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# Referral Agreements



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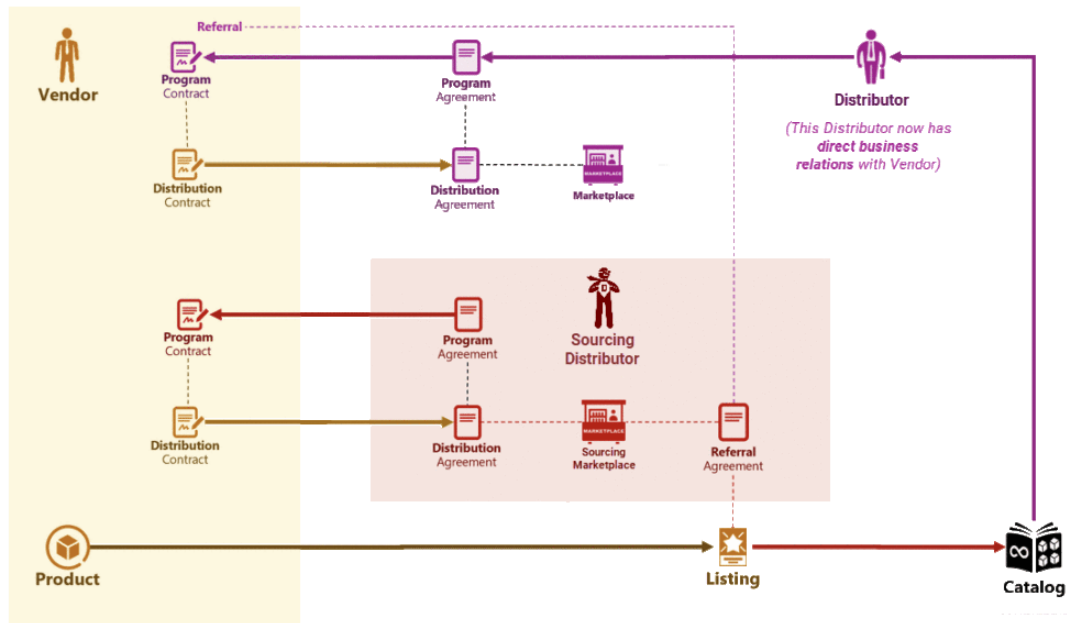
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## Overview

The Referral Agreements (also called *Direct Sourcing Agreements* or *Direct Agreements*) incorporate terms and conditions that Distributors can accept to list their selected product on their marketplace. Distributors define referral agreements to enable companies and organizations to discover required products via their Catalog of products. Therefore, by enrolling this agreement, Distributors can start business relationships directly with Vendors. Hence the name *referral* or *direct* agreements.

Note that such agreements represent templates for referral contracts on the CloudBlue Connect platform. Namely, it is required to select a product via the Catalog module, enroll a provided direct agreement and consequently create a referral contract on the platform.

The following schematically illustrates and describes referral agreements objects and their correlations with other objects on the Connect platform.



First, Vendors establish contractual relationships with Sourcing Distributor by signing their program contract and distribution contract on the Connect platform. Thereafter, Vendors submit a request to list their product on the Sourcing Distributor Marketplace. Once the listing request is accepted, the product will be available within the Sourcing Distributor Catalog. Thus, the system provides referral agreements for the listed product.

Next, the system allows invited Distributors to enroll the provided referral agreement and create a referral contract. Once your referral contract is activated, invited Distributors will have direct business relationship with Vendors.

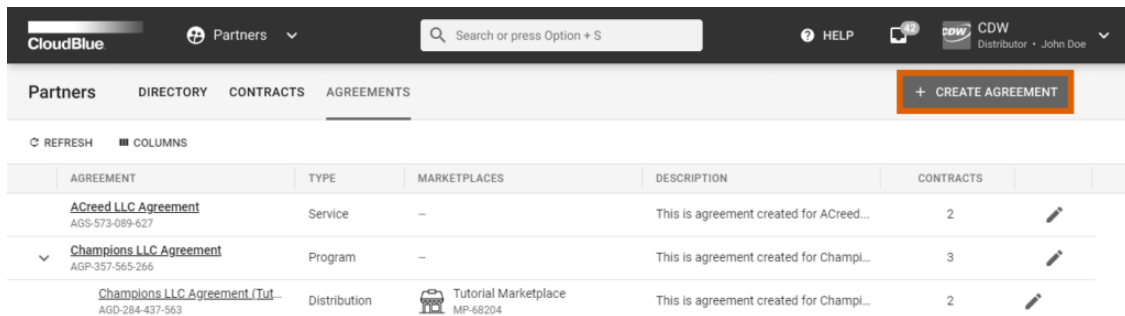
As a result, the system enables invited Distributors to define the program agreement and distribution agreements. In case Vendors successfully sign these agreements and activate corresponding contracts, the required product will be successfully listed within required marketplace.

## Referral Agreement Creation

Create a referral agreement to define terms and conditions for the corresponding referral contracts. Follow the steps below to successfully create a referral agreement.

### 1. Start creating a new agreement

Click the **Create Agreement** button to start creating a new agreement.



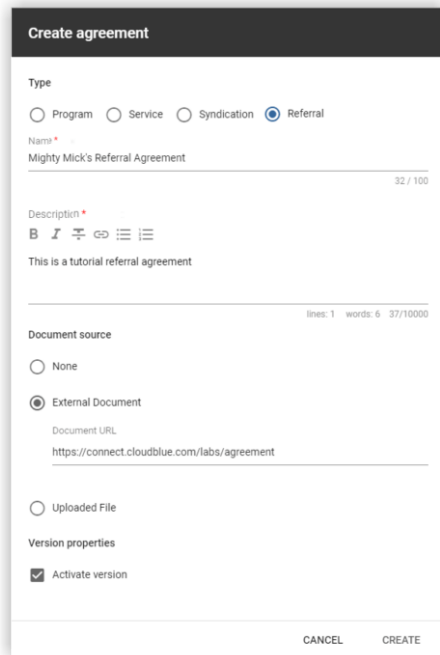
AGREEMENT	TYPE	MARKETPLACES	DESCRIPTION	CONTRACTS	
<a href="#">ACreed LLC Agreement</a> AGS-573-089-627	Service	–	This is agreement created for ACreed...	2	
▼ <a href="#">Champions LLC Agreement</a> AGP-357-565-266	Program	–	This is agreement created for Champi...	3	
<a href="#">Champions LLC Agreement / Tut-</a> AGD-284-437-563	Distribution	Tutorial Marketplace MP-68204	This is agreement created for Champi...	2	

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### 2. Specify agreement attributes

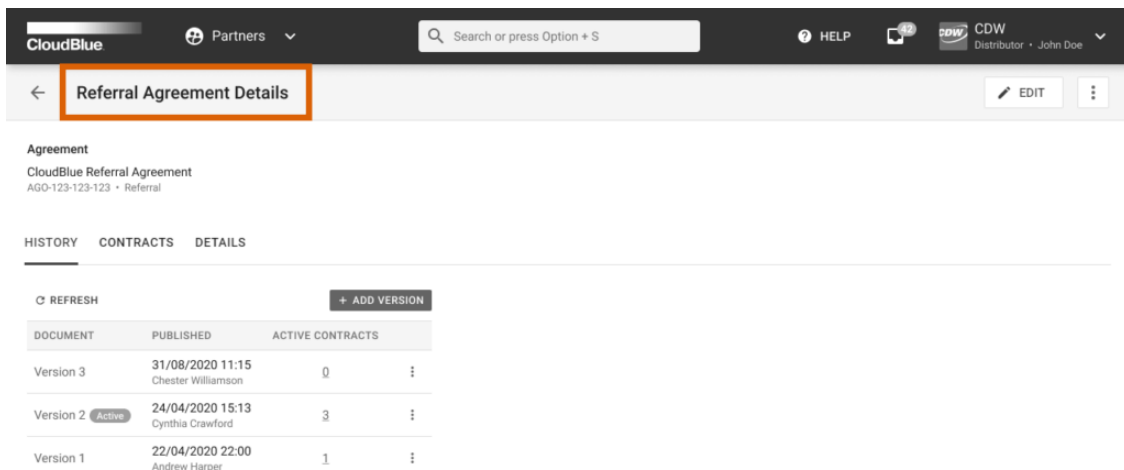
Fill out the following agreement form:

- **Type:** Select the *Referral* agreement type.
- **Name:** Enter a name for your agreement.
- **Description:** Provide a description for your agreement.
- **Document source:** Select *External Document* to provide a link to your agreement document or choose *Uploaded File* to upload a document file (in the PDF format). Otherwise, select *None* to show your Partner only the text from the *description* field.
- **Activate version:** Activate your agreement version by checking this checkbox. In case this checkbox is left unchecked, your agreement version can be specified and activated from the agreement details screen.



Click the **Create** button to finalize your agreement creation.

Therefore, your generated referral agreement will be displayed on the list within the **Agreements** tab. Note that you can review your created agreement details by clicking on the agreement name.



DOCUMENT	PUBLISHED	ACTIVE CONTRACTS	
Version 3	31/08/2020 11:15 Chester Williamson	0	⋮
Version 2 <span>Active</span>	24/04/2020 15:13 Cynthia Crawford	3	⋮
Version 1	22/04/2020 22:00 Andrew Harper	1	⋮

The *Referral Agreement Details* screen provides information on versions, associated referral contracts, update and creation date and more.

The Connect platform allows changing name and description for your referral agreement by using the *Edit* button at the top-right



corner of the screen. The Agreement Details screen also allows adding a new version for your agreement by using the *Add Version* button and manage existing versions agreements by using the vertical ellipsis icons within the *History* tab.