https://cloudblue.com

Documentation Modules Partners Agreements

Service Agreements

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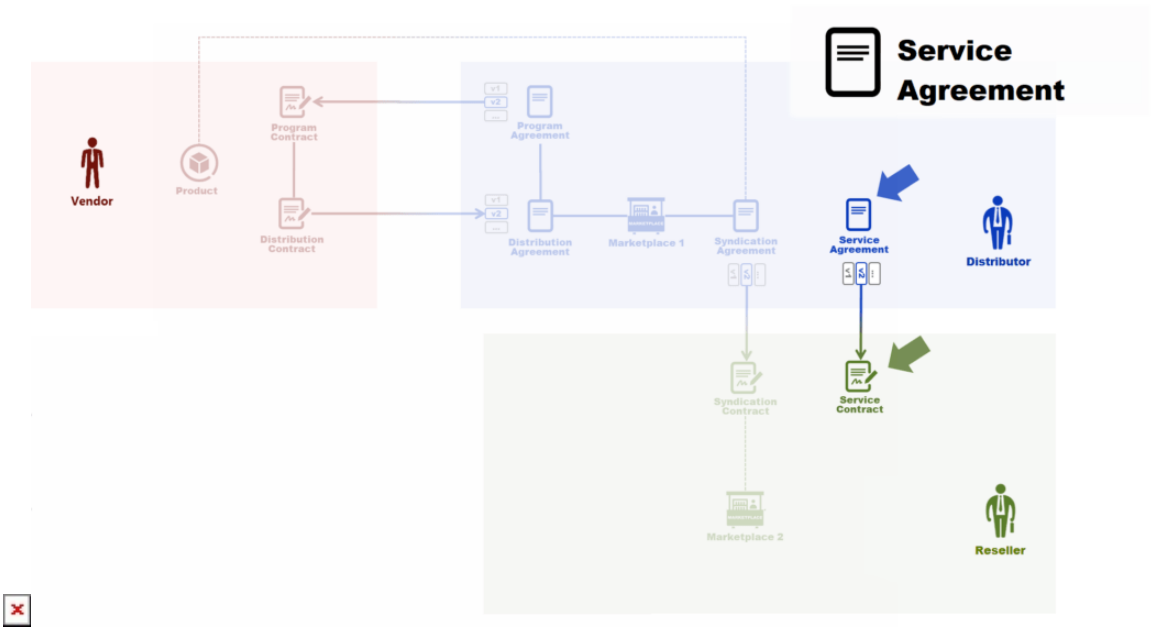
Overview

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:



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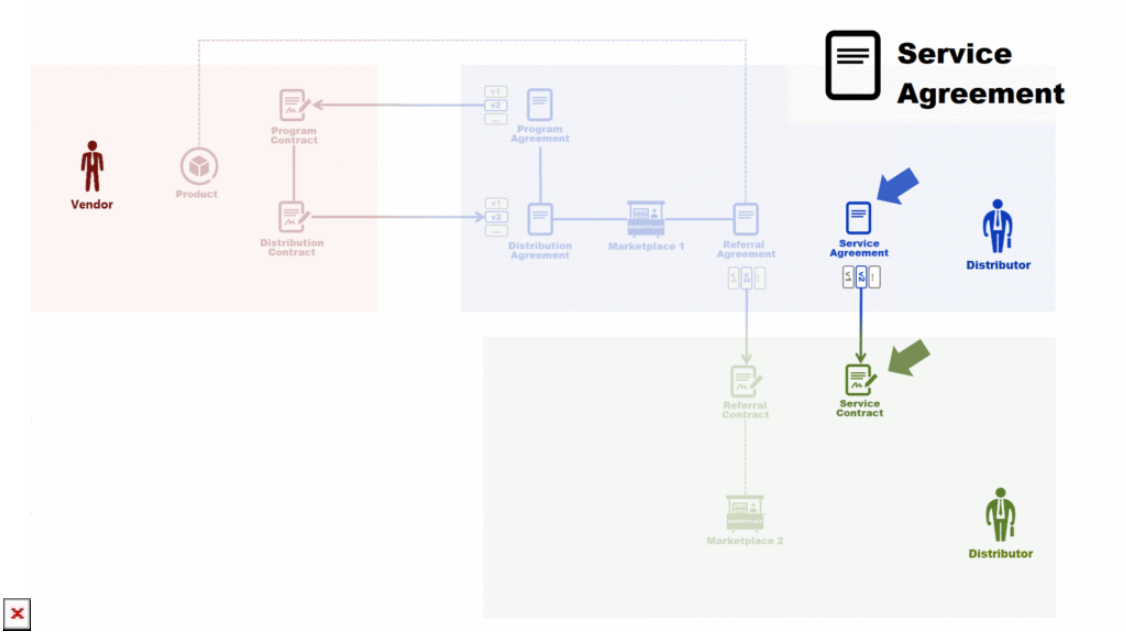

Distributor defines service agreements to create a Service contract with *Reseller*. Therefore, once Reseller activates the service contract successfully, the *Vendor's product* will be available on the Reseller's marketplace. Note that Distributors can also create a single generic agreement for several 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.

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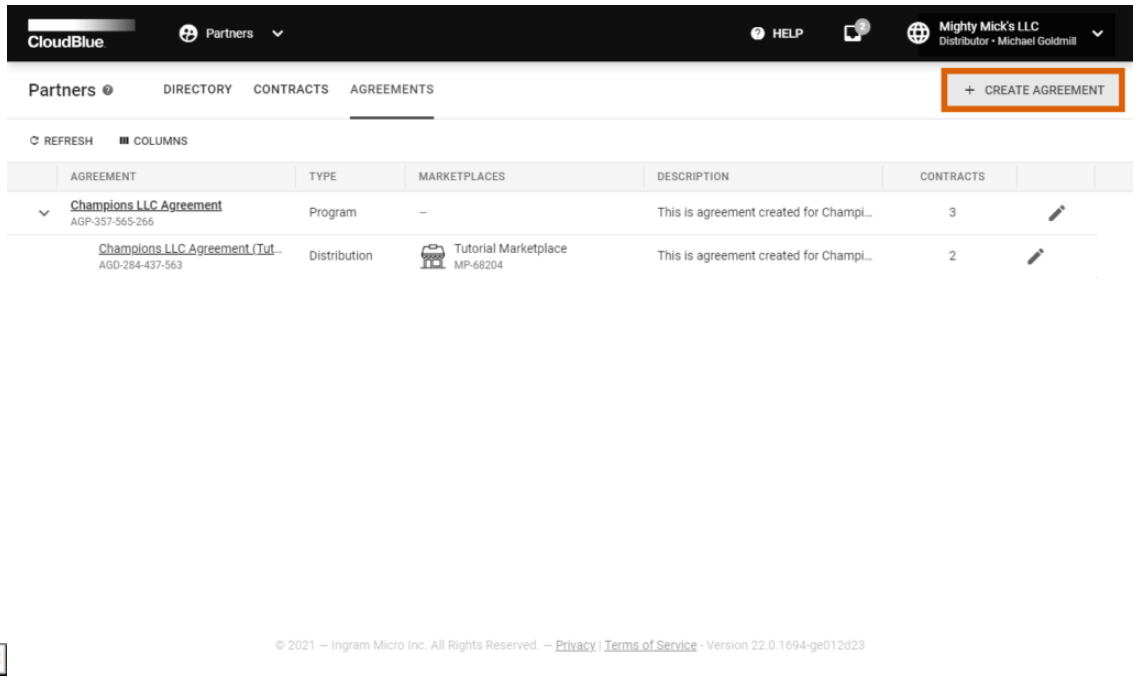
1. Click Create Agreement

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



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.

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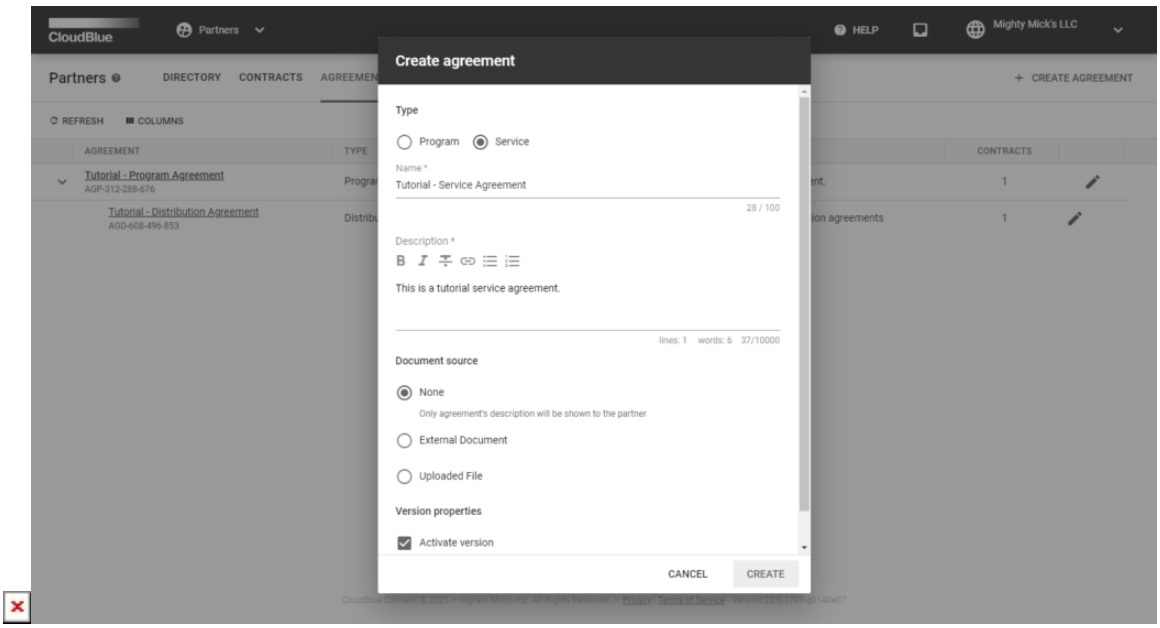

Click the **Create** button to finalize your agreement creation.

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.

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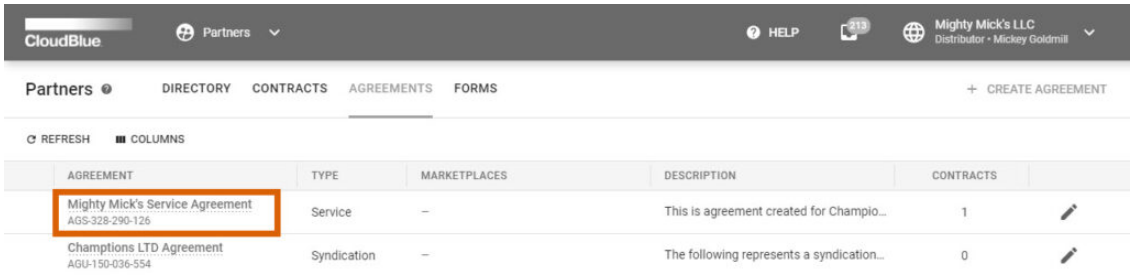

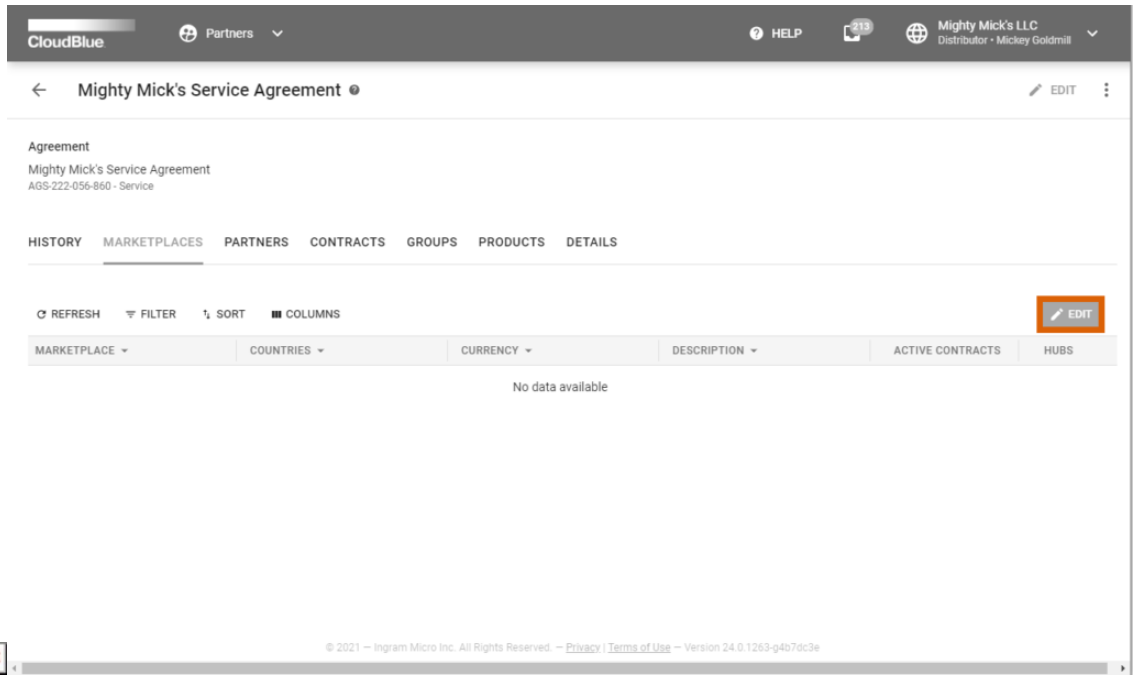

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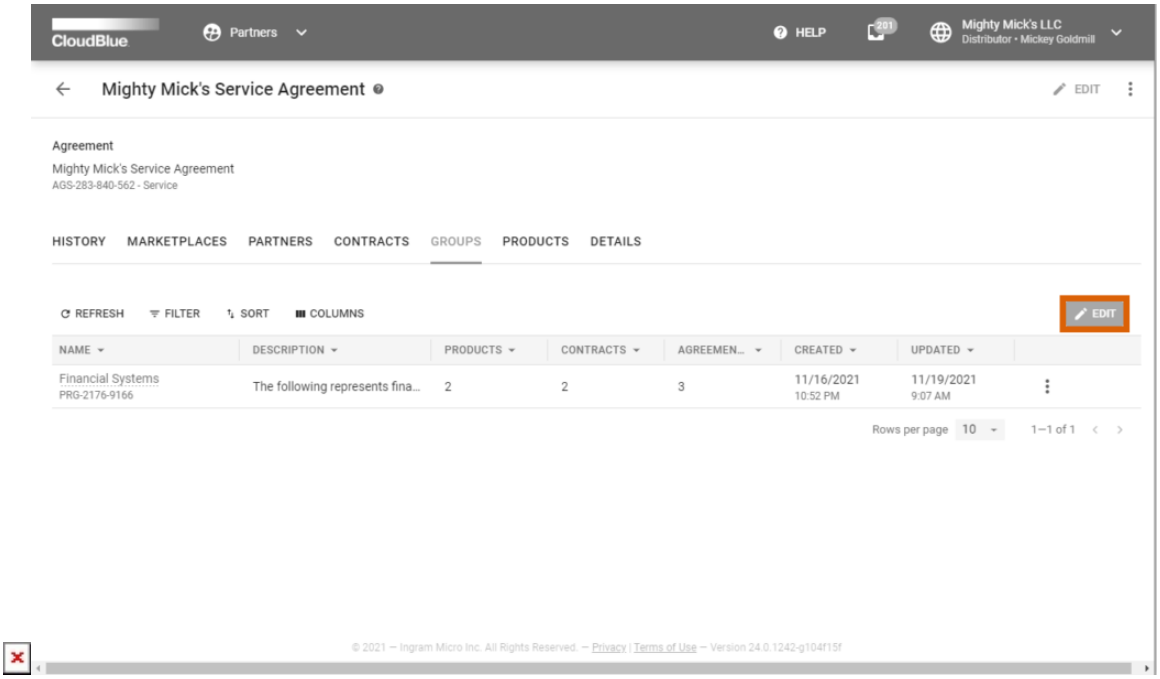

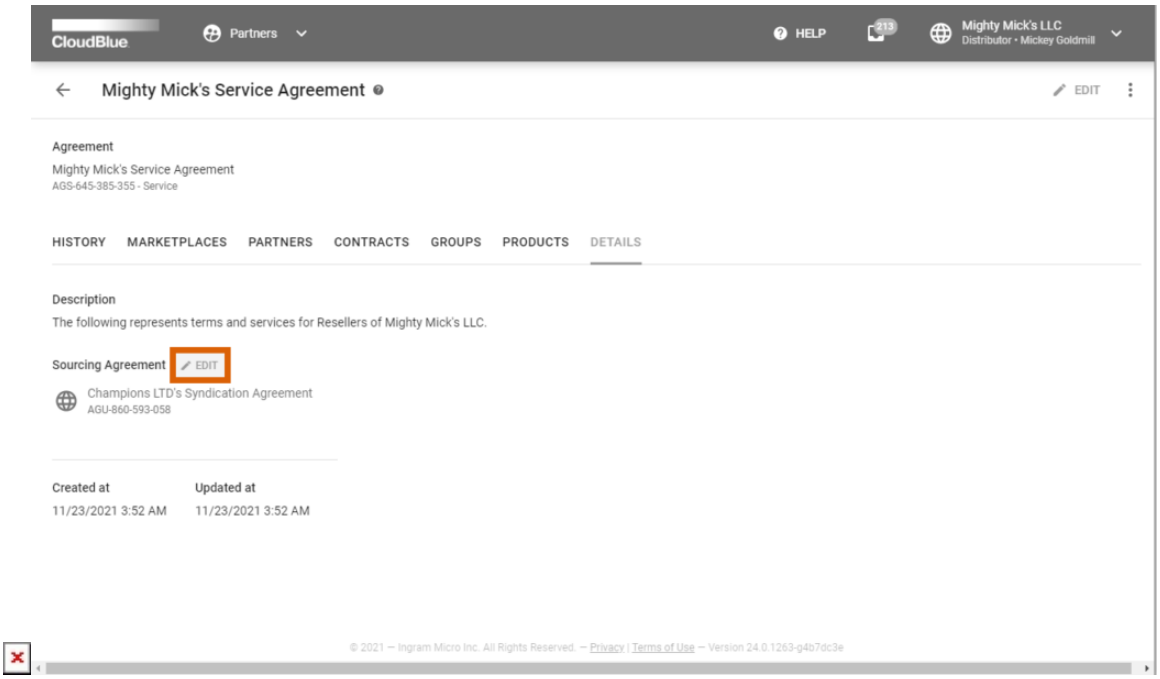

Once your configuration is finalized, the system allows creating service contracts based on your configured service agreement as described in the Service Contract documentation.

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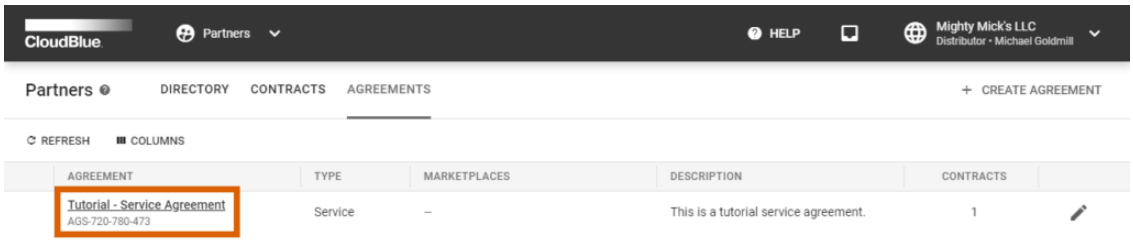
Updating Service Agreements

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.



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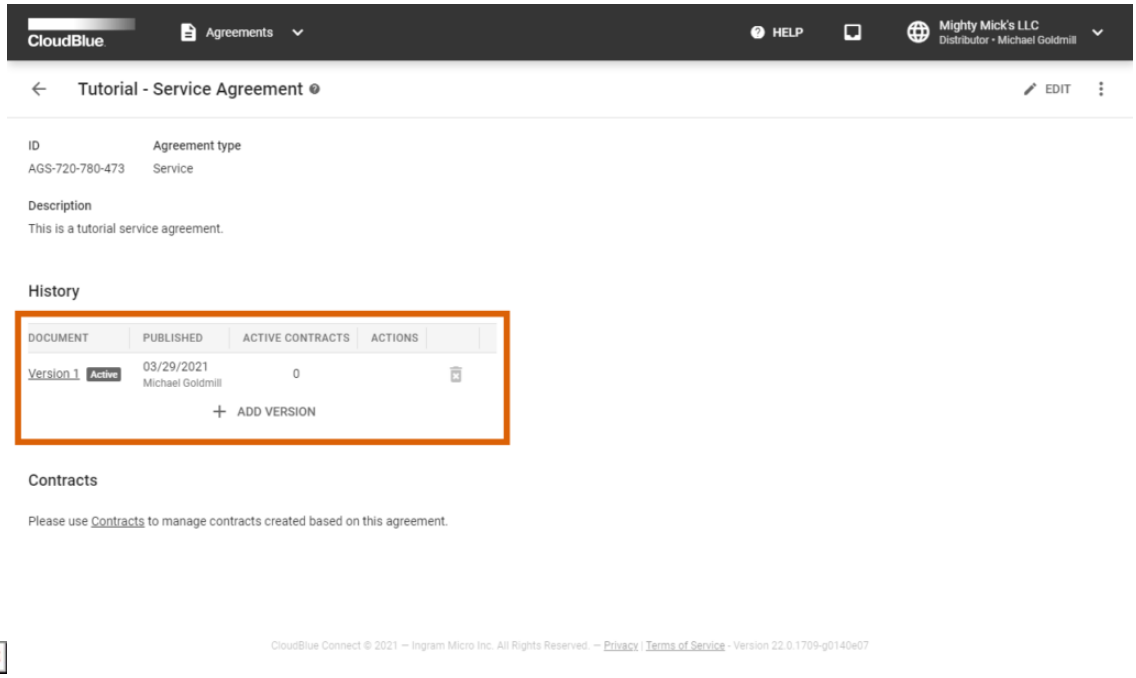

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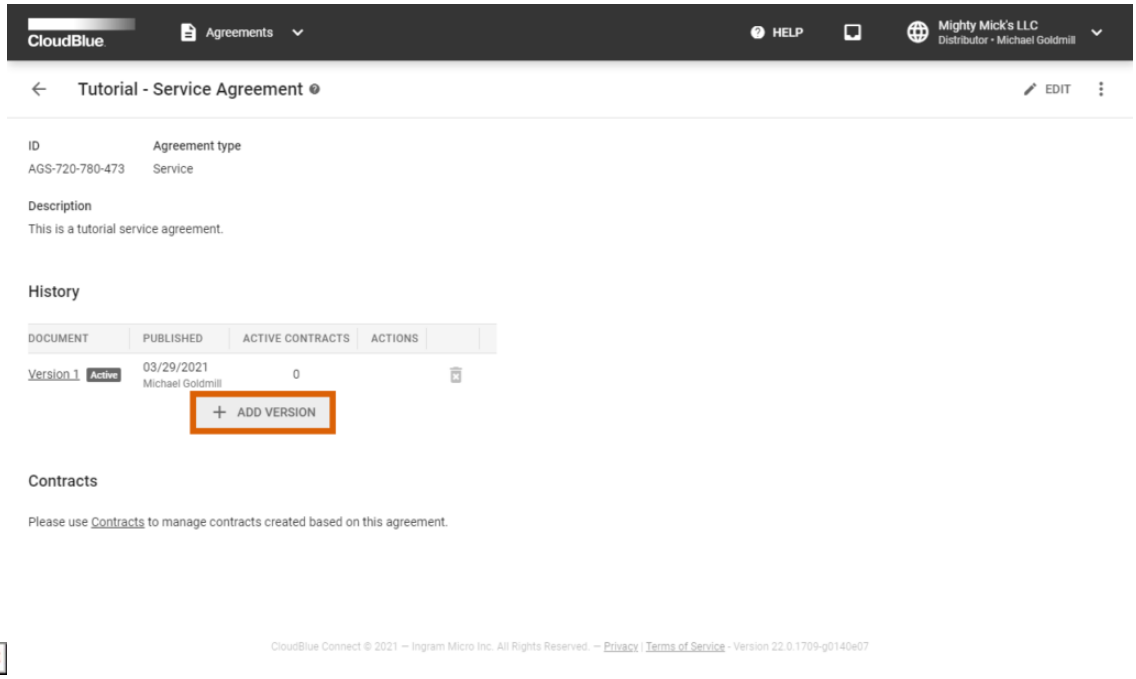
Follow the steps below to create a new version of your program agreement.

1. Add an agreement version

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



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.

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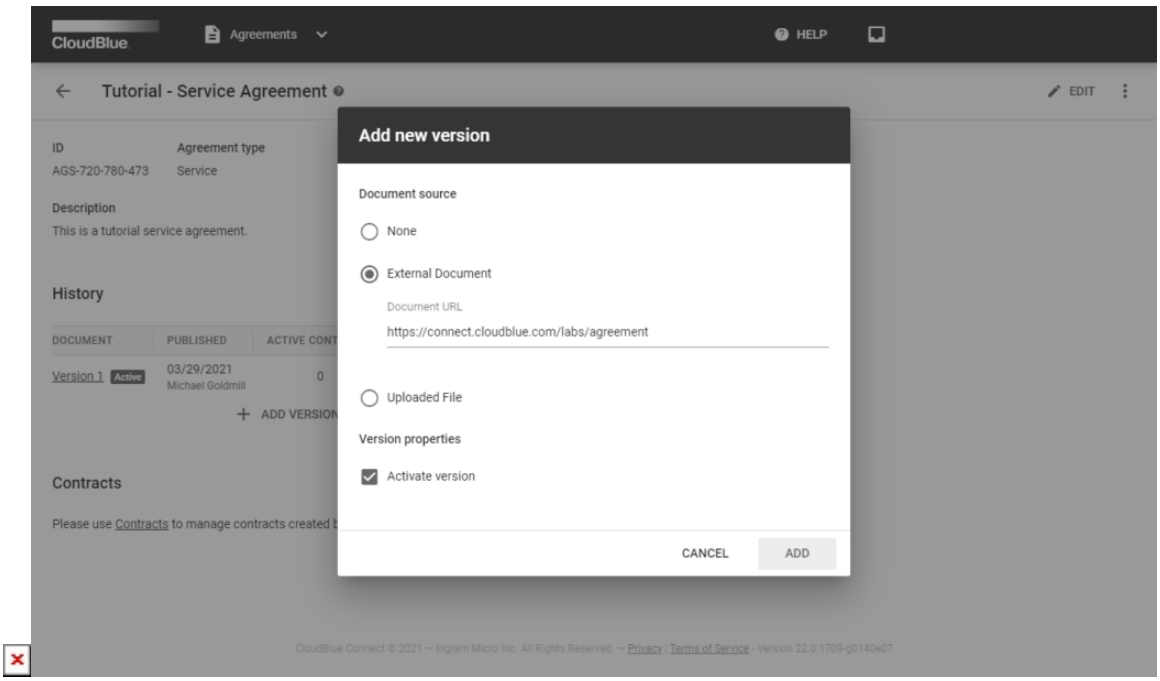
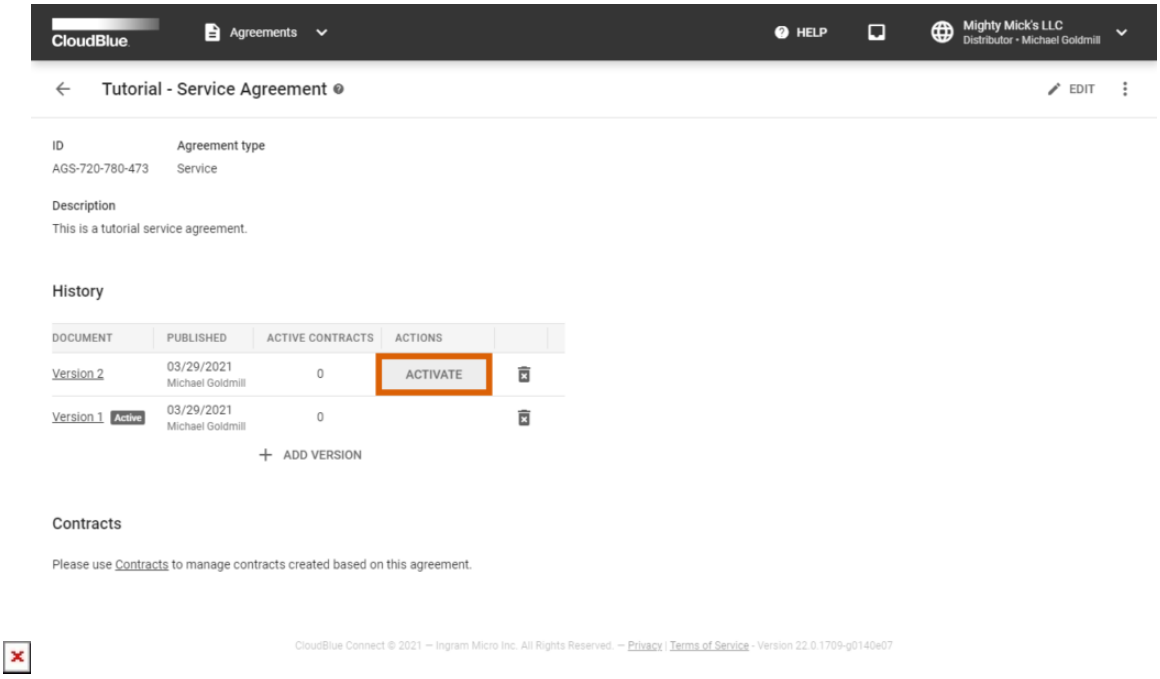


Click the **Add** button to finalize your version creation.

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.



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.

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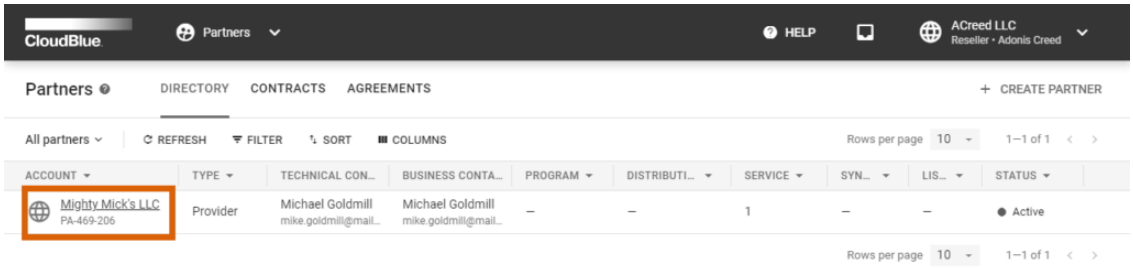
Accepting Agreement Updates

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.



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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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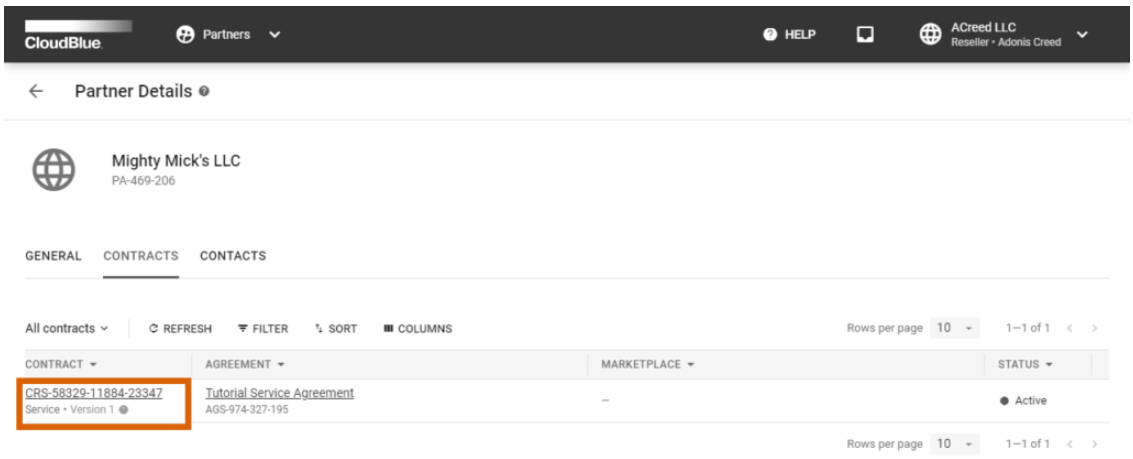
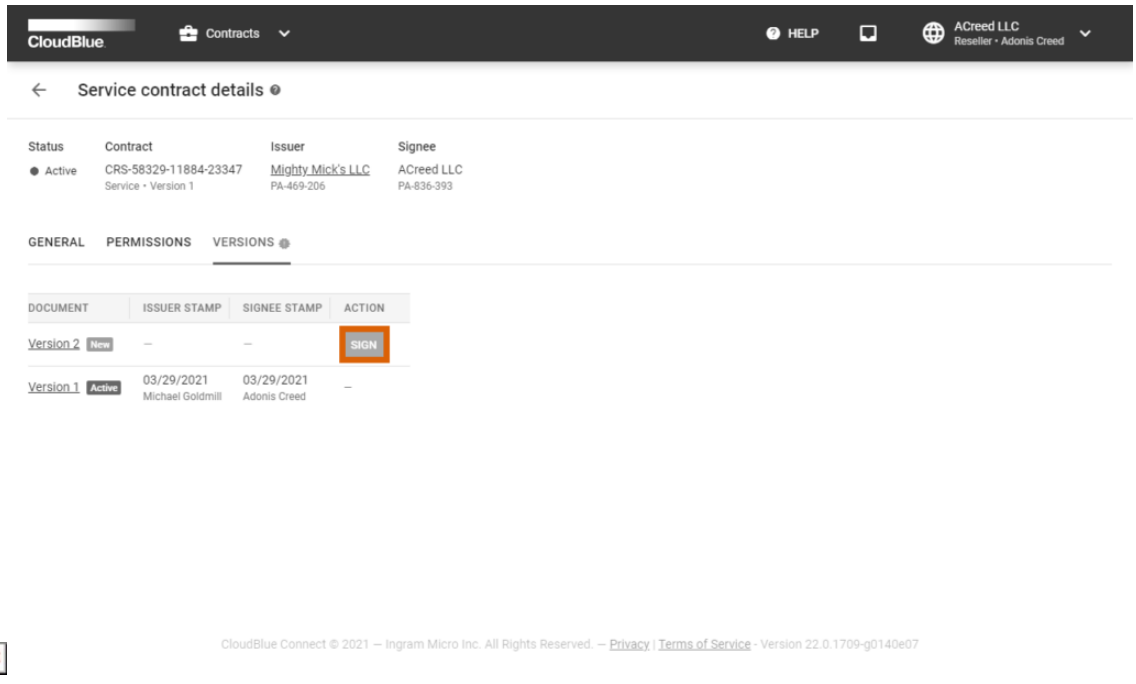


3. Access a new version

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



4. Sign the new version

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

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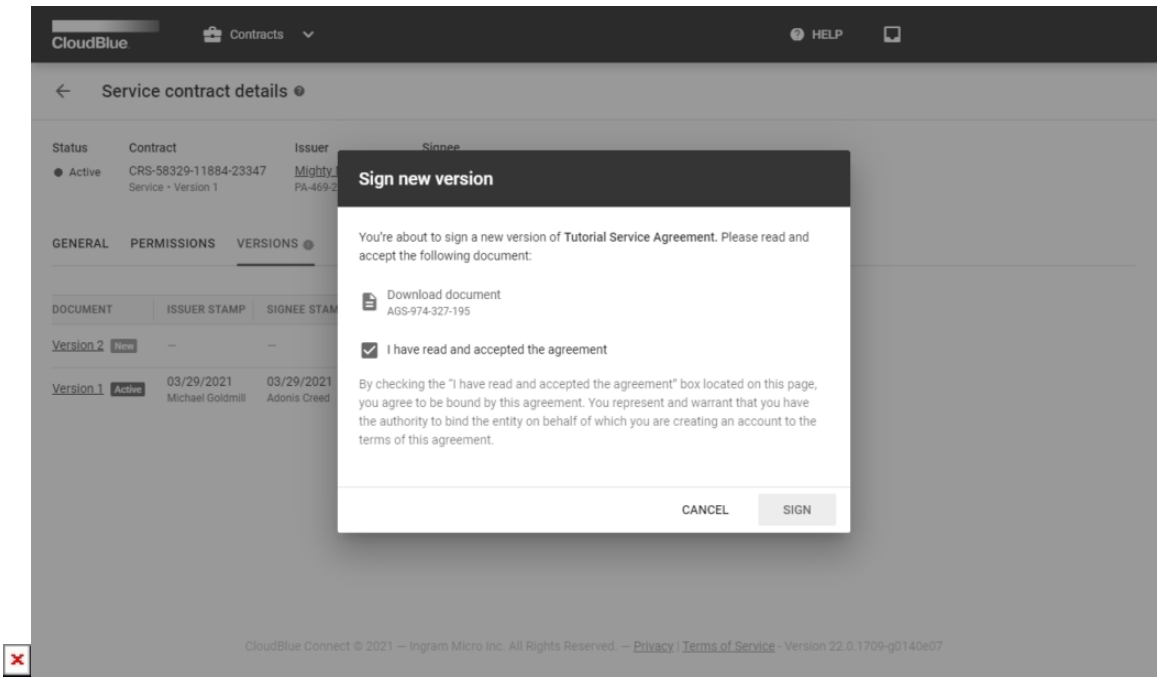
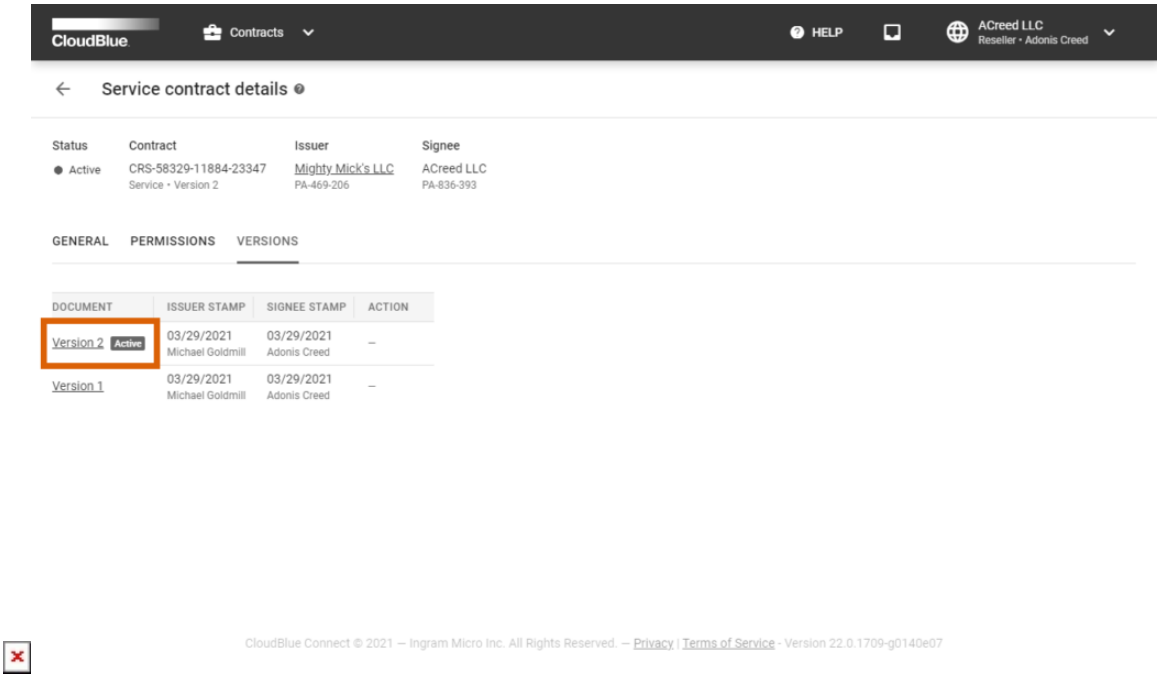


Click **Sign** to sign and activate your updated service agreement.

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



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