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

Service Agreements

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Overview

Service agreements are used to define terms and conditions for collaborating with business partners (Resellers and Distributors) on the CloudBlue Connect platform. Namely, a service agreement serves as a template for service contracts. Furthermore, note that a service agreement defines product groups that are available for your business partners, associated sourcing (syndication or referral) agreement, and the Catalog for enrolling sourcing agreements.

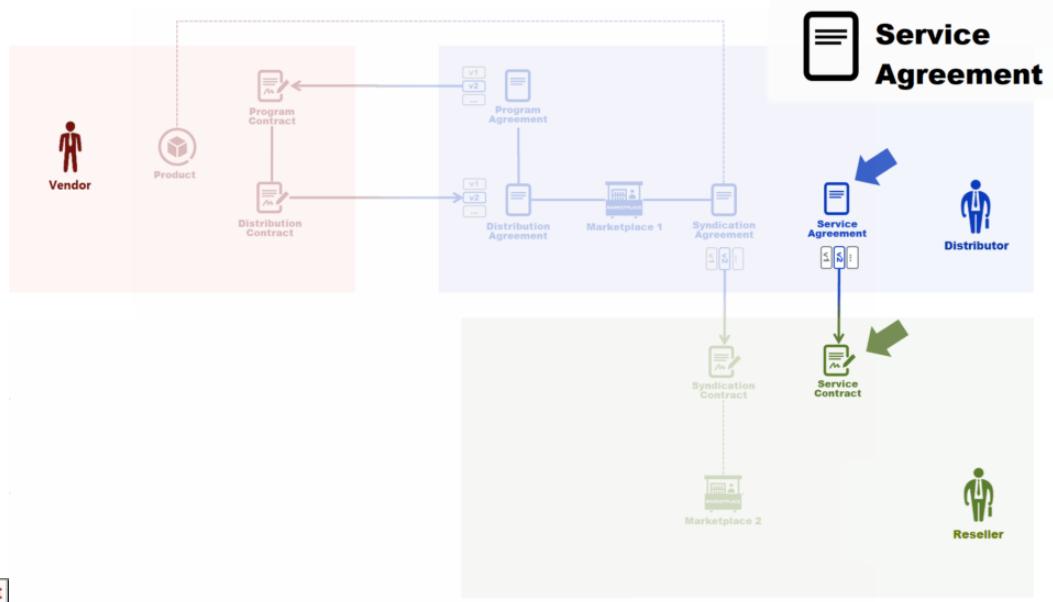
Once a service agreement is created and a service contract is successfully activated, your business partner can access their corresponding Connect Portal.

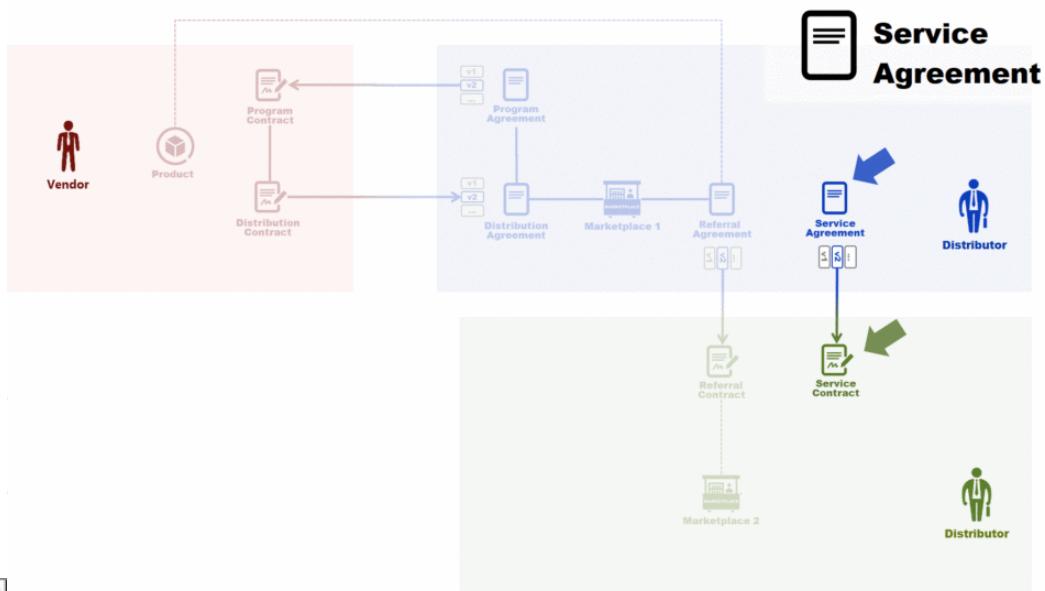


Note

The system does not allow creating service agreement and service contracts by default. Therefore, in case you cannot create service agreement, this feature is disabled for your account. Please contact your Sourcing Distributor or contact the Connect team if your organization wants to create service agreements and service contracts on the CloudBlue Connect platform.

The following diagram schematically illustrates service agreement data model on the Connect platform:





Distributor defines service agreements to create a Service contract with *Reseller*. Therefore, once Reseller activates the service contract successfully, the *Vendor's* product will be available on the Reseller's marketplace. Note that Distributors can also create a single generic agreement for several contracts (and consequently for several Reseller accounts) or create an agreement per an individual service contract.

The similar logic is used in case the *Sourcing Distributor* invites another *Distributor* on the CloudBlue Connect platform. The system allows defining a service agreement and generate a service contract to invite a Distributor. Consequently, invited Distributors can initiate direct contractual relationship with Vendors based on the signed service agreement.

Service Agreement Creation

Before creating a service contract and inviting your business partner to the CloudBlue Connect platform, it is necessary to create a service agreement. Follow the steps below to create a service agreement on the CloudBlue Connect platform.

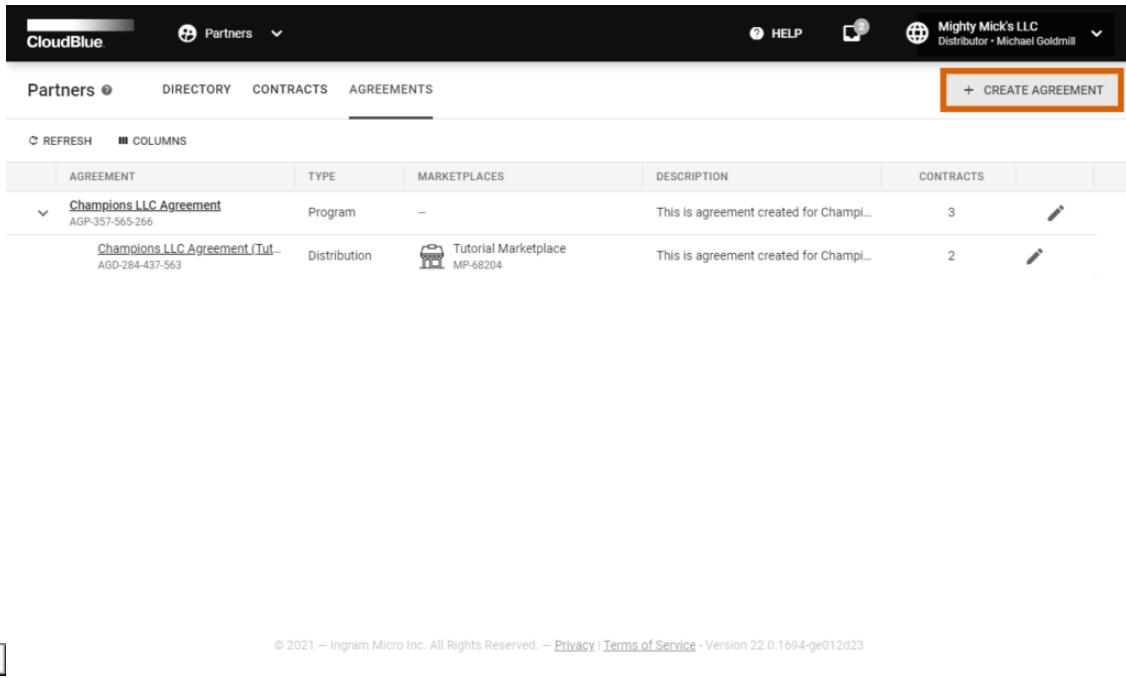


Note

Distributors can automatically generate service agreements and service contracts while creating a Partner account via the **Directory** tab. It is recommended to create an account (or generate a link) for your partner by using this wizard. However, you can also create required agreements manually as described below.

1. Click Create Agreement

Click the **Create Agreement** button to create a new agreement.

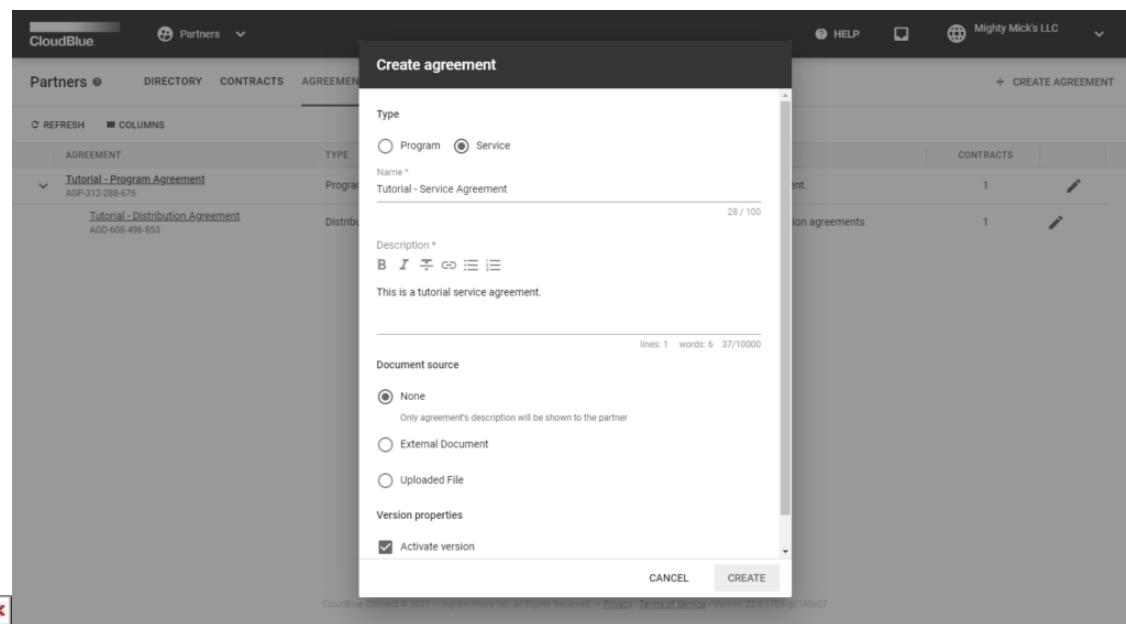


The screenshot shows the CloudBlue Partners dashboard. At the top, there are links for Documentation, Modules, Partners, Agreements, and Service Agreements. The 'Partners' link is highlighted with a red box. Below the header, there are tabs for 'Partners', 'DIRECTORY', 'CONTRACTS', and 'AGREEMENTS', with 'AGREEMENTS' being the active tab. A red box highlights the '+ CREATE AGREEMENT' button in the top right corner of the main content area. The main content area displays a table of agreements. The first row shows 'Champions LLC Agreement' (AGP-357-565-266) with a 'Program' type and a description 'This is agreement created for Champi...'. The second row shows 'Champions LLC Agreement (Tut...' (AGD-284-437-563) with a 'Distribution' type and a description 'This is agreement created for Champi...'. Both rows have a 'CONTRACTS' column showing the count (3 and 2 respectively) and a pencil icon for editing.

2. Specify Agreement Attributes

Fill out the following agreement form:

- **Type:** Select the *Service* 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.

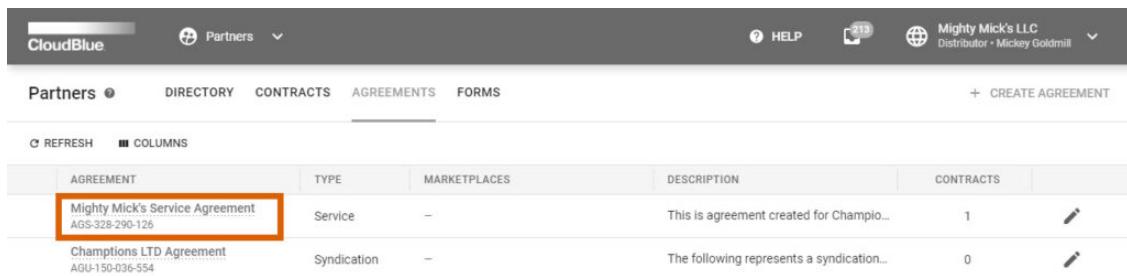
Therefore, your generated service agreement will be displayed on the list within the **Agreements** tab. Note that it is also required to configure product groups, source marketplace and attach sourcing agreement as described below.

Service Agreement Configuration

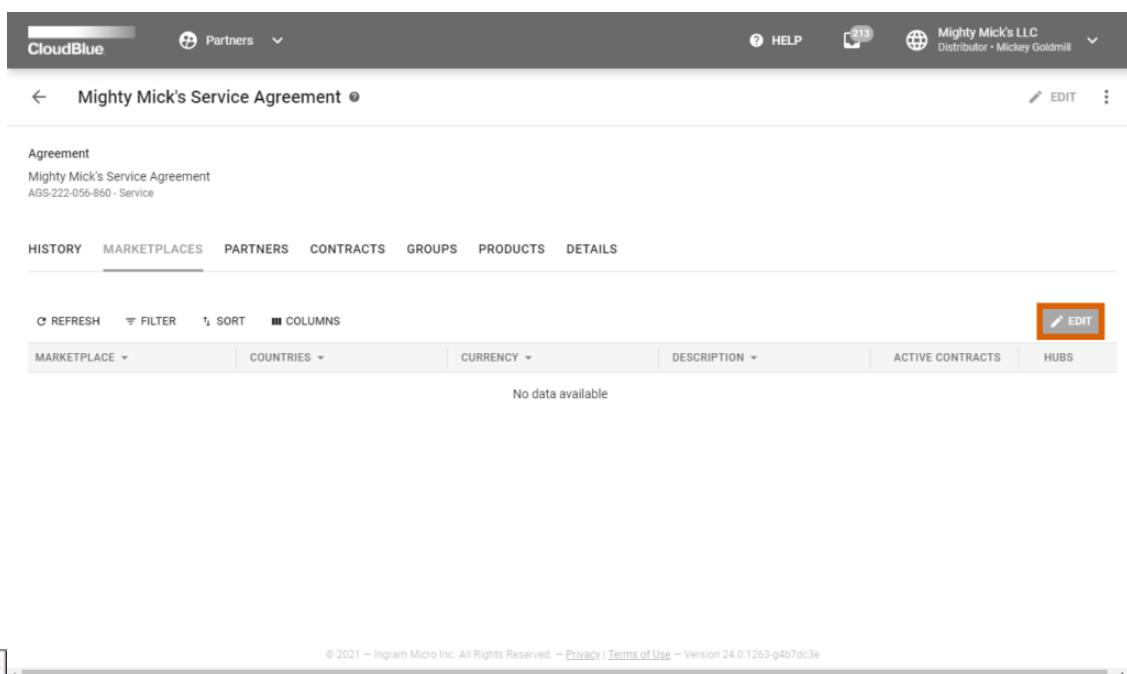
In case your service agreement is created manually, it is necessary to attach product groups, your marketplace, and a sourcing agreement to your created service agreement. Refer to the Catalog Management documentation to learn more about product groups and Catalog configuration. Learn more about sourcing agreements by accessing Syndication Agreement documentation and Referral Agreement documentation.

Click on your service agreement name to access the *Agreement Details* screen. This screen is used to access various service agreement data and perform required agreement configurations as follows:

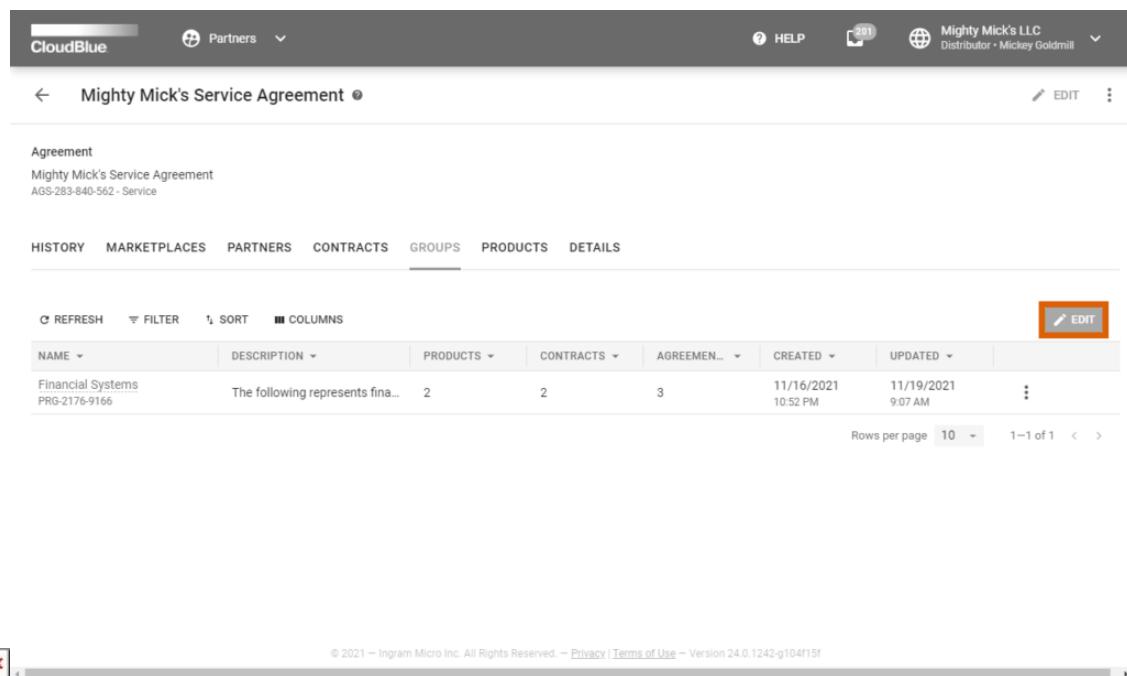
- **Marketplace:** Navigate to this tab and select source marketplaces for your business partners. At least one marketplace should be attached to your service agreement. Otherwise, your business partner will not be able to enroll a syndication or referral contract.
- **Groups:** Select product groups that should be visible for your business partners. Your specified product groups will be available for your invited Resellers and Distributors within the Catalog module.
- **Details:** Access this tab to attach your sourcing (syndication or referral) agreement to your service agreement. Therefore, your business partner will be able to enroll sourcing contracts based on your selected sourcing agreement.



AGREEMENT	TYPE	MARKETPLACES	DESCRIPTION	CONTRACTS	
Mighty Mick's Service Agreement AGS-328-290-126	Service	-	This is agreement created for Champio...	1	
Champions LTD Agreement AGU-150-036-554	Syndication	-	The following represents a syndication...	0	



Mighty Mick's Service Agreement 						
Agreement						
Mighty Mick's Service Agreement AGS-222-056-860 - Service						
HISTORY MARKETPLACES PARTNERS CONTRACTS GROUPS PRODUCTS DETAILS						
REFRESH	FILTER	SORT	COLUMNS			
MARKETPLACE 	COUNTRIES 	CURRENCY 	DESCRIPTION 	ACTIVE CONTRACTS	HUBS	
No data available						



Agreement
Mighty Mick's Service Agreement
AGS-283-840-562 - Service

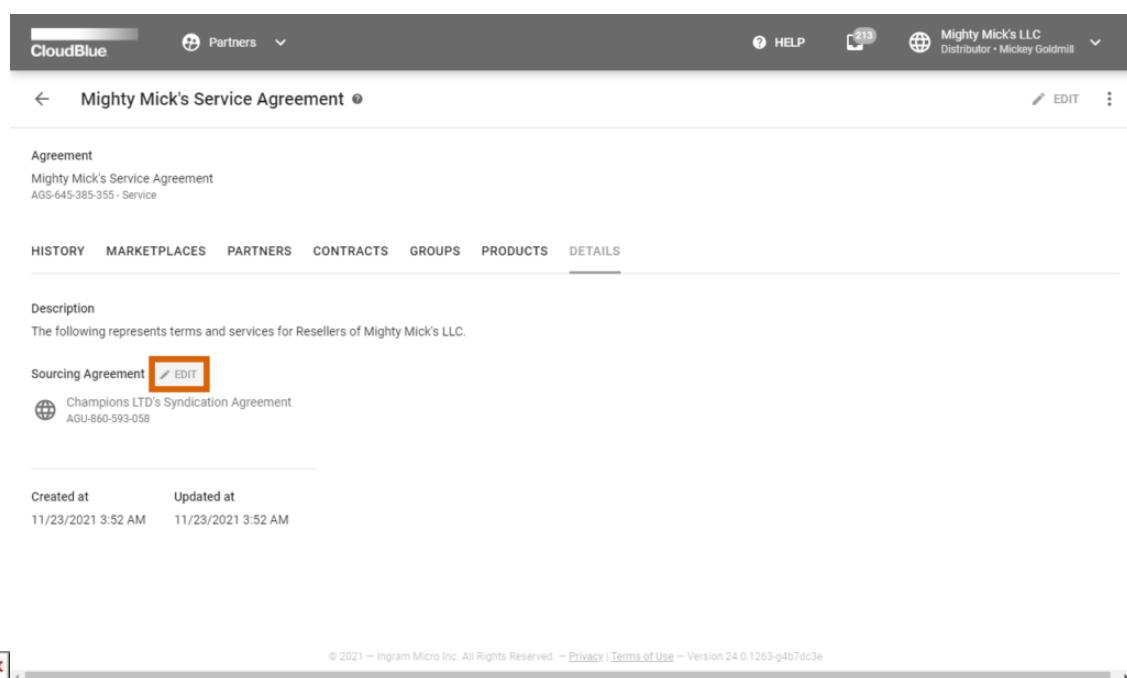
HISTORY MARKETPLACES PARTNERS CONTRACTS GROUPS PRODUCTS DETAILS

REFRESH FILTER SORT COLUMNS EDIT

NAME	DESCRIPTION	PRODUCTS	CONTRACTS	AGREEMENTS	CREATED	UPDATED
Financial Systems PRG-2176-9166	The following represents fina...	2	2	3	11/16/2021 10:52 PM	11/19/2021 9:07 AM

Rows per page: 10 | 1-1 of 1

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Agreement
Mighty Mick's Service Agreement
AGS-645-385-355 - Service

HISTORY MARKETPLACES PARTNERS CONTRACTS GROUPS PRODUCTS DETAILS

Description
The following represents terms and services for Resellers of Mighty Mick's LLC.

Sourcing Agreement 

Champions LTD's Syndication Agreement
AGU-860-593-058

Created at	Updated at
11/23/2021 3:52 AM	11/23/2021 3:52 AM

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Once your configuration is finalized, the system allows creating service contracts based on your configured service agreement as described in the Service Contract documentation.



Updating Service Agreements

The system allows revising and updating your service agreement by creating and activating newer agreement versions. Once a new version is created, your partners can accept a new version and activate your updated agreement. Create a new version for your service agreement by following the steps below.

Access the **service agreement versions** by clicking on your program agreement name from the **Agreements** tab. Here, you can examine and manage your agreement versions within the **History** field.

AGREEMENT	TYPE	MARKETPLACES	DESCRIPTION	CONTRACTS	
Tutorial - Service Agreement AGS-720-780-473	Service	-	This is a tutorial service agreement.	1	



DOCUMENT	PUBLISHED	ACTIVE CONTRACTS	ACTIONS
Version 1	03/29/2021 Michael Goldmill	0	

Contracts
Please use [Contracts](#) to manage contracts created based on this agreement.





Follow the steps below to create a new version of your program agreement.

1. Add an agreement version

Click the **Add Version** button under **History** from your program agreement details screen.

The screenshot shows the CloudBlue Agreement Details screen. At the top, there are navigation links for Documentation, Modules, Partners, Agreements, and Service Agreements. The main content area shows a program agreement with the following details:

ID	Agreement type
AGS-720-780-473	Service

Description
This is a tutorial service agreement.

History

DOCUMENT	PUBLISHED	ACTIVE CONTRACTS	ACTIONS
Version 1 Active	03/29/2021 Michael Goldmill	0	+ ADD VERSION

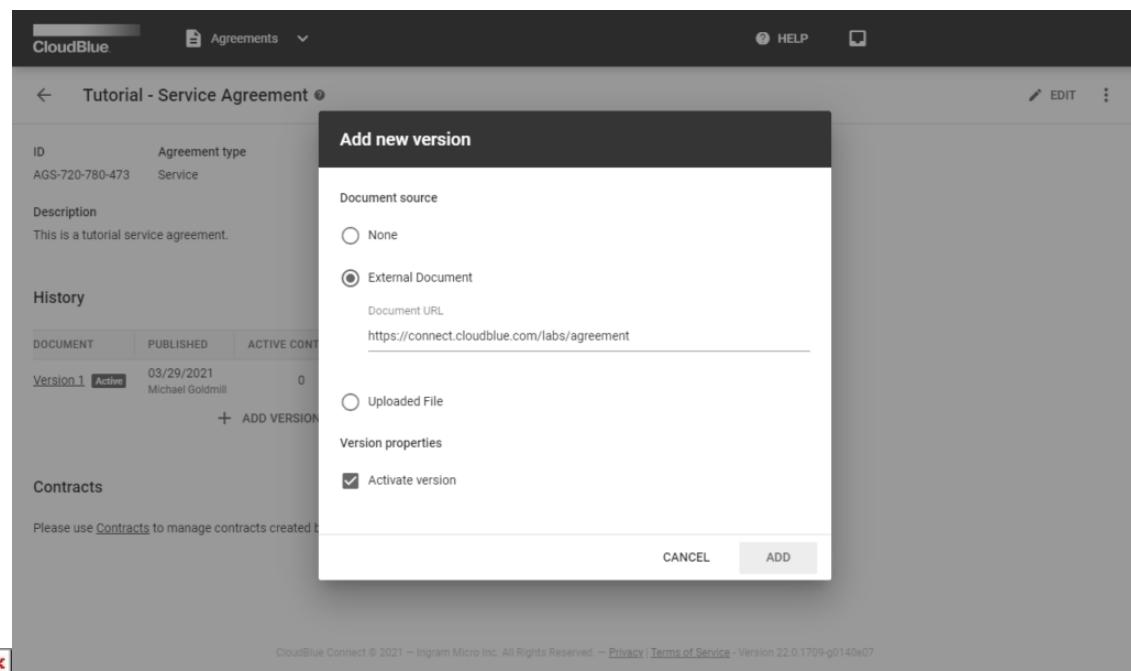
Contracts
Please use [Contracts](#) to manage contracts created based on this agreement.

At the bottom of the screen, there is a footer with the CloudBlue Connect copyright information: "CloudBlue Connect © 2021 - Ingram Micro Inc. All Rights Reserved. - [Privacy](#) | [Terms of Service](#) - Version 22.0.1709-g0140e07".

2. Specify new attributes

Fill out the following agreement version form:

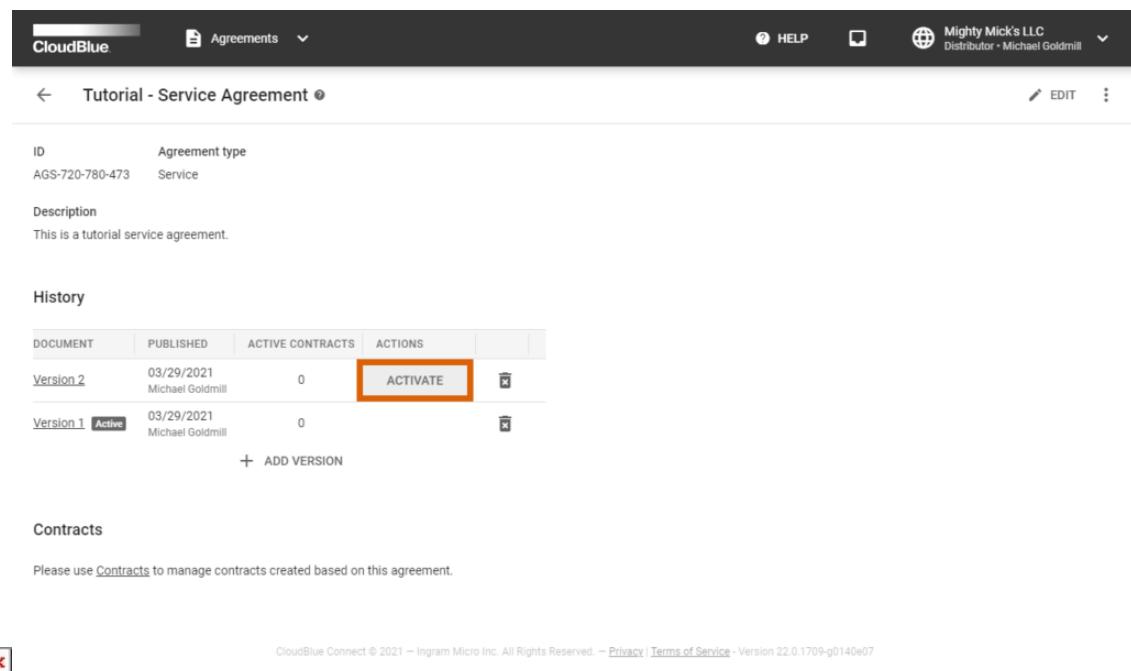
- **Document source:** Select *External Document* to provide a link to your agreement document or choose *Uploaded File* to upload a document file (in the PDF format). Otherwise, select *None* to show your Partner only the text from the *description* field.
- **Activate version:** Activate your agreement version by checking this checkbox.



The screenshot shows the 'Tutorial - Service Agreement' page. The 'History' section lists 'Version 1' as active. A modal dialog box titled 'Add new version' is open, showing the 'External Document' option selected with the URL 'https://connect.cloudblue.com/labs/agreement'. The 'Activate version' checkbox is checked. The 'ADD' button is highlighted.

Click the **Add** button to finalize your version creation.

Therefore, your created version will be displayed within the **History** field. Note if the **Activate version** checkbox is checked, your agreement version is activated automatically. In case this checkbox is left unchecked, click the **Activate** button to manually activate selected version.



The screenshot shows the 'Tutorial - Service Agreement' page. The 'History' section displays two versions: 'Version 2' (Active) and 'Version 1'. The 'ACTIVATE' button for 'Version 2' is highlighted with a red box. The 'Contracts' section is visible below the history table.

By activating a new version, the system notifies your business partners about your new agreement version. Your partners are also required to activate a new version as described below.



Accepting Agreement Updates

Once an invited Reseller or Distributor receives a notification about a new service agreement version, this Reseller or Distributor can associate accepted service contract with new service agreement. Follow the steps below to successfully sign your updated updated service agreement.

1. Access partners details screen

Proceed to the **Partners** module and click on your partner name from the **Directory** tab.

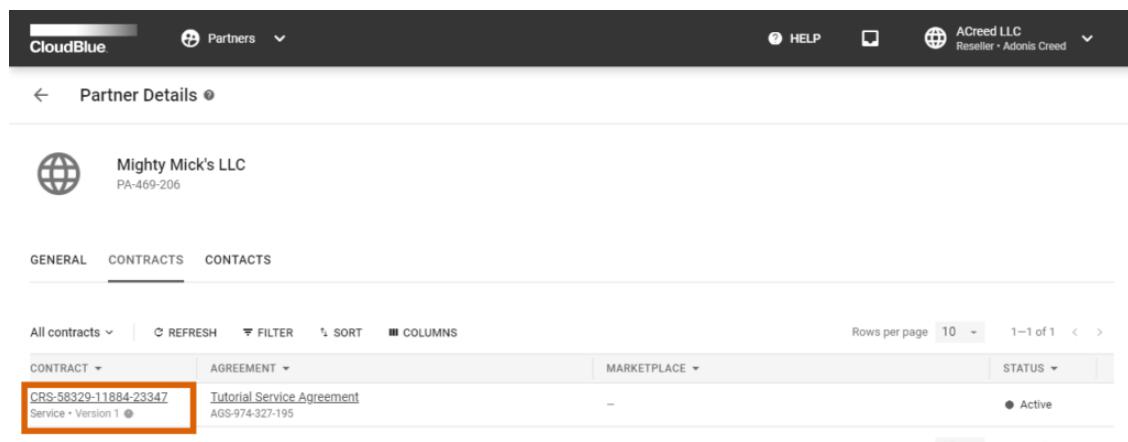
ACCOUNT	TYPE	TECHNICAL CON...	BUSINESS CONTA...	PROGRAM	DISTRIBUTI...	SERVICE	SYN...	LIS...	STATUS
Mighty Mick's LLC PA-469-206	Provider	Michael Goldmill mike.goldmill@mail...	Michael Goldmill mike.goldmill@mail...	-	-	1	-	-	● Active



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2. Locate your contract

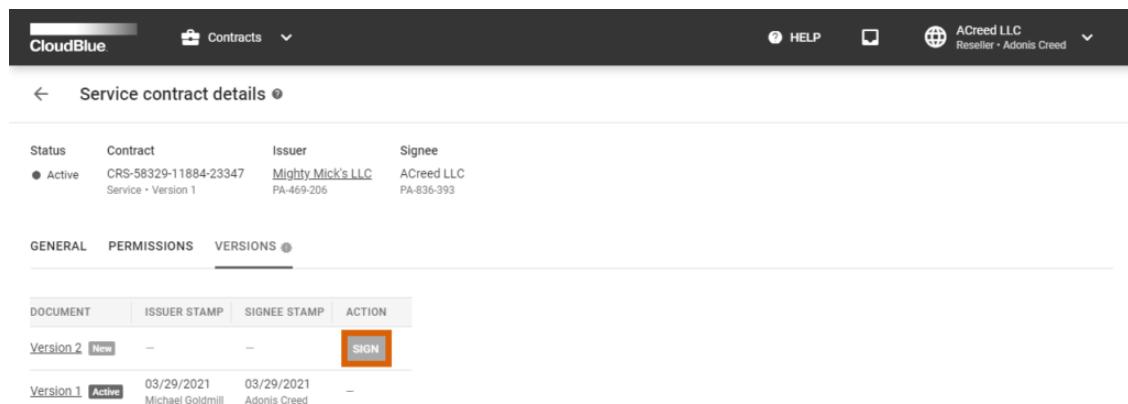
Navigate to **Contracts** tab and click on your contract ID that displays the *new version available* icon.



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3. Access a new version

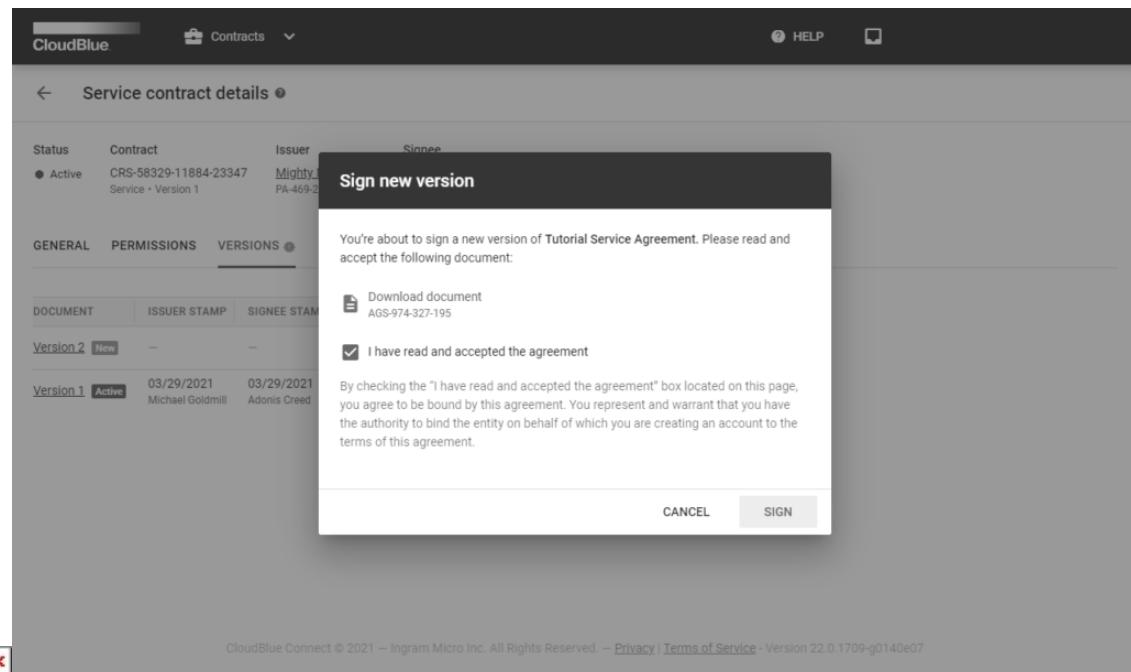
Proceed to the **Versions** tab and click the **Sign** button next to the new agreement version.



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4. Sign the new version

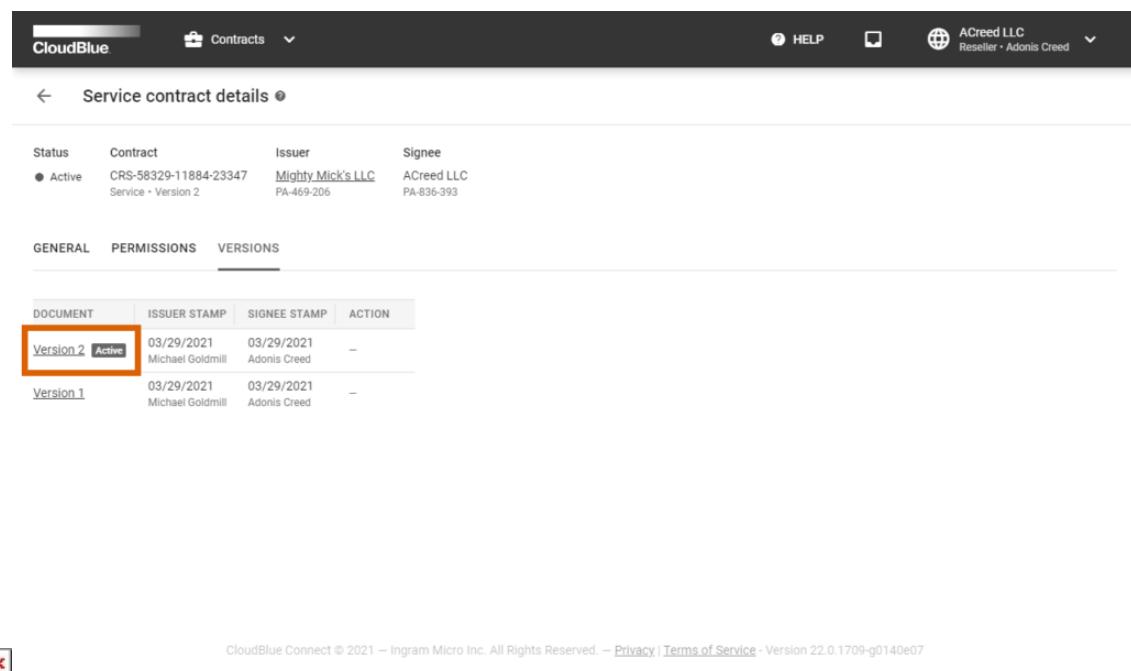
Review the provided document and check the **I have read and accepted the agreement** checkbox.



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Click **Sign** to sign and activate your updated service agreement.

Therefore, the system will mark your new activated document with the **Active** tag.



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