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Partners

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Video Tutorial

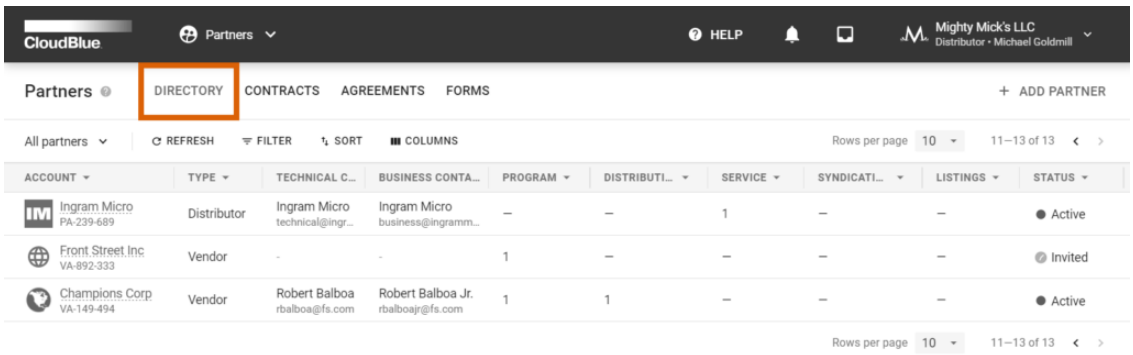
The following video tutorial showcases how to create a partner on the CloudBlue Connect® platform:

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.



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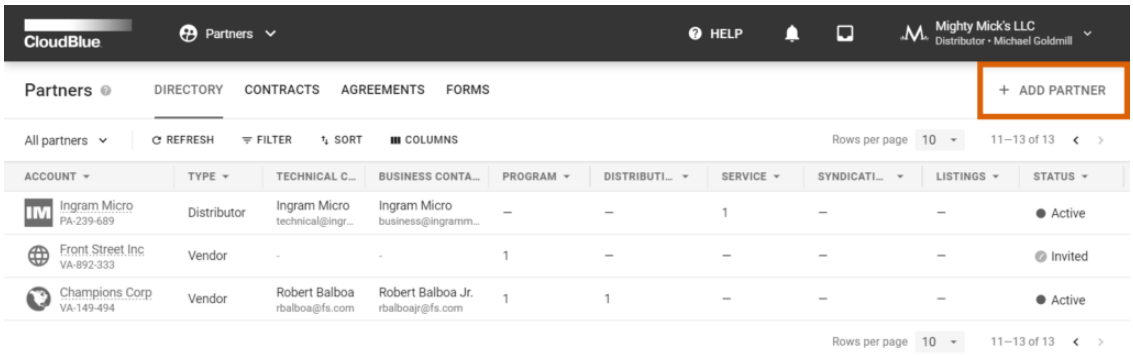
The **Agreements** tab enables you to examine, edit and create agreements with your Partners. Refer to Agreements for more information.

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.



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

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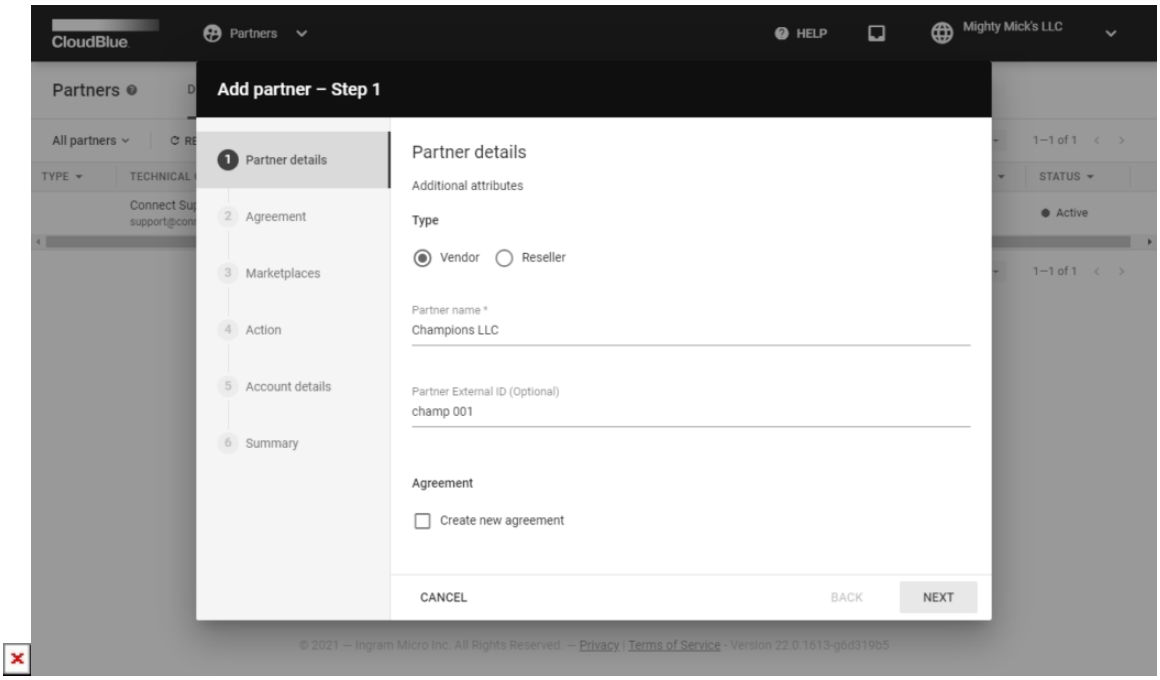
Partner details

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.



Agreement

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

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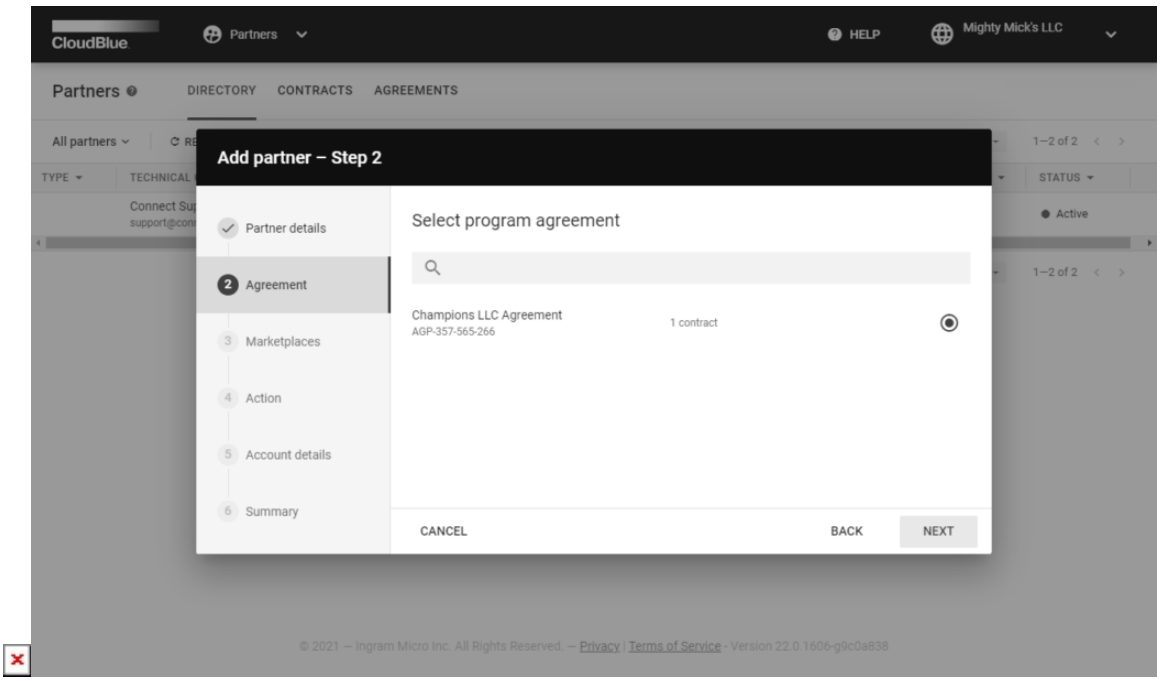

In case the **Create new agreement** checkbox is checked, the wizard requires to fill out the following form:

- **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.

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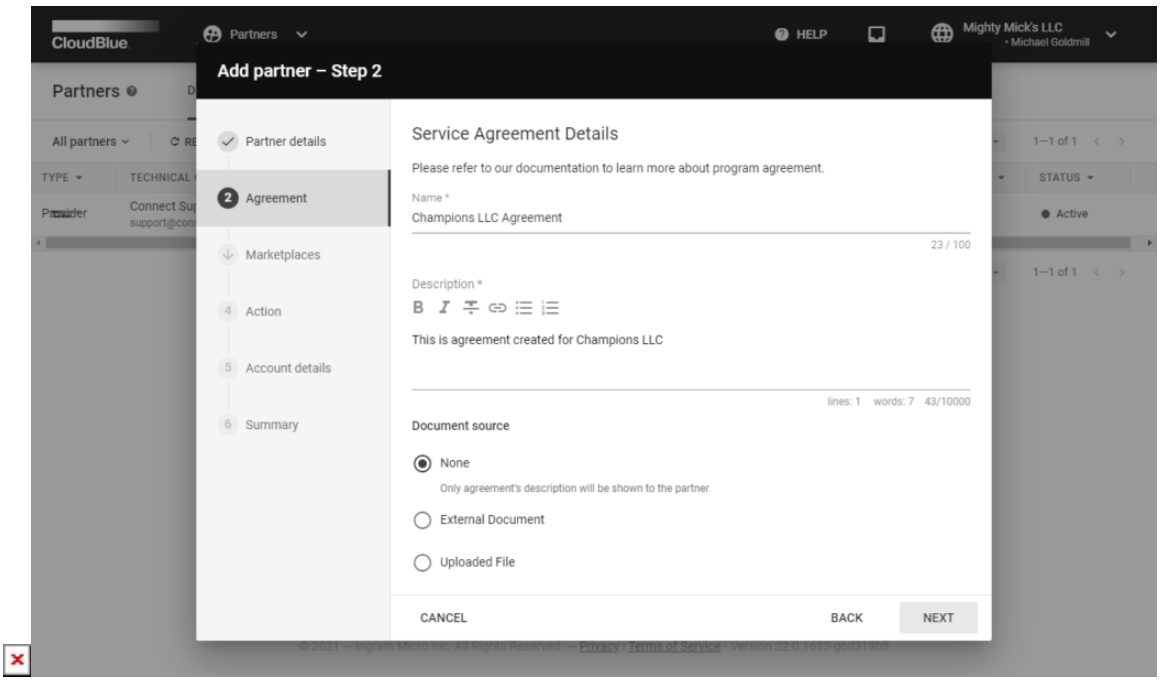

Therefore, a new agreement will be generated and selected for your new Partner.

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.

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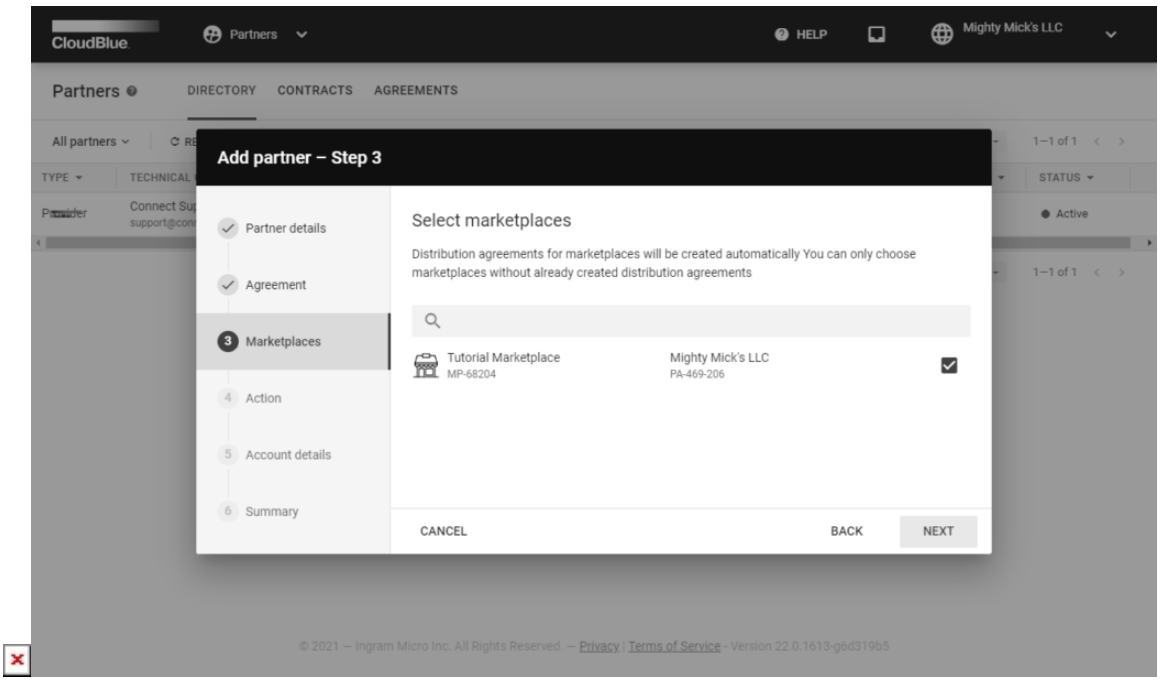
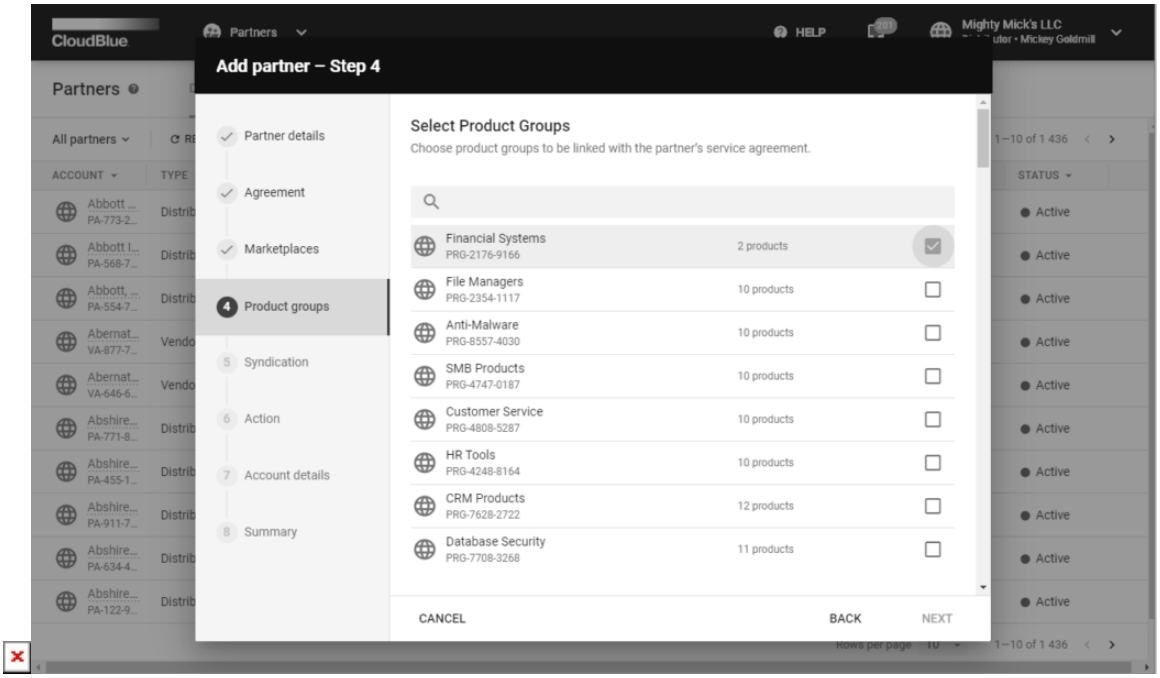


Alternatively, if the Reseller(or Distributor) Partner type is selected and a new agreement is required, the wizard prompts you to select a marketplace that will be linked to a new service agreement.

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.



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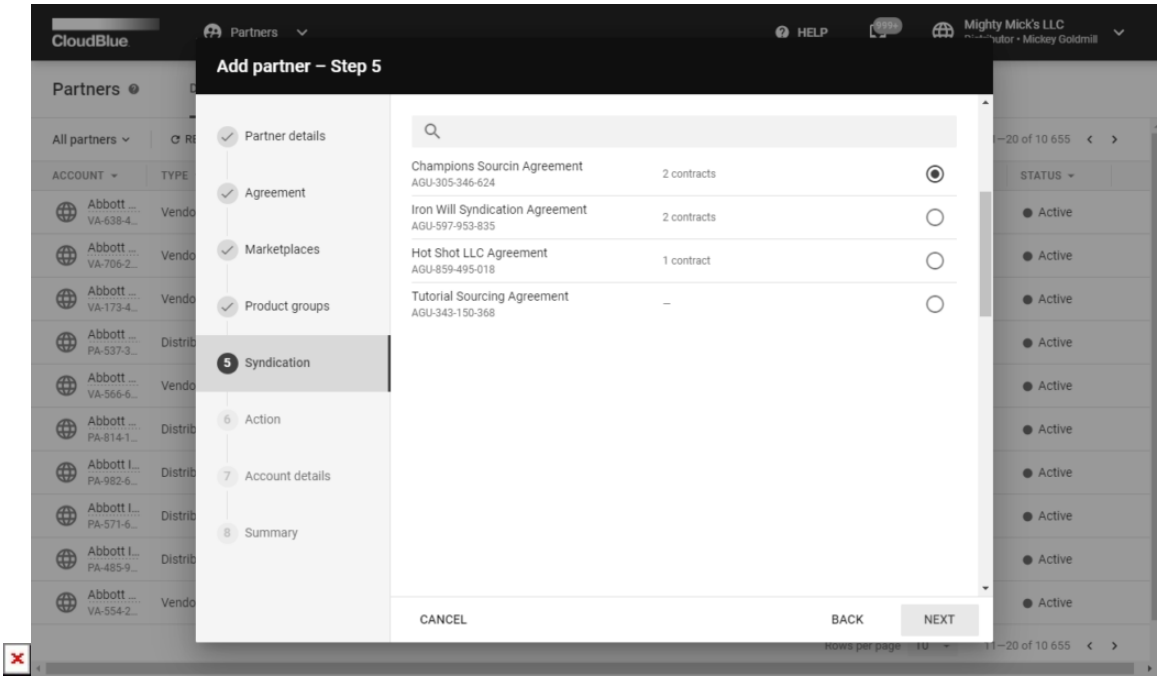
For more information on product groups and their creation, please refer to the Catalog module documentation.

Syndication

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.

> ⚠
> Warning
>
> 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.



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

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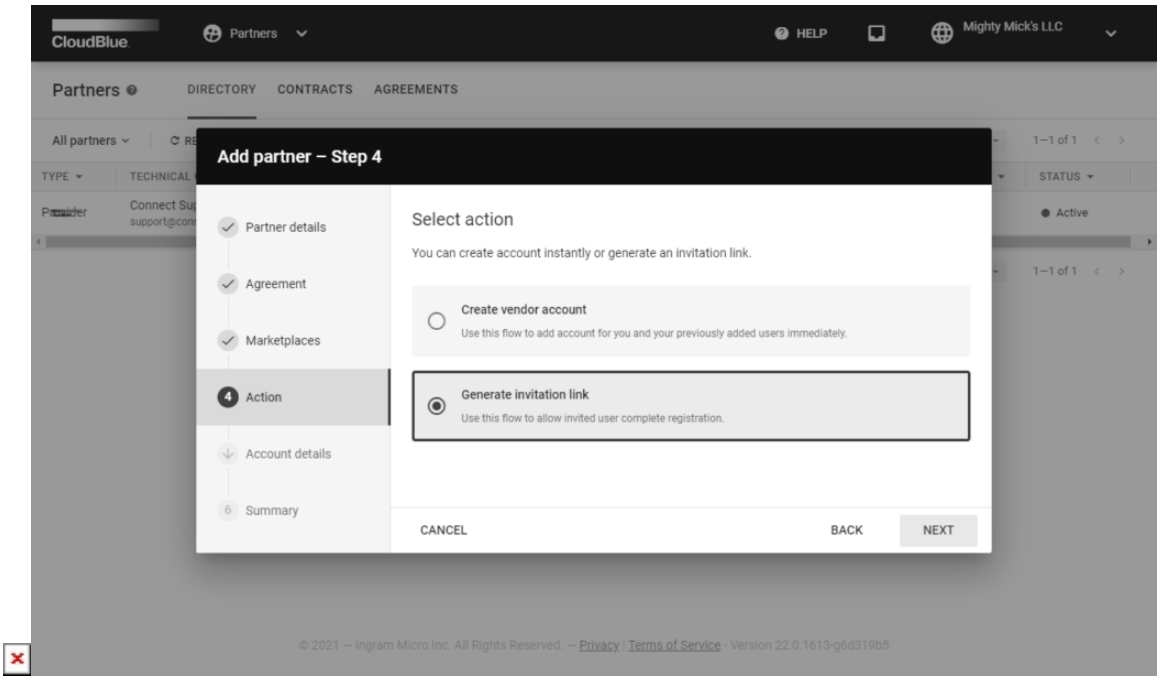
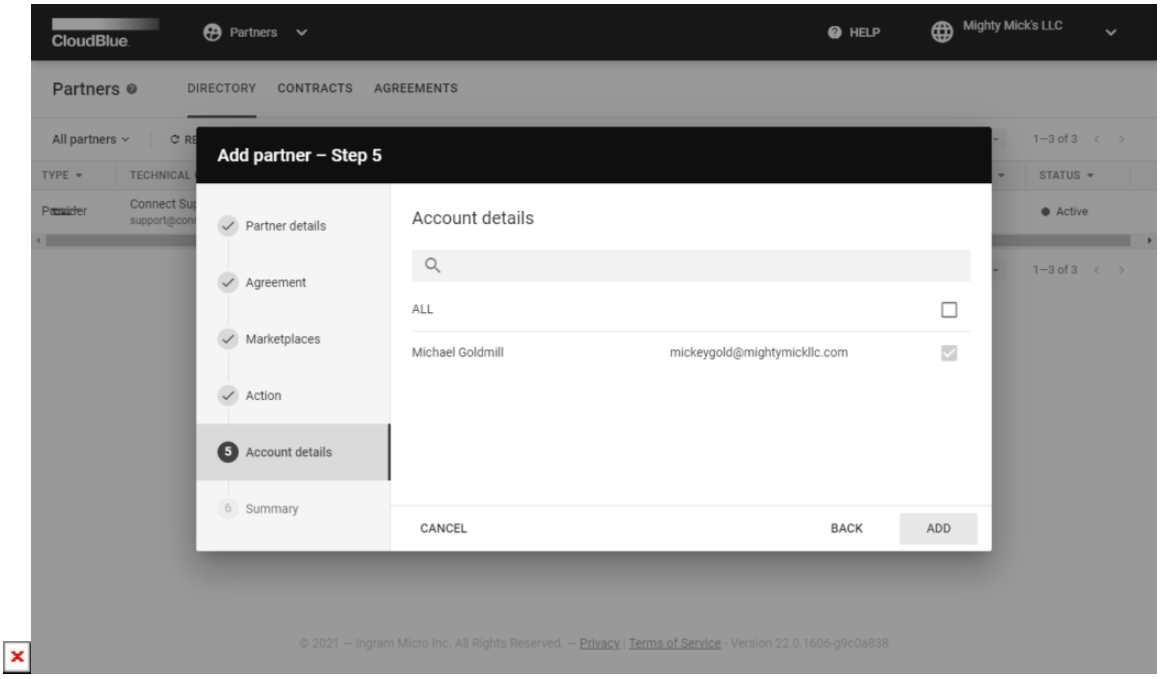
registration.



Account details

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



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

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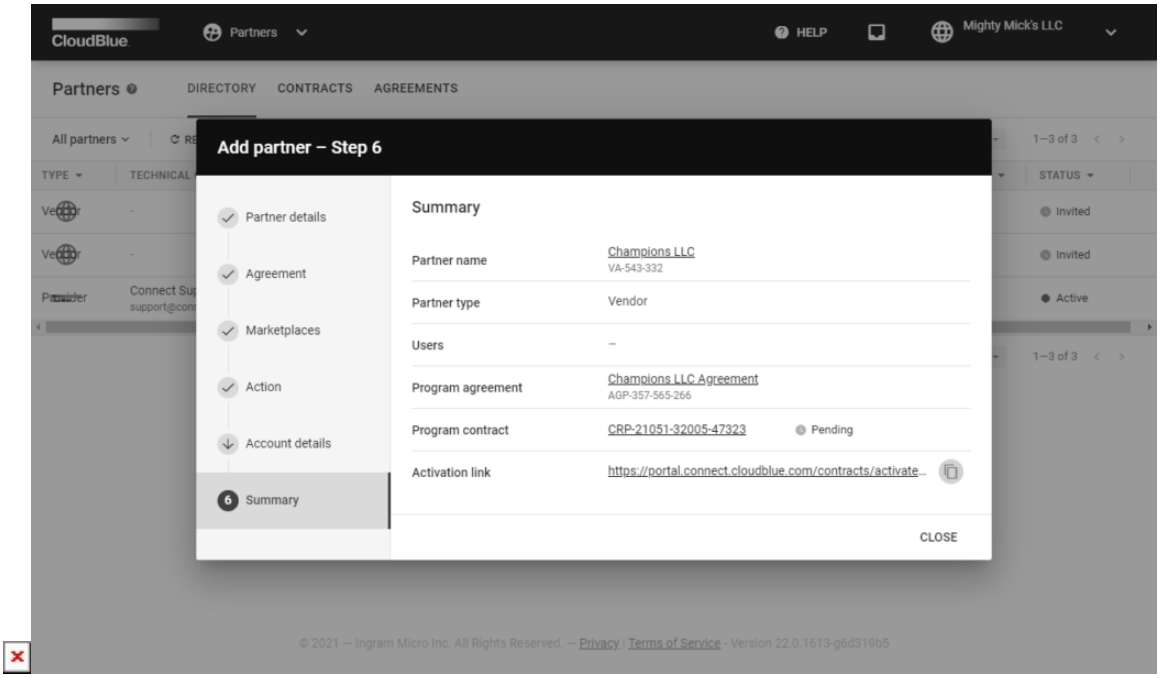
Summary

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.



Access your Partner details screen, specified agreement or contract by clicking on a corresponding contextual link. 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 Partner's account name 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:

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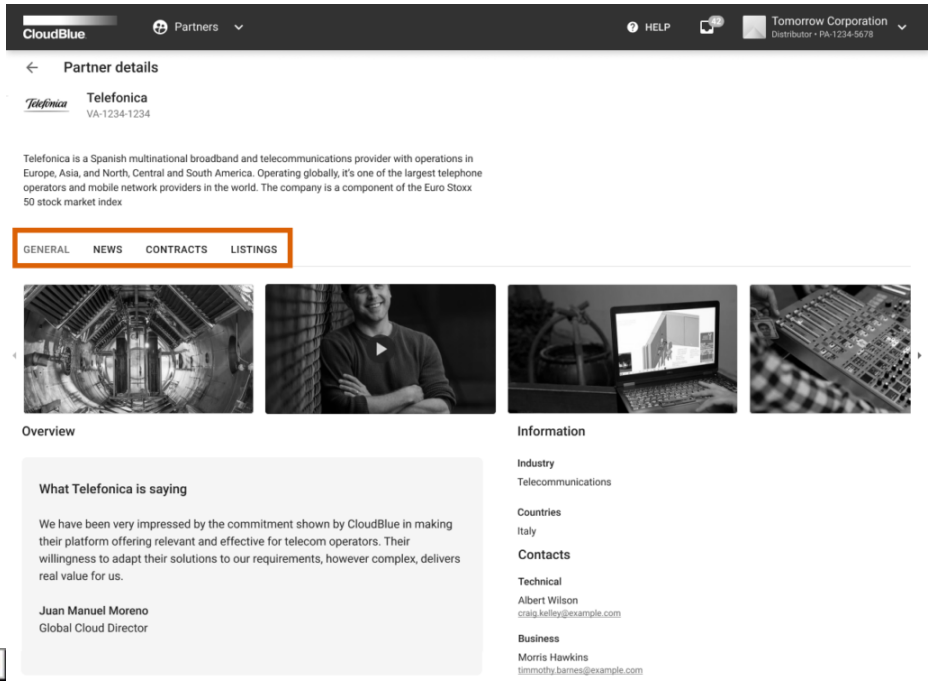

- The **General** tab, as the name suggests, displays your Partner's overview information (such as business and technical contacts, country, preferred language, etc.). Note that this tab displays uploaded product images, videos, and other media content.
- Switch to the **News** tab to view all articles 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.

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