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Documentation Modules Partners Agreements

Referral Agreements

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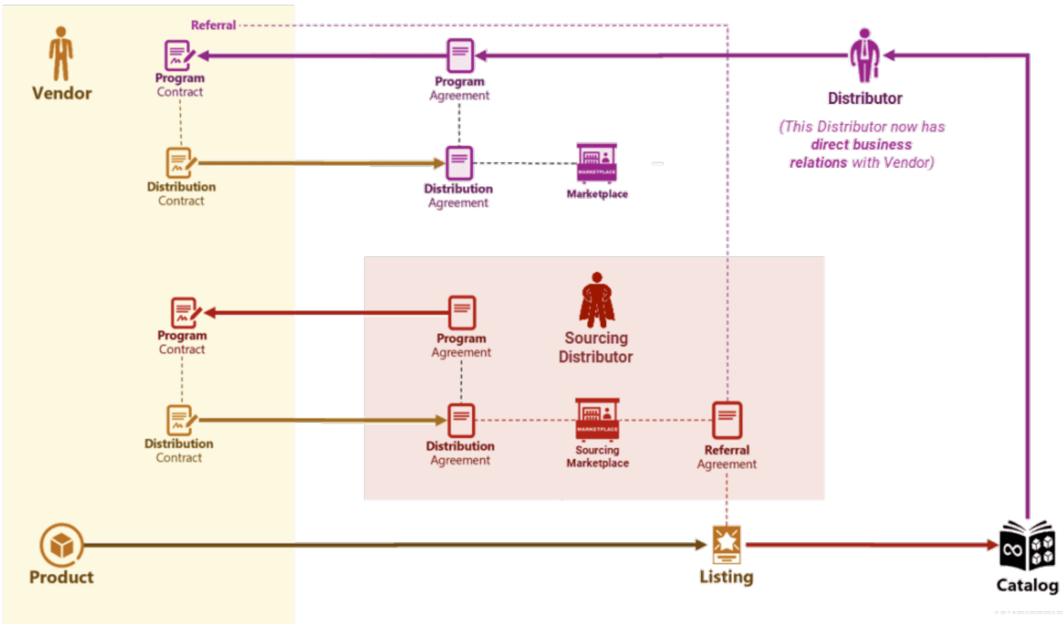
Auto-generated at December 21, 2025

Overview

The Referral Agreements (also called *Direct Sourcing Agreements* or *Direct Agreements*) incorporate terms and conditions that Distributors should accept to add selected products to their marketplace and establish direct business relationship with corresponding Vendors. The system allows defining referral agreements to provide your business partners with a Catalog of products. Therefore, by selecting products and enrolling such agreements, organizations can start collaborating with Vendors directly. Hence the name *referral* or *direct* agreements.

Note that such agreements represent templates for referral contracts on the CloudBlue Connect platform. Namely, by defining a referral agreement, your partners will be select a product via the Catalog module, enroll the corresponding *referral contract* and consequently start collaborating with Vendors.

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 the *Sourcing Distributor* (also known as *Hyper Provider*) by signing their program contract and distribution contract on the Connect platform. Thereafter, Vendors submit a request to list their product on the *Sourcing Marketplace*. Once the listing request is accepted, the product will be available within the *Product 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.

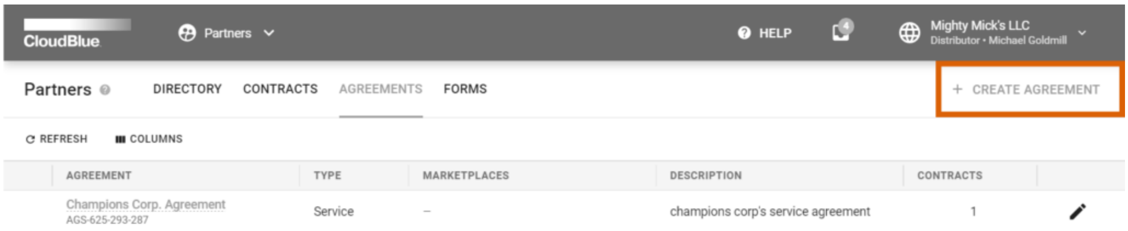
As a result, the system enables invited Distributors to define the program agreement and distribution agreements. In case Vendors successfully sign these agreements and activate corresponding contracts, the required product will be successfully listed within a required marketplace.

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

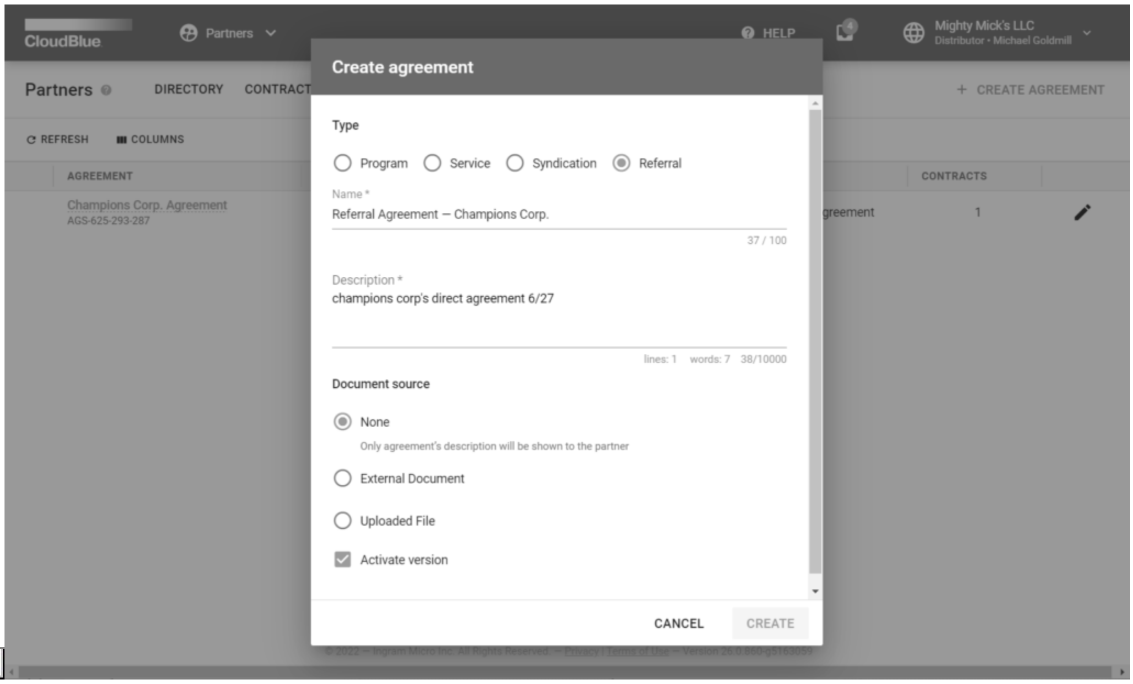
Click the **Create Agreement** button to start creating a new agreement.



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.

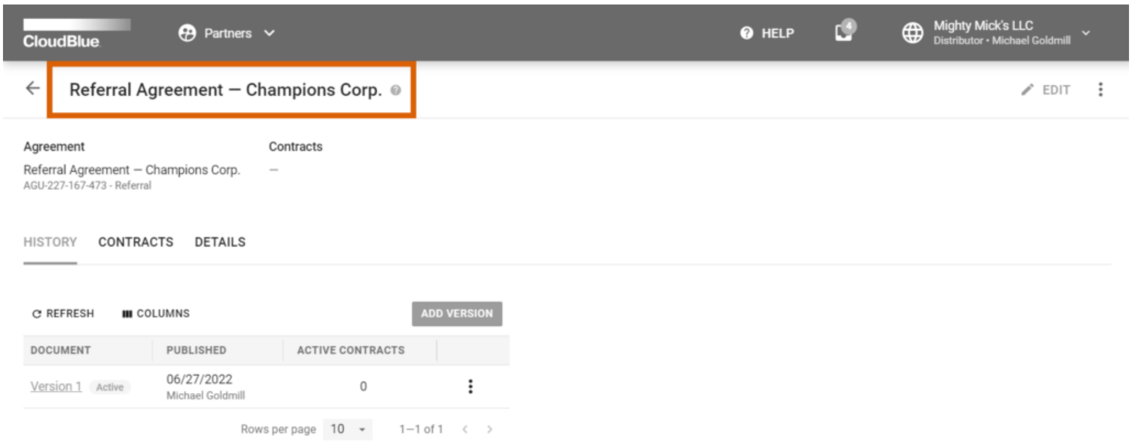


Click the **Create** button to finalize your agreement creation.

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.



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.