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Documentation 💌 Modules 💌

Partners

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Video Tutorial

The following video tutorial showcases how to create a partner on the CloudBlue Connect platform:

Overview

The Partners Management module allows examining, adding and managing associated **Partners**, **Contracts** and **Agreements** on the CloudBlue Connect platform. Partners represent Vendors, Distributors, or Resellers that signed and activated corresponding contract with your account.

The Partners module provides a centralized place to review all necessary information pertaining to companies your organization works or collaborates with. The module makes it easy to access required legal contracts and your partner account data. In addition, this module enabled Connect users to simplify various operations, such as creating an agreement, activating a contract and managing partner accounts. Therefore, the Partners module streamlines all required operations related to your partner data and legal documents, eliminating the need to use several platforms for accessing such information and managing your contracts or agreements.

The Directory tab from the Partners module contains a list with your associated Partners.

CloudBlue	Partners	~			Ø	HELP 🌲		Mighty Mick's Distributor • Micl	
Partners @ D	IRECTORY CO	ONTRACTS AGR	EEMENTS FORMS					+	ADD PARTNER
All partners 🗸 C	REFRESH = F	FILTER [†] SORT	III COLUMNS				Rows per page	10 • 11-	13 of 13 🕻 >
ACCOUNT -	TYPE 👻	TECHNICAL C	BUSINESS CONTA	PROGRAM *	DISTRIBUTI 🔻	SERVICE -	SYNDICATI *	LISTINGS -	STATUS -
IM Ingram Micro PA-239-689	Distributor	Ingram Micro technical@ingr	Ingram Micro business@ingramm	-	-	1	-	-	 Active
Front Street Inc VA-892-333	Vendor			1	-	-	-	-	Ø Invited
Champions Corp VA-149-494	Vendor	Robert Balboa rbalboa@fs.com	Robert Balboa Jr. rbalboajr@fs.com	1	1	-	-	-	 Active
							Bowe por pogo	10 11	12 of 12

Rows per page 10 • 11-13 of 13 < >

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This list contains provided **Technical** and **Business Contacts**, displays the number and of signed **Contracts** and **Agreements**, product **Listings** and **Status** of your Partners.

The **Contracts** tab allows signing and managing business contracts with your Partners. Refer to Contracts for more information.

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The Agreements tab enables you to examine, edit and create agreements with your Partners. Refer to Agreements for more information.

Creating Partners

The Directory tab allows inviting Vendors and Resellers/Distributors by generating an invitation link. Furthermore, it is possible to create a new Vendor or Reseller /Distributor account for users that are added to your Connect account. Follow the steps below to create a new Partner on the Connect platform.



Note

It is possible to generate required agreements and contracts during your Partner account creation. Alternatively, the system allows selecting defined agreements by using the wizard. The number of wizard steps vary depending on these selections.

Proceed to the Partners module on the Connect platform. Thereafter, click the Create Partner button from the Directory tab to launch a wizard.

CloudBlue	🤁 Partners	~			0	HELP 🌲			Mick's LLC or • Michael Goldmill
Partners	RECTORY CO	NTRACTS AGR	EEMENTS FORMS						+ ADD PARTNER
All partners 🗸 🕐	REFRESH = F	ILTER 1, SORT	COLUMNS				Rows per pa	ge 10 •	11-13 of 13 🕻 >
ACCOUNT -	TYPE 👻	TECHNICAL C	BUSINESS CONTA	PROGRAM *	DISTRIBUTI *	SERVICE -	SYNDICATI	 LISTING 	S - STATUS -
IIM Ingram Micro PA-239-689	Distributor	Ingram Micro technical@ingr	Ingram Micro business@ingramm	-	-	1	-	-	 Active
Front Street Inc VA-892-333	Vendor			1	-	-	-	-	Ø Invited
Champions Corp VA-149-494	Vendor	Robert Balboa rbalboa@fs.com	Robert Balboa Jr. rbalboajr@fs.com	1	1	-	-	-	 Active
							Rows per pa	ge 10 -	11-13 of 13 < >

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Follow the instructions of this wizard to successfully invite your Partner or a create Partner account.

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Partner details

Specify your Partner details in the following form:

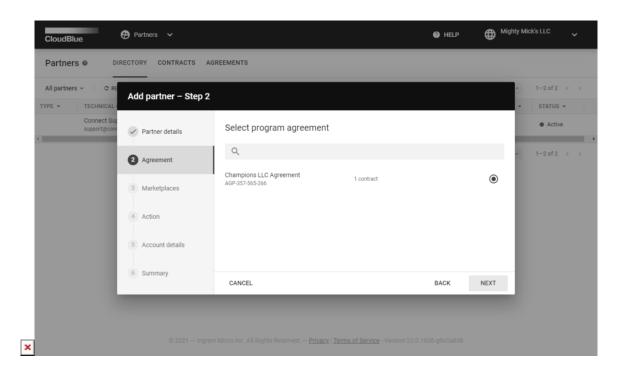
- **Type**: Select *Vendor* or *Reseller* type of your Partner.
- Partner name: Enter a name for your Partner's account.
- Partner external ID: Specify your Partner ID for your external system (optional).
- **Create new agreement**: Check this checkbox to generate a new agreement within the following wizard step.

CloudBlue.	🤁 Partners 🗸 🗸		HELP		Highty Mighty	y Mick's LLC 🗸 🗸 🗸
Partners @ D	Add partner – Step 1					
All partners ~ C RE TYPE ~ TECHNICAL Connect Suj supportacon	Partner details Agreement	Partner details Additional attributes Type				 1−1 of 1 < > STATUS - Active
4	3 Marketplaces	Vendor Reseller Partner name * Champions LLC				• 1−1 of 1 < >
	5 Account details 6 Summary	Partner External ID (Optional) champ 001				
		Agreement Create new agreement				
		CANCEL	BA	ск	NEXT	
	© 2021 — Ingram	Micro Inc. All Rights Reserved. — <u>Privacy</u> I <u>Terms of Service</u> - V	Version 22.0.1613-g6	d319b5		

Agreement

The system prompts you to select your defined **Agreement** from the following list.

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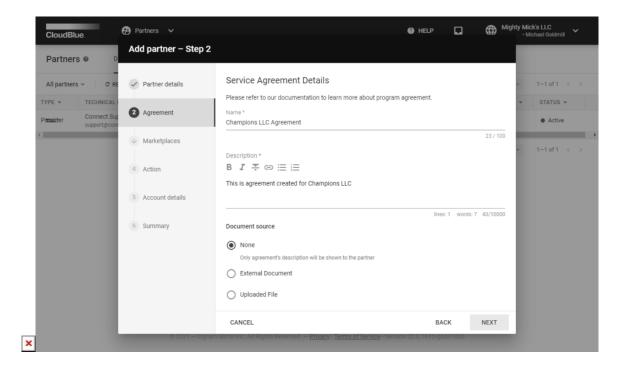


In case the **Create new agreement** checkbox is checked, the wizard requires to fill out the following form:

- Name: Enter a name for your agreement.
- **Description**: Provide a description for your agreement.
- **Document source**: Select a corresponding option to provide your agreement document. Paste a URL to your document or upload your file to the system. Otherwise, select **None** to skip this configuration.

No document source

In case documentation source is not defined, only your specified agreement description will be shown to your Partner.



Therefore, a new agreement will be generated and selected for your new Partner.

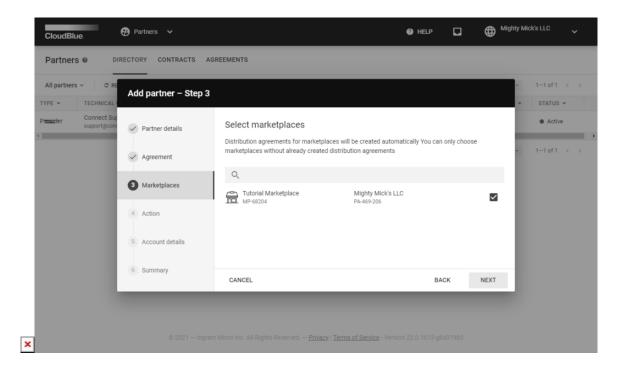
Marketplace

In case the Vendor Partner type is selected and a new agreement is required, the wizard prompts you to select a marketplace that should be used to create a distribution agreement. Thereafter, Connect automatically creates a distribution agreement for your selected marketplaces.

It is also possible to leave this form empty and specify marketplaces for your partner account later. In this case, distribution agreement will not be created.

Warning

Note that it is only possible to select marketplaces without previously created distribution agreements. Otherwise, the system will display a corresponding error.



Alternatively, if the Reseller(or Distributor) Partner type is selected and a new agreement is required, the wizard prompts you to select a marketplace that will be linked to a new service agreement.

Product groups

In case the Reseller/Distributor Partner type is selected and it is necessary to create a new service agreement, the wizard prompts you to choose product groups that will be available for your partner account. Otherwise, the wizard will skip this step.

	Add partner – Step 4				
All partners v C R	🗸 Partner details	Select Product Groups Choose product groups to be linked with 1	the partner's service agreement.	Î	1—10 of 1 436 〈
ACCOUNT - TYPE	✓ Agreement	Q		- 1	STATUS -
Abbott I Distrit	✓ Marketplaces	Financial Systems PRG-2176-9166	2 products		 Active
Abbott, Distrit	Product groups	File Managers PRG-2354-1117	10 products		 Active
Abernat Va-877-7 Vendo		Anti-Malware PRG-8557-4030	10 products		 Active
Abernat Vendo	5 Syndication	SMB Products PRG-4747-0187	10 products		 Active
Abshire Distrit	6 Action	Customer Service PRG-4808-5287	10 products		 Active
Abshire Distrit	7 Account details	HR Tools PRG-4248-8164	10 products		 Active
Abshire Distrit	8 Summary	CRM Products PRG-7628-2722	12 products		 Active
Abshire Distrit		Database Security PRG-7708-3268	11 products		 Active
Abshire Distrit		CANCEL	BACK	- NEXT	 Active

For more information on product groups and their creation, please refer to the Catalog module documentation.

Syndication

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In case the Reseller/Distributor Partner type is selected and a new agreement is required, the wizard requires to specify a sourcing agreement for your partner. Otherwise, the wizard skip this step.



The wizard cannot be used to generate a new sourcing agreement for your partner. Therefore, it is required to create a sourcing agreement before creating a partner account and use the wizard to select this agreement.

CloudBlue.	🗭 Partners 🗸			🛛 HELP 🛛 😭	₿	utor • Mickey Goldmill
Partners 🛛 🕬	Add partner – Step 5	5				
All partners ~ C R	Partner details	Q				I—20 of 10 655 <
ACCOUNT - TYPE	Agreement	Champions Sourcin Agreement AGU-305-346-624	2 contracts		۲	STATUS -
Abbott Vendo		Iron Will Syndication Agreement AGU-597-953-835	2 contracts		\bigcirc	 Active
Abbott Vendo	✓ Marketplaces	Hot Shot LLC Agreement AGU-859-495-018	1 contract		\bigcirc	 Active
Abbott Vendo	Product groups	Tutorial Sourcing Agreement AGU-343-150-368	-		\bigcirc	 Active
Abbott Distril	5 Syndication					 Active
Abbott Vendo						 Active
Abbott Distril	6 Action					Active
Abbott I PA-982-6 Distril	7 Account details					Active
Abbott I Distril	8 Summary					Active
Abbott I Distril	Sannary					Active
Abbott Vendo		CANCEL		BACK	NEXT	 Active
		CANCEL		DACK	NEXT	11-20 of 10 655 <

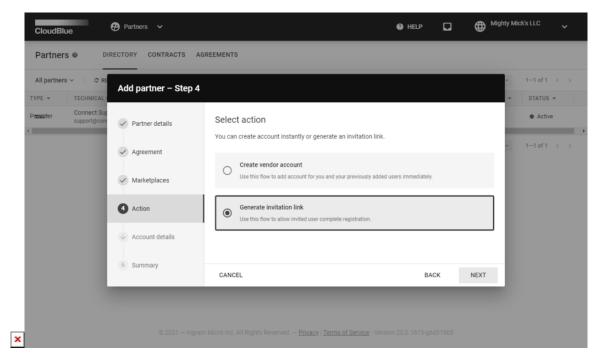
For more information on sourcing agreements, please refer to Syndication Agreements and Referral Agreements documentation.

Action

Select one of the following options from this wizard step:

- **Create partner account**: Select this option to create a Vendor or Reseller/Distributor account for you and your previously added users.
- Generate invitation link: Choose this option to generate an invitation link and invite your Partner to complete the

registration.



Account details

In case the Create vendor/reseller account option is selected, Connect asks you to add users to your partner account.

All partners 🔻	✓ ⊂ RE	Add partner – Step 5			-	1—3 of 3 <
ΓΥΡΕ ▼	TECHNICAL					▼ STATUS ▼
	Connect Sup support@cont	✓ Partner details	Account details			 Active
			Q			1-3 of 3 <
		✓ Agreement	ALL			
		✓ Marketplaces	Michael Goldmill	mickeygold@mightymickllc.com		
		Action				
		5 Account details				
		6 Summary				
			CANCEL	BACK	ADD	

If you want to select all available users, check the corresponding checkbox and click the **Add** button.

Summary

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As a result, the system provides a summary. Depending on your selected options, the system displays generated or selected agreements and contracts.

In case **Generate invitation link** option is selected, this summary provides an **Activation link**. Copy this link and pass it to your Partner. Thus, your Partner will be invited to complete the registration and activate a Vendor or Reseller account.

Otherwise, the system successfully generates and activates an account for you and your specified users within the *Account details* form.

All partners ~ C F	Add partner – Step 6	5			-	1—3 of 3 <
TYPE - TECHNICAL						STATUS -
/e⊕r -	Partner details	Summary			- 8	Invited
letter -	✓ Agreement	Partner name	Champions LLC VA-543-332			Invited
Connect Support@co		Partner type	Vendor			Active
	Marketplaces	Users	_			1—3 of 3 <
	 Action 	Program agreement	Champions LLC Agreement AGP-357-565-266			
	Account details	Program contract	CRP-21051-32005-47323	Pending	_	
		Activation link	https://portal.connect.cloudblu	ue.com/contracts/activate	0	
	6 Summary				_	
				с	LOSE	

Access your Partner details screen, specified agreement or contract by clicking on a corresponding <u>contextual link</u>. Alternatively, click **Close** to return to the *Directory* tab.

Partner Details

Once your Partner activates and signs a required agreement, you can access the **Partner Details** screen by clicking on your <u>Partner's account name</u> from the **Directory** tab. Furthermore, you can access this details screen by clicking on a contextual link from a corresponding agreement.

The Partners Details screen provides various information within the following tabs:

CloudBlue Partners ~	HELP HELP Tomorrow Corporation Vertibutor • PA-1224-5678
Fartner details Telefonica VA-1234-1234	
Telefonica is a Spanish multinational broadband and telecommunications provider with operations in Europe, Asia, and North, Central and South America. Operating globally, it's one of the largest telephone operators and mobile network providers in the world. The company is a component of the Euro Stoxx 50 stock market index	
GENERAL NEWS CONTRACTS LISTINGS	
Overview	Information
What Telefonica is saying	Industry Telecommunications
We have been very impressed by the commitment shown by CloudBlue in making their platform offering relevant and effective for telecom operators. Their willingness to adapt their solutions to our requirements, however complex, delivers real value for us.	Countries Italy Contacts
Juan Manuel Moreno Global Cloud Director	Technical Albert Wilson oralg-kelley@example.com Business
	Morris Hawkins timmothy.barnes@example.com

- The **General** tab, as the name suggests, displays your Partner's overview information (such as business and technical contacts, country, preferred language, etc.). Note that this tab displays uploaded product images, videos, and other media content.
- Switch to the **News** tab to view all articles and announcements of your business partner. Refer to the News module documentation for more details.
- The **Contracts** tab contains all created contracts and agreements with your Partner. Furthermore, this tab indicates your contract status and displays your associated marketplace. Use the **Contracts** tab to sign and activate your updated agreements.
- The Listings tab allows Distributors to focus on their available listing objects.