



Service Description

PROFESSIONAL SERVICES

July 2021

This Professional Services Description (“**Service Description**”) describes the Professional Services provided by CloudBlue (or Ingram Micro) to Customer(s) (the “**Services**”). This Service Description, together with any attachments, forms an integral part of the Agreement (as defined), and is part of and incorporated by reference into customer’s (“Customer(s)”) executed agreement and all related exhibits and schedules with CloudBlue (or Ingram Micro), which governs the use of the Services, (herein after referred to as the “Agreement”). All capitalized terms in this Services Description have the meanings ascribed to them in the Agreement (defined below) or in the Definitions section.

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1 PROFESSIONAL SERVICES

1.1 OVERVIEW

CloudBlue is driving value out of IT through its innovative Professional Service offerings. CloudBlue solutions leverage creativity to deliver value to Customer's business. CloudBlue starts by understanding the Customer business and its objectives. CloudBlue aims to assist Customers to experience high returns from their IT spend, since CloudBlue aligns the Services it provides with Customer objectives. Customers can select from either Deployment Services or Education Services to receive the appropriate service for their needs.

CloudBlue provides a range of Professional Services that are designed to bring value to Customer's business.

CloudBlue Professional Services offerings are categorized in two groups:

- a. Deployment Services.
- b. Education Services.

The parties acknowledge and agree that this Overview section is provided only for the convenience of the parties and does not bind either party to any additional obligations or perform any services that are not specified below.

2 DEPLOYMENT SERVICES

2.1 OVERVIEW AND CATEGORIES

CloudBlue Deployment Services are aligned to a Customer’s specific functionality or configuration. Deployment Services follow a standard project management delivery methodology.

Project Management: CloudBlue will assign a resource to manage Deployment Services and will provide Customer with the name and contact information of such project manager, following CloudBlue’s receipt of a signed statement of work (SoW). If provided, project management includes the following:

- a. Project planning, including report writing (status reports, meeting minutes etc.), establishing the project team and definition of roles and responsibilities, project structure, deadlines, progress review of phases, project controlling, preparing and conducting transition to Managed Services, and setting criteria for completion of the Services.
- b. Change-Order Management, error logging, risk management and development of alternative strategies.

Milestones (phases): The approach is to simplify the milestones for billing and are also referred to as groupings or project phases that have specific tasks. Delivery of the deployment project will be performed in a series of these phases and tracked and aligned to payment milestones consisting of deliverables, prerequisites, assumptions and exclusions as set forth below. Before proceeding from one phase to the next, Customer must provide acceptance of the Deliverables, if any, which may be applicable to the completed phase. Acceptance may not be unreasonably conditioned, withheld or delayed.

Implementation Services	Integration Services	Migration Services
Install Milestone 50%	Design Milestone 50%	Prepare Milestone 50%
Configure Milestone 25%	Build Milestone 25%	Import Milestone 25%
Verify Milestone 25%	Accept Milestone 25%	Validate Milestone 25%

2.2 CLOUDBLUE COMMERCE AND CONNECT PLATFORMS IMPLEMENTATION SERVICES

2.2.1 OVERVIEW

Utilizing CloudBlue experience and ecommerce platform knowledge, CloudBlue Solution Architects spend time working with Customer's team to understand both the initial requirements of the CloudBlue platform and business operations, as well as intended future goals.

As part of a thorough requirements analysis, a Solution Design Document captures the necessary requirements for a proper configuration of the platform.

CloudBlue Implementation Engineers, Architects, and Cloud Professionals form an integral part of its business. CloudBlue provides access to a range of cloud experts for the set-up, optimization and delivering a finished platform that meets Customers unique business needs, ready for use.

2.2.2 MODULAR SOLUTION PLANS AND ADD-ONS IMPLEMENTATION SERVICES

The goal of the Services under the modular solutions model is to enable CloudBlue Customers to rapidly establish CloudBlue platform(s) environment(s), achieve go to market as quickly as possible and to minimize the time to revenue.

There are three modular solution plans for distinct business scenarios that cover both CloudBlue Commerce and CloudBlue Connect platforms.

These plans can also be enhanced with three modular solution add-ons, that add flexibility.

2.2.2.1 PLAN #1 – CATALOG MANAGEMENT

This offering delivers access to all functionality of the CloudBlue Connect platform (Vendor and Provider accounts).

It is intended to enable product portfolio management and for the CloudBlue Connect platform to work with 3rd party commerce / marketplace platforms, without CloudBlue Commerce.

Service delivery is based on three phases:

1. Install Milestone

The tasks and outcomes for this phase include the following:

- a. Launch the project
- b. Gather and define all information required for the successful setup of CloudBlue Connect, including Customer branding configuration documents

2. Configure Milestone

The tasks and outcomes for this phase include the following:

- a. Assist Customer with creating Provider and Vendor (if required) accounts in CloudBlue Connect
- b. Set up Customer branding for the CloudBlue Connect portal in accordance with the branding configuration documents

3. Verify Milestone

The tasks and outcomes for this phase include the following:

- a. Make sure that Customer can access the created Provider and Vendor (if created) accounts in CloudBlue Connect successfully.
- b. Provide test support for User Acceptance Testing (UAT) of CloudBlue Connect configuration.
- c. Track, manage, report on, collaborate on and resolve any configuration defects of CloudBlue Connect.
- d. Obtain Customer acceptance sign-off on the UAT completion.

4. Exclusions

The exclusions are the following:

- a. Deployment or configuration of the CloudBlue Commerce platform.
- b. [Standard service exclusions.](#)

5. Training

“Connect Essentials Provider eLearning – 10 seats” training will be provided as part of this service, that includes:

- a. Access to the Webinar on Catalogue Management that includes:
 - i. Overview.
 - ii. Provider experience.
 - iii. Business flow.
 - iv. Glossary.

Time needed to complete the training:

3 (three) hours of eLearning

2.2.2.2 PLAN #2 – SUBSCRIPTION AND CATALOG MANAGEMENT

This offering builds upon [Plan #1 - Catalog Management](#) and extends its deliverables to 1 (one) environment of the CloudBlue Commerce platform intended to enable direct business (i.e., subscription management for end-customers, buying directly from the service provider).

Indirect business (i.e., partner / reseller / channel business) can also be enabled outside of CloudBlue Commerce in case Customer has its own or other third-party systems / platforms available for this.

Service delivery is based on three phases:

1. Install Milestone

The tasks and outcomes for this phase include the following:

- a. All tasks and outcomes for the Install Milestone of [Plan #1 - Catalog Management](#).
- b. Gather and define all information required for the successful deployment of CloudBlue Commerce (please see Pre-Requisites for details).
- c. Deploy all necessary standardized Azure infrastructure for the CloudBlue Commerce platform (please see Assumptions for details).
- d. Deploy the CloudBlue Commerce platform modules for the business functions enabled by this service (please see Assumptions for details).

2. Configure Milestone

The tasks and outcomes for this phase include the following:

- a. All tasks and outcomes for the Configure Milestone of [Plan #1 - Catalog Management](#).
- b. Using standardized configuration templates, configure the CloudBlue Commerce platform to support the business functions enabled by this service (please see Assumptions for details).
- c. Configure the integration of CloudBlue Commerce and CloudBlue Connect.
- d. Provide Customer with “as-built” documentation.

3. Verify Milestone

The tasks and outcomes for this phase include the following:

- a. All tasks and outcomes for the Verify and Launch Milestone of [Plan #1 - Catalog Management](#).
- b. Perform internal validation of the deployed configuration of the CloudBlue Commerce platform, the integration of CloudBlue Commerce and CloudBlue Connect and the deployed Connectors.
- c. Perform 1 (one) Customer walk-through and Q&A session.
- d. Provide test support for User Acceptance Testing of the CloudBlue Commerce environment.
- e. Track, manage, report on, collaborate on and resolve any configuration or deployment defects of CloudBlue Commerce using the following process:
 - i. Customer opens issues in the issue tracking system that the deployment team uses (e.g., Jira).
 - ii. Deployment and/or technical teams analyse the issue, for which more input or working session(s) can be required with Customer.
 - iii. Deployment and/or technical teams resolve the issue.
 - iv. Customer re-tests to validate that the issue is resolved.
- f. Obtain Customer acceptance sign-off on the UAT completion.

4. Pre-Requisites

The pre-requisites are the following:

- a. Access to the Azure Subscription and Tenant where CloudBlue Commerce will be deployed – the following roles must be assigned to the deployment team in the Azure Active Directory:
 - i. Application Administrator (to be able to deploy Azure Kubernetes Services (AKS) cluster).
 - ii. At the Azure Subscription level:
 - i. Contributor.
 - ii. Virtual Machine Administrator Login.
- b. Azure SendGrid application must be deployed by Customer.
 - i. Alternatively,
 - i. Application Administrator role is granted to the deployment team.
 - ii. Acceptance for Azure SendGrid to be deployed by the deployment team is provided in the pre-work documents.
 - iii. Plan (pricing tier) and Contact Details for Azure SendGrid are specified in pre-work documents.
- c. If Customer has not purchased the Azure Infrastructure Management option of CloudBlue Managed Services and plans to manage Azure infrastructure themselves, then any security hardening that Customer plans to perform must be performed before the start of the deployment.
- d. The Solution Design Document (“SDD”) must capture all detailed Customer use cases enabled by the CloudBlue Commerce platform. The SDD must be completed, finalized and accepted by Customer before the start of the deployment. This document is to be used for the definition of the success criteria for UAT .
- e. Configuration documents capturing all CloudBlue Commerce platform configuration decisions (“pre-work documents”) must be completed, finalized and accepted by Customer before the start of the deployment. These documents must capture at least the following information:
 - i. Company Name
 - ii. Preferred Azure domain prefix
 - iii. Currency
 - iv. Tax Registration ID
 - v. Taxation System Algorithm – from the list of “Default”, “Same Country/State”, and “EU VAT”
 - vi. Company Address (Street Address Line 1, Street Address Line 2, City, Postal Code, Country)
 - vii. Admin Contact Details (First Name, Middle Name (optional), Last Name, Email, Phone)
 - viii. Billing Contact Details (First Name, Middle Name (optional), Last Name, Email, Phone)
 - ix. Technical Contact Details (First Name, Middle Name (optional), Last Name, Email, Phone)
 - x. Languages to be enabled in addition to English – from the list of Dutch, French, German, Italian, Spanish, Russian, Brazilian Portuguese, and Japanese
 - xi. Notification Settings
 - xii. Products to be enabled – using up to 3 (three) Connect Connectors (Connect Product Packages)

- xiii Prices to set for products - provided in the format of JSON and/or CSV file(s) that can be used by the existing automated tools (for example, Product Configuration Manager, which includes Product Modeller and Product Inventory) as is, without any transformations (alternatively, acceptance to perform standard configuration of products provided by CloudBlue and Vendors, without changes)
 - xiv Credit terms and Customer class settings (alternatively, acceptance of the standard configuration)
 - xv Up to 10 (ten) additional roles for Customer staff for BSS and OSS components of CloudBlue Commerce
 - xvi Any changes to the standard configuration of UX1 (alternatively, acceptance to perform standard configuration without changes)
 - xvii Full details of any order flow customizations (alternatively, acceptance of the default configuration)
 - xviii Whether to deploy the default Monitoring Suite (Zabbix-based) or not
 - xix Operating Systems to be used on all VMs
 - xx Finalized specific networking setup requirements compatible with CloudBlue Commerce (alternatively, acceptance of the default configuration)
 - xxi Public IP addresses
 - xxii APSC proxy prefix for the Azure domain
 - xxiii SMTP credentials - address, login and password for Azure SendGrid
 - xxiv SSL certificate for the Azure domain FQDN (or acceptance to use a Let's Encrypt certificate)
 - xxv SSL certificate for the APSC proxy FQDN (or acceptance to use a Let's Encrypt certificate)
 - xxvi Permanent license for CloudBlue Commerce (or acceptance to use a one-month trial license)
- f. All required contractual agreements setup in CloudBlue Connect must be completed before the start of CloudBlue Commerce deployment
 - g. Trainings included in the service must be completed before User Acceptance Testing commencement
 - h. [Standard Service Pre-Requisites](#)

5. Limitations and Assumptions

The limitations and assumptions are the following:

- a. This service includes 1 (one) environment of CloudBlue Commerce. Additional environments (including Staging environments) are purchased extra by purchasing additional units of this service.
- b. The following business functions will be enabled in CloudBlue Commerce by this service:
 - i. Service Plan definition and management, including pricing
 - ii. Promotions, campaigns, discounts, bundling definition and management
 - iii. Subscription lifecycle management
 - iv. Customer account management (direct customers / end-customers)
 - v. Customer credit line management
 - vi. Producing rating data and allowing access to it via API / RDE (Rated Data Export)
 - vii. CloudBlue-branded UX1 for the platform Customers' own internal use (not for end-customers or end-users)
 - viii. Multi-language operations

- c. This service includes up to 3 (three) integrations using Connect Connectors (Connect Product Packages). Any additional integrations must be purchased separately.
- d. CloudBlue Commerce will be deployed to support 1 (one) Operating Company / Country (“OpCo”). This primary OpCo (primary CloudBlue Commerce platform tenant) will be configured at Level 1 in the platform account hierarchy. Additional OpCos are available as an add-on.
- e. In case additional unit(s) of this service are purchased in order to deploy Staging environment(s) of CloudBlue Commerce, then Staging environment(s) will be deployed after the deployment of Production environment(s) is complete.
- f. Only Azure is supported for the CloudBlue Commerce platform environment
- g. The following Azure infrastructure will be deployed:
 - i. Azure Database for PostgreSQL Server
 - ii. AKS Cluster
 - iii. VM for BSS Application (Billing Node)
 - iv. VM for OSS Application (Management Node)
 - v. VM for APSC Proxy
 - vi. Jump Host
 - vii. If requested in pre-work documents, VM for Monitoring Suite (Zabbix-based)
- h. The following configuration for the deployed infrastructure will be performed:
 - i. CIS L1 security hardening will be applied
 - ii. SELinux will be configured
- i. The following components of the CloudBlue Commerce will be deployed:
 - i. BSS Application
 - ii. OSS Application
 - iii. APSC Proxy
 - iv. Microservices
 - i. User Account Management
 - ii. Identity Service (IDP)
 - iii. Order Management
 - iv. Approval Engine
 - v. Vendor-Rated Data Manager
 - vi. Reporting and Data Export (RDE)
 - vii. Discount Manager
 - viii. GDPR Compliance
 - ix. UX1 User Interface
 - x. UX1 Marketplace
 - xi. Connect Adapter

- xii. Connect Extension
 - v. Up to 3 (three) Connect Product packages
 - vi. All platform updates available at the time of deployment
 - vii. If requested in pre-work documents, Monitoring Suite (Zabbix-based)
- j. SMTP settings will be configured to use Azure SendGrid
- k. The default platform UI will be set to UX1
- l. UX1 User Interface for internal Customer use will not have any branding (Customer domain, logo or skin) and will use default Azure domain (FQDN), CloudBlue logo, default skin and a SSL certificate provided by Customer or generated using the Let's Encrypt service
- m. UX1 Marketplace will only be available for internal Customer staff use, to buy on behalf of end-customers (unless an additional Branded Marketplace add-on is purchased)
- n. The following configuration in CloudBlue Connect will be performed, as part of the integration of CloudBlue Commerce and CloudBlue Connect
 - i. 1 (one) Marketplace will be created in Customer's Provider account.
- o. All configurations will be performed in accordance with the pre-requisite documents finalized before the start of the deployment
- p. All products will be configured using the existing automated tools (for example, Product Configuration Manager, which includes Product Modeller and Product Inventory) and the JSON and/or CSV file(s) provided as part of pre-work documents (or the standard configuration of products provided by CloudBlue and Vendors without changes). Further customization of product configuration can be performed by Customer(s) themselves, via CloudBlue Managed Services (if Customer(s) have them purchased and activated) or purchased in addition and to be performed by Professional Services separately.
- q. 1 (one) administrative user account for CloudBlue Commerce will be provided, which can be used by Customer to create all other user accounts for Customer's staff
- r. Up to 10 (ten) additional roles for Customer staff for BSS and OSS components of CloudBlue Commerce will be configured
- s. The following configuration of CloudBlue Commerce will be available only via CloudBlue Managed or Professional Services:
 - i. Configuring Custom Attributes for Accounts and Orders
 - ii. Installing new Connect Connectors (Connect Product Packages)
 - iii. Modifying delegated Syndication service plans
 - iv. Creating additional Product Resources
 - v. GDPR Activities, such as Right to be Forgotten and Right to Data Export
- t. Project meetings are limited to 5 (five) hours per week at the mutually agreed time within Monday to Friday 6:00 AM to 12:00 AM UTC+8 time window.
- u. Once commenced, the deployment will be performed to completion, with all supplied pre-requisites and it will not be put on hold/paused for any reason.
- v. UAT support is limited to 3 (three) days per 1 (one) environment.
- w. UAT support is limited to the resolution of issues raised via the ticketing system, used by the deployment team (e.g. Jira) and excludes trainings and how-to questions.

- x. In case any security hardening performed by Customer interferes with any CloudBlue Commerce functionality, the interfering elements of security hardening configuration must be rolled back.

6. Exclusions

The exclusions are the following:

- a. Deployment and configuration of the CloudBlue Commerce platform modules, that enable:
 - 1. Reseller creation and management. It is available on another plan.
 - 2. UX1 or any other interface for end-customers or end-users of the Customer (e.g., Marketplace / Online Store, Self-Service portals, etc.). It is available as an add-on.
 - 3. Billing, invoicing or payment processing in CloudBlue Commerce. It is available as an add-on.
- b. Deployment and configuration of any other CloudBlue Commerce modules other than explicitly specified
- c. Reconfiguration of any accepted standard or default configuration or any other configuration finalized in the pre-requisite documents before the start of the deployment
- d. Configuration of additional products / service plans besides the provided in pre-work documents JSON and/or CSV file(s)
- e. Manual reconfiguration of products / service plans
- f. Manual adjustments of product pricing
- g. Configuration of tiered pricing for resource rates unless it's used by the standard product pricing models
- h. Configuration of sales categories hierarchy
- i. Configuration or customization of email notification templates
- j. Configuration of promotions or discounts
- k. Configuration of additional credit terms and customer classes. This can be done by Customer(s) themselves, via CloudBlue Managed Services (if Customer(s) have them purchased and activated) or purchased in addition and to be performed by Professional Services separately.
- l. Any customization of any CloudBlue Commerce or Connector UI screens, including but not limited to customization of out-of-the-box translation besides the standard language packs
- m. Deployment of Disaster Recovery or High Availability configurations.
- n. Development of new language packs.
- o. Modification of layouts or templates of the existing pre-defined reports.
- p. Creation of custom reports.
- q. Migration of existing subscriptions from other systems. This is available as a separate service.
- r. Any other configuration of CloudBlue Commerce or any other deliverables, other than explicitly specified
- s. [Standard service exclusions](#)

7. Plan Upgrade

In case this service is purchased to upgrade from the completed deliverables of [Plan #1 – Catalog Management](#) deployment, then the already completed tasks from that service will not be repeated, only tasks and outcomes from the milestones of this service will be delivered.

8. Training

The following trainings will be provided as part of this Service, and they must be completed before User Acceptance Testing commencement:

1. The same training as in [Plan #1 – Catalog Management](#)
2. **“Commerce Sales Role-Based Instructor-Led Training”** which includes:
 - a. 1 (one) session for up to 10 (ten) people
 - b. Topics
 - i. Placing and managing orders
 - ii. Operations with subscriptions
 - iii. Marketing services
 - iv. Notification overview

Time needed to complete the training:

1. The same time as in [Plan #1 – Catalog Management](#)
2. Additionally, 4 (four) hours of Instructor-Led Training

2.2.2.3 PLAN #3 – MULTI-TIER SUBSCRIPTION MANAGEMENT AND CATALOG MANAGEMENT

This offering builds upon [Plan #2 – Subscription and Catalog Management](#) and extends its deliverables with the ability to operate indirect channel business (i.e., multi-tier subscription management for N-tier 3rd party resellers that either have or do not have their own subscription management capability) in 1 (one) environment of the CloudBlue Commerce platform.

Service delivery is based on three phases:

1. Install Milestone

The tasks and outcomes for this phase include the following:

- a. All tasks and outcomes for the Install Milestone of [Plan #2 – Subscription and Catalog Management](#)
- b. Gather and define all information required for the successful **extended configuration** of CloudBlue Commerce (please see Pre-Requisites for details)

2. Configure Milestone

The tasks and outcomes for this phase include the following:

- a. All tasks and outcomes for the Configure Milestone of [Plan #2 – Subscription and Catalog Management](#)
- b. Using standardized configuration templates, configure the CloudBlue Commerce platform to support the **extended** business functions enabled by this service (please see Assumptions for details)

3. Verify Milestone

The tasks and outcomes for this phase include the following:

- a. All tasks and outcomes for the Verify and Launch Milestone of [Plan #2 – Subscription and Catalog Management](#)
- b. Perform internal validation of the deployed **extended** configuration of the CloudBlue Commerce platform
- c. Extend the 1 (one) Customer walk-through and question and answer (Q&A) session, to the **extended business functions**
- d. Provide test support for User Acceptance Testing for the **extended business functions**
- g. Track, manage, report on, collaborate on and resolve any configuration defects for the **extended configuration**, using the following process:
 - i. Customer opens issues in the issue tracking system that the deployment team uses (e.g., Jira)
 - ii. Deployment and/or technical teams analyse the issue, for which more input or working session(s) may be required with Customer
 - iii. Deployment and/or technical teams resolve the issue
 - iv. Customer re-tests to validate that the issue is resolved
- e. Obtain Customer acceptance sign-off on the UAT completion

4. Pre-Requisites

The pre-requisites are the following:

- a. All pre-requisites of [Plan #2 – Subscription and Catalog Management](#)
- b. The Solution Design Document (“SDD”) must **additionally** capture all detailed Customer use cases enabled by the **extended** CloudBlue Commerce platform configuration. The SDD must be completed, finalized and accepted by Customer before the start of the deployment. The SDD is to be used for the definition of the success criteria for User Acceptance Testing.

- c. Configuration documents capturing the configuration decisions **for the first additional reseller** (“reseller pre-work documents”) must be completed, finalized and accepted by Customer before the start of the deployment. These documents must capture at least the following information:
 - i. Company Name
 - ii. Currency to be used to sell
 - iii. Company Address (Street Address Line 1, Street Address Line 2, City, Postal Code, Country)
 - iv. Admin Contact Details (First Name, Middle Name (optional), Last Name, Email, Phone)
 - v. Products to be enabled (delegated service plans)
 - vi. Any changes to the standard configuration of products provided by CloudBlue and Vendors to be delegated – only removal of some products/SKUs from delegation (alternatively, acceptance to perform delegation of all configured products/SKUs without changes)
 - vii. Credit terms and customer class settings for resellers (alternatively, acceptance of the default configuration)
 - viii. Any changes to the standard configuration of UX1 for Resellers (alternatively, acceptance to perform standard configuration without changes)
 - ix. Up to 10 (ten) additional roles for BSS and OSS components of CloudBlue Commerce that need to be made available for resellers (alternatively, acceptance of the default configuration)
 - x. List of notification templates that should be made available for resellers (alternatively, acceptance of the default configuration)
 - xi. Full details of any order flow customizations (alternatively, acceptance of the default configuration)
- d. Trainings included in the service must be completed before User Acceptance Testing commencement

5. Limitations and Assumptions

The limitations and assumptions are the following:

- a. All limitations and assumptions of [Plan #2 – Subscription and Catalog Management](#)
- b. This service includes coverage for 1 (one) environment of CloudBlue Commerce. Coverage for additional environments (including Staging environments) are purchased extra by purchasing additional units of this Service.
- c. The following **extended** business functions will be enabled in CloudBlue Commerce by this service:
 - i. Unlimited number and depth of 3rd party resellers and sub-resellers creation and management (within an Operating Company / Country)
 - ii. Access to CloudBlue Commerce for 3rd party resellers to manage their own direct (end-customers) or indirect (resellers) business using the platform
- d. This service includes configuration of 1 (one) reseller service template, 1 (one) reseller service plan and 1 (one) reseller. Additional reseller creation, reseller service plan or reseller service template configuration are to be performed either by Customer themselves, via Managed Services (if Customer has them purchased and activated), or purchased in addition and to be performed by Professional Services separately.
 - i. Resellers of the primary OpCo will be created at Level 2 and below in the platform account hierarchy
 - ii. Resellers of additional OpCo will be created at Level 3 and below in the platform account hierarchy

- e. UX1 User Interface for internal use of **3rd party resellers** will not have any branding (Customer domain, logo or skin) and will use default Customer's Azure domain (FQDN), CloudBlue logo, default skin and an SSL certificate provided by Customer or generated using the Let's Encrypt service
- f. UX1 Marketplace will only be available for **3rd party resellers'** staff use to buy on behalf of end-customers (unless additional Branded Marketplace add-on is purchased for each reseller that wants it)
- g. Classic Panel will be enabled for **3rd party resellers'** staff use for some business scenarios
- h. Products available for 3rd party resellers will be the products that are configured on the OpCo level and ready for delegation.
- i. All **extended** configuration will be performed in accordance with the pre-requisite documents finalized before the beginning of the deployment
- j. Up to 10 (ten) additional roles for BSS and OSS components of CloudBlue Commerce that need to be made available for resellers will be configured
- k. [Standard Service Pre-Requisites](#)

6. Exclusions

The exclusions are the following:

- a. All exclusions of [Plan #2 – Subscription and Catalog Management](#) except for “*Deployment and configuration of the CloudBlue Commerce platform modules that enables reseller creation and management*” that does not apply
- b. Reconfiguration of any accepted standard or default configuration or any other configuration finalized in the **extended** pre-requisite documents before the start of the deployment
- c. Configuration of promotions or discounts for resellers
- d. Reconfiguration of prices for products delegated to resellers – resellers will get default prices as configured by their parent OpCo/reseller and can adjust them if allowed by privileges configuration
- e. Configuration of additional products / service plans or reconfiguration of delegated products / service plans
- f. Reconfiguration of sales categories hierarchy
- g. Configuration of taxation – resellers will inherit taxation settings from their parent OpCo/reseller
- h. Customization of delegated email notification templates
- i. Configuration of additional credit terms and customer classes. This can be performed by Customer(s) themselves, via CloudBlue Managed Services (if Customer(s) have them purchased and activated) or purchased in addition and to be performed by Professional Services separately.
- j. Any customization of any CloudBlue Commerce or Connector UI screens, including but not limited to customization of out-of-the-box translation besides the standard language packs
- k. Any other configuration of CloudBlue Commerce other than explicitly specified
- l. [Standard service exclusions](#)

7. Plan Upgrade

In case this service is purchased to upgrade from the completed deliverables of [Plan #2 – Subscription and Catalog Management](#) deployment, then the already completed tasks from that service will not be repeated, only tasks and outcomes from the milestones of this service will be delivered.

8. Training

The following trainings will be provided as part of this service, and they must be completed before User Acceptance Testing commencement:

1. The same trainings as in [Plan #2 – Subscription and Catalog Management](#)
2. Instructor-Led Training on Reseller Management, which includes:
 - a. 1 (one) session for up to 10 (ten) people
 - b. Topics:
 - i. Reseller Concept
 - ii. Reseller Operations
 - iii. Reseller Environment
 - iv. Onboarding Resellers
 - v. Initializing Resellers
 - vi. Maintaining Resellers

Time needed to complete the training:

1. The same time as in [Plan #2 – Subscription and Catalog Management](#)
2. Additionally, 4 (four) hours of Instructor-Led Training

2.2.2.4 ADD-ON – OPERATING COMPANY / COUNTRY MANAGEMENT

This add-on service offering delivers the capability to manage 1 (one) additional Operating Company in 1 (one) environment of the CloudBlue Commerce platform.

It is intended to enable either geographical expansion of the business (including additional currencies support) or expansion within the platform Customer's organisation (additional business units, divisions, etc).

This add-on can be used with the [Plan #2 – Subscription and Catalog Management](#) or the [Plan #3 – Multi-Tier Subscription Management and Catalog Management](#) and it enables their respective business functions for 1 (one) additional Operating Company.

Service delivery is based on three phases:

1. Install Milestone

The tasks and outcomes for this phase include the following:

- a. Launch the project
- b. Gather and define all information required for the successful setup of the additional Operating Company in CloudBlue Commerce (please see Pre-Requisites for details)

2. Configure Milestone

The tasks and outcomes for this phase include the following:

- a. Using standardized configuration templates, configure the CloudBlue Commerce platform to enable additional Operating Company management (please see Assumptions for details)

3. Verify Milestone

The tasks and outcomes for this phase include the following:

- a. Perform internal validation of the deployed configuration of the CloudBlue Commerce platform
- b. Perform 1 (one) Customer walk-through and Q&A session
- c. Provide test support for User Acceptance Testing
- d. Track, manage, report on, collaborate on and resolve any configuration defects
- e. Obtain Customer acceptance sign-off on the UAT completion

4. Pre-Requisites

The pre-requisites are the following:

- a. Access to the Azure Subscription where CloudBlue Commerce is deployed
- b. The Solution Design Document ("SDD") must capture all detailed Customer use cases enabled by this add-on service. The SDD must be completed, finalized and accepted by Customer before the start of the deployment. The SDD is to be used for the definition of the success criteria for User Acceptance Testing.
- c. Configuration documents capturing the configuration decisions for the Operating Company ("pre-work documents") must be completed, finalized and accepted by Customer before the start of the deployment. These documents must capture at least the following information:
 - a. Company / Business Unit Name
 - b. Currency to be used to sell
 - c. Company / Business Unit Address (Street Address Line 1, Street Address Line 2, City, Postal Code, Country)
 - d. Admin Contact Details (First Name, Middle Name (optional), Last Name, Email, Phone)

- e. Products to be enabled (delegated service plans)
 - f. Any changes to the configuration of products to be delegated – only removal of some products/SKUs from delegation (alternatively, acceptance to perform delegation without changes)
 - g. Prices to set for products on the OpCo level – provided in the format of JSON and/or CSV file(s) that can be used by the existing automated tools (for example, Product Configuration Manager, which includes Product Modeller and Product Inventory) as is without any transformations (alternatively, acceptance to set the same pricing as for the primary OpCo without changes)
 - h. Credit terms and customer class settings (alternatively, acceptance of the default configuration)
 - i. Taxation settings to be configured on the OpCo level (alternatively, acceptance of the inheritance of the taxation settings from the primary OpCo)
 - j. Up to 10 (ten) additional roles for BSS and OSS components of CloudBlue Commerce that need to be made available for the OpCo staff (alternatively, acceptance of the default configuration)
 - k. Any changes to the standard configuration of UX1 (alternatively, acceptance to perform standard configuration without changes)
 - l. List of notification templates that should be made available to the OpCo (alternatively, acceptance of the default configuration)
 - m. Full details of any order flow customizations (alternatively, acceptance of the default configuration)
- d. In case this add-on is purchased multiple times to set up multiple Operating Companies, the full set of pre-requisite documents with full details listed above must be completed, finalized and accepted by Customer for each Operating Company before the start of its configuration.
 - e. Trainings included in the Service must be completed before User Acceptance Testing commencement
 - f. [Standard Service Pre-Requisites](#)

5. Limitations and Assumptions

The limitations and assumptions are the following:

- a. This service includes 1 (one) additional Operating Company / Country setup in 1 (one) environment of CloudBlue Commerce. This add-on service can be purchased multiple times to get the required number of Operating Companies / Countries in a required number of CloudBlue Commerce environments (including Staging environments)
- b. Additional OpCo(s) will be configured at Level 2 in the platform account hierarchy
- c. UX1 User Interface for internal use of the OpCo staff will not have any branding (Customer domain, logo or skin) and will use default Customer's Azure domain (FQDN), CloudBlue logo, default skin and an SSL certificate provided by Customer or generated using the Let's Encrypt service – the same as deployed for the primary (first) OpCo in the relevant modular deployment plan
- d. UX1 Marketplace will only be available for the OpCo staff use to buy on behalf of end-customers (unless additional Branded Marketplace add-on is purchased for each OpCo that needs it)
- e. All configuration will be performed in accordance with the pre-requisite documents finalized before the beginning of the deployment
- f. Products available for the OpCo will be the products that are configured on the primary OpCo level and ready for delegation
- g. All products pricing will be configured using the existing automated tools (for example, Product Configuration Manager, which includes Product Modeller and Product Inventory) and the JSON and/or CSV file(s) provided as part of pre-work documents (or the existing pricing from the parent primary OpCo without changes). Further customization of product pricing can be performed by Customer(s) themselves, via

CloudBlue Managed Services (if Customer(s) have them purchased and activated) or purchased in addition and to be performed by Professional Services separately.

- h. Up to 10 (ten) additional roles for BSS and OSS components of CloudBlue Commerce that need to be made available for the OpCo will be configured
- i. The following configuration of CloudBlue Commerce will be available only via CloudBlue Managed or Professional Services:
 - a. Configuring Custom Attributes for Accounts & Orders
 - b. Modifying delegated Syndication service plans
 - c. GDPR Activities, such as Right to be Forgotten and Right to Data Export
- j. Project meetings are limited to 5 (five) hours per week at the mutually agreed time within the Monday to Friday 6:00 AM to 12:00 AM UTC+8 time window.
- k. Once commenced, the deployment will be done to completion with all supplied pre-requisites and it's not going to be put on hold/pause for any reason.
- l. UAT support is limited to 3 (three) days per 1 (one) environment.
- m. UAT support is limited to the resolution of issues raised via the ticketing system used by the deployment team (e.g. Jira) and excludes trainings and how-to questions.

6. Exclusions

The exclusions are the following:

- a. Reconfiguration of any accepted standard or default configuration or any other configuration finalized in the pre-requisite documents before the start of the deployment
- b. Configuration of additional products / service plans
- c. Manual reconfiguration of delegated products / service plans
- d. Manual adjustments of delegated product pricing
- e. Configuration of tiered pricing for resource rates unless it's used by the standard product pricing models
- f. Customization of delegated email notification templates
- g. Configuration of promotions or discounts
- h. Any customization of any CloudBlue Commerce or Connector UI screens, including but not limited to customization of out-of-the-box translation besides the standard language packs
- i. Any other configuration of CloudBlue Commerce other than explicitly specified
- j. [Standard service exclusions](#)

7. Training

The following training will be provided to the OpCo staff as part of this Service, and it must be completed before User Acceptance Testing commencement:

- 1. The same trainings as in [Plan #2 - Subscription and Catalog Management](#) or [Plan #3 - Multi-Tier Subscription Management and Catalog Management](#) – depending on with which plan this Service is used

Time needed to complete the trainings:

- 1. The same time as in either [Plan #2 - Subscription and Catalog Management](#) or [Plan #3 - Multi-Tier Subscription Management and Catalog Management](#) – depending on with which plan this Service is used

2.2.2.5 ADD-ON – BRANDED MARKETPLACE AND CUSTOMER SELF-SERVICE

This add-on service offering delivers 1 (one) instance of a branded Marketplace and 1 (one) instance of a Customer Self-Service Portal (full UX1 experience) in 1 (one) environment of the CloudBlue Commerce platform for 1 (one) OpCo or reseller.

This add-on can be used with the [Plan #2 - Subscription and Catalog Management](#) or the [Plan #3 - Multi-Tier Subscription Management and Catalog Management](#).

Service delivery is based on three phases:

1. Install Milestone

The tasks and outcomes for this phase include the following:

- a. Launch the project
- b. Gather and define all information required for the successful delivery of this Service (please see Pre-Requisites for details)
- c. Create a skin package from the pre-requisite Customer branding artifacts using Theme Creator for CloudBlue Commerce
- d. Amend the created skin package with the login screen background and end-customer sign up form banner

2. Configure Milestone

The tasks and outcomes for this phase include the following:

- a. Using standardized configuration templates, configure the CloudBlue Commerce platform to support the business functions enabled by this service (please see Assumptions for details)
 1. Configure the domain and the brand in the platform
 2. Upload and apply the skin package
 3. Configure UX1 navigation settings
 4. Configure Privacy Policy, Cookie Policy and Cookie Banner

3. Verify Milestone

The tasks and outcomes for this phase include the following:

- a. Perform internal validation of the deployed configuration of the CloudBlue Commerce platform
- b. Perform 1 (one) Customer walk-through and Q&A session
- c. Provide test support for User Acceptance Testing
- d. Track, manage, report on, collaborate on and resolve any configuration or deployment defects
- e. Obtain Customer acceptance sign-off on the UAT completion

4. Pre-Requisites

The pre-requisites are the following:

- a. Access to the Azure Subscription where CloudBlue Commerce is deployed
- b. If Customer has not purchased the Azure Infrastructure Management option of CloudBlue Managed Services and manages / plans to manage Azure infrastructure themselves, then any security hardening that Customer plans to perform must be performed before the start of the deployment.
- c. The Solution Design Document (“SDD”) must capture all detailed Customer use cases enabled by this add-on service. The SDD must be completed, finalized and accepted by Customer before the start of the

deployment. This document is to be used for the definition of the success criteria for User Acceptance Testing.

- d. Configuration documents capturing all CloudBlue Commerce platform configuration decisions for this Service (“pre-work documents”) must be completed, finalized and accepted by Customer before the start of the deployment. These documents must capture Customer branding artifacts – including at least the following:
 - i. Domain Name (resolving to the IP address of the UI Cluster)
 - ii. SSL certificate matching the Domain Name
 - iii. Artefacts for the skin package
 - 1. Customer logo, colors and other input data for Theme Creator
 - 2. Login screen background and end-customer sign up form banner
 - iv. Brand interface settings (alternatively, acceptance of the default brand interface settings in place)
 - v. UX1 navigation settings (alternatively, acceptance of the default UX1 navigation settings in place)
 - vi. Privacy Policy (document)
 - vii. Cookie Policy (document)
 - viii. Cookie Banner (text)
- e. In case this add-on is purchased multiple times to set up multiple pairs of Branded Marketplace and Customer Self-Service Panel, the full set of pre-requisite documents with full details listed above must be completed, finalized and accepted by Customer for each pair of Branded Marketplace and Customer Self-Service Panel before the start of its configuration.
- f. Trainings included in the Service must be completed before User Acceptance Testing commencement
- g. [Standard Service Pre-Requisites](#)

5. Limitations and Assumptions

The limitations and assumptions are the following:

- a. The service includes 1 (one) branded Marketplace and 1 (one) Customer Self-Service Portal (full UX1 experience) in 1 (one) CloudBlue Commerce environment for 1 (one) OpCo or reseller. This add-on service can be purchased multiple times to get the required number of Marketplaces and Customer-Service Portals for required number of OpCos or resellers in a required number of CloudBlue Commerce environments (including Staging environments).
- b. The following business functions will be enabled in CloudBlue Commerce by this service:
 - a. Branded marketplace that enables end-customers to view and order products themselves, without contacting Customer’s sales team
 - b. Branded customer Self-Service Portal (full UX1 experience) that enables end-customers to manage their accounts and subscriptions without contacting Customer’s support team
- c. **Important:** If payments and invoicing are not enabled using the Revenue Management Add-On, end-customers will be able to place orders for products without going through any credit checks or payments being required up front. It is recommended to Customer to have a process in place which will verify orders being placed and ensure that payments are made for those transactions.
- d. All configuration will be performed in accordance with the pre-requisite documents finalized before the beginning of the deployment

- e. 1 (one) brand for the vendor entity (OpCo or Reseller) will be configured with brand interface settings from the pre-requisite documents
- f. UX1 navigation settings will be configured for 1 (one) brand
- g. Public-facing Marketplace will be enabled for 1 (one) brand
- h. Privacy policy, cookie policy, cookie banner configuration will be done for 1 (one) brand
- i. Project meetings are limited to 5 (five) hours per week at the mutually agreed time within the Monday to Friday 6:00 AM to 12:00 AM UTC+8 time window.
- j. Once commenced, the deployment will be done to completion with all supplied pre-requisites and it's not going to be put on hold/pause for any reason.
- k. UAT support is limited to 3 (three) days per 1 (one) environment.
- l. UAT support is limited to the resolution of issues raised via the ticketing system used by the deployment team (e.g. Jira) and excludes trainings and how-to questions.
- m. In case any security hardening performed by Customer interferes with any CloudBlue Commerce functionality, the interfering elements of security hardening configuration must be rolled back.

6. Exclusions

The exclusions are the following:

- a. Reconfiguration of any accepted standard or default configuration or any other configuration finalized in the pre-requisite documents before the start of the deployment
- b. Configuration of the promo section in the Customer UX1 Marketplace
- c. Configuration of a custom catalog for the Customer UX1 Marketplace
- d. Reconfiguration of sales categories hierarchy
- e. Configuration of the integration with Google Analytics
- f. Further customization of the Customer UX1 Marketplace appearance beyond the skin package and the UX1 navigation settings from the pre-requisite documents
- g. Deployment or configuration of any other CloudBlue Commerce modules other than explicitly specified
- h. [Standard service exclusions](#)

7. Training

The following training will be provided as part of this service and it must be completed before User Acceptance Testing commencement:

- 1. eLearning on available options to customize your UX and Marketplace

Time needed to complete the training:

- 1. 1 (one) hour

2.2.2.6 ADD-ON – REVENUE MANAGEMENT

This add-on service offering delivers the capability to run invoicing and payment processing from the CloudBlue Commerce platform for 1 (one) environment of the platform.

This add-on can be used with the [Plan #2 - Subscription and Catalog Management](#) or the [Plan #3 - Multi-Tier Subscription Management and Catalog Management](#).

Service delivery is based on three phases:

1. Install Milestone

The tasks and outcomes for this phase include the following:

- a. Launch the project
- b. Gather and define all information required for the successful delivery of this Service (please see Pre-Requisites for details)
- c. Deploy the selected payment plug-in(s)

2. Configure Milestone

The tasks and outcomes for this phase include the following:

- a. Using standardized configuration templates, configure the CloudBlue Commerce platform to support the business functions enabled by this service (please see Assumptions for details)
 1. Activate and configure payment gateway(s)
 2. Configure payment system(s) associated with payment gateway(s)
 3. Enable payment systems(s) for existing OpCo(s) and reseller(s) (in case they are configured on the platform) according to the pre-work documents
 4. Configure email notification templates for invoicing (if to be used)

3. Verify Milestone

The tasks and outcomes for this phase include the following:

- a. Perform internal validation of the deployed configuration of the CloudBlue Commerce platform
- b. Perform 1 (one) Customer walk-through and Q&A session
- c. Provide test support for User Acceptance Testing
- d. Track, manage, report on, collaborate on and resolve any configuration or deployment defects
- e. Obtain Customer acceptance sign-off on the UAT completion

4. Pre-Requisites

The pre-requisites are the following:

- a. Access to the Azure Subscription where CloudBlue Commerce is deployed
- b. The Solution Design Document (“SDD”) must capture all detailed Customer use cases enabled by this add-on service. The SDD must be completed, finalized and accepted by Customer before the start of the deployment. This document is to be used for the definition of the success criteria for User Acceptance Testing.
- c. Configuration documents capturing all CloudBlue Commerce platform configuration decisions for this Service (“pre-work documents”) must be completed, finalized and accepted by Customer before the start of the deployment. These documents must capture at least the following information:
 - i. Payment system(s) configuration

1. Payment plug-in(s) to be used
 2. Payment gateway(s) to be configured and their configuration (URL, credentials)
 3. Payment system(s) to be configured
 4. Currencies for which to enable payment system(s)
 5. List of restricted countries where payment system(s) cannot be used
 6. List of the existing additional OpCos and resellers on the environment (if any) for which to enable payment system(s)
 7. When using this add-on with the Multi-Tier Subscription Management Plan (Plan #3), reseller availability settings for the payment system(s) (available for resellers: Yes/No, Type of Merchant Account resellers can use)
- ii. Email Notification Templates configuration for invoicing
 1. Whether invoices are to be emailed (yes/no)
 2. If yes, email templates in the HTML format (up to 5 (five))
 - iii. Default Credit Terms and Customer Class to be configured (or acceptance of the previous/default configuration)
- d. Trainings included in the Service must be completed before User Acceptance Testing commencement
 - e. [Standard Service Pre-Requisites](#)

5. Limitations and Assumptions

The limitations and assumptions are the following:

- a. This service covers 1 (one) environment of CloudBlue Commerce. Coverage for additional environments (including Staging environments) is purchased extra by purchasing additional units of this Service.
- b. The following business functions will be enabled in CloudBlue Commerce by this service:
 - a. Invoicing both over email (included in the plan) and in Customer UX1 Self-Service Portal (if the add-on enabling it is selected)
 - b. Payment processing using various payment service providers for sales and change orders as well as for recurring billing
 - c. Managing different credit and payment terms
- c. All configuration will be performed in accordance with the pre-requisite documents finalized before the beginning of the deployment
- d. Deployment of up to 5 (five) payment plug-ins available out of the box is included
- e. Configuration of up to 5 (five) payment gateways supported out of the box is included – across all OpCos and resellers (in case OpCos or resellers are to use their own merchant accounts and the selected Merchant Account Type allows it)
- f. Configuration of up to 5 (five) invoice email notification templates is included
- g. Selected payment plug-in(s) are supported by the version of CloudBlue Commerce used in the environment
- h. Project meetings are limited to 5 (five) hours per week at the mutually agreed time within the Monday to Friday 6:00 AM to 12:00 AM UTC+8 time window.
- i. Once commenced, the deployment will be done to completion with all supplied pre-requisites and it's not going to be put on hold/pause for any reason.

- j. UAT support is limited to 3 (three) days per 1 (one) environment.
- k. UAT support is limited to the resolution of issues raised via the ticketing system used by the deployment team (e.g. Jira) and excludes trainings and how-to questions.

6. Exclusions

The exclusions are the following:

- a. Reconfiguration of any accepted standard or default configuration or any other configuration finalized in the pre-requisite documents before the start of the deployment.
- b. Configuration of additional or reconfiguration of existing credit terms and customer classes. This can be done by Customer themselves, via CloudBlue Managed Services (if Customer(s) have them purchased and activated) or purchased in addition and to be performed by Professional Services separately.
- c. Configuration of payment methods availability by customer class for existing OpCos/resellers.
- d. Customization of invoice layout templates.
- e. Development of new payment plug-ins or adding support for new payment gateways. This can be done by purchasing a separate service.
- f. Deployment or configuration of any other CloudBlue Commerce modules and capabilities other than explicitly specified.
- g. [Standard service exclusions](#)

7. Training

The following training will be provided as part of this Service and it must be completed before User Acceptance Testing commencement:

- 2. Instructor-Led Training on Finance, which includes:
 - a. 1 (one) session for up to 10 (ten) people
 - b. Topics:
 - i. Payments in the platform
 - ii. Financial Relations
 - iii. Notification management

Time needed to complete the training:

- 2. 4 (four) hours of Instructor-Led Training

2.2.3 TAILOR-MADE IMPLEMENTATION SERVICES

In case the standardized modular solutions do not meet Customer's business needs for some reason, then all other flexible deployment Services can be used to fit specific business needs.

2.2.3.1 CUSTOM CLOUDBLUE COMMERCE DEPLOYMENT

This offering delivers an instance of the CloudBlue Commerce platform with 2 (two) environments – Production and Staging.

It is intended to be used when modular solution plans and add-ons described above do not fit the requirements and a bespoke tailor-made CloudBlue Commerce deployment is needed.

Service delivery is based on three phases:

1. Install Milestone

The purpose of this phase is to deploy infrastructure and install platform modules in the Staging environment.

The tasks and outcomes for this phase include the following:

- a. Launch the project
- b. Gather and define all information required for the successful installation of the platform
- c. Create pre-work documents capturing the required configuration of the cloud infrastructure for the platform and its components
- d. Create cloud infrastructure of the agreed size (small/medium/large/XL) for the Staging environment of CloudBlue Commerce (in case of Azure - Resource Group, Network Security Groups, IP Addresses, Virtual Networks, Storage, Backup Services, Azure Log Analyzer, VPN Gateway, Azure Firewall, Azure Kubernetes Services and Virtual Machines)
- e. Deploy the agreed set of platform components, microservices, modules and plug-ins - including but not limited to UX1, Marketplace, REST API, XML-RPC API, APS Controller Proxy for CloudBlue Connect and Rated Data Export (RDE) (for exporting billable data from the platform) – to the Staging environment
- f. Deploy the standardized configuration of the core platform modules, Marketplace, Rated Data Export, reports, notification templates and order flows to the Staging environment
- g. Deploy 1 (one) standardized Reseller tenant template to the Staging environment
- h. Deploy default branding for platform Reseller tenants and Marketplace to the Staging environment

2. Configure Milestone

The purpose of this phase is to perform necessary Platform configuration for Customer in the Staging environment.

The tasks and outcomes for this phase include the following:

- a. Finalize pre-work documents capturing the required business configuration of the platform
- b. Configure the modules of the CloudBlue Commerce platform in accordance with the pre-work documents in the Staging environment
- c. Set up the technical configuration of the platform – SSL certificates, SMTP server settings, SFTP setup for Rated Data Export (if required), etc. in accordance with the pre-work documents in the Staging environment
- d. Perform the business configuration of the platform in accordance with the pre-work documents in the Staging environment
- e. Upload Reseller-specific branding and localization for 1 (one) reseller, Customer notifications and Marketplace to the Staging environment
- f. Collaborate and iterate on pre-work documents and the business configuration of the Staging system.

3. Verify and Launch Milestone

The purpose of this phase is to perform verification and acceptance of the deployed and configured Staging environment, and when it is done, graduate the accepted configuration into the Production environment.

The tasks and outcomes for this phase include the following:

- a. Perform unit testing of the deployed modules and infrastructure configuration in the Staging environment
- b. Perform testing of the Customer ordering, upgrade/downgrade and cancellation scenarios in the Staging environment
- c. Perform a guided walkthrough for primary business scenarios for Customer staff in the Staging environment
- d. Provide test support for User Acceptance Testing (UAT) in the Staging environment
- e. Track, manage, report on, collaborate on and resolve configuration defects in the Staging environment
- f. Obtain Customer acceptance sign-off for the UAT completion and for the Staging environment configuration to graduate to Production
- g. Deploy the cloud infrastructure mirroring the Staging environment to the Production environment
- h. Deploy the CloudBlue Commerce platform modules mirroring the Staging environment to the Production environment
- i. Replicate the approved business configuration of the Staging system to the Production system
- j. Hand over platform operations to the Customer Operations team and CloudBlue Managed Services if Customer purchased Managed Services from CloudBlue
- k. Provide support for Production verification testing and assist with resolving issues

4. Pre-Requisites

The pre-requisites are the following:

- a. [Standard Service Pre-Requisites](#)

5. Exclusions

The exclusions are the following:

- a. Connector deployment and service plan configuration. Please add the required number and type of Connector Deployment services.
- b. More than one reseller configuration. Please add the required number of Reseller Setup services.
- c. High Availability configuration. Please get a quote for the specific High Availability deployment architecture in addition to this service.
- d. Standard [Service Exclusions](#)

2.2.3.2 CLOUDBLUE CONNECT PROVIDER SETUP

This offering is based on three phases to complete the delivery of the setup of CloudBlue Connect. The CloudBlue Connect Provider Setup offering enables Customers to use the CloudBlue Connect platform to offer CloudBlue Connect-based products in Customer's CloudBlue Commerce platform environments. CloudBlue Connect allows Providers to brand (white label) various aspects of its portal.

This Service covers 2 (two) environments of the CloudBlue Commerce platform – Staging and Production.

1. Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful setup of CloudBlue Connect, as follows:

- a. Deployment of inbound and outbound proxies to communicate with CloudBlue Connect - in Customer's staging and production platform environments;
- b. Setup of monitoring for the integration of Customer's platform environments with CloudBlue Connect – in the context of the existing CloudBlue-managed monitoring system (in case such system is already deployed and managed by CloudBlue);
- c. Portal Branding. CloudBlue Connect portal (Vendor account, Provider account and Customer activation screens) support branding. In order to setup branding within CloudBlue Connect, there is pre-work that needs to be provided by Customer. The information that is to be gathered for Branding includes the following attributes:
 - I. Email Notifications Branding – CloudBlue Connect sends in multiple cases emails to different actors, for example when a vendor receives a new request, CloudBlue Connect may send him a notification;
 - II. User Agreement Branding – CloudBlue Connect may enforce the acceptance of a user agreement each time that a user is enrolled on its portal. This enrolment may happen due to the creation of new vendors accounts, or due an existing vendor invites a new user to his account. The user will need to supply its contact data and agree with the agreement that may be referenced from an external source;
 - III. Help Portal Branding - Providers have an option to either deploy branded help portal or redirect users to any external URL managed externally; and
 - IV. Support Portal Branding - Providers have an option to either deploy branded support portal experience (managed by CloudBlue staff) or redirect users to any external URL of the ticketing system, managed externally.

2. Configure Milestone

The purpose of this phase is to perform necessary configuration for the setup of CloudBlue Connect, including:

- a. Assist Customer with creating a CloudBlue Connect Provider account.
- b. Assist Customer with creating a CloudBlue Connect Vendor account (optional).
- c. Registration of Customer's platform environments in CloudBlue Connect.
- d. Deployment of a test CloudBlue Connect APS package to Customer's platform environments for integration validation purposes.
- e. Hand-over to Customer Operations team and CloudBlue Managed Services (optional).

3. Verify Milestone

The purpose of this phase is to verify that the CloudBlue Connect integration is functioning by doing the following:

- a. Validation unit testing of the deployed components and configuration;

- b. Testing of Customer ordering, upgrade/downgrade and cancellation scenarios using the test CloudBlue Connect APS package;
- c. Guided walkthrough for primary business scenarios for Customer staff;
- d. Test support for User Acceptance Testing;
- e. Tracking, management, reporting on, collaboration on and resolution of defects; and
- f. Obtaining of Customer acceptance for the staging environment configuration to graduate to production.

4. Pre-Requisites

The following pre-requisites are required:

- a. Staging and production platform environments, necessary access to them; and
- b. Firewall and networking configuration allowing outbound and inbound communications between Customer's platform environments and CloudBlue Connect.
- c. [Standard Service Pre-Requisites](#)

5. Exclusions

The following are the exclusions:

- a. Functional customizations of Customer's platform.
- b. Functional customizations of the CloudBlue Connect portal.
- c. Creation of any branding materials and customer-facing content and communication templates.
- d. Creation of custom operations or deployment documentation.
- e. Deployments, configuration and verifications of any software and modules other than specified.
- f. Configuration and troubleshooting of any operating systems, networking and hardware.
- g. Resolution of any issues with hardware and software encountered during the delivery of Services.
- h. Registration of domains, provision of SSL certificates.
- i. Creation of User Acceptance Testing plans.
- j. Performing extended testing (e.g., end-to-end testing covering third party systems, full regression testing, performance and load testing, stress testing, penetration testing, etc.).

2.2.3.3 CLOUDBLUE CONNECT AND COMMERCE RESELLER SETUP

This offering is based on three phases to complete the delivery. This offering enables Customers to use CloudBlue Connect to offer CloudBlue Connect-based products under a Reseller in Customer's platform environments.

This Service covers 2 (two) environments of the CloudBlue Commerce platform – Staging and Production.

1. Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful Service delivery.

2. Configure Milestone

The purpose of this phase is to perform configuration activities for the delivery of the service as follows:

- a. Creation of a separate CloudBlue Connect Marketplace within a Customer's CloudBlue Connect Provider account;
- b. Creation of a CloudBlue Connect Vendor for Customer (optional);
- c. Creation of a test/example Product within Customer's CloudBlue Connect Vendor (optional);
- d. Creation of a connection for the test/example Product with Customer's new CloudBlue Connect Marketplace;
- e. Publishing of the test/example Product in Customer's platform Staging and Production environments, delegation of the test/example Product service plans to the designated reseller; and
- f. Hand over to Customer Operations team and CloudBlue Managed Services (optional).

3. Verify Milestone

The purpose of this phase is to verify the delivered components and configuration as follows:

- a. Validation unit testing of the deployed components and configuration;
- b. Placing and fulfilling test orders for the test/example Product;
- c. Guided walkthrough for primary business scenarios for Customer staff;
- d. Test support for User Acceptance Testing;
- e. Tracking, management, reporting on, collaboration on and resolution of defects; and
- f. Obtaining of Customer acceptance for the staging environment configuration to graduate to production.

4. Pre-Requisites

This offering has the following pre-requisites:

- a. Customer's platform environments are already integrated with CloudBlue Connect, i.e. CloudBlue Connect Provider Setup is already completed successfully;
- b. Customer's platform environments already have the target Reseller configured; and
- c. Necessary access to Customer's staging and production platform environments.
- d. [Standard Service Pre-Requisites](#)

2.2.3.4 VALUE ADDED RESELLER SETUP

This Service is based on three phases to complete the delivery of a Value-Added Reseller.

This Service covers 1 (one) environment of the CloudBlue Commerce platform.

1. Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful service delivery.

- a. Validation of service plans, templates and reseller specific parameters.

2. Configure Milestone

The purpose of this phase is to perform necessary platform configuration for Customer as follows:

- a. Reseller setup and configuration.
- b. Upload Reseller-specific branding and localization.
- c. Create a Sales Channel/Reseller/Operating Company configuration; and
- d. Billing configuration: Sales Category, Resource Category, Online Store.

3. Verify Milestone

The purpose of this phase is to have Customer sign off that User Acceptance Testing is complete and ready for business cutover as follows:

- a. Verify panel functionality;
- b. Verify configuration: branding, customization, localization, Online Store;
- c. Verify services provisioning; and
- d. Verify end-user's part.

4. Pre-Requisites

The pre-requisites are the following:

- a. [Standard Service Pre-Requisites](#)

2.2.3.5 CLOUDBLUE CONNECT CONNECTOR DEPLOYMENT

This Service is based on three phases to complete the service delivery.

This Service covers 2 (two) environments of the CloudBlue Commerce platform – Staging and Production.

1. Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful service delivery. The tasks include the following:

- a. Deploy the APS frontend available from CloudBlue Connect.
- b. Verify the pre-work document (licenses, resources, service templates, service plans).

2. Configure Milestone

The purpose of this phase is to perform necessary platform configuration for Customer. The tasks include the following:

- a. Application instance configuration according to the pre-work document.
- b. Licenses, resources, service templates, service plans configuration according to the pre-work document.
- c. Marketplace configuration.
- d. Additional configuration, if required.

3. Verify Milestone

The purpose of this phase is to assist Customer with the User Acceptance Testing (UAT) and business cutover preparations and to obtain a sign-off on the UAT completion and the business cutover readiness. Also, the Services Organization will work with Customer to support business cutover activities and will work together with Customer and the CloudBlue Managed Services team for the handover of ongoing connector support. The tasks include the following:

- a. Perform unit testing of the deployed connector.
- b. Perform testing of Customer ordering, upgrade/downgrade and cancellation scenarios.
- c. Perform a guided walkthrough for primary business scenarios for Customer staff.
- d. Provide test support for User Acceptance Testing.
- e. Track, manage, report on, collaborate on and resolve defects.
- f. Obtain Customer acceptance for the deployed connector configuration.

4. Pre-Requisites

The pre-requisites are the following:

- a. Customer must provide API credentials for the Connector, if it is deployed in the direct mode.
- b. [Standard Service Pre-Requisites](#)

2.2.3.6 SELF-DEPLOYED CLOUDBLUE CONNECT CONNECTOR VALIDATION & CERTIFICATION

This Service is based on three phases to complete the validation and certification of a CloudBlue Connect package. The CloudBlue Connect platform provides a self-onboarding framework for service vendors and service providers to effectively manage service integrations with CloudBlue automation platform. The service described in this document is for validation and certification of self-deployed connector in a CloudBlue environment.

This Service covers 1 (one) environment of the CloudBlue Commerce platform.

1. Install Milestone

- a. Verification of self-deployed connector package at CloudBlue environment.
- b. Verification tests are conducted against the test script which verifies conformance to Connector standard

2. Configure Milestone

- a. Perform dry run of self-deployed connector
- b. In case of any failure, appropriate error logs and documentation of failure scenarios are provided to Customer

3. Verify Milestone

- a. If a CloudBlue Connect package verification fails, the recertification process is repeated after consultation with Customer

4. Pre-Requisites

The pre-requisites are the following:

- a. [Standard Service Pre-Requisites](#)

5. Assumptions

- a. Each Connector package in any given environment (Production or Staging) is treated as a single entity
- b. Services will be able to deliver the validation/certification work remotely
- c. Maximum of two SKUs are verified during the certification dry run
- d. The subject Connector has been successfully "Previewed" by the Vendor before and operational
- e. Any additional recertification requirement (e.g. failure on the first run or due to ISV changes)

6 Exclusions

- a. Installation of the platform, package itself
- b. Any code changes to the connector package
- c. Making any changes / configuration in Customer's Connect Vendor or Provider accounts

2.2.3.7 SYNDICATION PRODUCT SETUP (CLOUDBLUE CONNECT BASED)

This offering is based on three phases to complete the delivery.

Application backend (endpoint) is configured on the CloudBlue side (CloudBlue Connect platform) and there is no application backend (endpoint) in Provider's environments.

This Service covers 2 (two) environments of the CloudBlue Commerce platform – Staging and Production.

1. Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful service delivery and:

- a. Verify prework (licenses, resources, service templates, service plans)
- b. Install CloudBlue Connect Connector for the product
- c. Apply APS specific configuration settings

2. Configure Milestone

The purpose of this phase is to perform necessary platform configuration for Customer as follows:

- a. Application instance configuration according to prework
- b. Licenses, resources, service templates, service plans configuration
- c. Online Store configuration
- d. Additional configurations for the product, if required

3. Verify Milestone

The purpose of this phase is to have Customer sign off that User Acceptance Testing is complete and ready for business cutover.

- a. Perform unit testing of the deployed Connector
- b. Perform testing of Customer ordering, upgrade/downgrade and cancellation scenarios
- c. Perform a guided walkthrough for primary business scenarios for Customer staff
- d. Provide test support for User Acceptance Testing
- e. Track, manage, report on, collaborate on and resolve defects
- f. Obtain Customer acceptance for the deployed Connector configuration

4. Pre-Requisites

- a. Provider's CloudBlue Connect account is set up and Provider's platform environments are integrated with the CloudBlue Connect platform. As part of that, APS Controller Proxy is deployed and configured in Provider's platform environments.
- b. Syndication/reseller agreement is signed with CloudBlue.
- c. [Standard Service Pre-Requisites](#)

2.2.3.8 SYNDICATION PRODUCT SETUP (CLOUDBLUE HOSTED BACKEND)

This offering is based on three phases to complete the delivery.

Application backend (endpoint) is configured on the CloudBlue side and there is no application backend (endpoint) in Provider's environments. This can also be referred to as a Syndication Type II Connector.

This Service covers 2 (two) environments of the CloudBlue Commerce platform – Staging and Production.

1. Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful service delivery and:

- a. Verify prework (licenses, resources, service templates, service plans)
- b. Install Connector for the product
- c. Apply APS specific configuration settings

2. Configure Milestone

The purpose of this phase is to perform necessary platform configuration for Customer as follows:

- a. Application instance configuration according to prework
- b. Licenses, resources, service templates, service plans configuration
- c. Online Store configuration
- d. Additional configurations for the product, if required

3. Verify Milestone

The purpose of this phase is to have Customer sign off that User Acceptance Testing is complete and ready for business cutover.

- a. Perform unit testing of the deployed Connector
- b. Perform testing of Customer ordering, upgrade/downgrade and cancellation scenarios
- c. Perform a guided walkthrough for primary business scenarios for Customer staff
- d. Provide test support for User Acceptance Testing
- e. Track, manage, report on, collaborate on and resolve defects
- f. Obtain Customer acceptance for the deployed Connector configuration

4. Pre-Requisites

- a. APS Controller Proxy is deployed and configured in Provider's platform environments
- b. [Standard Service Pre-Requisites](#)

2.2.3.9 APS CONTROLLER PROXY DEPLOYMENT

This Service is based on three phases to complete the delivery of the ASP Controller proxy.

This Service covers 2 (two) environments of the CloudBlue Commerce platform – Staging and Production.

1. Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful installation of the APS Controller proxy by doing the following:

- a. Hardware requirements verification;
- b. Network requirements verification;
- c. Required packages installation; and
- d. Install SSL certificate.

2. Configure Milestone

The purpose of this phase is to perform necessary configuration of the APS Controller host for Customer by doing the following:

- a. Create configuration files;
- b. Adjusting firewall configuration; and
- c. Add configured proxies to OA settings.

3. Verify Milestone

The purpose of this phase is to verify that the APS Controller host is functioning by doing the following:

- a. Verifying the connection to APS Controller through proxy with curl;
- b. Add APS Controller IP to Allowed Network section if necessary;
- c. Verify external connection to APS Controller; and
- d. Verify SSL functionality.

4. Pre-Requisites

The pre-requisites are the following:

- a. [Standard Service Pre-Requisites](#)

2.2.3.10 STANDALONE APS CONNECTOR DEPLOYMENT

This Service is based on three phases to complete the delivery of a standalone APS package.

This Service covers 2 (two) environments of the CloudBlue Commerce platform – Staging and Production.

1. Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful installation of a standalone APS package as follows:

- a. Verify hardware requirements;
- b. Verify prework (licenses, resources, service templates, service plans);
- c. Endpoint preparation; and
- d. APS deployment.

2. Configure Milestone

The purpose of this phase is to perform necessary platform configuration for Customer as follows:

- a. Application instance configuration according to prework;
- b. Licenses, resources, service templates, service plans configuration;
- c. Online Store configuration; and
- d. Additional configurations, if required (optional).

3. Verify Milestone

The purpose of this phase is to have Customer sign off that User Acceptance Testing is complete and ready for business cutover by doing the following:

- a. Perform unit testing of the deployed APS package;
- b. Perform testing of Customer ordering, upgrade/downgrade and cancellation scenarios;
- c. Perform a guided walkthrough for primary business scenarios for Customer staff;
- d. Provide test support for User Acceptance Testing;
- e. Track, manage, report on, collaborate on and resolve defects; and
- f. Obtain Customer acceptance for the deployed APS package configuration.

4. Pre-Requisites

The pre-requisites are the following:

- a. [Standard Service Pre-Requisites](#)

2.2.3.11 SERVICE PLAN SETUP

This Service is based on three phases to complete the delivery of the CloudBlue platform.

This Service covers 2 (two) environments of the CloudBlue Commerce platform – Staging and Production.

1. Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful service delivery.

- a. Validation of the pre-work document.

2. Configure Milestone

The purpose of this phase is to perform necessary platform configuration for Customer as follows:

- a. Configure the service plan according to the pre-work document.

3. Verify Milestone

The purpose of this phase is to have Customer sign off that User Acceptance Testing is complete and ready for business cutover as follows:

- a. Verify service plan settings (fees, subscription periods etc.); and
- b. Test provisioning.

4. Pre-Requisites

The pre-requisites are the following:

- a. Completed pre-work document with all required service plan settings (SKUs, pricing, etc).
- b. [Standard Service Pre-Requisites](#)

2.2.3.12 PLUG-IN DEPLOYMENT

This offering is based on three phases to complete the delivery of a plugin of one of the following types:

Code	Name	Description
TAXPLUGIN	Taxation Plugin	Payment Plugin to Platform
PAYPLUGIN	Payment Plugin	Payment Plugin to Platform

This Service covers 2 (two) environments of the CloudBlue Commerce platform – Staging and Production.

1. Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful installation of the plugin as follows:

- a. Endpoint validation;
- b. Pework validation; and
- c. Plugin deployment.

2. Configure Milestone

The purpose of this phase is to perform necessary plugin configuration for Customer as follows:

- a. Plugin configuration;
- b. Specific plugin settings configuration, based on the plugin type; and
- c. Resources, templates, service plans configuration (if required).

3. Verify Milestone

The purpose of this phase is to have Customer sign off that User Acceptance Testing is complete and ready for business cutover as follows:

- a. Verify the connectivity between plugin and target system (either domain registrar or payment center).

4. Pre-Requisites

The pre-requisites are the following:

- a. Customer has an active contract with a payment gateway provider or the tax calculation provider and working access credentials.
- b. Completed pre-work with the configuration for the payment or the tax calculation plugin.
- c. [Standard Service Pre-Requisites](#)

2.2.3.13 LOCALIZATION PACK DEPLOYMENT

This Service is based on three phases to complete the delivery of an additional language pack.

This Service covers 2 (two) environments of the CloudBlue Commerce platform – Staging and Production.

1. Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful service delivery as follows:

- a. Locale installation; and
- b. For custom locale installation – OA, BA and APS part separately.

2. Configure Milestone

The purpose of this phase is to perform necessary platform configuration for Customer, including:

- a. Enabling locale choice on login screen (per brand).

3. Verify Milestone

The purpose of this phase is to have Customer sign off that User Acceptance Testing is complete and ready for business cutover, as follows:

- a. Verify that the correct language is displayed in all OA and BA screens and Online Store and
- b. Verify that locale was propagated to required resellers (per brand).

4. Pre-Requisites

The pre-requisites are the following:

- a. [Standard Service Pre-Requisites](#)

2.2.3.14 WEBHOSTING PLESK DEPLOYMENT

This service is based on three phases to complete the delivery of the Webhosting Plesk module.

This service covers 2 (two) environments of the CloudBlue Commerce platform – Staging and Production.

1. Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful installation of the Webhosting Plesk module, including:

- a. Hardware requirement check;
- b. Network requirements validation;
- c. Plesk licenses validation;
- d. Prework for non-default service templates and plans – if required;
- e. Service node registration in OA (Admin Plesk panel will be installed on this step); and
- f. Additional hosts registration – if required.

2. Configure Milestone

The purpose of this phase is to perform necessary Webhosting Plesk module configuration for Customer, as follows:

- a. Default resources are configured automatically; and
- b. Additional resources (service plans, templates) configuration.

3. Verify Milestone

The purpose of this phase is to have Customer sign off that User Acceptance Testing is complete and ready for business cutover, including:

- a. Perform unit testing of the deployed module;
- b. Perform testing of Customer ordering, upgrade/downgrade and cancellation scenarios;
- c. Perform a guided walkthrough for primary business scenarios for Customer staff;
- d. Provide test support for User Acceptance Testing;
- e. Track, manage, report on, collaborate on and resolve defects;
- f. Obtain Customer acceptance for the deployed connector configuration; and
- g. Verify that additional resources are configured according to the prework.

4. Pre-Requisites

The pre-requisites are the following:

- a. [Standard Service Pre-Requisites](#)

2.2.3.15 HOSTED SERVICES ADDITIONAL SERVER DEPLOYMENT

This Service is based on three phases to complete the delivery of an additional server to any hosting module (ex. WHP, OACI, Exchange).

This Service covers 1 (one) environment of the CloudBlue Commerce platform.

1. Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful installation of an additional server to a hosting module, including:

- a. Hardware requirement check;
- b. Network requirements validation;
- c. Licenses validation (if required); and
- d. Service node registration in OA.

2. Configure Milestone

The purpose of this phase is to perform necessary server configuration for Customer, including:

- a. Service node configuration; and
- b. Module configuration.

3. Verify Milestone

The purpose of this phase is to have Customer sign off that User Acceptance Testing is complete and ready for business cutover, including:

- a. Perform unit testing of the deployed server; and
- b. Perform testing of provisioning to the newly deployed server.

4. Pre-Requisites

The pre-requisites are the following:

- a. [Standard Service Pre-Requisites](#)

2.2.3.16 CONFIGURATION

This offering is based on three phases to complete the delivery.

This Service covers 2 (two) environments of the CloudBlue Commerce platform – Staging and Production.

1. Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful service delivery, as follows:

- a. Hardware requirement check;
- b. Network requirements validation;
- c. Plesk licenses validation;
- d. Prework for non-default service templates and plans – if required;
- e. Service node registration in OA; and
- f. Additional hosts registration – if required.

2. Configure Milestone

The purpose of this phase is to perform necessary platform configuration for Customer, as follows:

- a. Transition of platform modules (Shared Hosting, Plesk, OACI) from a platform to Customer platform;
- b. Install and configure a Payment Plugin on the platform;
- c. Deploy Staging environment for the platform; and
- d. As part of this project, the following steps may be taken:
 - I. Installation and configuration of a Plugin on the platform (if required);
 - II. De-registering hosts from the platform;
 - III. Deployment of module in the instance of the platform;
 - IV. Deployment of hosts in instance of the platform;
 - V. Configuration of Service Templates and Service Plans on the platform;
 - VI. Deployment of Staging environment for the platform with following modules: OA, BA, Online Store, Office365, WebHosting Linux (Clustered), Shared Hosting Plesk, Domain Registration Plugin, SSL Certificate Plugin, Payment Plugin); and
 - VII. Configuration of one (1) Value Added Reseller.

3. Verify Milestone

The purpose of this phase is to have Customer sign off that User Acceptance Testing is complete and ready for business cutover. The CloudBlue Services Organization will work with Customer to support business cutover activities to the platform, and will work together with Customer and the CloudBlue Managed Services team for a proper handover of ongoing platform support, including:

- a. Perform unit testing of the installations, deregistered, deployed, configured components of the platform;
- b. Perform a guided walkthrough for primary business scenarios for Customer staff;
- c. Provide test support for User Acceptance Testing;
- d. Track, manage, report on, collaborate on and resolve defects;
- e. Obtain Customer acceptance for the configuration scope; and
- f. Verify that additional resources are configured according to the prework.

4. Pre-Requisites

The pre-requisites are the following:

- a. [Standard Service Pre-Requisites](#)

2.2.3.17 BILLING VALIDATION

The following scope of Services will be provided to Customer as listed in this section, testing of the platform behaviour on future date billing to understand how the platform will act on a specific date in future. This Service is based on three milestone phases to complete the delivery of the CloudBlue platform.

This Service covers 1 (one) environment of the CloudBlue Commerce platform.

1. Install Milestone

The purpose of this phase is to launch the project, gather and define all information required to deliver the following tasks;

- a. Design, test and document procedures required to test platform behavior on specific date in future and rollback platform to initial state after testing
- b. Review and validate test plan provided by Customer
- c. Check that necessary objects required for testing (accounts, subscriptions) are created

2. Configure Milestone

The purpose of this phase is to perform necessary platform configuration and include the following;

- a. Create backup of environment
- b. Change date on environment to a specific date in future, run daily billing process to trigger creation of recurring orders, documents and notifications, create change orders and cancellation orders if required by test plan
- c. Restore environment to initial state after testing is completed

3. Verify Milestone

The purpose of this phase is to have Customer sign off that UAT is complete and ready for business cutover and support the business cutover activities to the platform, and to work together with Customer and or the CloudBlue Managed Services team for the handover of ongoing platform support, including;

- a. Verify that daily billing process completes successfully during testing
- b. Verify that all necessary orders requested in test plan were created
- c. Prepare report with details of orders and documents generated and share report with Customer for review
- d. Verify that environment functions correctly after restoring

4. Pre-Requisites

The pre-requisites are the following:

- a. [Standard Service Pre-Requisites](#)

5. Assumptions

The following assumptions are applied to this section:

- a. Testing will be performed on non-Production environment
- b. Datacom will be provided with necessary level of access to the environment to perform backup, date change and restore

- c. Service described in this section covers testing of 1 product (service plan with specific billing type, billing period, subscription period, cancellation and refund settings) for up to 3 dates in future (for example: 1 month, 6 months and 12 months)
- d. Test plan with details of service plan and orders/documents and other objects to be checked after date shift will be provided by Customer
- e. Testing will only include changing date to future. Tests with changing date to past will not be performed as such date changes can result in unexpected behavior of the platform
- f. Any platform objects (orders, documents, accounts, subscriptions, etc.) created during testing after environment backup will be gone once environment is restored to its initial state
- g. Sending email notifications may be rejected by email servers due to invalid date when environment date is shifted to future. Notifications screen in Billing will be used to check what notifications platform would send on specific date

6. Exclusions

The following exclusions are applied to the section;

- a. Platform configuration and products (service plans) configuration
- b. Testing of services provisioning after date change – it may not work (especially if provisioning is done in system controlled by third-party ISV) due to invalid date
- c. Troubleshooting and identifying root cause if behavior of the platform during testing (such as billing dates and/or total/sub-total values in orders and documents generated) is different from what is expected by Customer
- d. Anything not explicitly mentioned in this section.

2.3 GO-TO-MARKET (GTM) AUTOMATOR IMPLEMENTATION SERVICES

Go-to-Market (GTM) Automator is a digital solution that helps to simplify and digitize the go-to-market launches of products and Services within an intuitive interface. As an add-on to CloudBlue Connect and CloudBlue Commerce, Go-to-Market Automator centralizes and standardizes how marketing content is provided and consumed by internal teams and indirect partners to help streamline sales enablement and marketing activities.

2.3.1 GO-TO-MARKET AUTOMATOR SETUP

The following scope of Services will be provided to Customer, covering the activity of GTM Automator Setup with Customer's branding and content.

1. Install Milestone

The purpose of this phase is to launch the GTM Automator Setup project, gather and define all information required and perform the following tasks:

- a. Master account creation and configuration of terms and conditions, alert notifications and system e-mails
- b. SSO integration

2. Configure Milestone

The purpose of this phase is to perform necessary configuration, which includes the following tasks:

- a. Configure branding, including domain/subdomain setup, company logo and brand style guidelines (optional)
- b. Curation of fifty (50) products content (playbooks and campaigns)
- c. Upload of Customer content in the Insights and Tools section
- d. Admin setup including Content Management System (CMS) and global reporting

3. Verify Milestone

The purpose of this phase is to perform validation, assist Customer with User Acceptance Testing (UAT) completion and support business cutover activities for the platform. That includes the following tasks:

- a. Full end-to-end QA
- b. User Acceptance Testing support
- c. Four (4) virtual training sessions to educate and onboard operations teams

4. Pre-Requisites

The pre-requisites are the following:

- a. [Standard Service Pre-Requisites](#)

5. Assumptions

The following assumptions are applied to this section:

- a. Required efforts are not to exceed one hundred and fifty (150) man-hours of development resources

6. Exclusions

The following exclusions are applied to the section:

- a. Any custom software development and/or scripting unless explicitly detailed in the scope of Services above
- b. Anything not specifically described in the scope of Services above

2.3.2 GO-TO-MARKET BUILDER SETUP

Go-to-Market Builder is a SaaS content creation and management tool that enables Customer's internal teams and external partners/vendors to create, provide and manage standardized go-to-market content that will get published into Go-to-Market Automator and help streamline sales enablement and marketing activities.

The following scope of Services will be provided to Customer as listed in this section, covering the activity of Go-to-Market Builder Setup.

The Services are based on three (3) milestone phases to complete the delivery.

1. Install Milestone

The purpose of this phase is to launch the Go-to-Market Builder Setup project, gather and define all information required and perform the following tasks:

- a. Master Go-to-Market Builder account creation
- b. Setup of a Content Management System instance to allow for Customer's internal teams or external partners/vendors to create and manage their product content (playbooks and campaigns)

2. Configure Milestone

The purpose of this phase is to perform necessary configuration, which includes the following tasks:

- a. Configuration of branding for Go-to-Market Builder, including Customer domain/subdomain setup, company logo and design

3. Verify Milestone

The purpose of this phase is to perform validation, assist Customer with User Acceptance Testing (UAT) completion and support business cutover activities. That includes the following tasks:

- a. Full end-to-end QA, including a review session with Customer
- b. User Acceptance Testing support and obtaining of Customer's acceptance
- c. Up to four (4) virtual training and onboarding sessions to educate and onboard operations teams

4. Pre-Requisites

The pre-requisites are the following:

- a. [Standard Service Pre-Requisites](#)

5. Assumptions

The following assumptions are applied to this section:

- a. Required efforts are not to exceed two hundred and fifty (250) man-hours

6. Exclusions

The following exclusions are applied to the section:

- a. Any custom software development and/or scripting
- b. Anything not specifically described in the scope of Services above

2.3.3 GO-TO-MARKET AUTOMATOR SSO SETUP

Go-to-Market Automator SSO Setup Service allows Customer to integrate the Go-to-Market Automator UI into existing systems including SSO and centralized identity management (e.g. Microsoft Office 365, Google).

The following scope of Services will be provided to Customer as listed in this section, covering the activity of GTM Automator SSO Setup.

The Services are based on three (3) milestone phases to complete the delivery.

1. Install Milestone

The purpose of this phase is to launch the GTM Automator SSO Setup project, gather and define all information required and perform the following tasks:

- a. Obtain SSO credentials and protocol from Customer

2. Configure Milestone

The purpose of this phase is to perform necessary configuration, which includes the following tasks:

- a. Configure and test SSO with several test user accounts

3. Verify Milestone

The purpose of this phase is to perform validation, assist Customer with User Acceptance Testing (UAT) completion and support business cutover activities. That includes the following tasks:

- a. Hold a review session with Customer and demonstrate SSO working from Customer portal(s) to GTM Automator
- b. User Acceptance Testing support and obtaining of Customer's acceptance

4. Pre-Requisites

The pre-requisites are the following:

- a. [Standard Service Pre-Requisites](#)

5. Assumptions

The following assumptions are applied to this section:

- a. Required efforts are not to exceed one hundred and fifty (150) man-hours

6. Exclusions

The following exclusions are applied to the section:

- a. Any custom software development and/or scripting
- b. Anything not specifically described in the scope of Services above

2.4 INTEGRATION SERVICES

2.4.1 OVERVIEW

The goal of Integration Services is to seamlessly integrate the CloudBlue platform into Customer's organization. CloudBlue Integration Services provide an enterprise grade implementation of the subjects covered in the Integration guide, applying CloudBlue experience and knowledge of integrating into Customer's existing value chains.

CloudBlue can be integrated with any existing back office environments; and supports both multi-tenant and dedicated models to meet all requirements. While integrations are initially focused on the implementation of a new CloudBlue platform, they are equally appropriate throughout the lifecycle as Customer's business grows and changes.

Integration is a complete managed process, that covers the full range of tasks to identify, agree and deliver a seamless integration, as well as providing on-going support to assist in the long-term delivery of value.

2.4.2 INTEGRATION DEVELOPMENT

Integration Development is a value-added service that can be configured to meet Customer's requirements, combining personalized Services of CloudBlue specialist integration architects, with CloudBlue experience of delivering the CloudBlue platform into a wide range of businesses.

This Service is based on three phases to complete the delivery. This Service varies in size and complexity.

1. Design Milestone

The purpose of this phase is to define and plan the integration, setting the foundation for the successful integration of the platform into Customer's organization. This phase will:

- a. Generate a High-Level Architecture positioning the CloudBlue platform within Customer's organization
- b. Determine and agree a plan to deliver the integration as agreed

Depending on the level of integration needed, this process can include:

- a. Agreeing and identifying the position of the CloudBlue platform within the wider context of Customer's organization. Working through the options relevant for Customer's organization's landscape and goals.
- b. Mapping the standard Customer Journeys supported by the CloudBlue platform to Customer's specific requirements, operation and business outcomes. Identifying how the CloudBlue platform will cooperate with the other aspects of Customer's organization in term of systems, people and process.
- c. Determining the interactions between CloudBlue and other systems to ensure accurate and timely availability of information and delivery of a seamless and cohesive experience and service. Applying the well-known and proven patterns for each type of integration.
- d. Mapping the interaction between Customer's organization and those of your partners and/or resellers, determining how and where CloudBlue will enable and enhance this relationship and the levels and types of integration that will be offered to partners.
- e. Determining an appropriate hosting and deployment model of to ensure that your security performance and compliance requirements are met.
- f. Developing an implementation plan to achieve the above; either as a single delivery or a staged roadmap as appropriate.

2. Build Milestone

The purpose of this phase is to deliver the integration agreed in the Design Phase. This phase will require a degree of collaboration with parts of your organization to correctly configure, implement and test the integration. The phase will consist of:

- a. Establishing a lab/test environment and connections to your lab/test systems
- b. Performing detailed design, mapping the flow of information between your systems and CloudBlue
- c. Implementing connectors to your organizations systems through the CloudBlue integration framework.
- d. Unit, system and integration level testing of the connectors.
- e. Establishing the production environment and connections to your systems

3. Accept Milestone

The purpose of this phase is to sign off that UAT is complete and ready for business cutover. CloudBlue will work with you to support business cutover activities to the integrated platform, and to the CloudBlue Managed Services team for proper handover of ongoing integration support, including:

- a. Provide test support for User Acceptance Testing of the integration scenarios
- b. Track, manage, report on, collaborate on and resolve defects
- c. Obtain Customer acceptance for the lab/test environment to graduate to production
- d. Provide support for production verification testing and resolve issues

4. Pre-Requisites

The pre-requisites are the following:

- a. Completed Business Requirements Document (BRD), agreed with Customer.
- b. [Standard Service Pre-Requisites](#)

5. Exclusions

- a. This Service does not include deployments (implementation) of the built integration into Customer's platform environments.

2.4.3 INTEGRATION MAINTENANCE

This offering is for a previously developed integration. It is billed on an annual basis in advance and provides ongoing certainty for the operation of the developed integration and includes:

- a. Ongoing IP management and retention. Securing and managing the source code and relevant documentation, along with ensuring there are available staff with the skills and specific knowledge to maintain the developed integration
- b. 3rd line support for analysis of production issues and break fix resolution as appropriate
- c. Support and testing for upgrades of the deployment environment (e.g., operating systems, dependent tools, non-breaking changes for integrated systems upgrades, patching)

This Service does not include deployments (implementation) of the integration or its updates into Customer's platform environments.

This Service can be enhanced to include support for on-going change and enhancements to the integration on a prioritized basis

2.4.4 PLATFORM FUNCTIONALITY ACCELERATED DEVELOPMENT

This Service is based on three phases to complete the delivery of Generally Available (GA) platform functionality as per the requirements specified in a Business Requirements Document (BRD) or a Product Requirements Document (PRD).

1. Design Milestone

The purpose of this phase is to launch a project and gather and define all information required for the successful development of the required functionality. The tasks and outcomes are:

- a. Define project delivery timelines based on the product lifecycle, resources availability and priorities.
- b. Define the software architecture for the functionality based on the BRD / PRD and, optionally, a Solution Design Document (SDD).

2. Build Milestone

The purpose of this phase is to build the functionality designed and agreed on in the Design Phase. The tasks and outcomes are:

- a. Develop the functionality as per the BRD / PRD scope.
- b. Perform internal QA as per the BRD / PRD scope.
- c. Create or update documentation.
- d. Release the functionality in the agreed product version as per the project timelines.

3. Accept Milestone

The purpose of this phase is to provide support for Customer User Acceptance Testing, sign-off and business cutover activities. The tasks and outcomes are:

- a. When Customer's platform is upgraded to the agreed product version that includes the functionality, perform a demonstration for Customer staff and / or CloudBlue Managed Services, if Customer uses Managed Services from CloudBlue.
- b. Provide support for User Acceptance Testing performed on a Staging Environment, track and resolve defects found during User Acceptance Testing.
- c. Provide support for Production Verification Testing performed on the Production Environment and assist with resolving issues.

4. Pre-Requisites

The pre-requisites are the following:

- a. BRD / PRD must be signed off by Customer.
- b. [Standard Service Pre-Requisites](#)

5. Exclusions

- a. This Service does not include deployments (implementation) of the delivered functionality into Customer's platform environments.

2.5 MIGRATION SERVICES

2.5.1 OVERVIEW

CloudBlue Migration Services are based on the simplified model from the migration framework and service specific modules built, which can be leveraged to import end-customer accounts and to migrate existing subscriptions.

CloudBlue has developed several processes for migrating information from one system to another. CloudBlue Migration Services uses tools and a framework for each type of migration. CloudBlue will focus on the specific logic of the migration, which includes processes developed, on database access, rest clients and the interaction with the public APIs. In addition, the framework comes with a log system and a stage control.

CloudBlue specialists will assist Customer to build its migration strategy, assess its portfolio, review its cost structure and identify the best-fit cloud platform for its needs.

Either moving from a legacy on-premise solution or another marketplace provider, with the right strategy, Customer can drive efficiency through operations automation, grow revenue through innovation, modernize Customer's services and realize cost savings offered by CloudBlue

The following are some of the migration types that can be performed.

T2CMPCNT	Traditional to CloudBlue Connect	Import external data (customers and subscriptions) to CloudBlue Connect.
T2CMPADV	Traditional to APS 2.0	Import external data (customers and subscriptions) to APS 2.0
OLD2ADV	APS 1.2 to APS 2.0	Move old APS 1.2 subscriptions to APS 2.0
OLD2CNT	APS 1.2 to CloudBlue Connect	Move old APS 1.2 subscriptions to CloudBlue Connect
CNT2ADV	CloudBlue Connect to APS 2.0	Move CloudBlue Connect Subscription to APS 2.0
ADV2CNT	APS 2.0 to CloudBlue Connect	Move APS 2.0 Subscriptions to CloudBlue Connect.
PLT2PLT	Platform to Platform	Move any platform item from one to another. External to CloudBlue

2.5.2 MIGRATION

This Service covers 1 (one) environment of the CloudBlue Commerce platform.

1. Prepare Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful migration to CloudBlue Commerce and perform the following tasks:

- a. Develop or modify tools for reseller migration, as required.
- b. Develop or modify tools for customer data migration, as required.
- c. Develop tools or make changes to existing services integration, as required by subscription migration process.
- d. Deploy/configure/test tools or procedure as required for reseller data migration.
- e. Deploy/configure/test tools or procedure as required for customer data migration.
- f. Deploy/configure/test tools or procedure as required for subscription migration.
- g. Prepare/provide templates to gather information about resellers to be migrated.
- h. Prepare/provide templates to gather information about customers to be migrated.
- i. Prepare/provide templates to gather information about subscriptions to be migrated

2. Import Milestone

The purpose of this phase is to perform necessary platform configuration for Customer.

- a. On-board resellers
 - I. Review and validate CSV file and make sure it has all necessary details for reseller creation.
 - II. Check for duplicates in the CSV file.
 - III. Check if reseller already exists in CloudBlue Commerce.
 - IV. Run few test migrations.
 - V. On-board resellers.
 - VI. Configure the resellers to ensure that they have relevant and required catalogue available, as required by migration.
 - VII. Validate if the procedure went smoothly, review logs.
 - VIII. Troubleshoot and fix, if any errors.
 - IX. Verify results.
- b. Import customer accounts.
 - I. Review CSV file and make sure it has all necessary details for account creation.
 - II. Check for duplicates in CSV file.
 - III. Check if customer already exists in CloudBlue.
 - IV. Run few test migrations.
 - V. On-board customers.

- VI. Validate if the procedure went smoothly, review logs.
- VII. Troubleshoot and fix, if any errors.
- c. Import existing subscriptions for the following 3 Services:
 - I. Review and validate gathered customer data and make sure it has all necessary details for subscription migration.
 - II. Validate if pre-requisites required for subscription migration are in place.
 - III. Make configuration changes, as required.
 - IV. Run few test migrations.
 - V. Perform migration operation.
 - VI. Validate if the procedure went smoothly, review logs.
 - VII. Troubleshoot and fix, if any errors.

3. Validate Milestone

The purpose of this phase is to have Customer sign off that UAT is complete and ready for business cutover. CloudBlue will work with Customer to support business cutover activities to the platform, and to work together with Customer and the CloudBlue Managed Services team for proper handover of ongoing platform support, including:

- a. Verify results of on-boarded resellers
- b. Verify results of customer accounts imported
- c. Verify results of subscriptions imported

4. Pre-Requisites

The pre-requisites are the following:

- a. [Standard Service Pre-Requisites](#)

5. Assumptions

- a. Customer provides data to be migrated in pre-defined data import templates.
- b. Customer provides test data for migration tool testing.
- c. Past reconciliation of orders has been done for orders.
- d. Subscriptions being migrated are active.

6. Exclusions

- a. CSV or other data files preparation.
- b. Migration of order or subscription history.
- c. Migration of invoicing or payment history.

2.5.3 ADVANCED UPGRADE ASSISTANCE

CloudBlue is not obligated to provide continued support and maintenance to the platform and CloudBlue shall not be liable for any consequences (including losses or damages of any nature whatsoever) when the End of Maintenance Milestone and End of Life period is reached (including but not limited to system or platform downtime, delays, outages, or functionality issues, etc.).

For those Customers that are on a version that has exceeded (surpassed) the End of Maintenance Milestone, CloudBlue recommends the following service as a paid engagement under an agreed SoW to be entered into.

If you continue to use the CloudBlue platform that is on a version that has reached End of Life, your platform may still work, but it may become more vulnerable to security risks. CloudBlue may no longer provide best practices for the support for your business.

This Service covers 2 (two) environments of the CloudBlue Commerce platform – Staging and Production.

1. Prepare Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful Service delivery:

- a. Downtime assessment.
- b. Run pre-check and provide results.
- c. Database validation.
- d. Build upgrade and tech risks mitigation plan.
- e. Release notes walk through.
- f. Consultancy for pre-upgrade backup.
- g. Go through pre-check results with recommendations.
- h. Flexible upgrade schedule.
- i. Gap-analysis (platform).
- j. Gap-analysis (apps, infrastructure, CSD).
- k. Flexible upgrade timing (fixed maintenance timeslot).
- l. Consultancy for blockers elimination.
- m. Consultancy for task queue clean up.
- n. Customer specific post-upgrade test scenarios development.

2. Import Milestone

The purpose of this phase is to perform necessary platform configuration for Customer, including:

- a. In-progress communication (status updates);
- b. Upgrade coordinator available 24/7;
- c. Support SME on duty for Business-Critical issues; and
- d. Critical issues expedited (report to support).

3. Validate Milestone

The purpose of this phase is to have Customer sign off that User Acceptance Testing is complete and ready for business cutover. The CloudBlue Services Organization will work with Customer to support business cutover activities to the platform, and will work together with Customer and the CloudBlue Managed Services team for a proper handover of ongoing platform support, including:

- a. Status report and issues tracker provided.
- b. Basic check-up of main services up and running.
- c. Customer-specific post-upgrade tests scenarios (User Acceptance Testing follow up) - an upgrade project coordinator will provide consultative assistance and follow up during Customer's User Acceptance Testing for the set of scenarios developed on the pre-upgrade stage.
- d. Issue tracker follow-up until full resolution.

4. Pre-Requisites

The pre-requisites are the following:

- a. [Standard Service Pre-Requisites](#)

2.6 SKU LIST

The following table defines Service Description, SKUs and metrics used in this chapter.

Description	SKU #	Metric
Modular Solution Plan #1 Implementation – Catalog Management	CB-DEP.CCM-PC-1T	One-Time Charge
Modular Solution Plan #2 Implementation – Subscription and Catalog Management	CB-DEP.CCM-PSC-1T	One-Time Charge
Modular Solution Plan #3 Implementation – Multi-Tier Subscription Management and Catalog Management	CB-DEP.CCM-PMSC-1T	One-Time Charge
Modular Solution Add-On Implementation – Operating Company / Country Management – Per OpCo	CB-DEP.CCM-AMOC-1T	One-Time Charge
Modular Solution Add-On Implementation – Branded Marketplace and Customer Self-Service – Per Marketplace	CB-DEP.CCM-AMCP-1T	One-Time Charge
Modular Solution Add-On Implementation – Revenue Management	CB-DEP.CCM-AR-1T	One-Time Charge
Custom CloudBlue Commerce Deployment	CB-DEP.CBD-SETUP-1T	One-Time Charge
CloudBlue Connect Provider Setup	CB-DEP.CONN-SETUP-OA-1T	One-Time Charge
CloudBlue Connect and Commerce Reseller Setup	CB-DEP.CONN-SETUP-OARS-1T	One-Time Charge
Value Added Reseller Setup	CB-DEP.OA-VAR-1T	One-Time Charge
CloudBlue Connect Connector Deployment	CB-DEP.OA-CNCT-1T	One-Time Charge
Self-Deployed CloudBlue Connect Connector Validation and Certification	CB-DEP.OA-SDCCVC-1T	One-Time Charge
Syndication Product Setup (CloudBlue Connect based)	CB-DEP.OA-SYND-CONN-1T	One-Time Charge
Syndication Product Setup (Ingram Micro hosted backend)	CB-DEP.OA-SYND2-1T	One-Time Charge
APS Controller Proxy Deployment	CB-DEP.OA-APSC-1T	One-Time Charge
Standalone APS Connector Deployment	CB-DEP.OA-CNCT-ST-1T	One-Time Charge
Service Plan Setup	CB-DEP.OA-SP-1T	One-Time Charge
Plug-in Deployment	CB-DEP.OA-PG-1T	One-Time Charge
Localization Pack Deployment	CB-DEP.LOCALIZE-1T	One-Time Charge
WebHosting Plesk Deployment	CB-DEP.OA-WHP-ST-1T	One-Time Charge
Hosted Services Additional Server Deployment	CB-DEP.OA-HS-A-1T	One-Time Charge
Configuration	CB-DEP.CBS-PC-1T	One-Time Charge
Billing Validation	CB-DEP.CBSP-BV-1T	One-Time Charge
Go-to-Market Automator Setup	CB-DEP.GTMA-1T	One-Time Charge
Go-to-Market Builder Setup	CB-DEP.GTMA-B-1T	One-Time Charge
Go-to-Market Automator SSO Setup	CB-DEP.GTMA-SSO-1T	One-Time Charge
Integration Development	CB-DEP.INTGR-1T	One-Time Charge
Integration Maintenance	CB-DEP.INTGR-MNT-1Y	Annual Charge
Platform Functionality Accelerated Development	CB-DEP.BLD-AD-1T	One-Time Charge
Migration	CB-DEP.MIGRATE-1T	One-Time Charge
Advanced Upgrade Assistance	CB-DEP.UPGRADE-1T	One-Time Charge

2.7 STANDARD SERVICE PRE-REQUISITES

All Deployment Services have the following standard pre-requisites:

- a. Customer must inform CloudBlue deployment teams of any change freeze on any production or other systems that could delay the delivery of Services.

2.8 STANDARD SERVICE LIMITATIONS AND ASSUMPTIONS

All Deployment Services have the following standard limitations and assumptions:

- a. In case any security hardening performed by Customer interferes with any CloudBlue Commerce functionality, the interfering elements of security hardening configuration must be rolled back.

2.9 STANDARD SERVICE EXCLUSIONS

All Deployment Services have the following standard exclusions:

- b. Functional customizations of the CloudBlue Connect platform
- c. Functional customizations of the CloudBlue Commerce platform other than explicitly specified
- a. Custom software development (CSD), scripting, modifications or maintenance of any functionality or integrations with any solutions or platforms other than explicitly specified
- b. Analysis of any requests or design of any solutions not explicitly specified
- c. Consulting on design, development or testing of integrations, unless explicitly specified
- d. Handover of any internal tools or internal documentation used in the course of the Services delivery.
- e. Registration of domains, provisioning of SSL certificates or software licenses
- f. Deployments, configuration or verifications of any software or modules (CloudBlue or third party) other than explicitly specified
- g. Configuration, troubleshooting, settings customization, custom security configuration or security hardening of any third-party software or services, operating systems, networking or hardware other than explicitly specified
- h. Resolution of any issues with hardware, networking, operating systems, third party services or software encountered during the delivery of Services – other than explicitly specified
- i. Creation of any branding materials or customer-facing content or customer communication templates
- j. Creation of custom operations or deployment documentation other than explicitly specified
- k. Creation of User Acceptance Testing plans
- l. Performing extended testing (e.g., end-to-end testing covering third party systems, full regression testing, performance and load testing, stress testing, penetration testing, etc.)
- m. Anything else not explicitly specified in the Service scope

3 EDUCATION SERVICES

CloudBlue Education Services are designed to enable Customers to maximize their potential of their CloudBlue solutions, and support them in reaching business goals, through instruction and distribution of quality learning programs.

A blended learning approach combines digital learning, with traditional instructor-led training (ILT) methods. This allows maximum choice and flexibility to ensure both experienced and new platform users receive the knowledge they need to be competent in CloudBlue Commerce, and CloudBlue Connect.

3.1 DIGITAL TRAINING

Access to web-based, on-demand eLearning training modules or other online resources, covering the fundamentals required to work within the CloudBlue Commerce and CloudBlue Connect platforms. Modular topics cover a range of features and function, including navigation and real-world scenarios.

eLearning is designed to supplement instructor-led training. It can be used to quickly onboard platform users, embed into new-hire programs, provide just-in-time reference, and/or provide a foundation level training to those unable to travel or afford time away from the office.

eLearning is accessible from the [Ingram Micro Training platform](#). These training courses consist of:

- a. On-demand courses for CloudBlue Commerce and CloudBlue Connect accessed asynchronously by individual learners, through the learning management platform.
- b. Targeted role-based Commerce training, covering the basic operations per user. Learn through theory, guided simulations, and knowledge checks.
- c. CloudBlue Connect focused training, covering the fundamentals of using CloudBlue Connect for a simple and cost-effective way to offer new services.
- d. Access is provided on a per-user basis. Individuals are granted access to the specific course(s) matched to their role and responsibility in the platform.

3.2 VIRTUAL INSTRUCTOR-LED TRAINING

Access to live training courses, delivered remotely by a Certified CloudBlue trainer, covering the breadth and depth of the platform. Courses are presented in a modular format, covering a wide range of technology, features, and management of the platform.

These Services are offered in the following formats:

- a. Dedicated: devoted to the needs of an individual Customer. Content can be adjusted and focused to the needs of that specific Customer, using Customer environment to deliver the training, where possible. Dates and times are agreed with Customer.
- b. Open Enrolment: open to any new or existing Customer to attend. Content is generic, using a pre-configured training environment. Dates and times are decided by CloudBlue – a calendar of such classes will be made available.

These courses consist of:

- a. Live instructor-led training, delivered using the Zoom webinar conferencing tool
- b. Targeted role-based Commerce training, covering the basic and/or advanced operations per user, plus additional course options for the management and configuration of solutions via the platform.
- c. CloudBlue Connect focused training, covering either the fundamentals of using CloudBlue Connect for a simple and cost-effective way to offer new services and/or the advanced processes, workflows, standards and best practices of how to create products specific to your company and business operations.

- d. Participants learn through theory, extensive demonstrations by the trainer, interaction, discussions, and knowledge checks
- e. Audience size is restricted to twelve persons per class. This allows the trainer to replicate a classroom environment, with appropriate teacher/student interactions and activities

3.3 ONSITE INSTRUCTOR-LED TRAINING

Access to live training modules, delivered face-to-face by a Certified CloudBlue trainer, covering the breadth and depth of the platform. Courses are presented in a modular format, covering a wide range of technology, features, and management of the platform.

These Services are offered in the following formats:

- a. **Dedicated:** dedicated to the needs of an individual Customer. Content can be adjusted and focused to the needs of that individual Customer, using Customer environment to deliver the training, where possible. Dates and times are agreed with the Customer. Training venue is provided by the customer. CloudBlue is responsible for making travel arrangements, Customer is responsible for the associated costs (agreed in advance, billed after the event).
- b. **Open Enrolment:** open to any new or existing Customer to attend. Content is generic, using a pre-configured training environment. Dates and times are decided by CloudBlue – a calendar of such classes will be made available. Training venue is provided by CloudBlue. Customer is responsible for making travel arrangements, Customer is responsible for the associated costs.

These courses consist of:

- a. Live instructor-led training, delivered at Customer's location or CloudBlue office or location.
- b. 50/50 hands-on/lecture experience. Participants learn primarily by doing, performing structured Lab activities in a pre-configured training environment/Customer staging environment, with face-to-face expert guidance and support, interaction and discussions in a group setting
- c. Targeted role-based Commerce training, covering the basic and/or advanced operations per user, plus additional course options for the management and configuration of Services via the platform.
- d. CloudBlue Connect focused training, covering the advanced processes, workflows, standards and best practices of how to create products specific to your company and business operations.
- e. Audience size is restricted to twelve persons per class. This allows the trainer to effectively manage a traditional classroom environment, with multiple teacher/student interactions and activities

3.4 SERVICE(S) OVERVIEW

Education Services are offered in the following categories:

3.4.1 EDUCATION SUBSCRIPTION BUNDLES

- a. access to learning resources in a single, annual subscription; choose from the breadth of the CloudBlue Commerce and CloudBlue Connect training Services over a 12-month period, giving flexibility to deliver training as and when your team need it most.
- b. Includes:
 - i. Digital training/eLearning
 - ii. Live instructor-led training
 - iii. Certification exams
 - iv. Exclusive invites to webinars for releases of CloudBlue Commerce and CloudBlue Connect; be amongst the first to see changes and access the latest exams.

3.4.2 STANDALONE EDUCATION SERVICES

- a. Access to any of the CloudBlue Commerce and CloudBlue Connect training Services as and when required.

Education Subscription Bundles			
Services included	Essentials	Classic	Advanced
Digital eLearning seats	Up-to 12 active seats at any time	Up-to 12 active seats at any time	Up-to 12 active seats at any time
Certification exams	Yes For attendees of training classes	Yes For attendees of training classes	Yes For attendees of training classes
Instructor-led training Virtual or Onsite	Up-to 6 days 12 students per class	Up-to 8 days 12 students per class	Up-to 12 days 12 students per class
Release Training	12 attendees per webinar for each major CloudBlue Commerce and CloudBlue Connect release	12 attendees per webinar for each major CloudBlue Commerce and CloudBlue Connect release	12 attendees per webinar for each major CloudBlue Commerce and CloudBlue Connect release
Lab environment outside training	No	No	Yes

3.5 SERVICE ACTIVATION

CloudBlue will activate the Services and provide the following deliverables including, among other items:

- a. Provide login credentials for Digital Training within thirty (30) Days of the applicable SoW Effective Date
- b. Schedule a pre-training call with Customer within thirty (30) Days of the applicable SoW Effective Date to review chosen options
- c. Provide a customized training plan and schedule of delivery within thirty (30) Days of the applicable SoW Effective Date

3.6 SERVICE LIMITATIONS

Prior to the start of scheduled training:

- a. Customer will indicate to CloudBlue in writing, a person to be the point of contact. All project communications will be addressed to such point of contact. Customer contact has the authority to act on behalf of Customer in all aspects of the project and to resolve conflicting Customer requirements, including:
 - i. Coordinate with appropriate resources and book facilities for the delivery of Services
 - ii. Obtain and provide project requirements, information, data, decisions and approvals within three (3) working days of the request, unless both parties agree to a different response time
 - iii. Provide accurate participant count, names and emails within two (2) weeks of scheduled Services
 - iv. Ensure CloudBlue Trainers have reasonable and safe access to training facility, parking, telephone and Internet connectivity and workspace, as required for Onsite Services
- b. The parties intend for delivery of Services to be provided within one (1) year of the applicable SoW Effective Date. In the event Customer does not schedule and allow CloudBlue to provide the Services within such one (1) year commencing on SoW Effective Date, Customer will remain liable for payment of the full amount of

the Fees set out in the applicable SoW. The Customer will also forfeit any Fees paid in advance and the Service will be considered fully delivered and accepted. Any unused entitlement for training days at the end of the one (1) year period, will be forfeited (will expire).

- c. Specific dates for delivery of Services will be agreed by Customer and Ingram Micro. The following Services require at least forty-five (45) business days advance notification for delivery:
 - i. Virtual Instructor-Led Training: Dedicated
 - ii. Onsite Instructor-Led Training: Dedicated
- d. Ingram Micro will provide a description of requirements for the Service Onsite Instructor-Led Training: Dedicated, including specifications for computer systems and/or Internet connectivity. If required specifications cannot be provided by Customer, the Service will be delivered in lecture only format, with no or limited practical activities.
- e. Agreed dates (e.g., scheduled training) will not be changed within less than two (2) calendar weeks' notice.
- f. To request a change, Customer must submit a Change Request. Ingram Micro will then assess the impact in terms of cost, timeline and scope and will revert back with an offer.

Should Ingram Micro cancel any scheduled Services, Ingram Micro will use reasonable efforts to give Customer advance notice of cancellation and will endeavour to reschedule, as mutually agreed between Ingram Micro and Customer. If the Services are cancelled for reasons solely due to Ingram Micro, and cannot reasonably be rescheduled, Ingram Micro will refund that portion of the Customer's associated pre-paid training fees. The refund will be Customer's only recourse in the event of Ingram Micro's cancellation.

- a. All training materials provided by Ingram Micro in any form, whether printed or electronic, are the copyrighted works of Ingram Micro. Training materials are for the sole use by the participant enrolled in the training course, they may not be used by any other person, and may not be reproduced, distributed or modified without Ingram Micro's express written permission.
- b. If Ingram Micro cannot reach an agreement with Customer for the requirements listed above, Ingram Micro reserves the right to terminate the Services as described in the applicable SoW

3.6.1 SPECIFIC TO DIGITAL TRAINING SERVICES

Customer agrees to be responsible for ensuring that there is no sharing of access or credentials of the Ingram Micro training site across multiple users. Ingram Micro reserves the right to revoke access for any user(s) at any time, at its sole discretion.

- a. Ingram Micro will not be held responsible for Customer completing this Service or for Service failures, delays, downtimes, if such failures, delays or downtime is on account of any reasons not solely attributable to Ingram Micro, including but not limited to, force majeure events, or Customer's delay or failure to comply with its obligations under the applicable Agreement and SoW, or due to factors under Customer's control or risk.

3.6.2 SPECIFIC TO VIRTUAL INSTRUCTOR-LED TRAINING SERVICES

Ingram Micro may refuse to provide Service if, in its reasonable opinion, providing the Service creates an unreasonable risk to Ingram Micro or Ingram Micro's subcontractors or service providers or if any requested service is beyond the agreed scope of Service. Ingram Micro is not liable for any failure or delay in performance which is not solely attributed to it, or due to any cause beyond its control, or due to any breach by Customer of its obligations under the Agreement, including Customer's failure to comply with its obligations under this Service Description.

3.6.3 SPECIFIC TO VIRTUAL INSTRUCTOR-LED OPEN ENROLMENT TRAINING SERVICES

- a. A public calendar of these classes will be accessible from the Ingram Micro Training site.

- b. Individual users at Customer will register for relevant class(es) via the Ingram Micro Training site.
- c. To register for these classes, Customer will be issued with a 'voucher code'. The code to be entered during the checkout process on the Ingram Micro Training site. One code per student/class will be issued. Ingram Micro will provide Customer with full further instructions on the associated process, and demonstration, if necessary.

3.6.4 SPECIFIC TO ONSITE INSTRUCTOR-LED TRAINING SERVICES

- a. Ingram Micro may refuse to provide Service if, in its reasonable opinion, providing the Service creates an unreasonable risk to Ingram Micro or Ingram Micro's subcontractors or service providers, or if any requested service is beyond the agreed scope of service. Ingram Micro is not liable for any failure or delay in performance which is not solely attributed to it, or due to any cause beyond its control, or due to any breach by Customer of its obligations under the Agreement, including Customer's failure to comply with its obligations under this Service Description.
- b. Customer is responsible for ensuring availability of the following Onsite training requirements:
 - i. Data projector/screen for presentations
 - ii. Separate whiteboard with markers
 - iii. Students have individual desktops/laptops to run labs
 - iv. Sufficient number of power outlets for all students
 - v. Internet connectivity to remotely access to CloudBlue Education Services' training systems, preferably hard wire or very stable wireless. Lab exercises are dependent on a stable connection.
 - vi. A room of appropriate size to allow easy movement between all students
- c. Unless otherwise specified, the Parties acknowledge that any on-site Services are intended to be performed during Normal Work Hours. Normal Work Hours do not include weekends, public holidays (observed in the country in which Services are performed), or hours between 8 a.m. and 6 p.m. local time.
- d. Complete the questionnaire provided by Ingram Micro to Customer prior to delivery of the course

3.6.5 POST-DELIVERY OF ANY INSTRUCTOR-LED TRAINING SERVICES

- a. All students will be asked to complete a digital survey at the end of each event. Submissions are treated anonymously, and information is used to improve the Education Services Ingram Micro provides to Customers.

3.7 SERVICE EXCLUSIONS

- a. Training for 3rd party systems or software
- b. Development of custom courseware, unless agreed in advance with Customer
- c. Implementation, configuration or operations of 3rd party systems or software except listed in the applicable SoW
- d. The development of any intellectual property created solely and specifically for Customer
- e. Ingram Micro will, at its sole discretion, determine the number of instructors and the appropriate skill sets necessary to conduct the training. Customer agrees that any Ingram Micro resource may be an employee or consultant of Ingram Micro and/or an Ingram Micro subcontractor or service provider.
- f. This Service Description does not provide Customer with any warranties which are in addition to the warranties provided under the terms of the applicable Agreement. Ingram Micro expressly disclaims all other warranties, whether express, implied, statutory or otherwise.

3.8 SKU LIST

The following table defines Service Description, SKUs and metrics used in this chapter.

Education Subscription Bundles	SKU #	Metrics	Notes
Essential Training Bundle	CB-EDU.SUB-ESS	One-Time	Recurring
Classic Training Bundle	CB-EDU.SUB-CLA	One-Time	Recurring
Advanced Training Bundle	CB-EDU.SUB-PRE	One-Time	Recurring
Standalone Commerce Services	SKU #	Metrics	Notes
Sales role-based Instructor-Led: Dedicated	CB-EDU.SAL	One-Time	Per Class
Sales role-based Instructor-Led: Open Enrolment	CB-EDU.SAL-OE	One-Time	Per User
Sales role-based Digital Training	CB-EDU.SAL-EL	One-Time	Per User
Finance role-based Instructor-Led: Dedicated	CB-EDU.FIN	One-Time	Per Class
Finance role-based Instructor-Led: Open Enrolment	CB-EDU.FIN-OE	One-Time	Per User
Finance role-based Digital Training	CB-EDU.FIN-EL	One-Time	Per User
Customer Service role-based Instructor-Led: Dedicated	CB-EDU.CS	One-Time	Per Class
Customer Service role-based Instructor-Led: Open Enrolment	CB-EDU.CS-OE	One-Time	Per User
Customer Service role-based Digital Training	CB-EDU.CS-EL	One-Time	Per User
Product-Marketing role-based Instructor-Led: Dedicated	CB-EDU.PDM	One-Time	Per Class
Product-Marketing role-based Instructor-Led: Open Enrolment	CB-EDU.PDM-OE	One-Time	Per User
Product-Marketing role-based Digital Training	CB-EDU.PDM-EL	One-Time	Per User
Admin Level1 role-based Instructor-Led: Dedicated	CB-EDU.AD	One-Time	Per Class
Admin Level1 role-based Instructor-Led: Open Enrolment	CB-EDU.AD-OE	One-Time	Per User
Admin Level1 role-based Digital Training	CB-EDU.AD-EL	One-Time	Per User
Admin Level2 role-based Instructor-Led: Dedicated	CB-EDU.AVA	One-Time	Per Class
Admin Level2 role-based Instructor-Led: Open Enrolment	CB-EDU.AVA-OE	One-Time	Per User
O365 CSP Instructor-Led Training: Dedicated	CB-EDU.OCSP	One-Time	Per Class
O365 CSP Instructor-Led Training: Open Enrolment	CB-EDU.OCSP-OE	One-Time	Per User
Azure CSP Instructor-Led Training: Dedicated	CB-EDU.ACSP	One-Time	Per Class
Azure CSP Instructor-Led Training: Open Enrolment	CB-EDU.ACSP-OE	One-Time	Per User
Orchestrator Instructor-Led Training: Dedicated	CB-EDU.ORB	One-Time	Per Class
Orchestrator Instructor-Led Training: Open Enrolment	CB-EDU.ORB-OE	One-Time	Per User
Training Environment for Labs-Testing	CB-EDU.TENV	One-Time	Per Day, Per Sandbox
CloudBlue Connect Standalone Education Services	SKU #	Metrics	Notes
CloudBlue Connect Essentials Digital Training	CB-EDU.CONN-EL	One-Time	Per User
CloudBlue Connect Champion Instructor-Led: Dedicated	CB-EDU.CONN	One-Time	Per Class
CloudBlue Connect Champion Instructor-Led Training: Open Enrolment	CB-EDU.CONN-OE	One-Time	Per User

4 DEFINITIONS

- a. Capitalized terms used in this Service Description, and not otherwise defined in the Agreement or in an applicable SoW, have the meaning given below.
- b. In this Service Description, the term “you” or “your” refers to the Customer.

Capitalized term	Description
Production Environment	A revenue-generating platform environment.
Staging Environment	A non-production, non-revenue-generating environment used by developers to model impacts to Customer environment or test upgrades.
Operating Company (or OpCo)	A separate company, entity or a business unit using the same Production Environment to manage commercial relationships with a separate customer base, segment, channel or country.
Standalone Connector	A CloudBlue Commerce component that is either a standard or a custom application packaged using classic Application Packaging Standard (APS), which directly integrates CloudBlue Commerce with third-party systems and services external to CloudBlue Commerce for the purpose of provisioning and management of products and services.
CloudBlue Connect (or Connect)	A cloud-based self-onboarding framework for service vendors and service providers that provides a simple, cost effective and accelerated way to offer new and manage lifecycle of existing service integrations and to replace the complexity of classic Application Packaging Standard (APS) package design, development, testing, certification and publishing.
Connect Connector	Product Package as defined by CloudBlue Connect documentation at https://connect.cloudblue.com/community/extensions/cloudblue-commerce/product-package/
Connector	Either a Standalone Connector or a Connect Connector.

5 GOVERNANCE

- a. This Service Description is governed by the applicable Agreement.
- b. If there is any conflict or inconsistency between any elements of this Service Description and the Agreement, or the applicable SoW, this Service Description shall control.
- c. This Service Description, together with any other documents incorporated herein by reference and all related exhibits and schedules, constitutes the sole and entire agreement of the parties to the Agreement with respect to the subject matter contained herein, and supersedes all prior and contemporaneous understandings, agreements, representations, and warranties, both written and oral, with respect to such subject matter.

End of Service Description – Professional Services