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Offers Interface



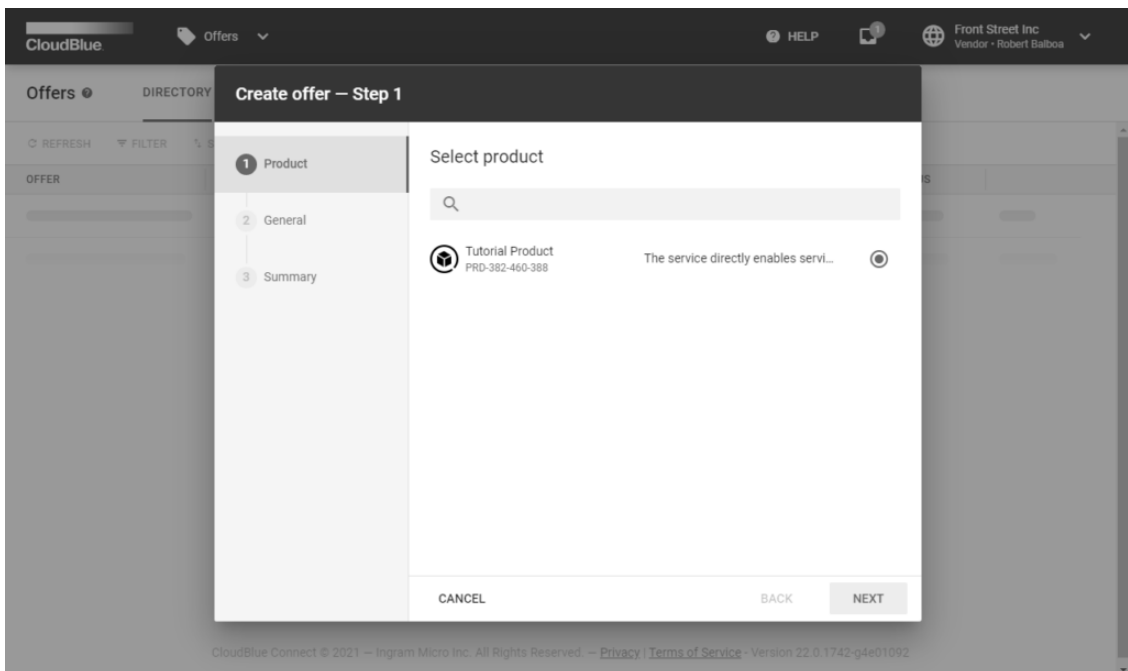
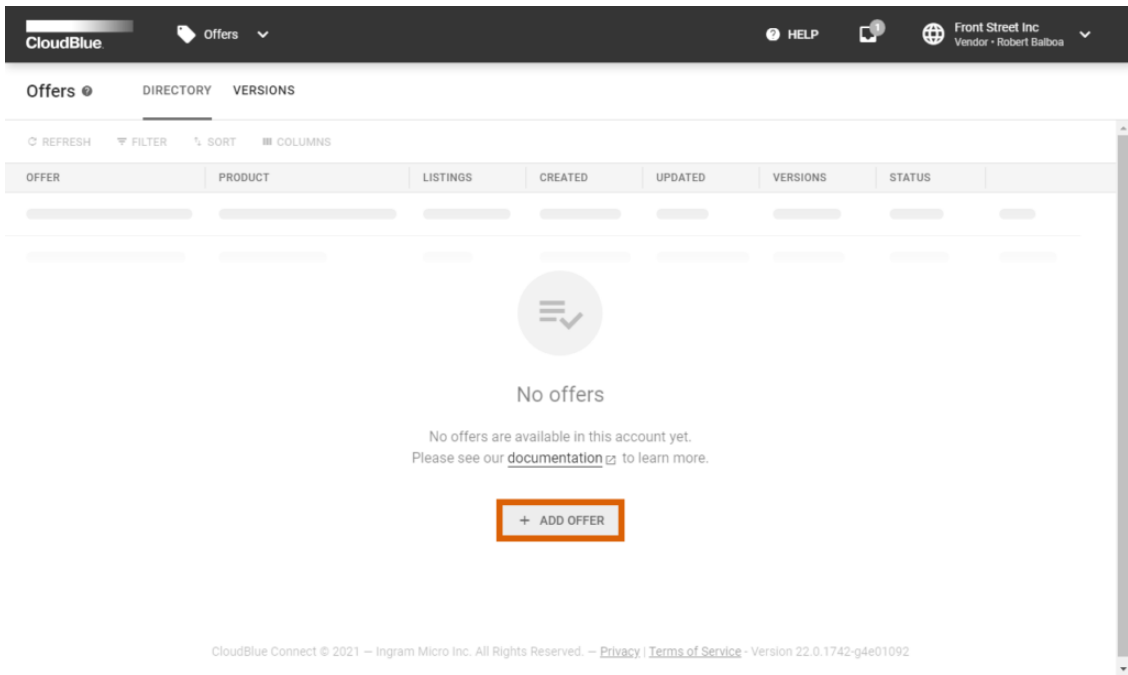
This article has been generated from the online version of the documentation and might be out of date. Please, make sure to always refer to the online version of the documentation for the up-to-date information.

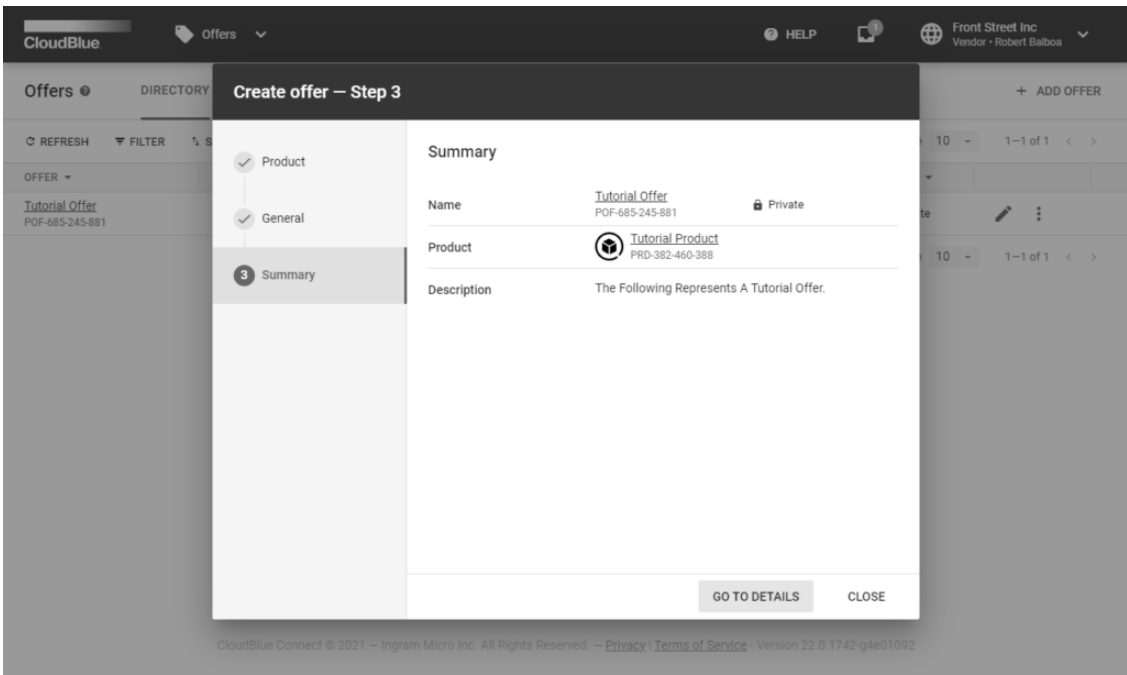
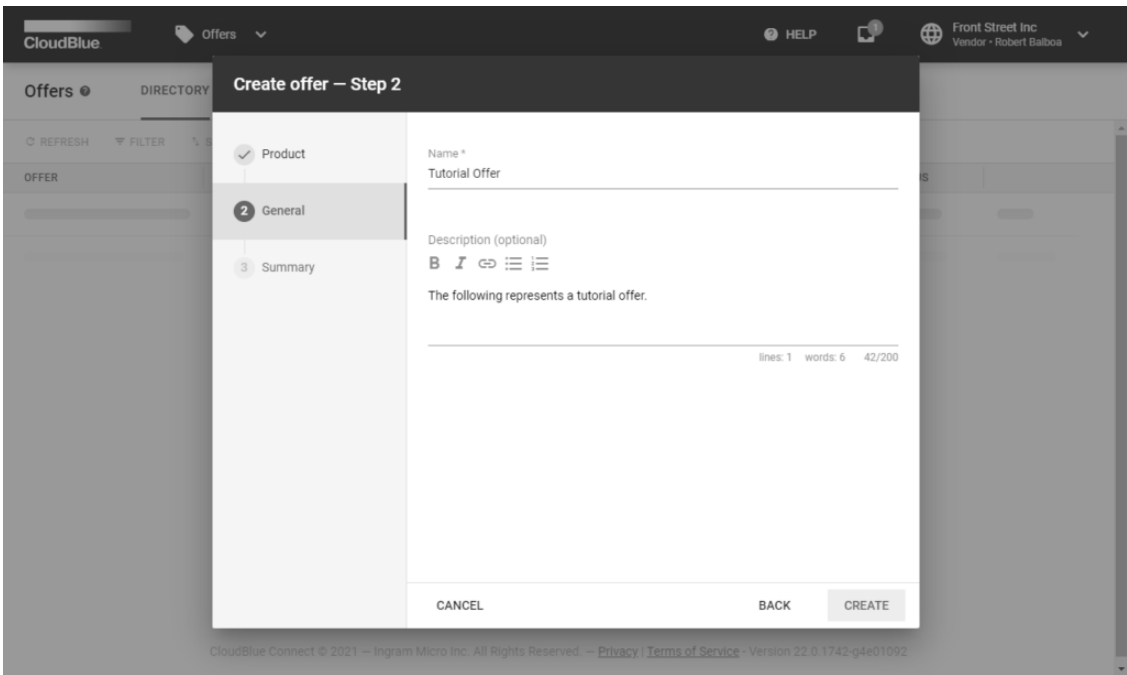
Auto-generated at July 16, 2024

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.





Follow the wizard steps to successfully configure a new offer:

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

CloudBlue

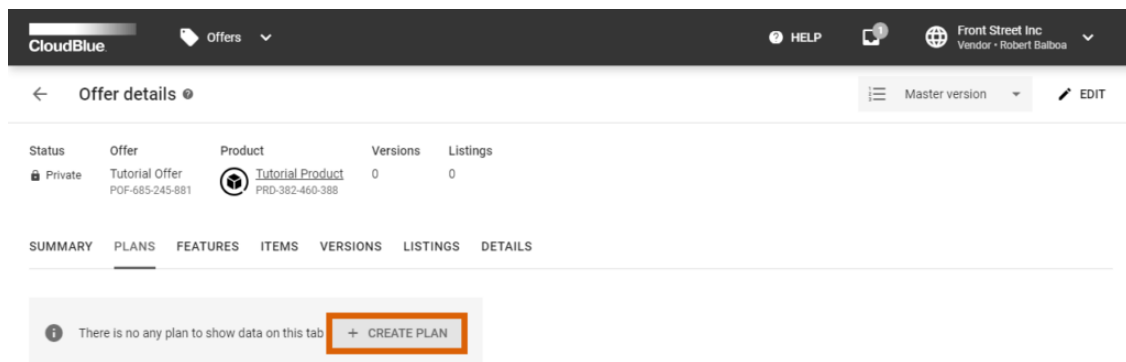
- **Description:** Provide a description of your offer (optional). Note that this description will be displayed within the *Details* tab from your offer details screen.
3. Click **Create** to finalize your offer creation.

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.



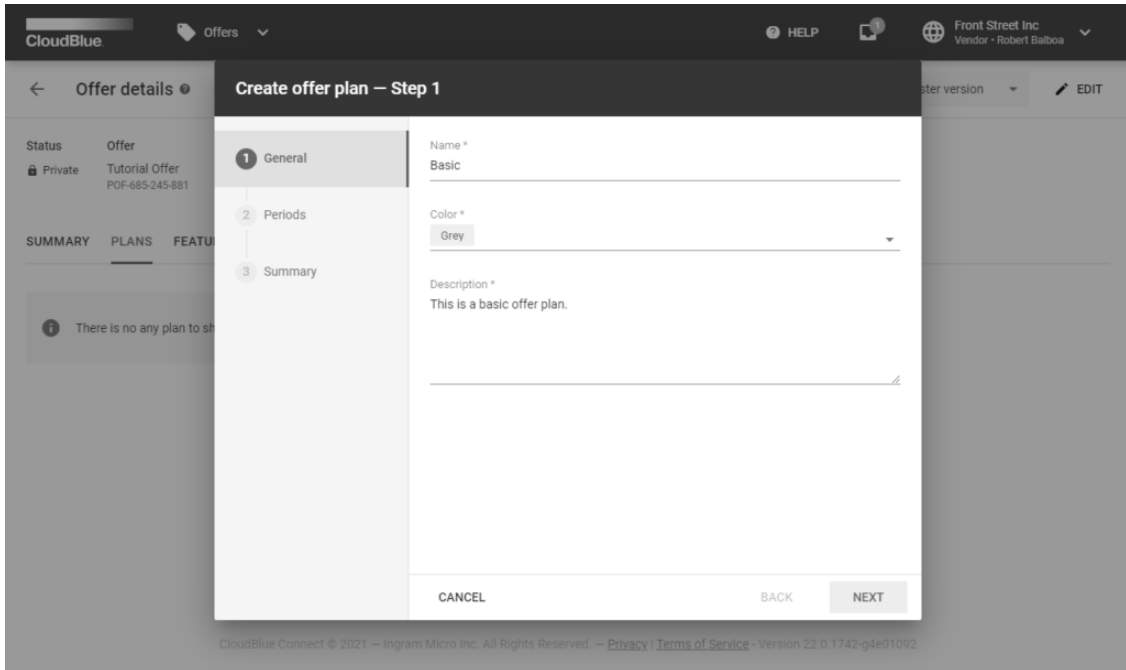
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Follow the steps below to successfully configure a new plan.

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.



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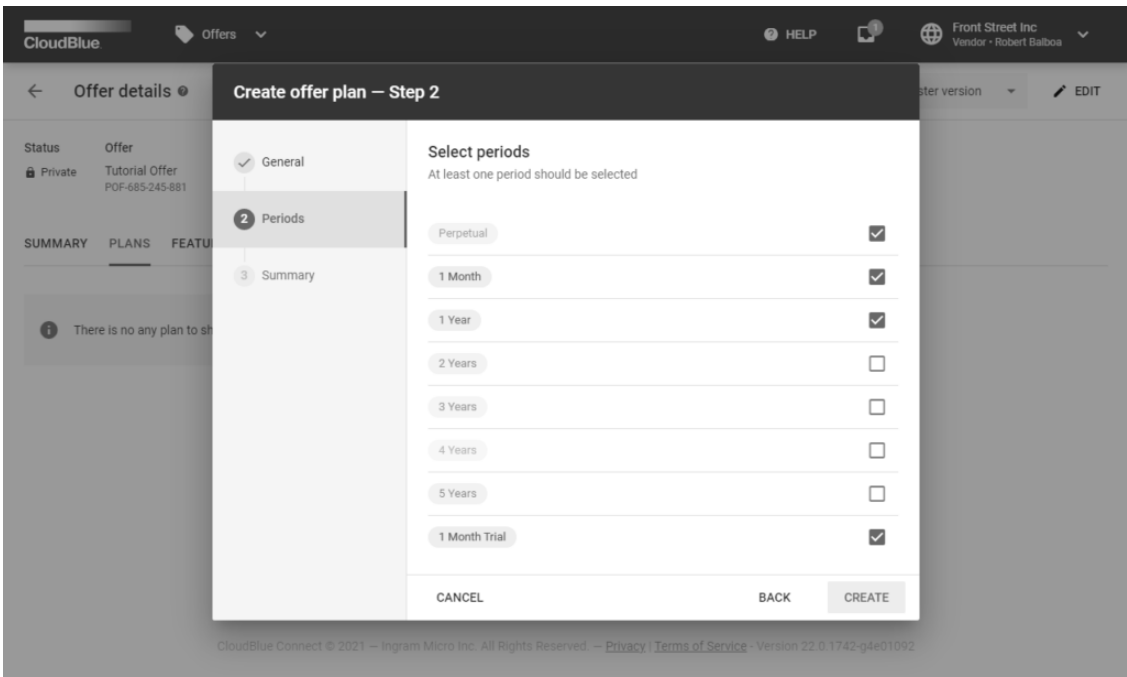
Click **Next** to continue.

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

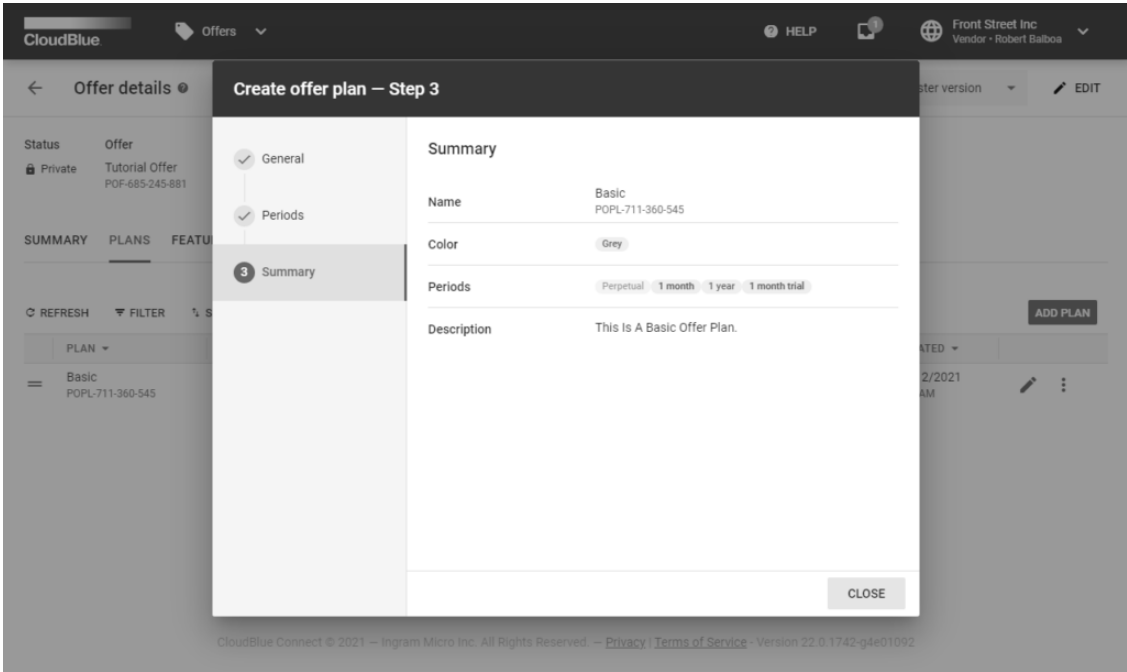
Note that the **1 Month Trial** period can only be selected for one of your offer plans.



Click the **Create** button to continue.

3. Review your summary

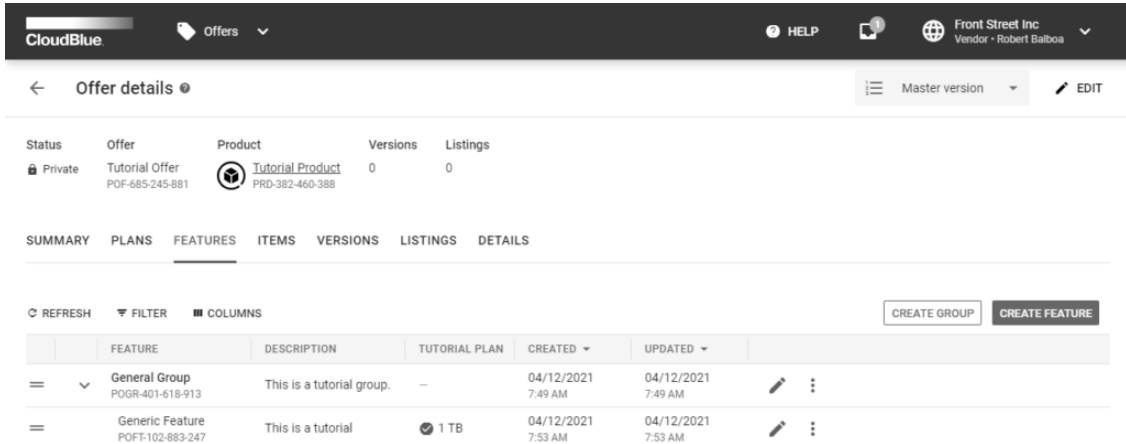
The wizard will provide plan creation summary.



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.

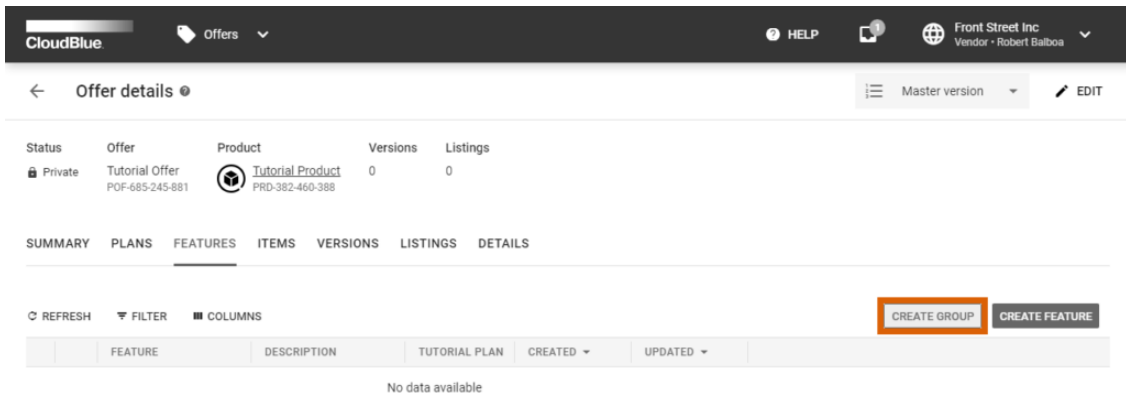


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The following steps showcase how to create a group and a feature on the Connect platform.

1. Create a new Group

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

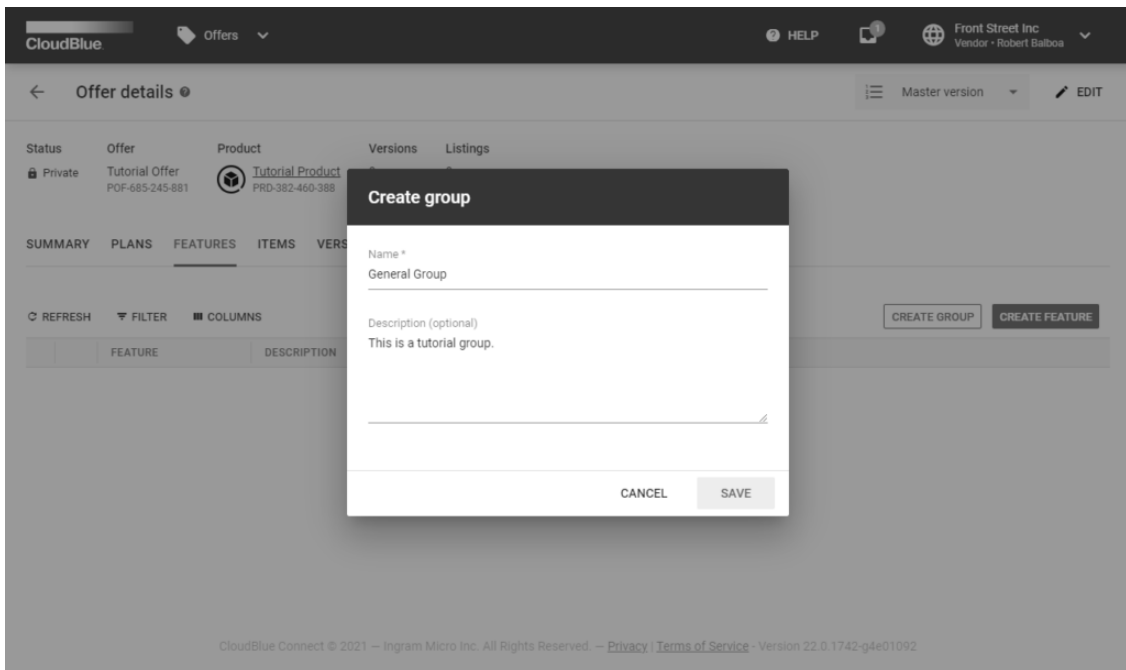


The screenshot shows the 'Offer details' page in the CloudBlue interface. At the top, there's a navigation bar with 'Offers' and 'Front Street Inc' (Vendor: Robert Balboa). Below that, a breadcrumb trail shows 'Offer details'. A table displays offer information: Status (Private), Offer (Tutorial Offer POF-685-245-881), Product (Tutorial Product PRD-382-460-388), Versions (0), and Listings (0). Below the table are tabs for SUMMARY, PLANS, FEATURES, ITEMS, VERSIONS, LISTINGS, and DETAILS. At the bottom, there's a table with columns: FEATURE, DESCRIPTION, TUTORIAL PLAN, CREATED, and UPDATED. The 'CREATE GROUP' button is highlighted with an orange box.

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2. Enter a name and description

Provide a name and a description for your group.

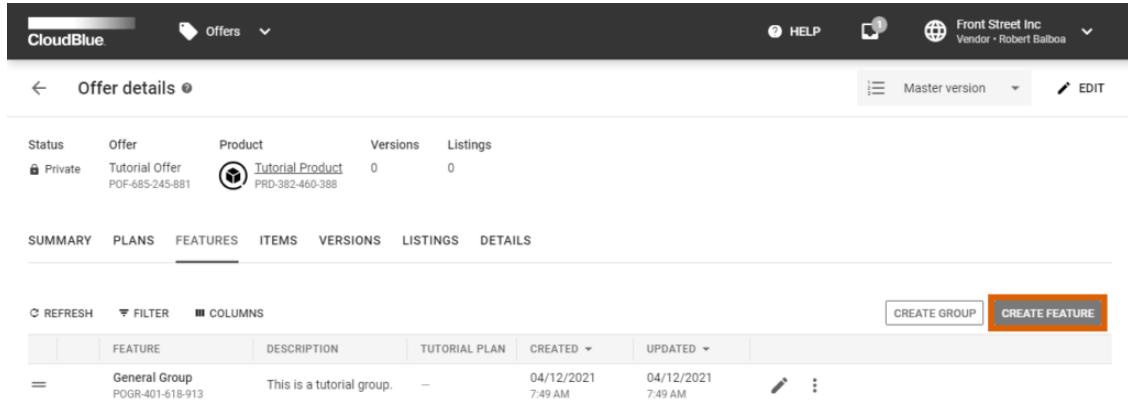


The screenshot shows the 'Create group' dialog box overlaid on the 'Offer details' page. The dialog box has a title 'Create group' and two input fields: 'Name *' with the value 'General Group' and 'Description (optional)' with the value 'This is a tutorial group.'. At the bottom of the dialog box, there are 'CANCEL' and 'SAVE' buttons.

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

3. Create a new feature

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

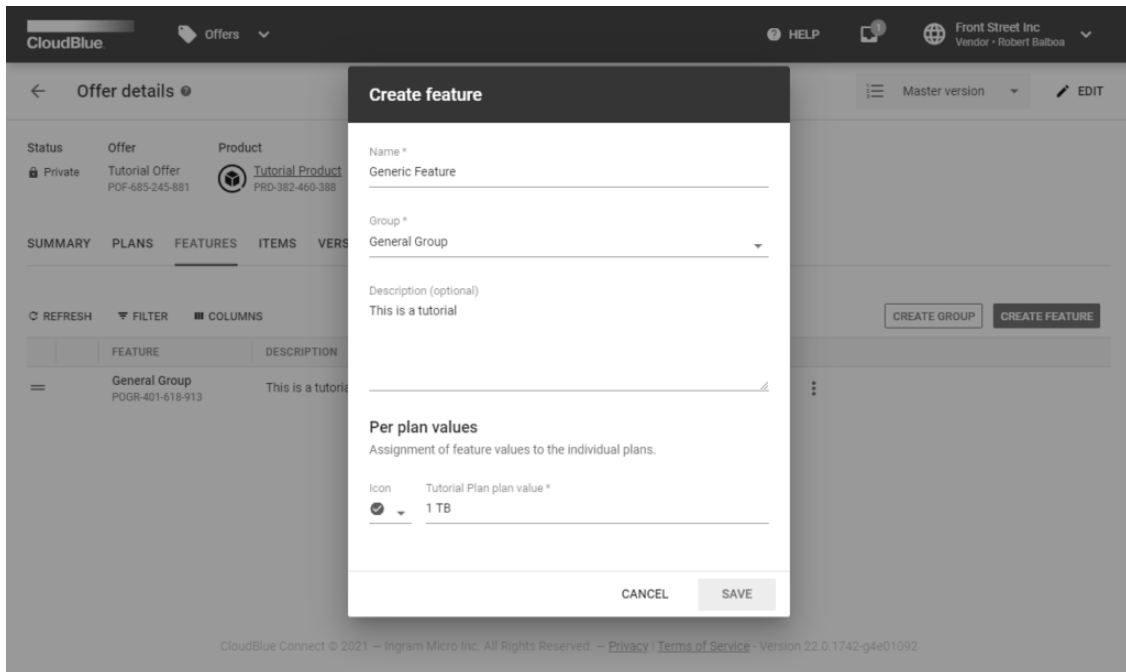


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4. Specify feature properties

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

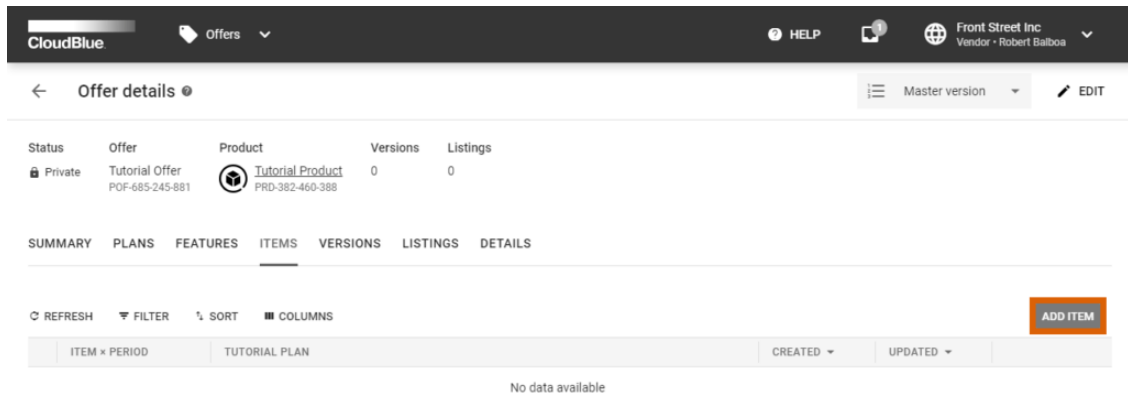
Proceed to the **Items** tab from the **offer details** screen. This tab displays your defined items for each of your configured plans and selected periods.



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.



The screenshot shows the 'Offer details' page in the CloudBlue interface. The header includes the CloudBlue logo, 'Offers' dropdown, 'HELP', a notification icon, and 'Front Street Inc Vendor - Robert Balboa'. The main content area displays the offer details:

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

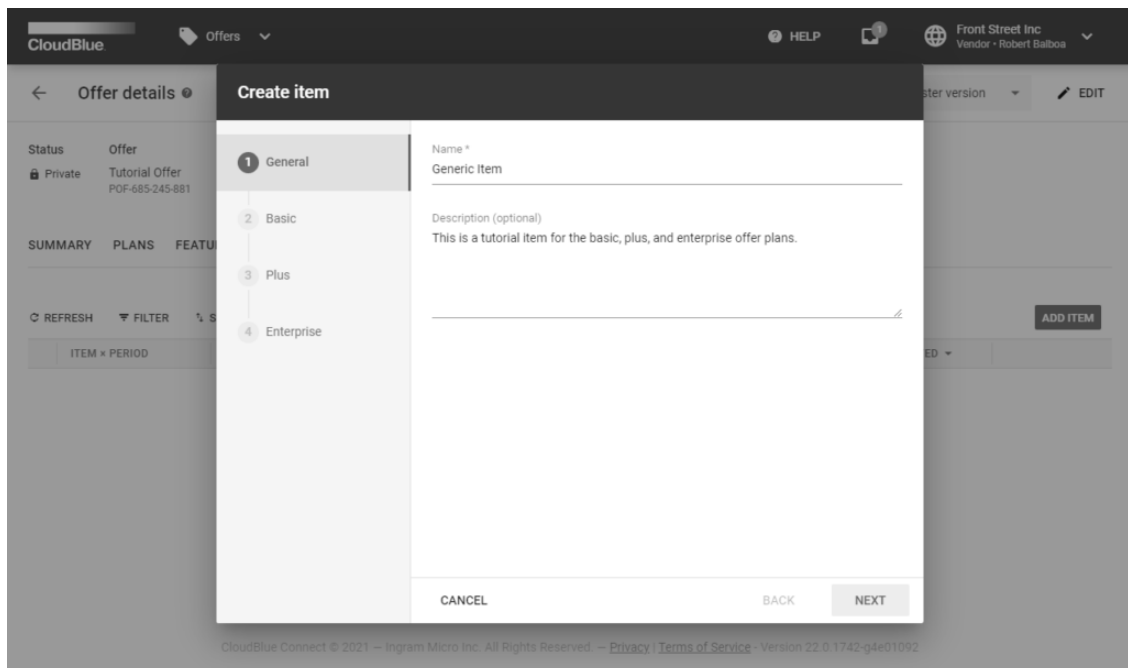
Below the table are tabs for SUMMARY, PLANS, FEATURES, ITEMS, VERSIONS, LISTINGS, and DETAILS. At the bottom, there are controls for REFRESH, FILTER, SORT, and COLUMNS, along with an 'ADD ITEM' button. A table below shows columns for ITEM x PERIOD, TUTORIAL PLAN, CREATED, and UPDATED, with the message 'No data available'.

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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.



The screenshot shows the 'Create item' wizard in the CloudBlue interface. The wizard is titled 'Create item' and has four steps: 1. General, 2. Basic, 3. Plus, and 4. Enterprise. The 'General' step is currently active. The form fields are:

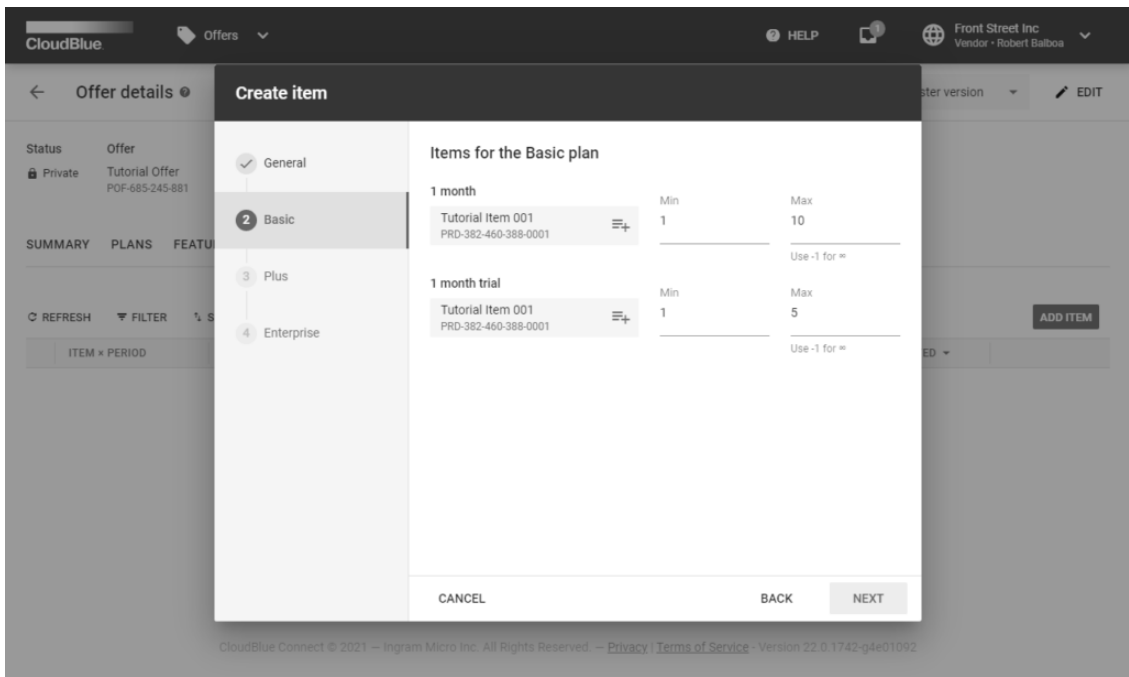
- Name ***: Generic Item
- Description (optional)**: This is a tutorial item for the basic, plus, and enterprise offer plans.

At the bottom of the wizard, there are buttons for CANCEL, BACK, and NEXT. The background shows the 'Offer details' page from the previous screenshot.

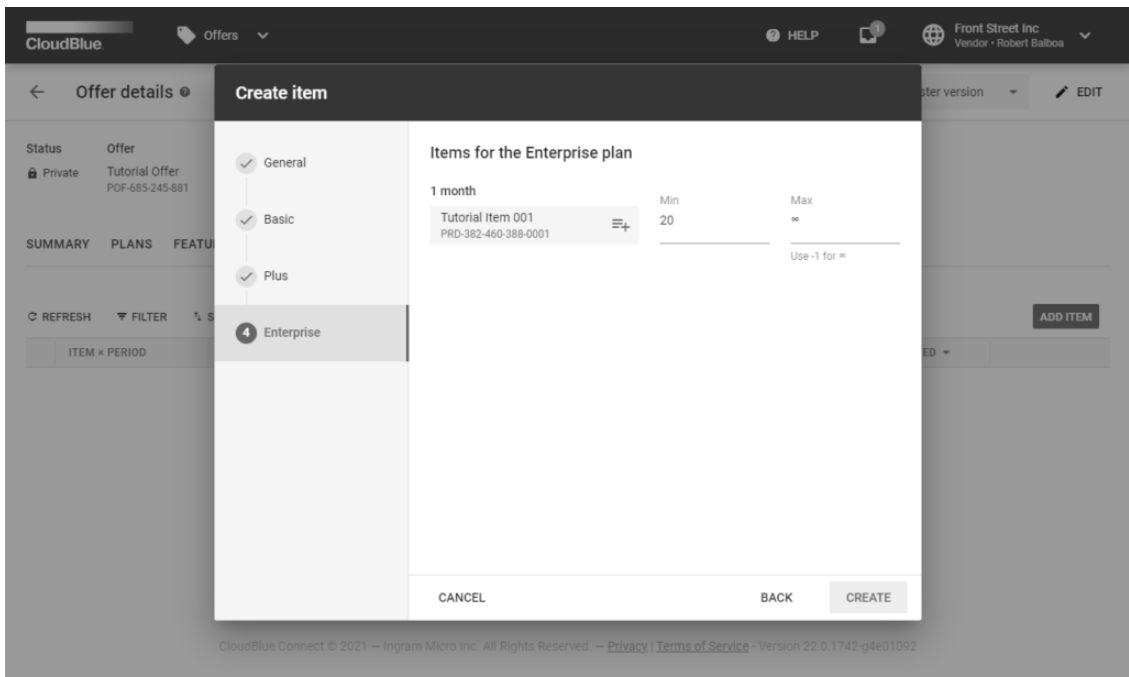
Click **Create** to continue.

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.



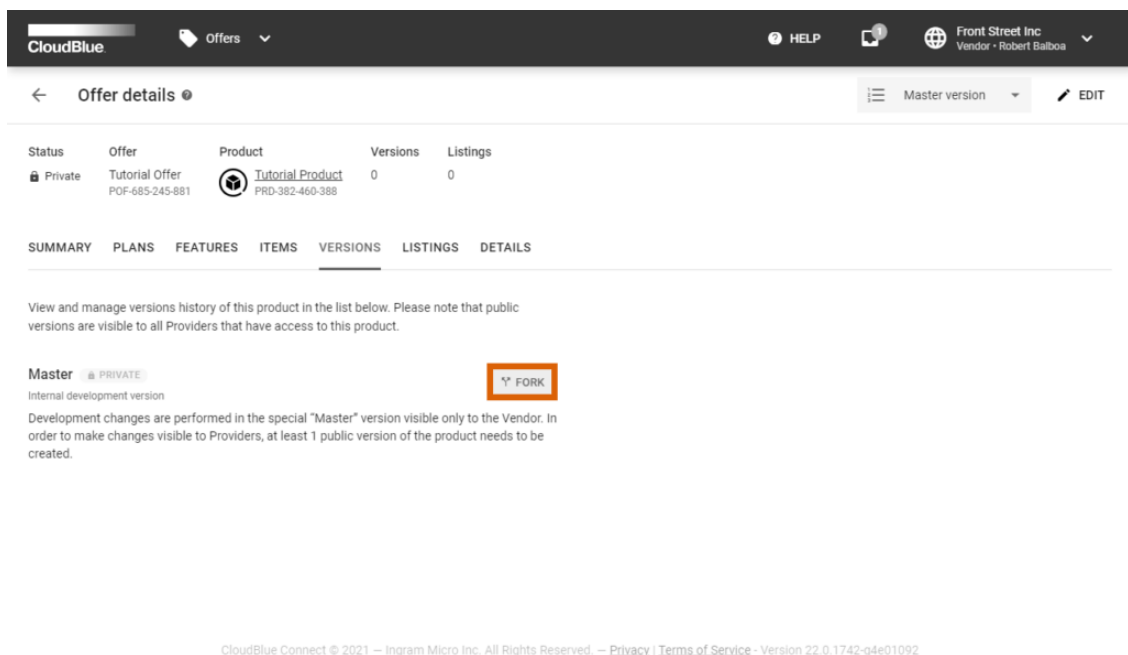
Thus, your item configuration will be successfully completed.

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 main header shows 'Offer details' with a 'Master version' dropdown and an 'EDIT' button. Below this 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 for SUMMARY, PLANS, FEATURES, ITEMS, VERSIONS (selected), LISTINGS, and DETAILS. A note 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 'Master' version labeled 'PRIVATE' with an 'INTERNAL DEVELOPMENT VERSION' icon and a circled 'FORK' button. A description below reads: '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.'

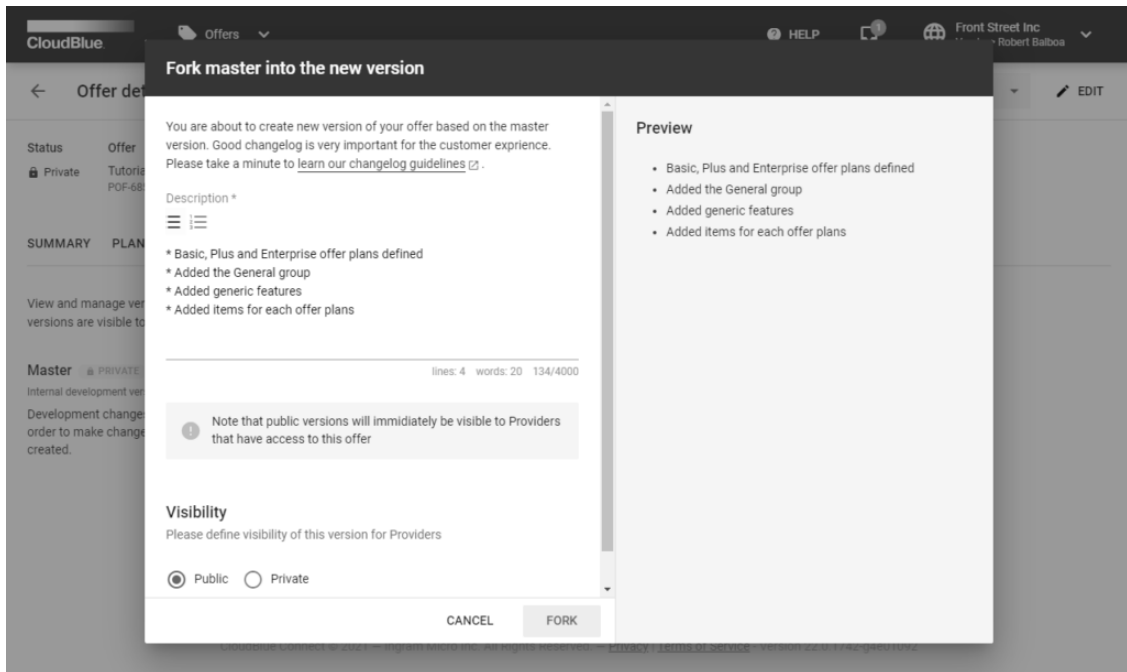
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2. Fill out the required form

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

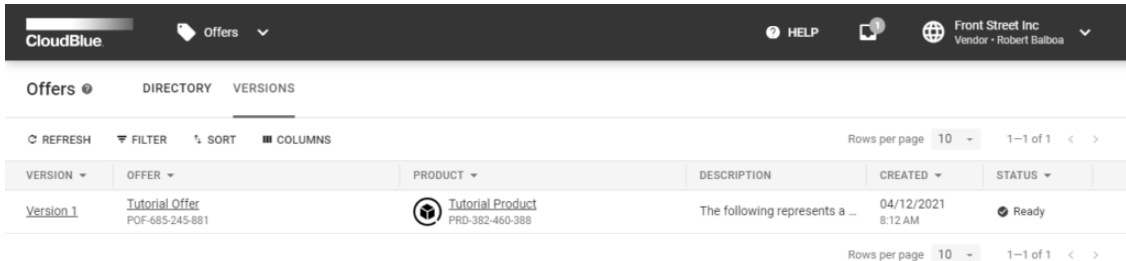
Description: Provide a description for your offer version. In general, this description contains release notes and update information.

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

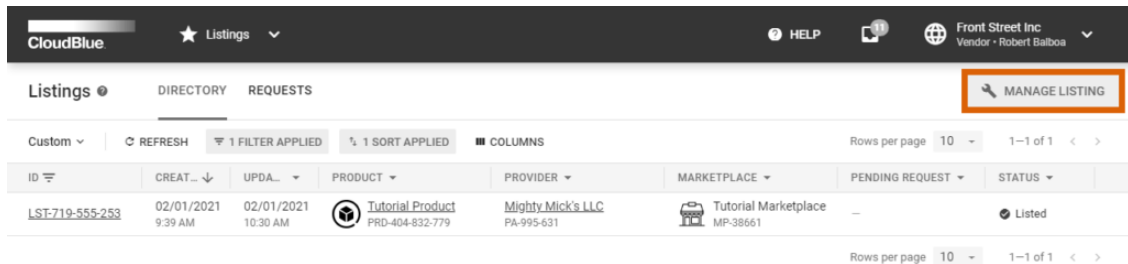
Associate Offers with your Listing

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 an orange box. Below the button is a table with the following data:

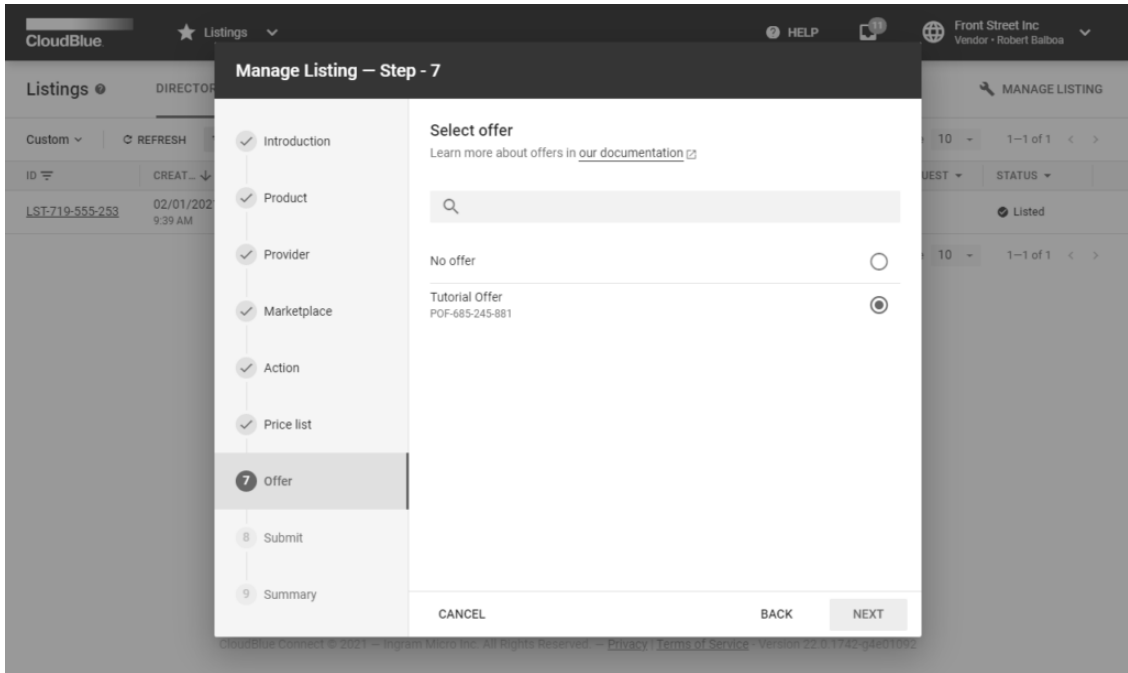
ID	CREAT...	UPDA...	PRODUCT	PROVIDER	MARKETPLACE	PENDING REQUEST	STATUS
LST-719-555-253	02/01/2021 9:39 AM	02/01/2021 10:30 AM	 Tutorial Product PRD-404-832-779	 Mighty Mick's LLC PA-995-631	 Tutorial Marketplace MP-38661	—	Listed

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

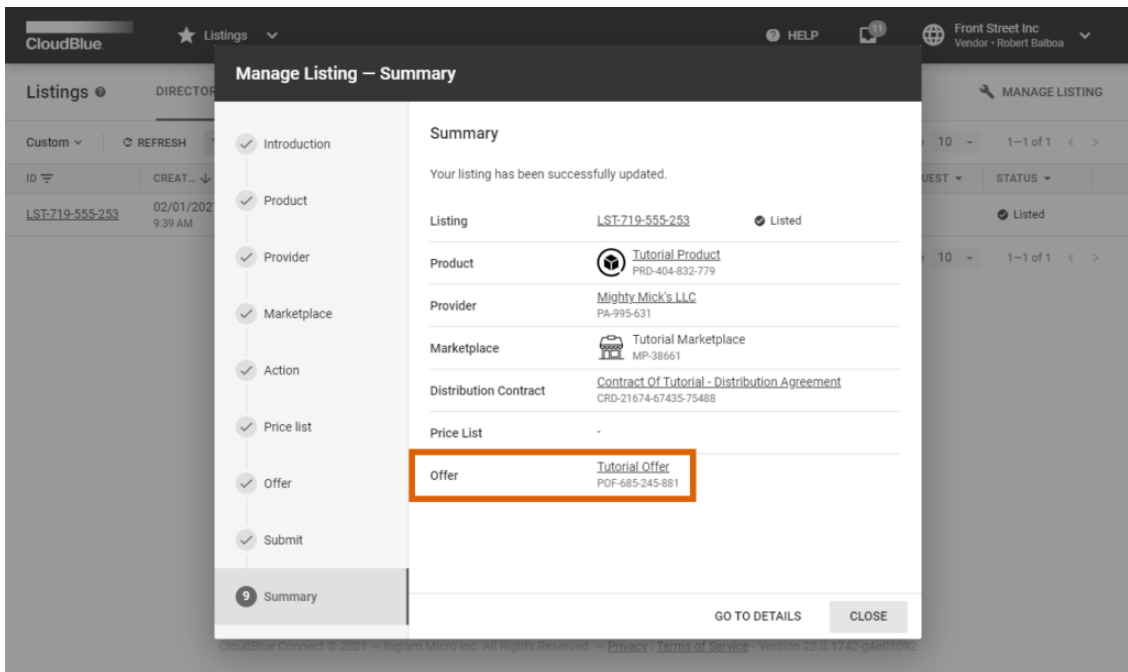
2. Include your offer

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
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	Mighty Micks LLC PA-995-631	—	Listed

Rows per page 10 ▼
1--1 of 1 < >