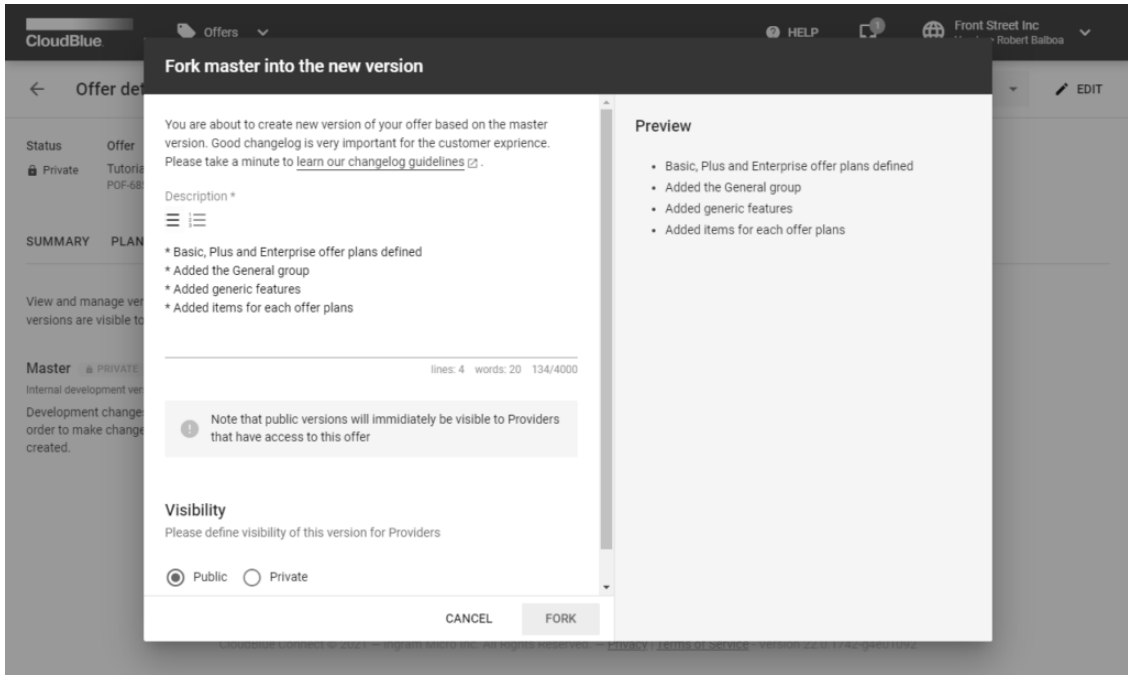
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2. Fill out the required form

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.

VERSION	OFFER	PRODUCT	DESCRIPTION	CREATED	STATUS
Version 1	Tutorial Offer POF-685-245-881	Tutorial Product PRD-382-460-388	The following represents a ...	04/12/2021 8:12 AM	Ready

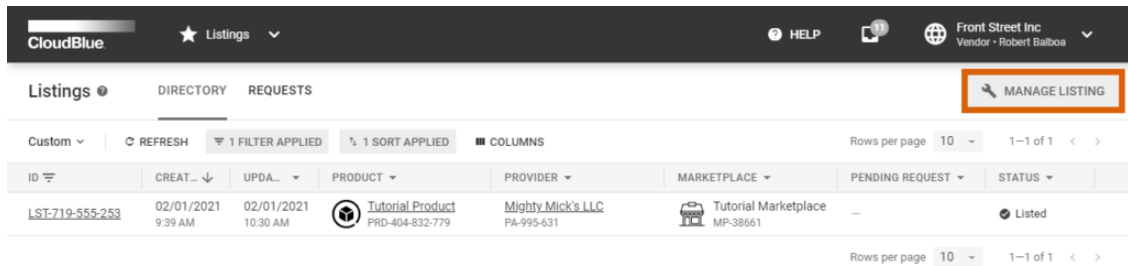
Associate Offers with your Listing

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.



The screenshot shows the CloudBlue interface with the 'Listings' tab selected. A 'MANAGE LISTING' button is highlighted with a red box. Below the navigation bar is a table with the following data:

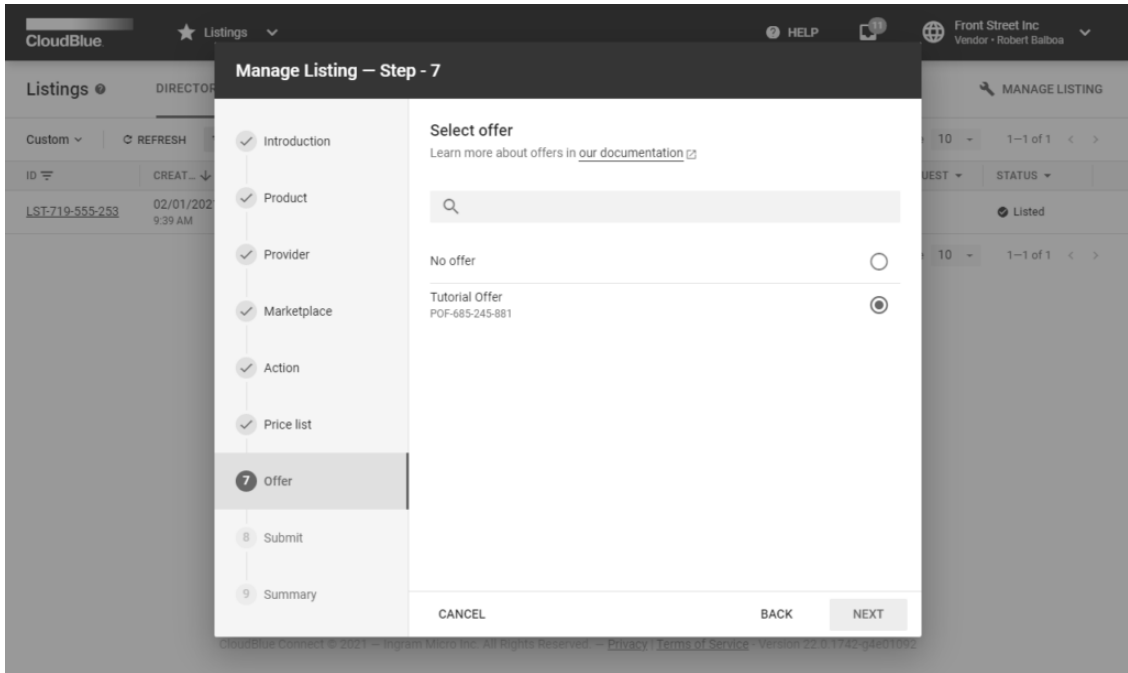
ID	CREAT...	UPDA...	PRODUCT	PROVIDER	MARKETPLACE	PENDING REQUEST	STATUS
LST-719-555-253	02/01/2021 9:39 AM	02/01/2021 10:30 AM	 Tutorial Product PRD-404-832-779	 Mighty Mick's LLC PA-995-631	 Tutorial Marketplace MP-38661	—	Listed

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

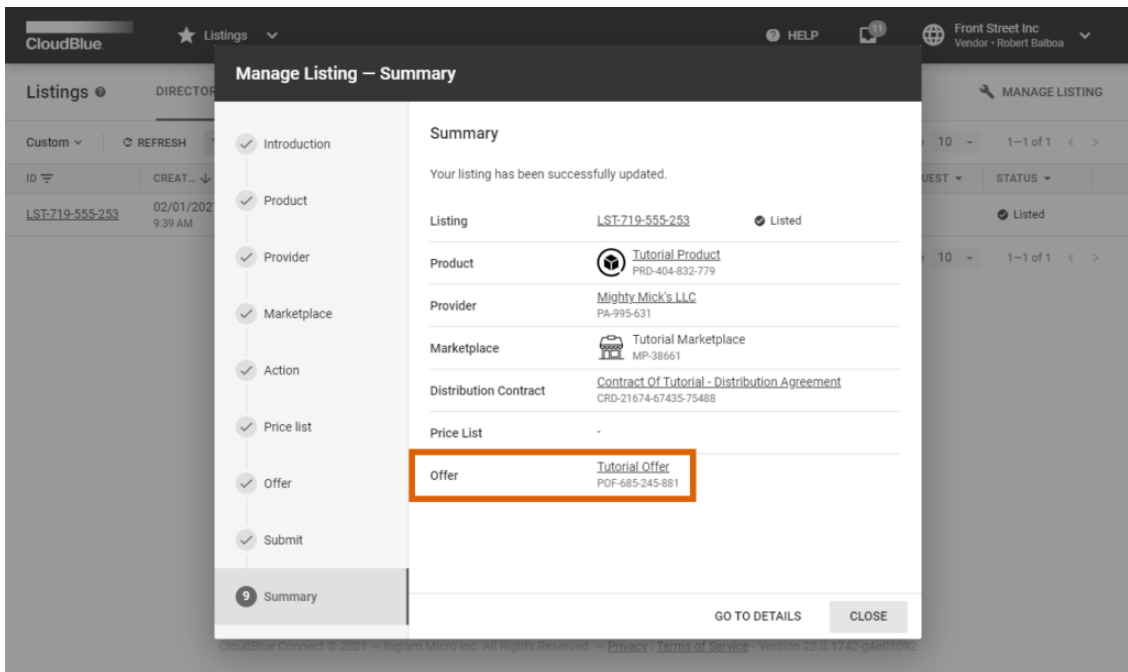
2. Include your offer

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.


CloudBlue Offers HELP Front Street Inc Vendor - Robert Balboa

Offer details Master version EDIT

Status	Offer	Product	Versions	Listings
Listed	Tutorial Offer POF-685-245-881	 Tutorial Product PRD-404-832-779	1	1

SUMMARY PLANS FEATURES ITEMS VERSIONS LISTINGS DETAILS

All Listings REFRESH FILTER 1 SORT APPLIED COLUMNS Rows per page 10 1-1 of 1

ID	CREAT...	UPDA...	MARKETPLACE	PROVIDER	PENDING REQUEST	STATUS
LST-719-555-253	02/01/2021 9:39 AM	04/12/2021 8:18 AM	 Tutorial Marketplace MP-38661	<u>Mighty Micks LLC</u> PA-995-631	-	Listed

Rows per page 10 1-1 of 1