



<https://cloudblue.com>

[Documentation](#)  [Modules](#)  [Partners](#)  [Agreements](#) 

Referral Agreements



This article has been generated from the online version of the documentation and might be out of date.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 16, 2025



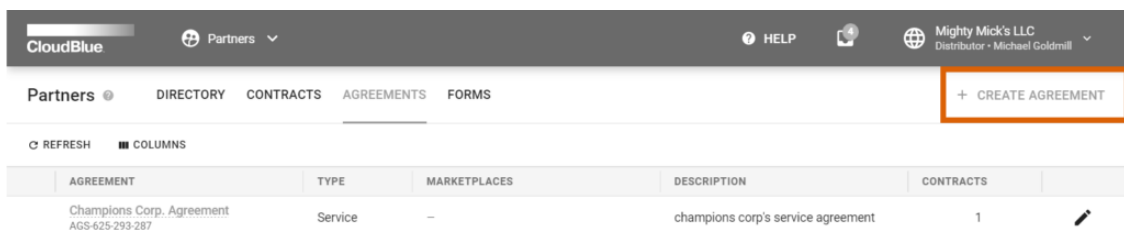
listed within a required marketplace.

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

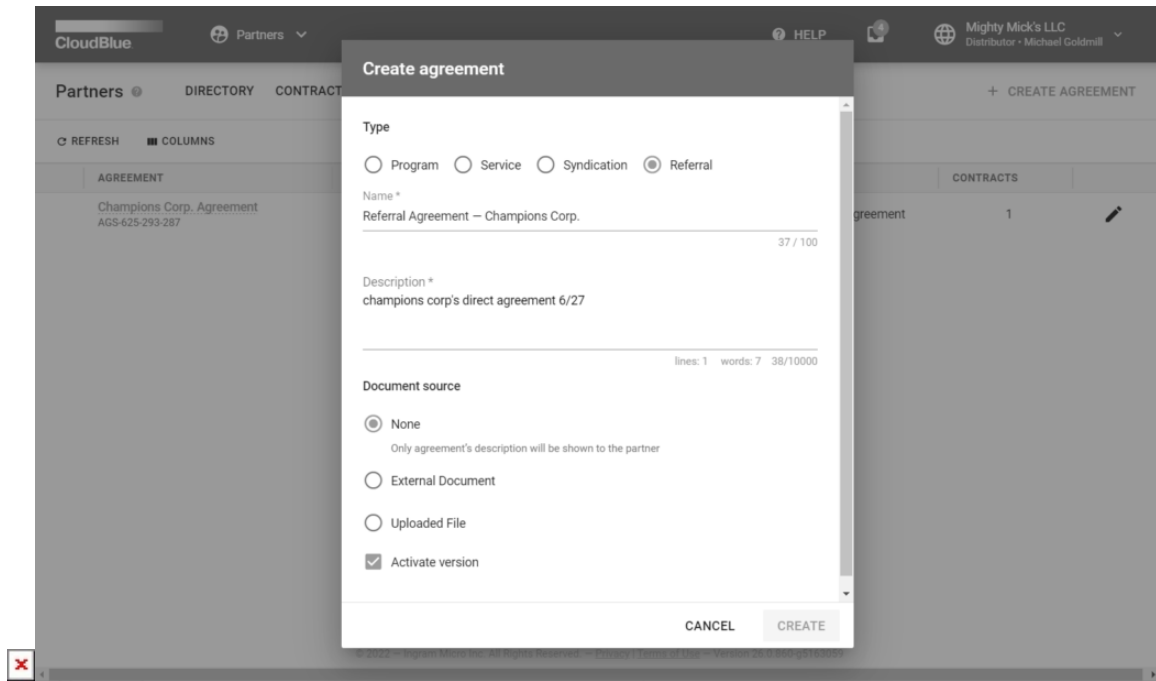
Click the **Create Agreement** button to start creating a new agreement.



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.

Referral Agreement Details

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



CloudBlue Partners HELP Mighty Mick's LLC
Distributor - Michael Goldmill

← Referral Agreement – Champions Corp. EDIT

Agreement Contracts
Referral Agreement – Champions Corp. –
AGU-227-167-473 - Referral

HISTORY CONTRACTS DETAILS

REFRESH COLUMNS ADD VERSION

DOCUMENT	PUBLISHED	ACTIVE CONTRACTS	
Version 1 Active	06/27/2022 Michael Goldmill	0	

Rows per page 10 1–1 of 1 < >



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 Referral Agreement Details screen is also used to add a new version for your agreement by using the **Add Version** button. Furthermore, the system allows manage existing versions agreements by using corresponding interface within the *History* tab.

Review enrolled contracts by using the *Contracts* tab. In case it is required to review update and creation dates or description of your agreement, access such information by using the *Details* tab.