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Referral Contracts



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Overview

Invited Distributors can enroll a *Referral Contract* (also called *Direct Sourcing Contracts* or *Direct Contracts*) to arrange direct collaboration with Vendors via Product Catalog. Specifically, the system allows organizations to enroll a referral contract in case the Sourcing Distributor creates a *Referral Agreement* and attaches it to the configured *Service Agreement*. Navigate to the Referral Agreements documentation and Catalog Management documentation for more details.



Program Agreement is Required!

In case your organization needs to enroll a new referral contract, make sure that your organization created at least one *Program Agreement*. Refer to the Program Agreement documentation for more details.

The following describes how to enroll a referral contract and how invited Distributors can start collaborating with Vendors on the CloudBlue Connect platform.

Enrolling Referral Contracts

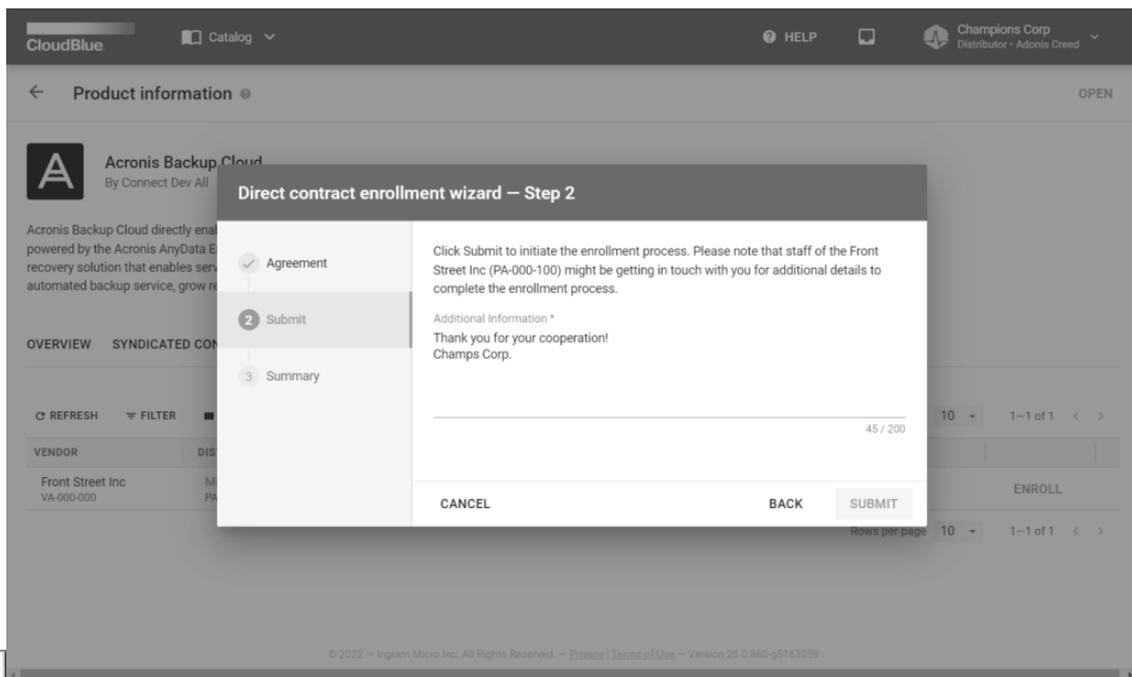
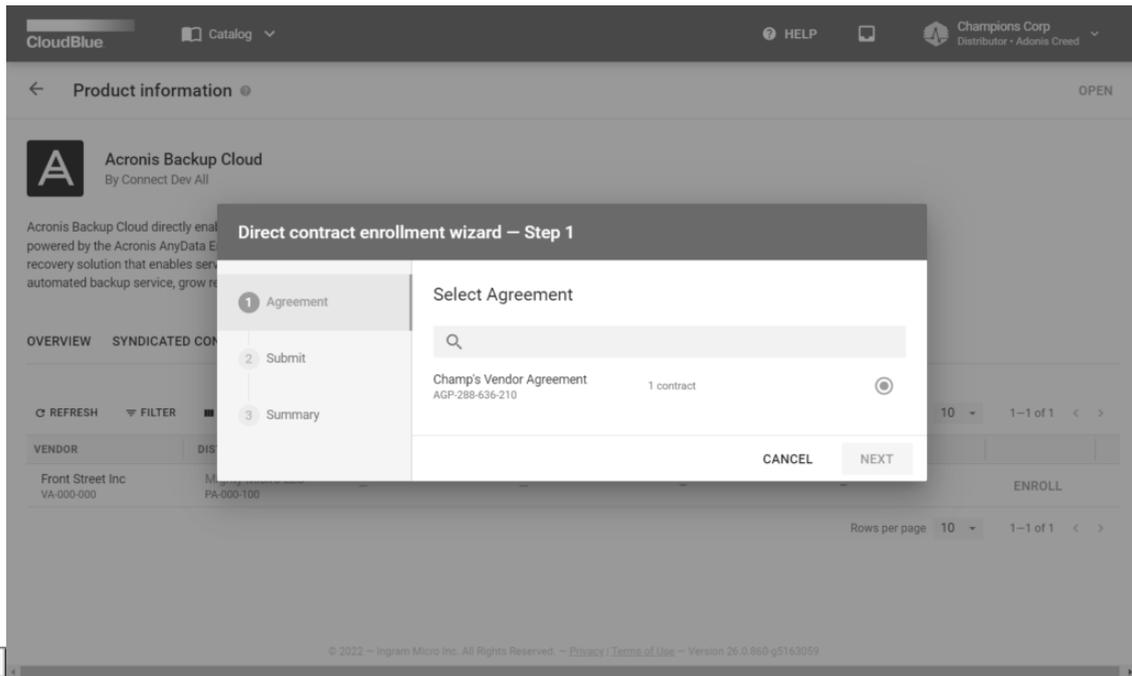
Access the Catalog module and select a product that provides a referral agreement in the **Direct Contracts** tab.

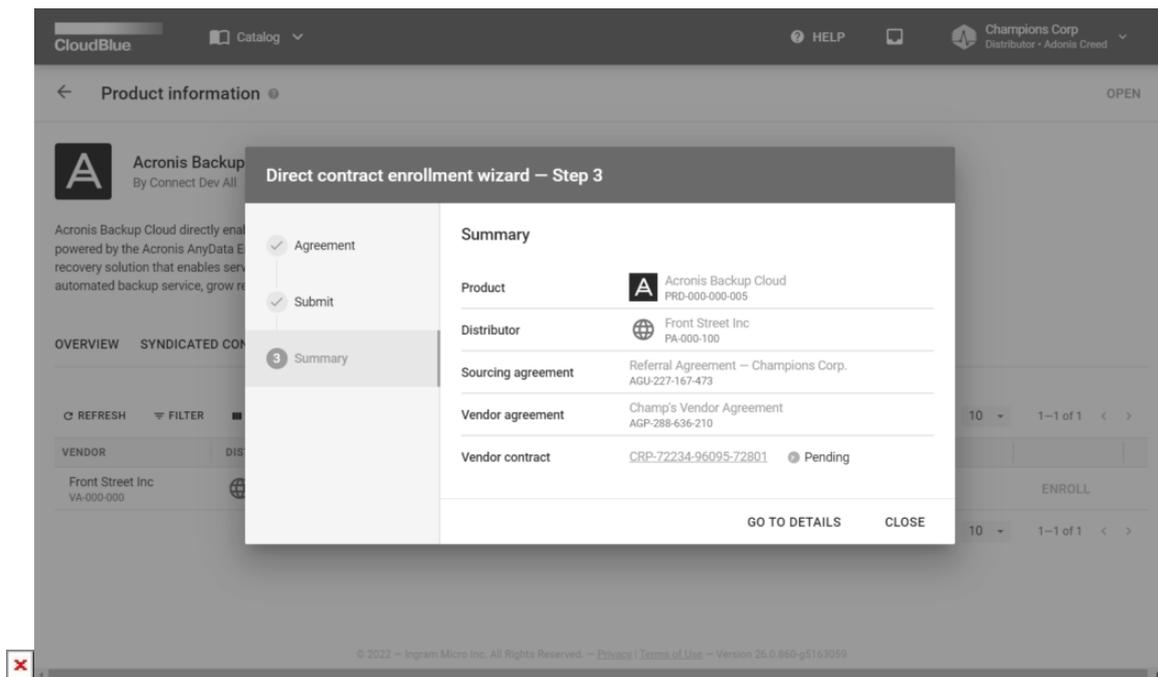
Click the **Enroll** button to launch a referral contract creation wizard. Thereafter, follow the wizard steps to successfully create and enroll a referral contract:

The screenshot shows the CloudBlue interface for 'Acronis Backup Cloud'. The 'DIRECT CONTRACTS' tab is active. Below the product description, there are tabs for OVERVIEW, SYNDICATED CONTRACTS, DIRECT CONTRACTS, and VERSIONS. A table displays contract details with an 'ENROLL' button highlighted in orange.

VENDOR	DISTRIBUTOR	SOURCING AGREEM...	VENDOR AGREEMENT	CONTRACT ID	STATUS	
Front Street Inc VA-000-000	Mighty Mick's LLC PA-000-100	-	-	-	-	ENROLL







1. **Agreement:** The system prompts Distributors to select their defined Program Agreement. This agreement will be sent to the product Vendor once your contract is submitted successfully.

2. **Submit:** Specify any additional information that may be required to process your contract. Click the *Submit* button to enroll your referral contract and .

3. **Summary:** The system will provide a summary with the specified Distributor, product, target marketplace and your created contract.

Click the **Go to Details** button to access your created contract or click **Close** to close the summary.

As a result, the system will submit your created contract to Vendors. Once Vendors successfully approve the submitted contract, your organization can start collaborating with Vendors on the Connect platform.



Program Contracts

Note that once invited Distributors enroll a referral contract, the CloudBlue Connect platform will generate a *Program Contract*. Therefore, the system will prompt Vendors to process a new submitted program contract and consequently confirm collaboration with



Distributors.

Processing Program Contracts

Once Distributors submit their program contract to Vendors on the CloudBlue Connect platform, Vendors are required to process such contracts to initiate new business collaboration. In case Vendors successfully sign the program contract, the system allows Distributors to list the product within their marketplace.

The following steps demonstrate how Vendors can process the submitted program contract and start collaborating with Distributors.

CONTRACT	AGREEMENT	ISSUER	CREATED...	MARKETPLACE	STATUS
CRP-12401-29624-21428 Program - Version 1	Front Street Inc. Agreement AGP-182-432-382	Champions LTD PA-055-101	11/02/2021 7:04 PM	-	● Processing



CloudBlue Partners HELP Front Street Inc Vendor - Robert Balboa

Program contract details SIGN CONTRACT

Status	Contract	Issuer	Signee
● Processing	CRP-12401-29624-21428 Program - Version 1	Champions LTD PA-055-101	Front Street Inc VA-055-000

GENERAL VERSIONS

Program agreement
Front Street Inc. Agreement
AGP-182-432-382

Note to signee
Thank you for collaborating with Champions LTD!

Created	Updated
11/02/2021 7:04 PM Clubber Lang (UR-055-000-003)	11/02/2021 7:04 PM

Sign contract

You're about to sign Program contract. Please read and accept the following document:

Front Street Inc. Program Agreement

I have read and accepted the agreement

By checking the "I have read and accepted the agreement" box located on this page, you agree to be bound by this agreement. You represent and warrant that you have the authority to bind the entity on behalf of which you are creating an account to the terms of this agreement.

CANCEL SIGN



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HELP

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Vendor - Robert Balboa

Program contract details

Status	Contract	Issuer	Signee
Active	CRP-12401-29624-21428 Program - Version 1	Champions LTD PA-055-101	Front Street Inc VA-055-000

GENERAL VERSIONS

Program agreement
Front Street Inc. Agreement
AGP-182-432-382

Note to signee
Thank you for collaborating with Champions LTD!

Created	Updated
11/02/2021 7:04 PM Clubber Lang (UR-055-000-003)	11/02/2021 7:04 PM



1. Vendors are required to access the **Partners** module and locate a submitted program contract within the **Contracts** tab.
2. Click on the program contract identifier to access the *contract details* screen. Vendors can use this screen to get familiar with the provided terms and conditions.
3. Click the **Sign Contract** button to open a specific form and sign the program contract.
4. Check *I have read and accepted the agreement* checkbox and click the **Sign** button.

Therefore, Vendors will successfully sign a program contract that is submitted by enrolling a referral contract. Note that the status of this contract should be also switched to *Active*. This indicates that the specified Distributor can start collaborating with the specified Vendor by using the Connect platform.



Following operations are available

Once a referral contract and a program contract are successfully activated, the Distributor and the Vendor can proceed with following operations. Specifically, the system allows creating and signing Distribution Agreement, managing required listings, establishing a product to hub connection, and performing other operations on the Connect platform that streamline and enhance business collaboration with your partners.