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Offers Interface



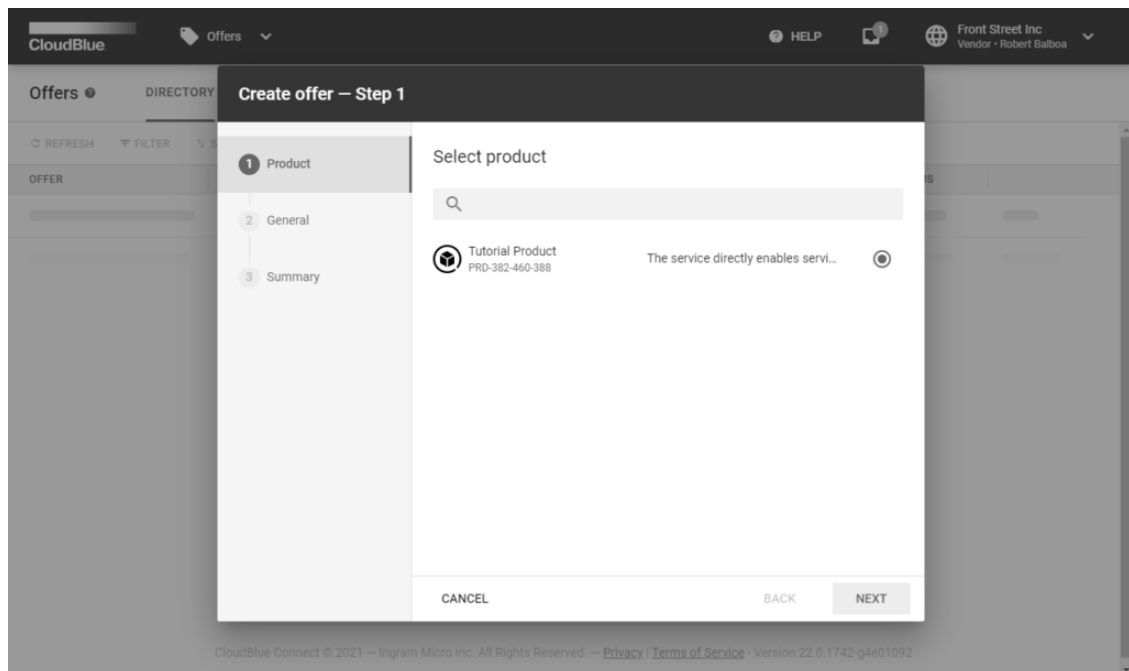
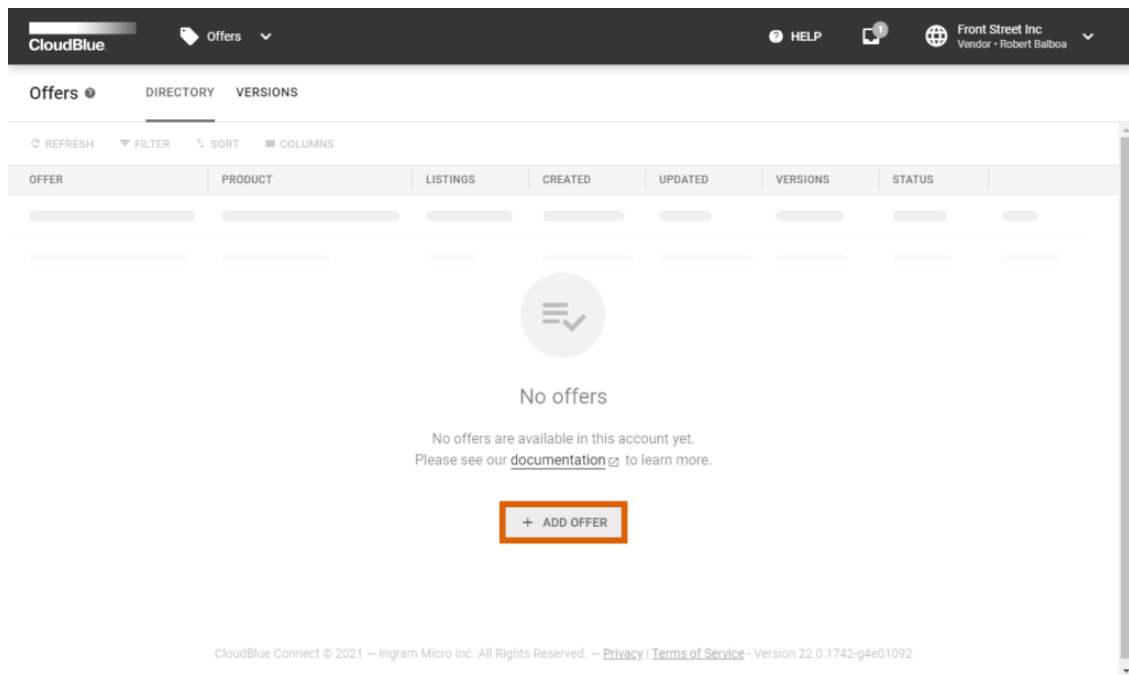
This article has been generated from the online version of the documentation and might be out of date. Please, make sure to always refer to the online version of the documentation for the up-to-date information.

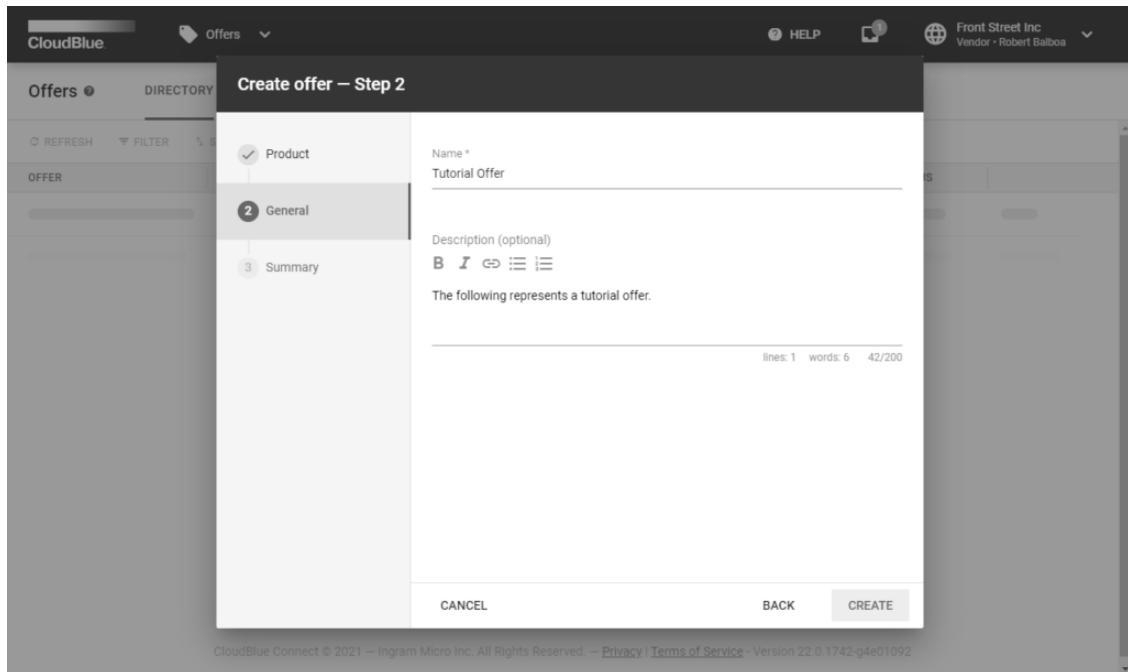
Auto-generated at April 25, 2024

Creating Offers

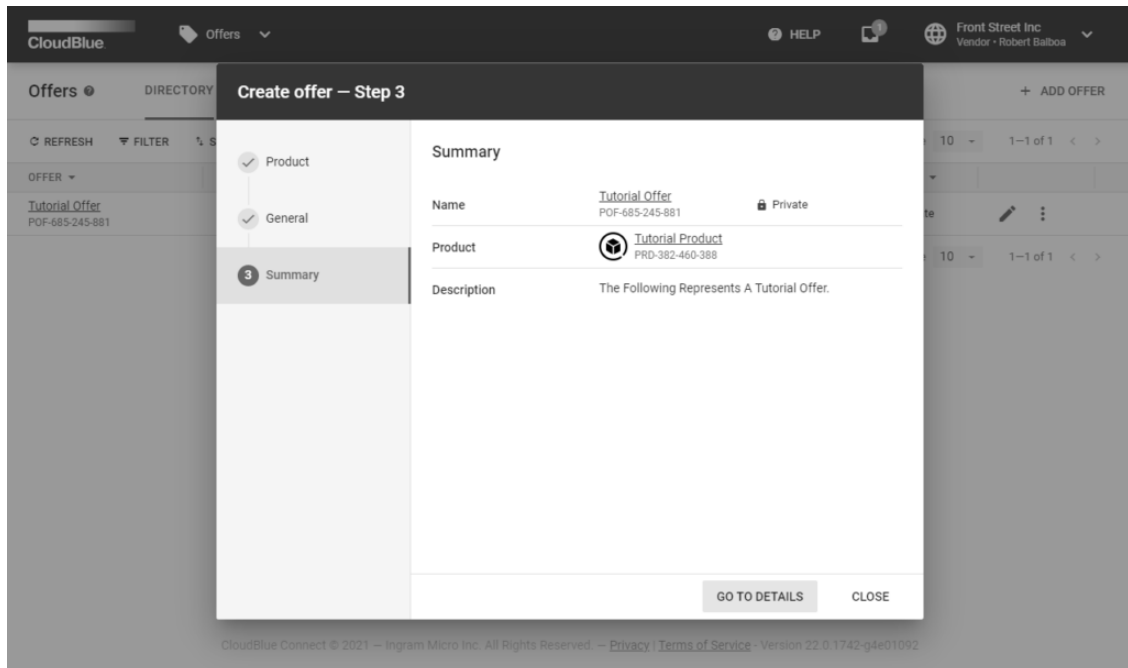
Navigate to the **Offers** module on the Vendor Portal. Created offers are displayed under the **Directory** section.

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





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Follow the wizard steps to successfully configure a new offer:

1. Select a product from the provided list.
2. Specify the following general properties:
 - **Name:** Enter your offer name.

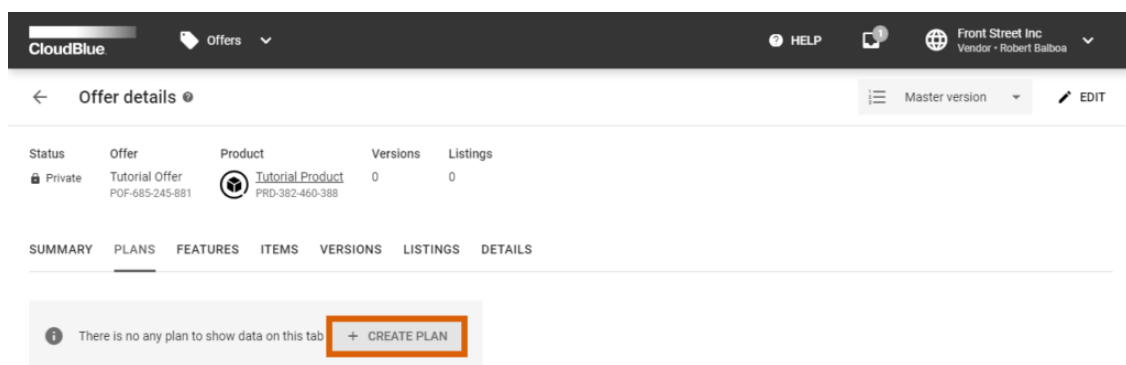
- **Description:** Provide a description of your offer (optional). Note that this description will be displayed within the *Details* tab from your offer details screen.
3. Click **Create** to finalize your offer creation.

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.



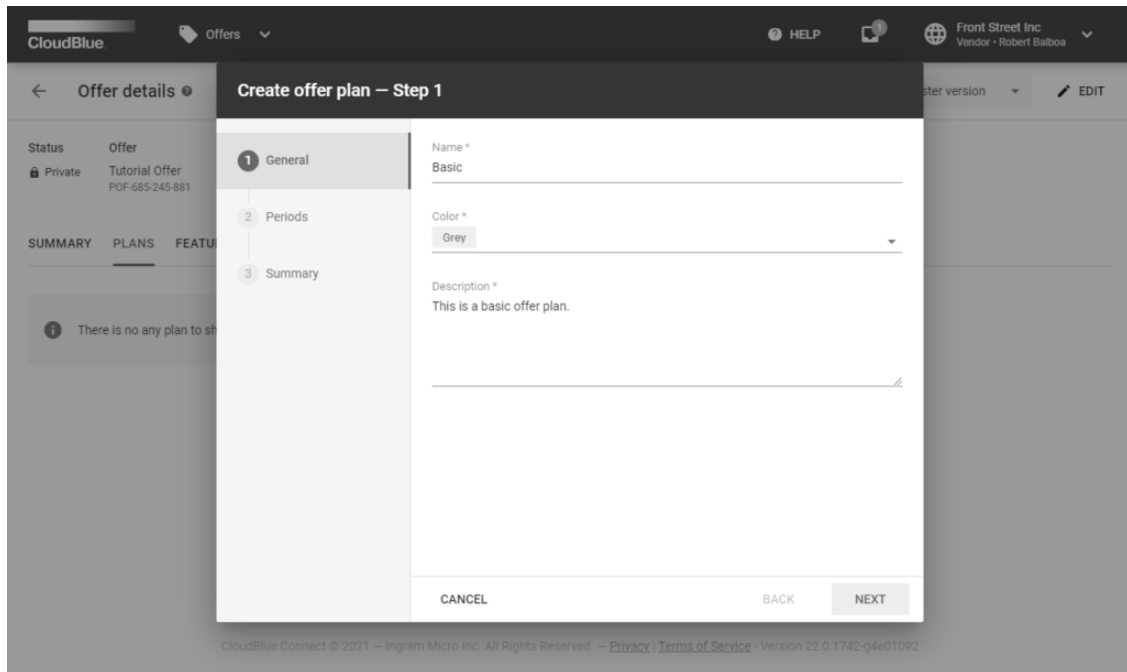
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Follow the steps below to successfully configure a new plan.

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.



Click **Next** to continue.

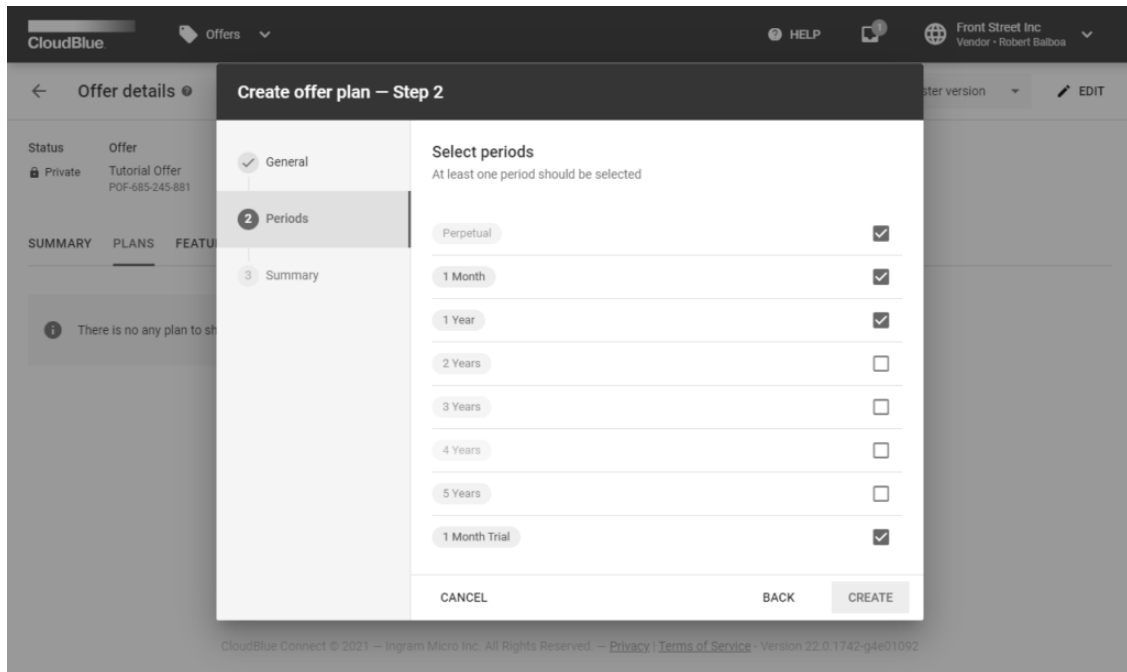
2. Select a period for your plan

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.



Create offer plan — Step 2

General

Periods

Summary

Select periods
At least one period should be selected

Perpetual ☒

1 Month ☒

1 Year ☒

2 Years ☐

3 Years ☐

4 Years ☐

5 Years ☐

1 Month Trial ☒

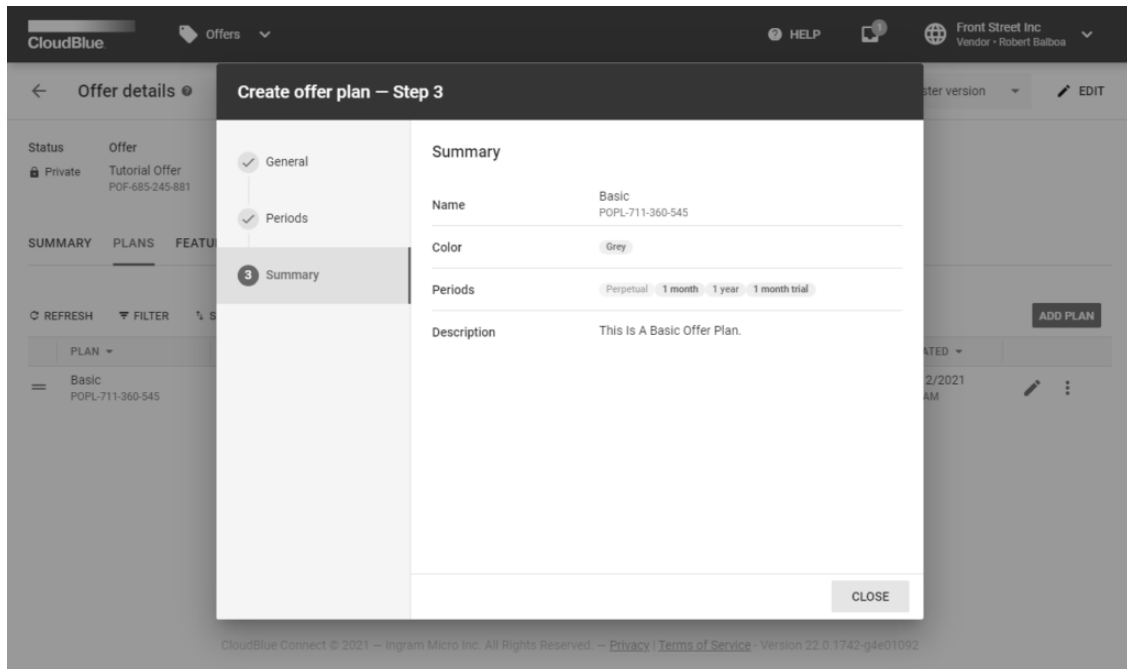
CANCEL BACK CREATE

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Click the **Create** button to continue.

3. Review your summary

The wizard will provide plan creation summary.



Create offer plan — Step 3

General

Periods

Summary

Summary

Name Basic POPL-711-360-545

Color Grey

Periods Perpetual 1 month 1 year 1 month trial

Description This Is A Basic Offer Plan.

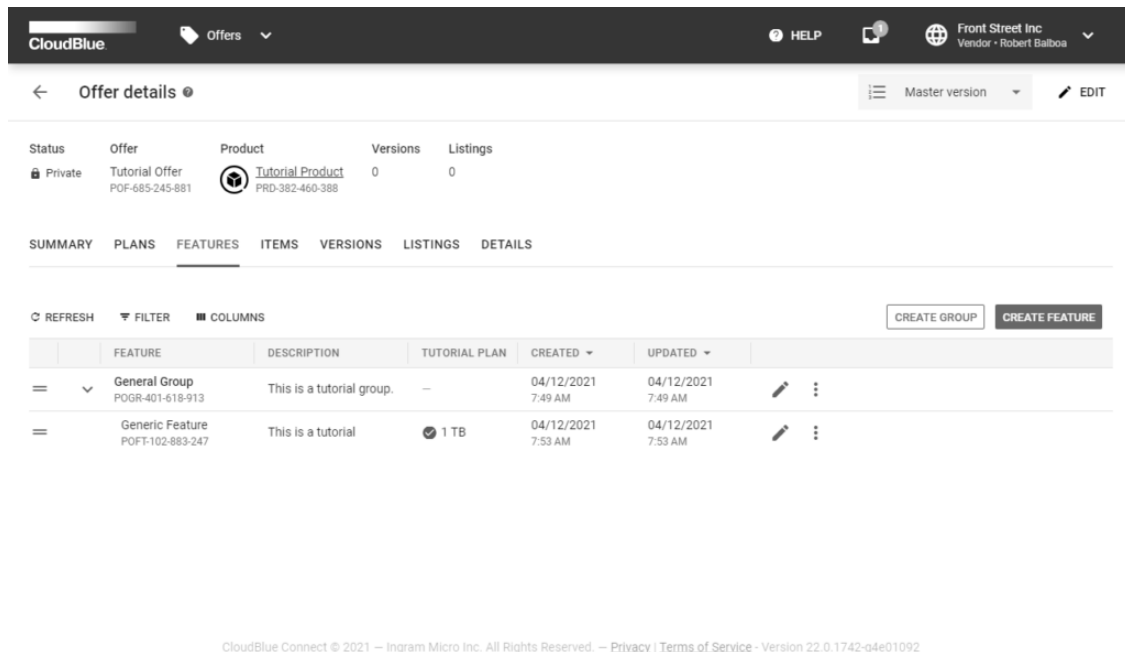
CLOSE

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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 screenshot shows the 'Offer details' screen in the CloudBlue interface. The top navigation bar includes the CloudBlue logo, a dropdown menu for 'Offers', and user information for 'Front Street Inc' (Vendor: Robert Balboa). The main header shows the offer status as 'Private', the offer name as 'Tutorial Offer' (POF-685-245-881), the product as 'Tutorial Product' (PRD-382-460-388), and the number of versions and listings as 0 each.

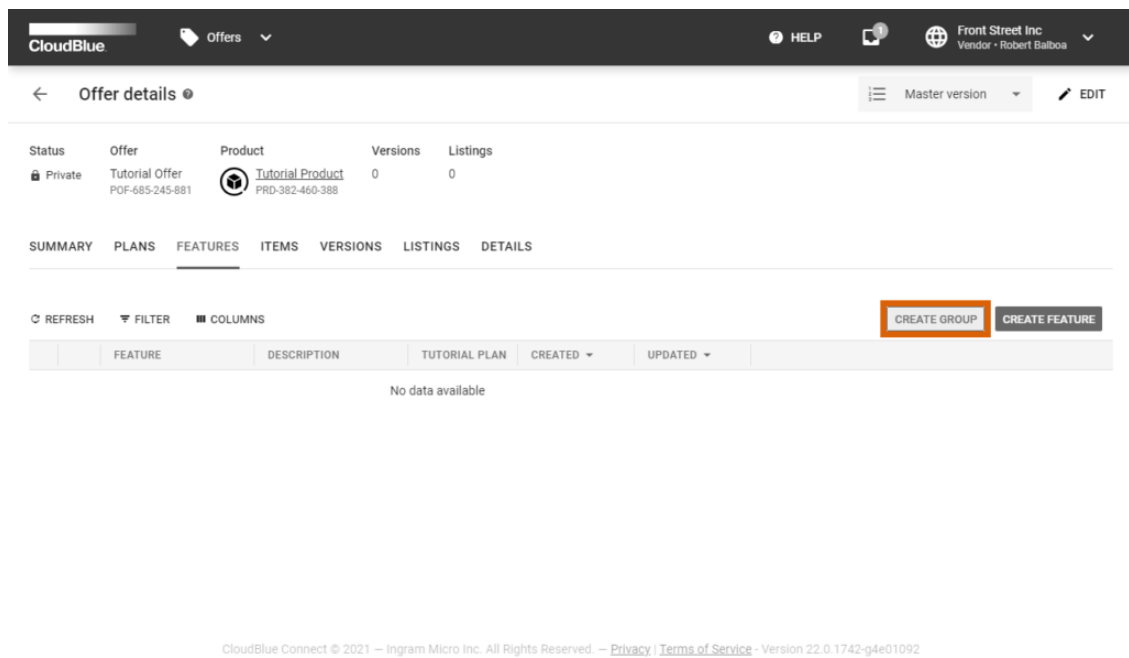
The 'FEATURES' tab is selected, displaying a table of features. The table has columns for 'FEATURE', 'DESCRIPTION', 'TUTORIAL PLAN', 'CREATED', and 'UPDATED'. There are two features listed: 'General Group' (POGR-401-618-913) and 'Generic Feature' (POFT-102-883-247). The 'General Group' has a description 'This is a tutorial group.' and the 'Generic Feature' has a description 'This is a tutorial' and a size of 1 TB. Both features were created on 04/12/2021 at 7:49 AM and 7:53 AM respectively. There are 'CREATE GROUP' and 'CREATE FEATURE' buttons at the top right of the table.

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

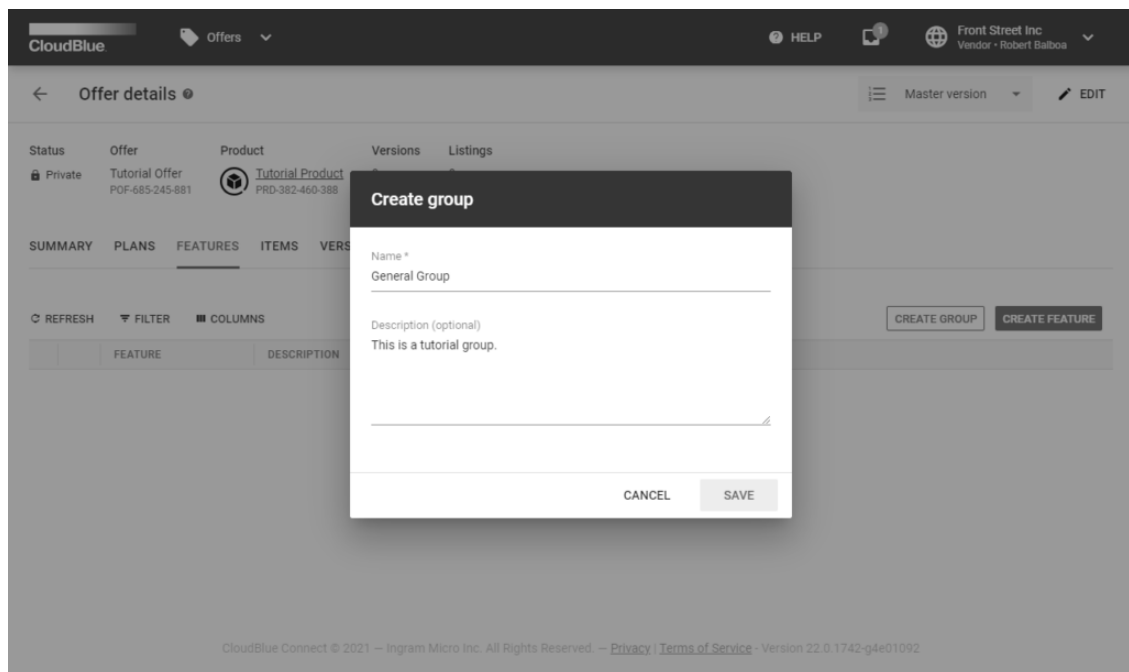
1. Create a new Group

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



2. Enter a name and description

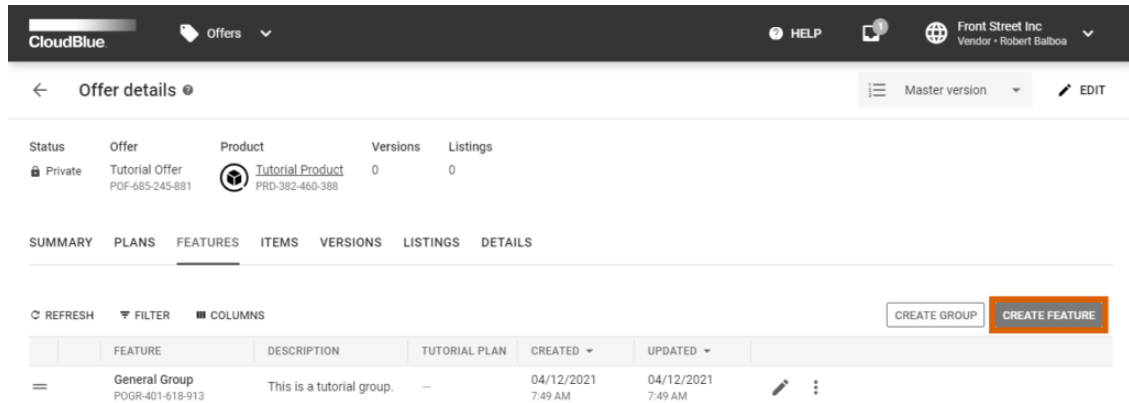
Provide a name and a description for your group.



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

3. Create a new feature

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



Status	Offer	Product	Versions	Listings
Private	Tutorial Offer POF-685-245-881	Tutorial Product PRD-382-460-388	0	0

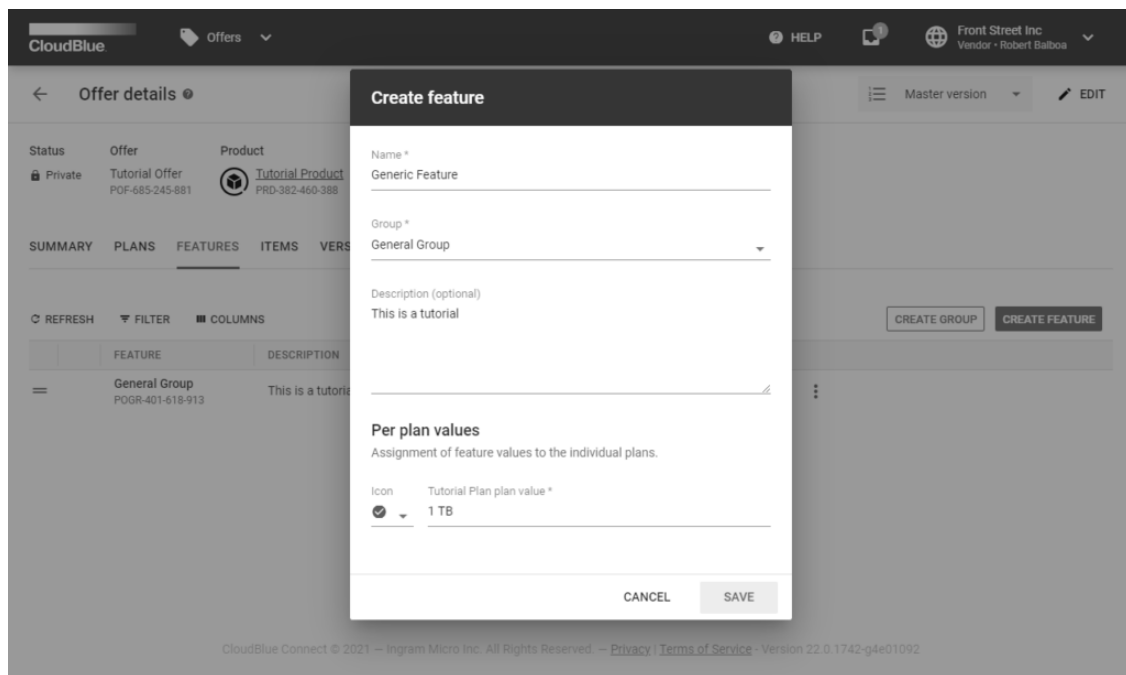
FEATURE	DESCRIPTION	TUTORIAL PLAN	CREATED	UPDATED
General Group POGR-401-618-913	This is a tutorial group.	—	04/12/2021 7:49 AM	04/12/2021 7:49 AM

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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

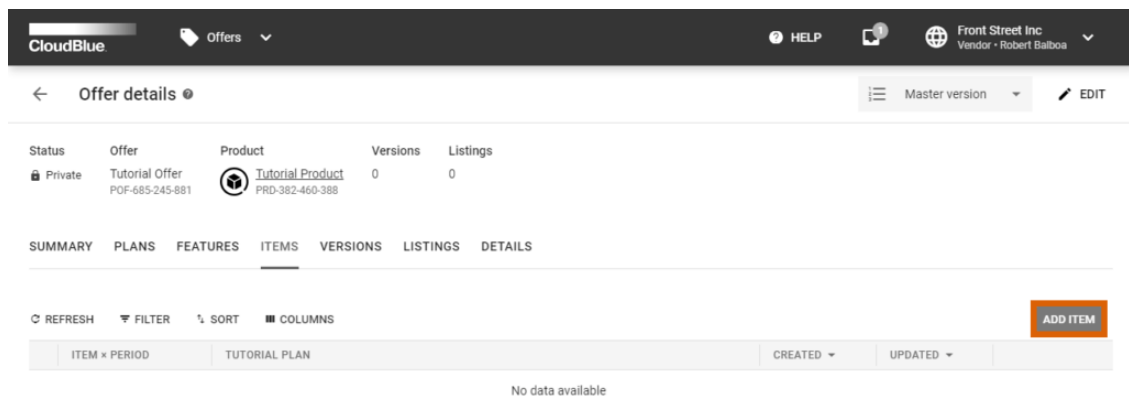
Proceed to the **Items** tab from the **offer details** screen. This tab displays your defined items for each of your configured plans and selected periods.



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.

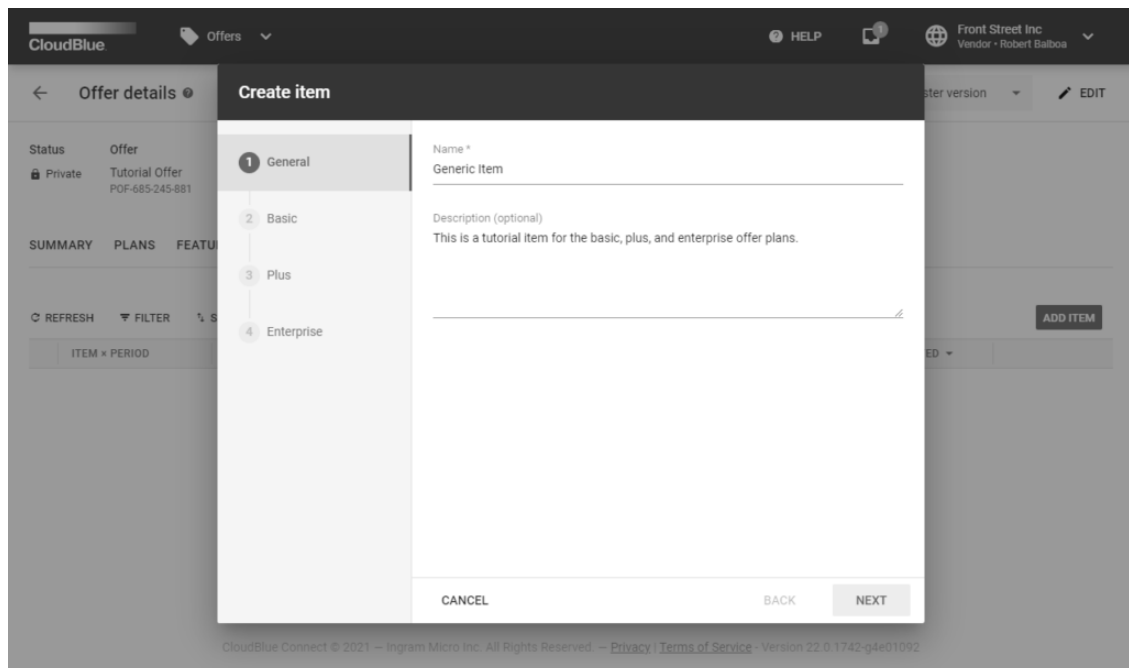


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Follow the steps of this wizard to configure your items.

1. Fill out general properties

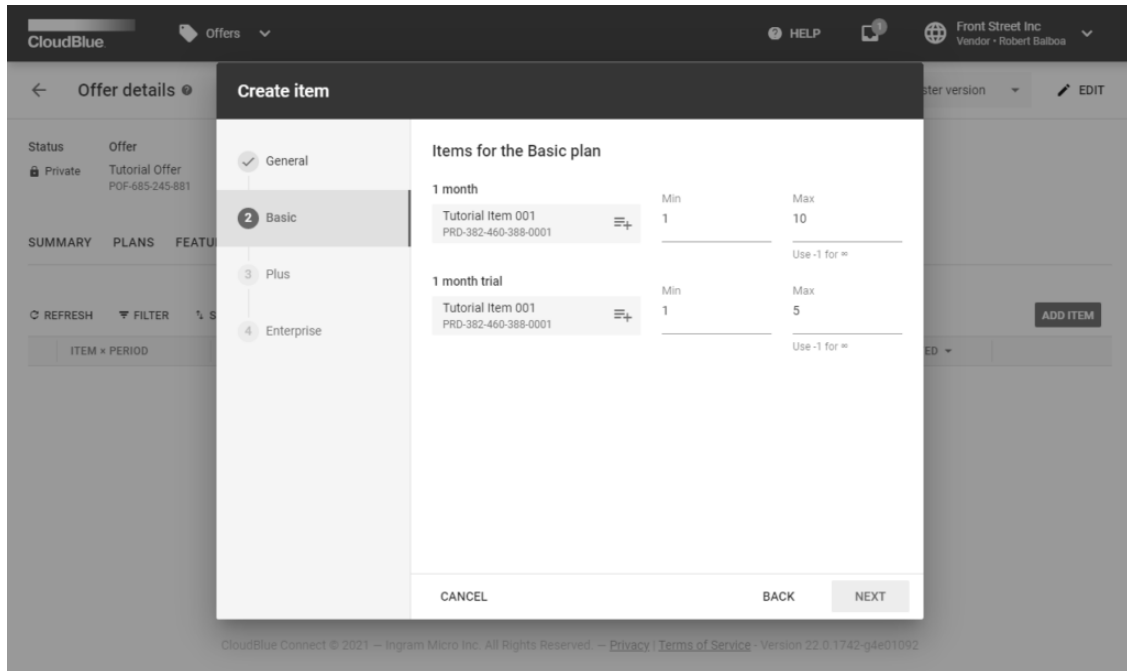
Provide a name for your item configuration. Optionally, enter a description for this configuration.



Click **Create** to continue.

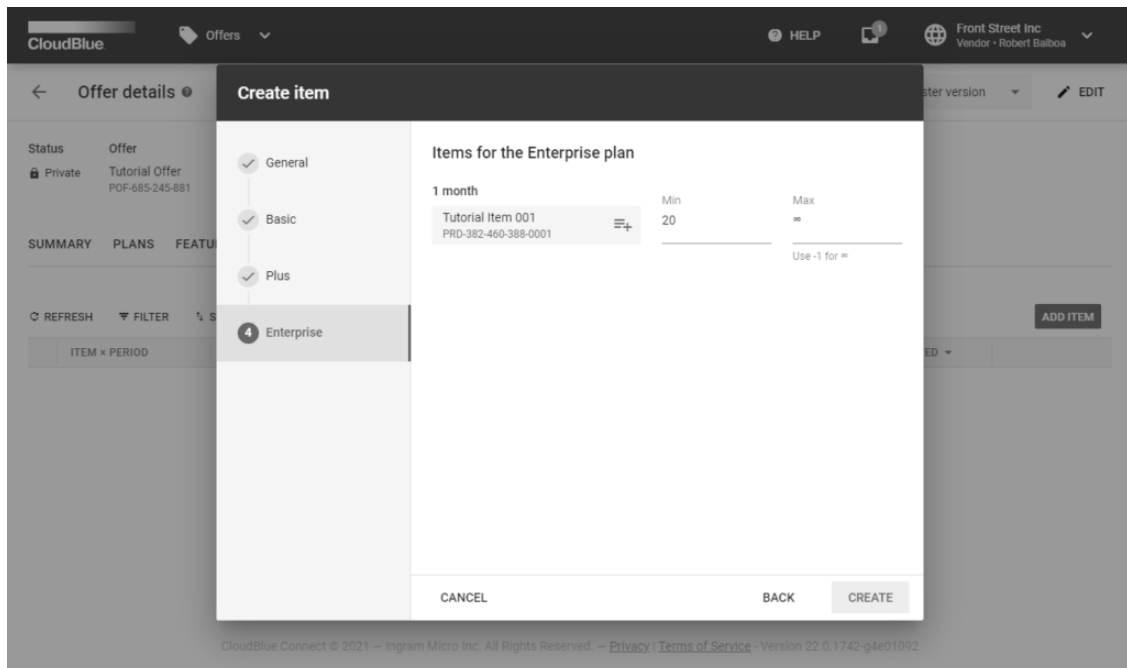
2. Specify your items

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



The screenshot shows the 'Create item' dialog in the CloudBlue interface. The dialog is titled 'Create item' and has a sidebar with four tabs: General, Basic, Plus, and Enterprise. The 'Basic' tab is selected. The main content area is titled 'Items for the Basic plan' and contains two rows of items. Each row has a '1 month' period, a 'Tutorial Item 001' (PRD-382-460-388-0001), and a 'Min' value of 1. The 'Max' value is 10 for the first row and 5 for the second row. There are 'Use -1 for ∞' links next to the 'Max' values. At the bottom of the dialog are 'CANCEL', 'BACK', and 'NEXT' buttons.

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.



The screenshot shows the 'Create item' dialog in the CloudBlue interface. The dialog is titled 'Create item' and has a sidebar with four tabs: General, Basic, Plus, and Enterprise. The 'Enterprise' tab is selected. The main content area is titled 'Items for the Enterprise plan' and contains one row of items. The row has a '1 month' period, a 'Tutorial Item 001' (PRD-382-460-388-0001), and a 'Min' value of 20. The 'Max' value is ∞. There is a 'Use -1 for ∞' link next to the 'Max' value. At the bottom of the dialog are 'CANCEL', 'BACK', and 'CREATE' buttons.

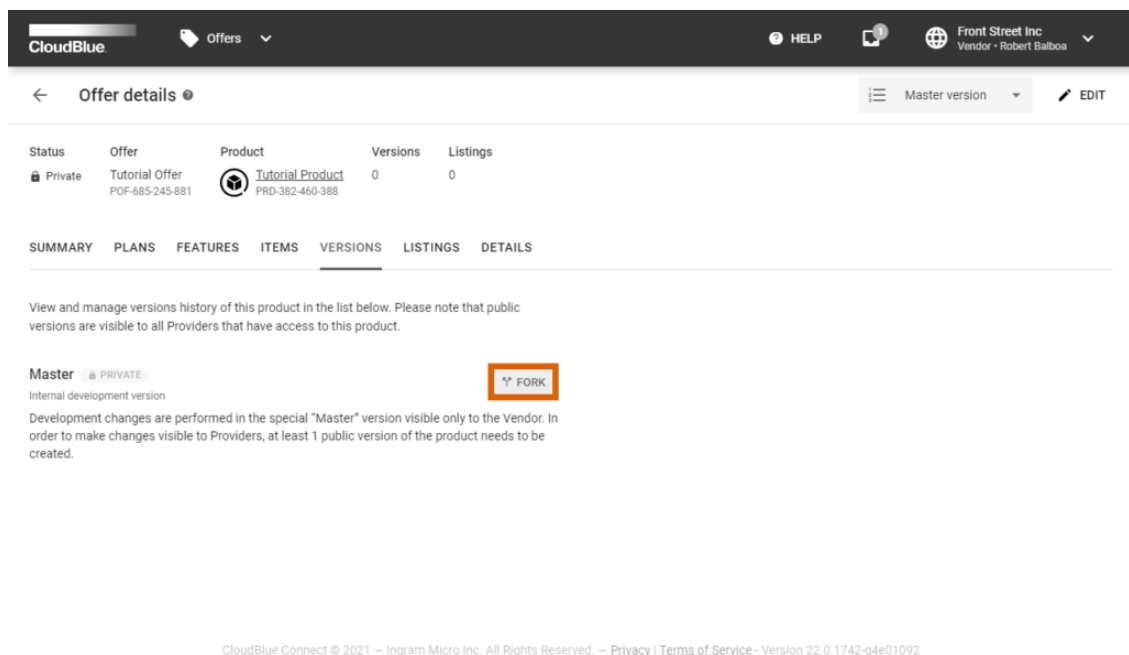
Thus, your item configuration will be successfully completed.

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. At the top, there's a navigation bar with 'CloudBlue', 'Offers', 'HELP', and user information for 'Front Street Inc'. Below this is a breadcrumb 'Offer details' and a 'Master version' dropdown. A table lists offers with columns for Status, Offer, Product, Versions, and Listings. The 'Tutorial Offer' is selected. Below the table, tabs for 'SUMMARY', 'PLANS', 'FEATURES', 'ITEMS', 'VERSIONS', 'LISTINGS', and 'DETAILS' are shown, with 'VERSIONS' being the active tab. 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 this, the 'Master' version is listed as 'PRIVATE' and 'Internal development version'. A 'FORK' button is highlighted with an orange box. A note explains that development changes are performed in the 'Master' version and that at least one public version is needed for changes to be visible to providers.

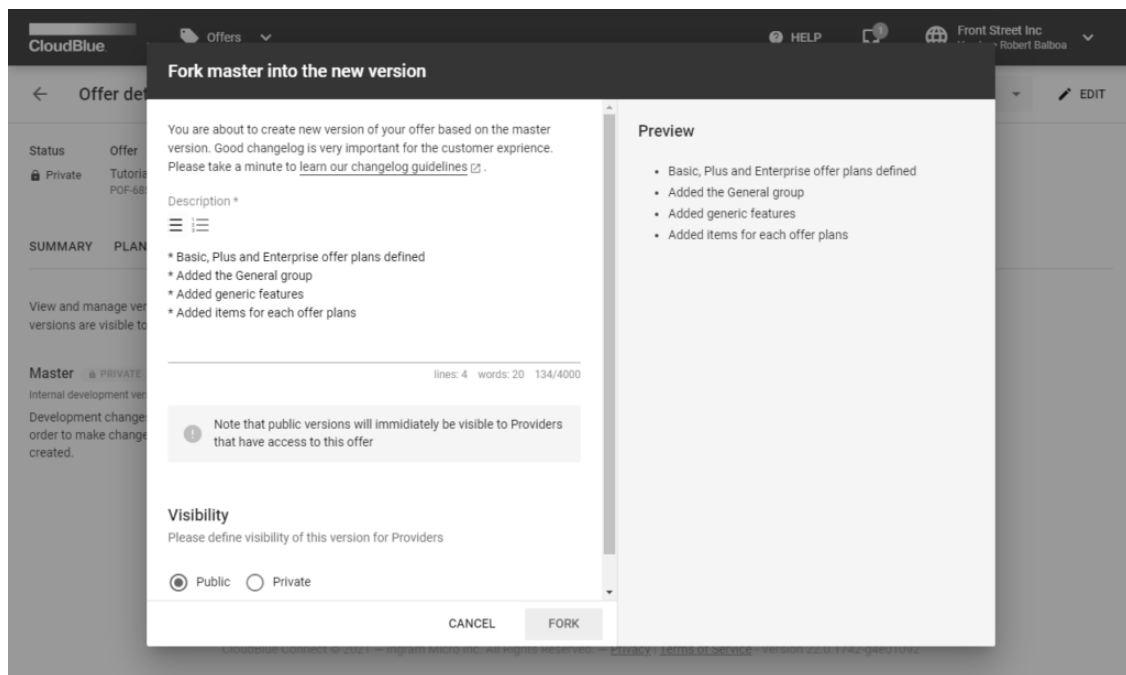
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2. Fill out the required form

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

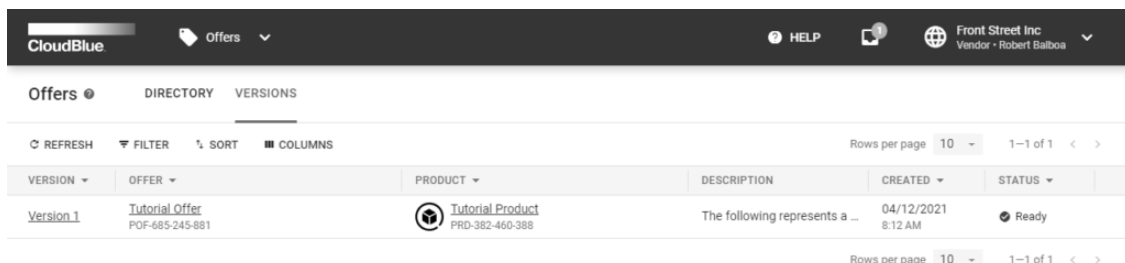
Description: Provide a description for your offer version. In general, this description contains release notes and update information.

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

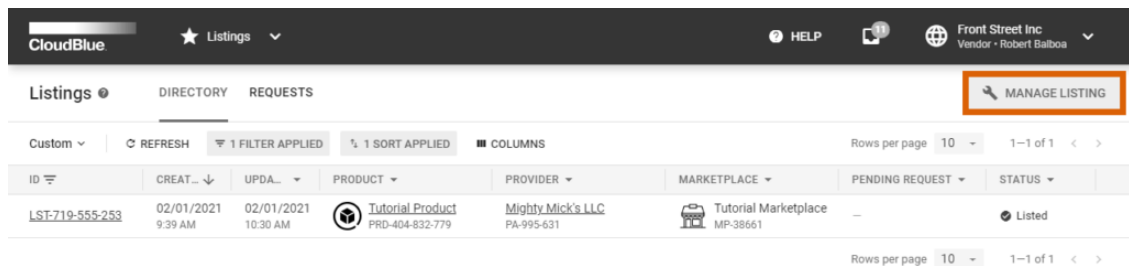
Associate Offers with your Listing

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.



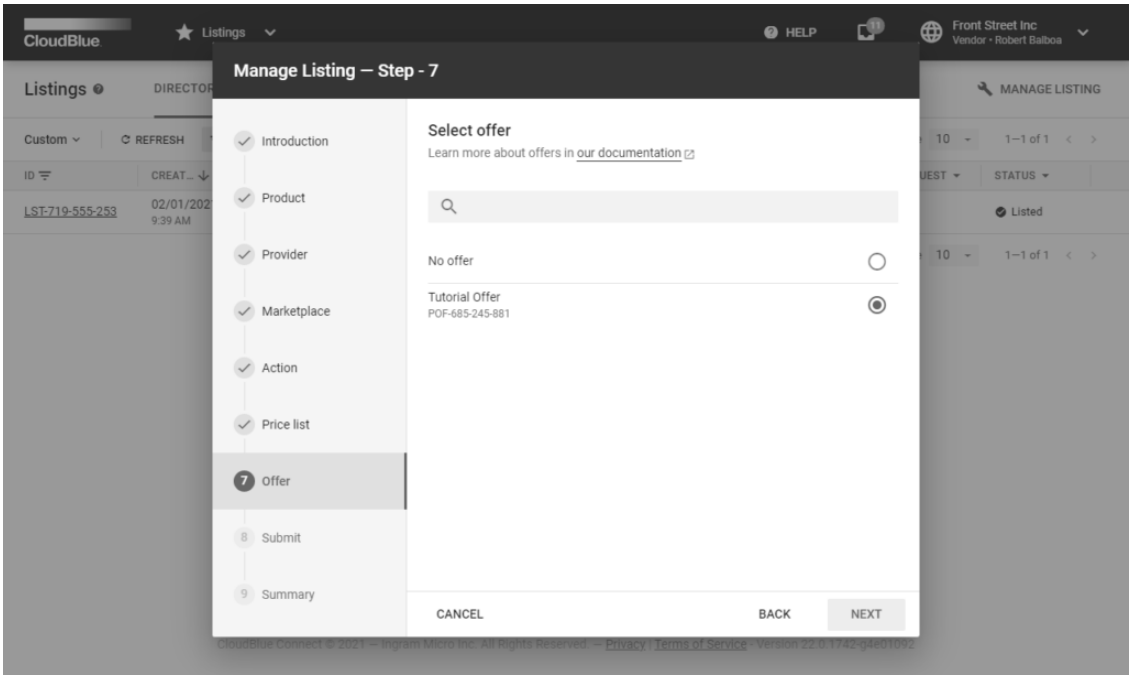
ID	CREAT...	UPDA...	PRODUCT	PROVIDER	MARKETPLACE	PENDING REQUEST	STATUS
LST-719-555-253	02/01/2021 9:39 AM	02/01/2021 10:30 AM	Tutorial Product PRD-404-832-779	Mighty Mick's LLC PA-995-631	Tutorial Marketplace MP-38661	—	Listed

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

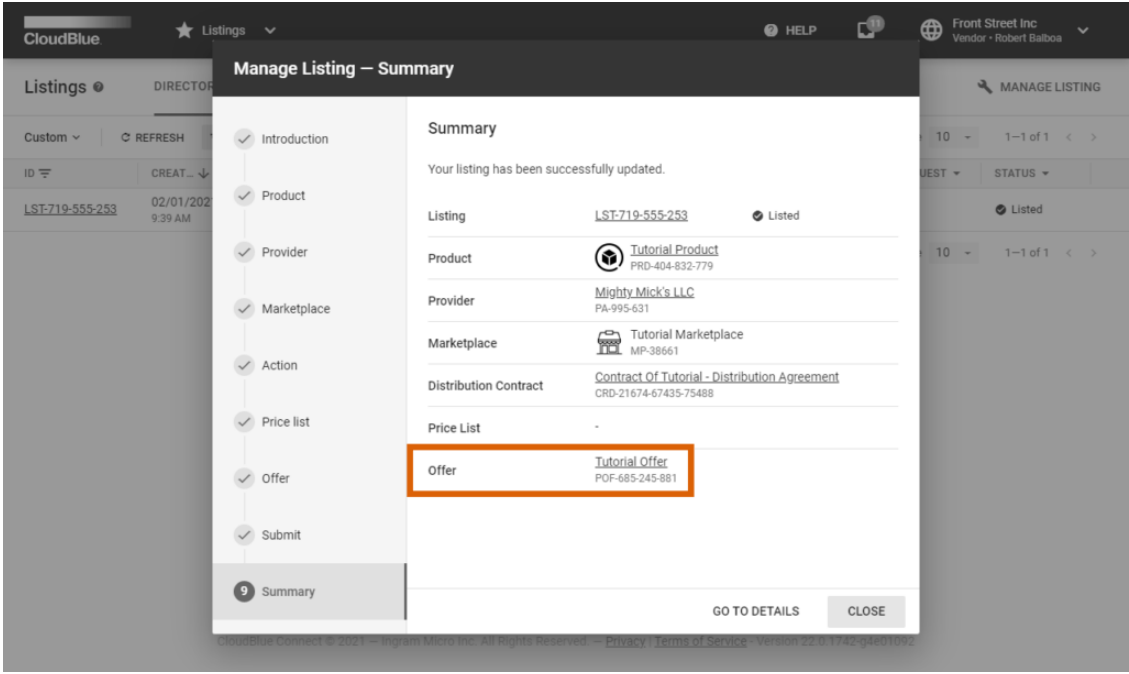
2. Include your offer

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	<div>Tutorial Marketplace</div> <div>MP-38661</div>	<div>Mighty Micks LLC</div> <div>PA-995-631</div>	—	Listed

Rows per page 10

1-1 of 1