https://cloudblue.com

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.

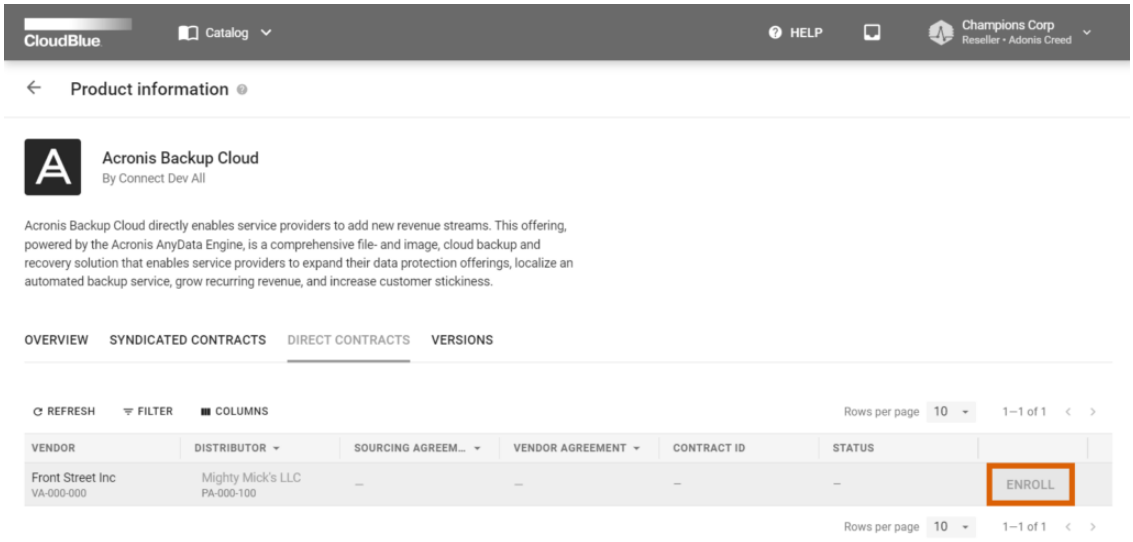
> Program Agreement is Required!
>
> In case your organization needs to enroll a new referral contract, make sure that your organization created at least one *Program Agreement*. Refer to the Program Agreement documentation for more details.

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:



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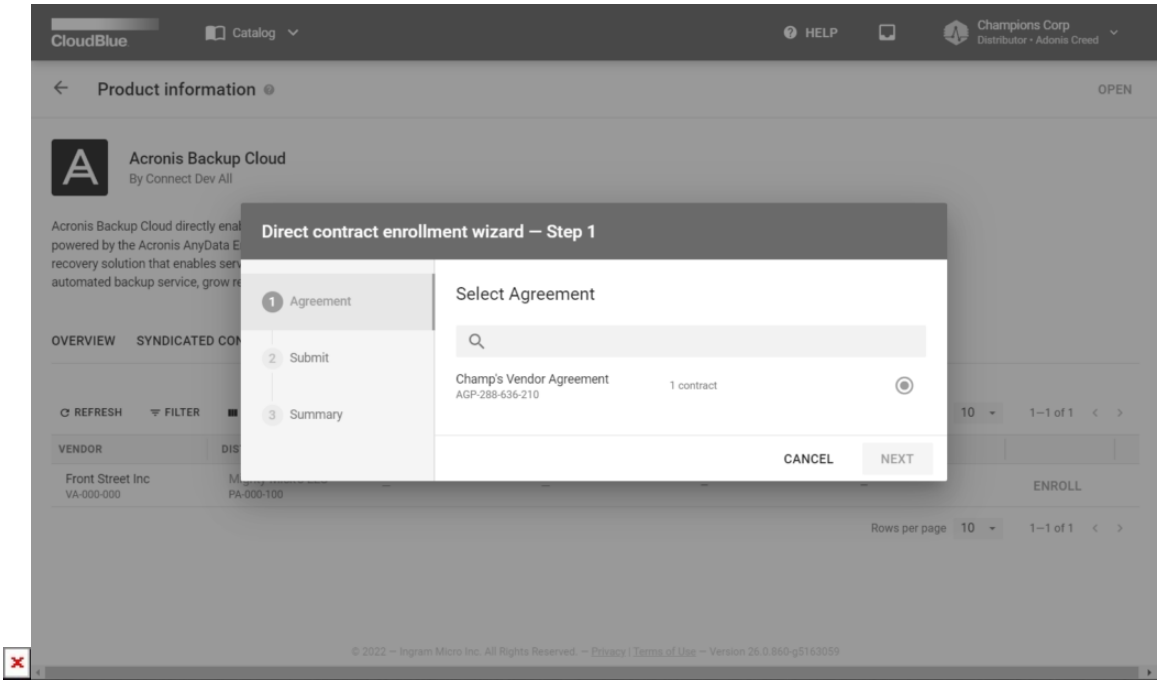

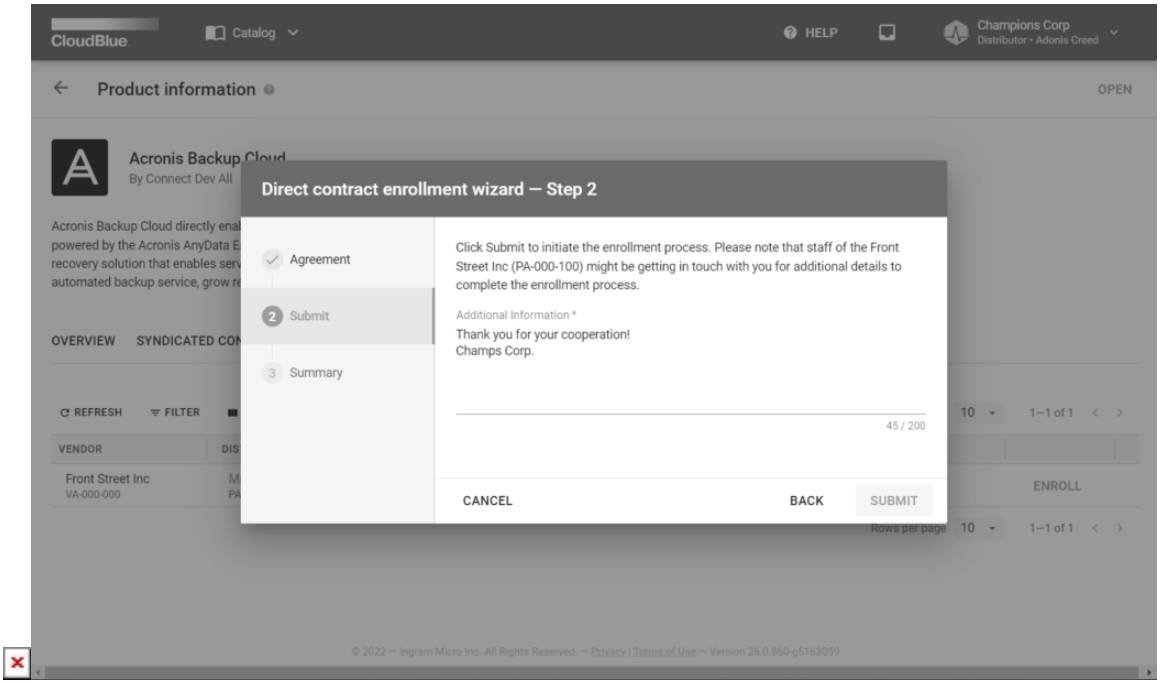

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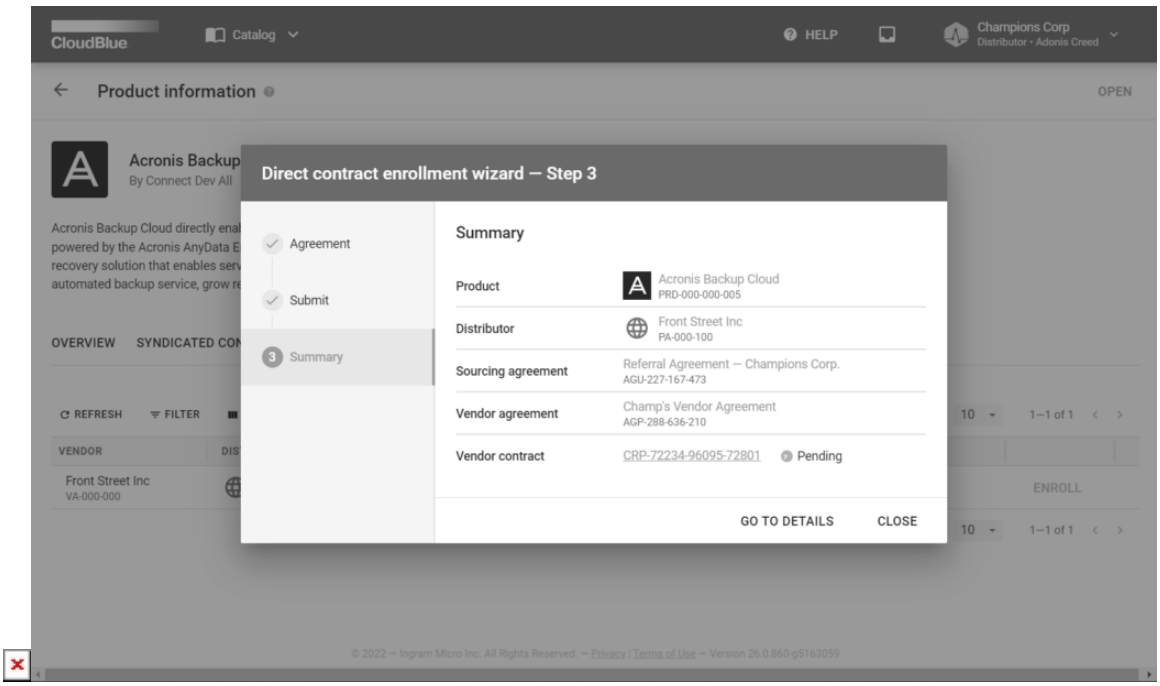

1. **Agreement**: The system prompts Distributors to select their defined Program Agreement. This agreement will be sent to the product Vendor once your contract is submitted successfully.

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

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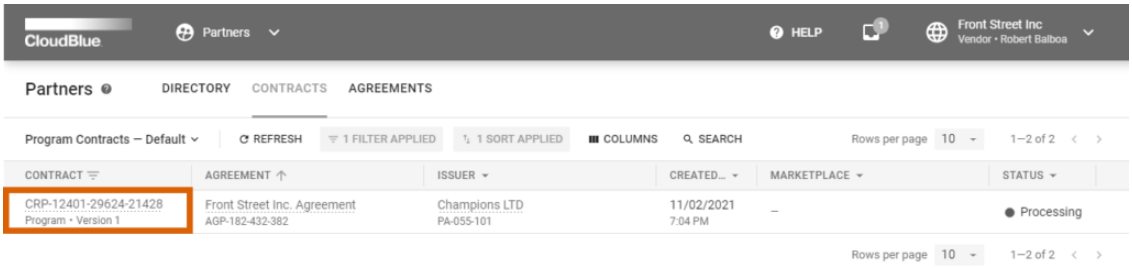
> Distributors.

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.



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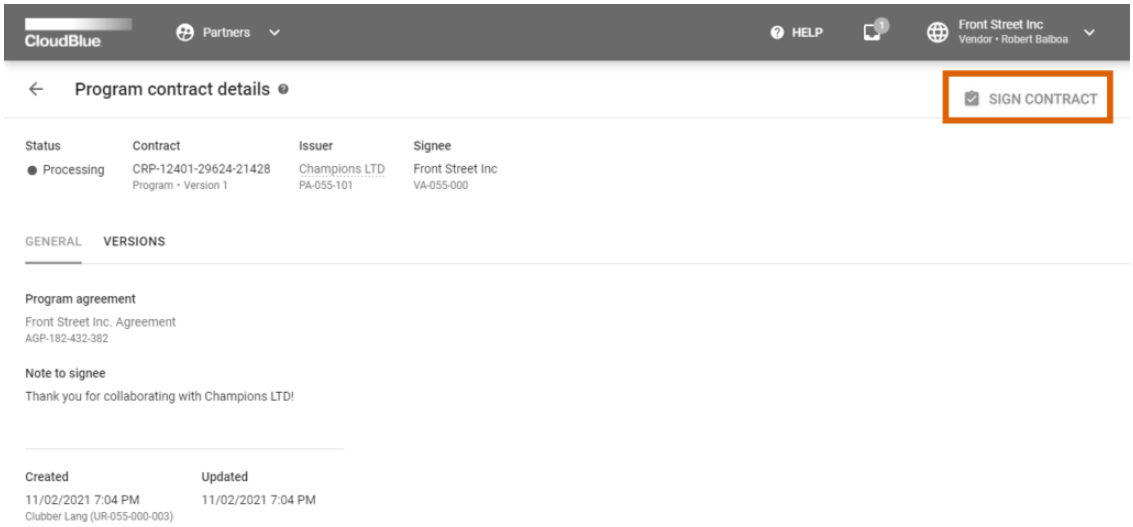

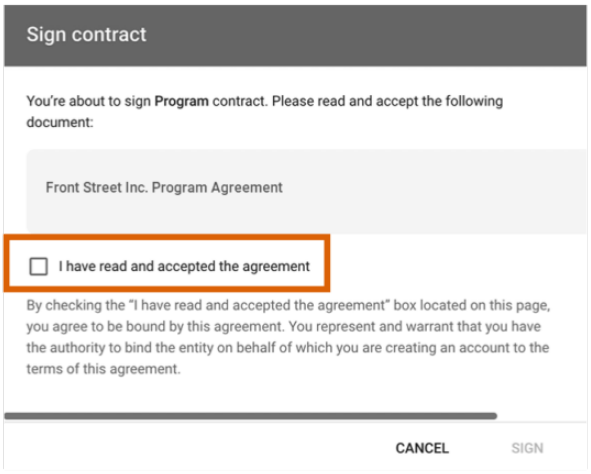

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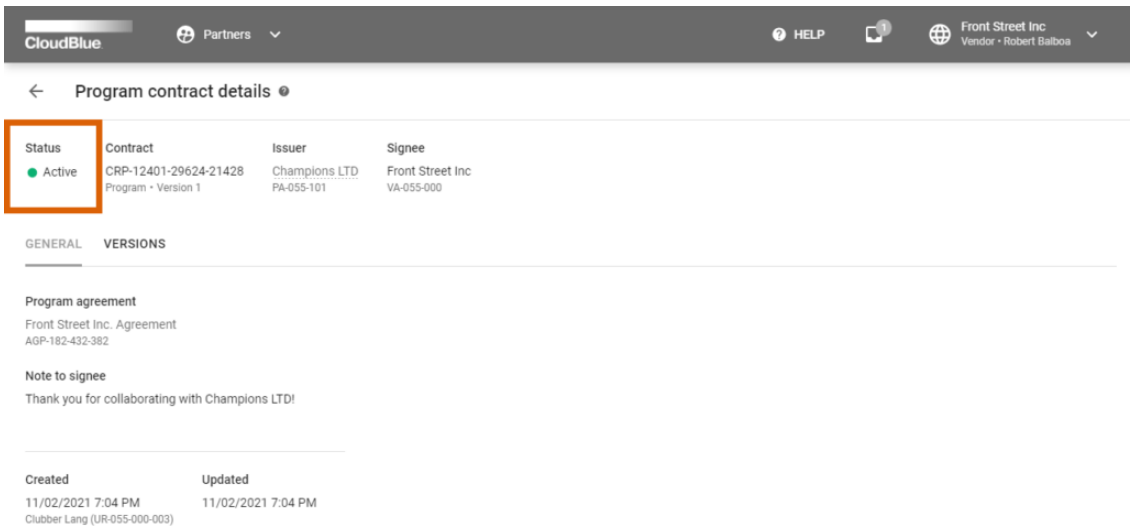

1. Vendors are required to access the **Partners** module and locate a submitted program contract within the **Contracts** tab.
2. Click on the program contract identifier to access the *contract details* screen. Vendors can use this screen to get familiar with the provided terms and conditions.
3. Click 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.

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