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Documentation Modules Products

Guidelines

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The product **Guidelines** functionality allows Vendors within the platform to set up product guideline rules that can be referenced by the distributors that the product is listed to. These Guidelines are a configurable rules that Vendors can use to specify how a specific item/SKU can interact with other items/SKUs within the product item list. These guidelines are important for Vendors that may have complex item lists that have certain rules of how the product's items can be sold.

Overview

The Guidelines within the CloudBlue Connect® Product module allows vendors to configure rules that can identify a specific item (source item), what the rule is (type), which scope the rule should apply to (scope), and which target item (target item) is affects the rule.

- Source Item: This is the item that the customer has within the cart, purchase order, or subscription
- Type: These are the rules that are triggered
  - Conflicts with: This item cannot be combined with the Target item
  - Require Specific Item: This item must be combined with the Target item
- Scope: How wide ranging should the rule be applied to (Note: only Conflicts with type will allow for the selection of scope)
  - Subscription: This rule will only be applied to the subscription
  - Account: This rule will be applied on an end-customer account level
- Target: This is the item that the rule is applied against

Some examples include:

- Customer must purchase the support item with the core base item
- Customer cannot have a business-level support item with an enterprise-level support item
- Customer cannot have an personal-level subscription item when they have an active enterprise-level subscription item on a different order/subscription

> ▲
> Warning
>
> All rules set up within Guidelines are merely just guidelines. Distributors and Marketplace Operators will have to enforce these guidelines within the marketplace. Connect will not validate and enforce the guidelines set within the product against the subscription of the same product.

Adding a Guideline Rule

Access the product menu of the specific product and navigate to the Guidelines tab. Once within the Guidelines page, click **Add Rule** to launch the configuration screen.

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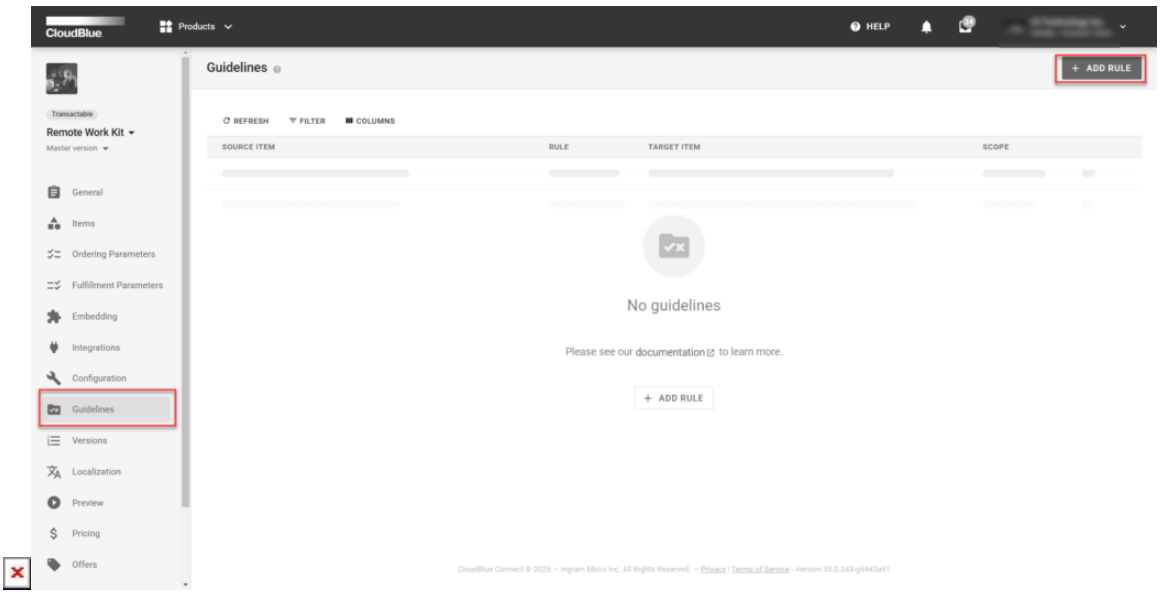

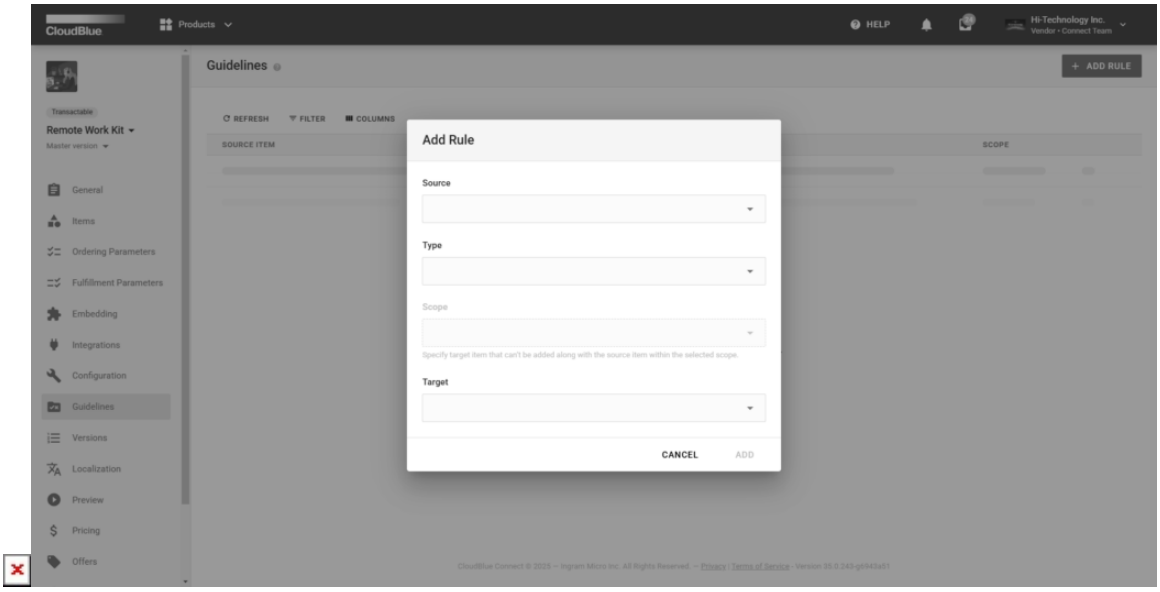

Rules can be set up in with the configured fields to **Source Items, Type, Scope, and Target Items**

Deleting a Guidelines Rule

Locate the Guideline rule that you want to remove from your account and click the vertical ellipsis (⋮) icon on the corresponding row. Thereafter, click the **Delete** button to remove this Guideline rule.

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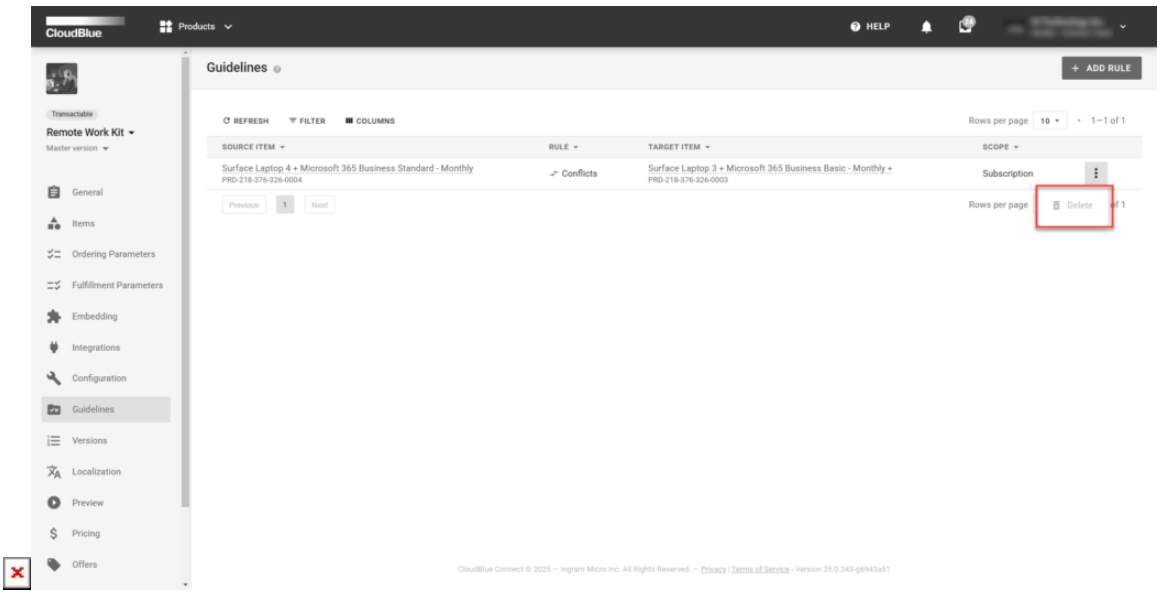

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