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Referral Agreements



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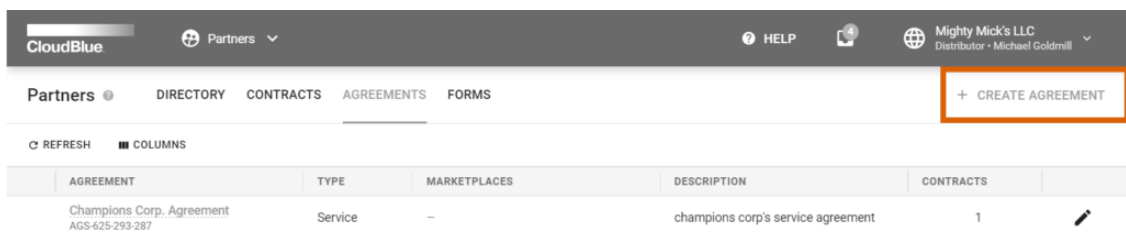
listed within a required marketplace.

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

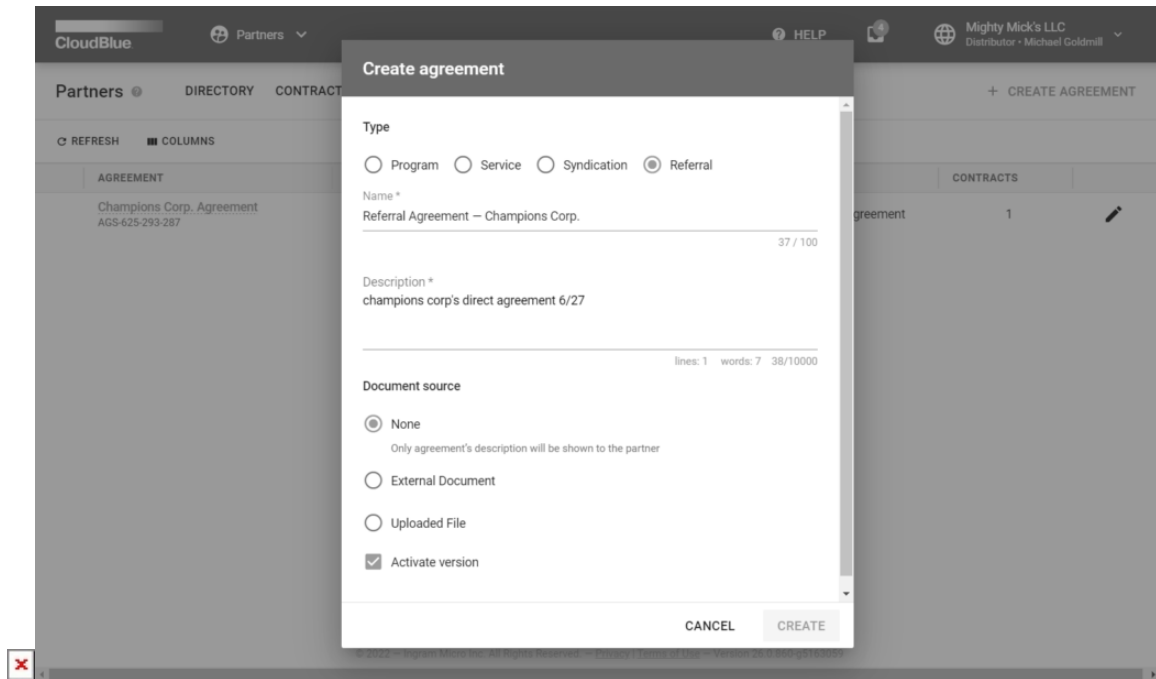
Click the **Create Agreement** button to start creating a new agreement.



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 <small>Active</small> | 06/27/2022 Michael Goldmill | 0 | |

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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.