



CLOUDBLUE

Service Description

DEPLOYMENT SERVICES

Updated: September 1, 2019


CloudBlue[™]

CloudBlue, an Ingram Micro Business
3351 Michelson Drive, Suite 100, Irvine, CA 92612 United States
Tel: +1 714-566-1000

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DEPLOYMENT SERVICES - SERVICE DESCRIPTION

Updated: September 1, 2019

This Service Description describes Deployment Services (“Service”). All capitalized terms in this description have the meaning ascribed to them in the Agreement (defined below) or in the Definitions section. This Service Description, with any attachments included by reference, is part of and incorporated into Customer’s signed agreement with Ingram Micro which governs the use of the Service (hereinafter referred to as the “Agreement”).

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1. DEPLOYMENT SERVICES

CloudBlue Deployment Services are based on proven, repeatable success at every step of the solution that is aligned to a customer’s specific functionality or configuration. Deployment Services follow a standard project management delivery methodology.

Project Management: Ingram Micro will assign a project manager to manage Deployment Services and will provide Customer with the name and contact information of such project manager following Ingram Micro’s receipt of the signed 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 service, 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, 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%

Service Exclusions: The following services are out of scope of Deployment Services ;

- a. Analysis and design of any items not explicitly outlined;
- b. Development of any items not explicitly outlined; and
- c. Deployment of any items not explicitly outlined.

1.2 COMMON SKU DESCRIPTIONS

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

Description	SKU #	Metric
Platform Implementation	CB-DEP.CBD-SETUP-1T	One-Time Charge
Connect Provider Setup	CB-DEP.CONN-SETUP-OA-1T	One-Time Charge
Connect Reseller Setup	CB-DEP.CONN-SETUP-OARS-1T	One-Time Charge
Self-Deployed Connector Validation Service	CB-DEP.OA-SDCCVC-1T	One-Time Charge
APS Controller Proxy deployment	CB-DEP.OA-APSC-1T	One-Time Charge
APS Package deployment	CB-DEP.OA-CNCT-ST-1T	One-Time Charge
Syndication Type I connector deployment	CB-DEP.OA-SYND1-1T	One-Time Charge
Syndication Type II connector deployment	CB-DEP.OA-SYND2-1T	One-Time Charge
Value Added Reseller deployment	CB-DEP.OA-VAR-1T	One-Time Charge
Additional Service Plan deployment	CB-DEP.OA-SP-1T	One-Time Charge
Plug-in deployment	CB-DEP.OA-PG-1T	One-Time Charge
OACI standalone deployment	CB-DEP.OA-OACI-ST-1T	One-Time Charge
OACI clustered deployment	CB-DEP.OA-OACI-CL-1T	One-Time Charge
WebHosting Plesk standalone deployment	CB-DEP.OA-WHP-ST-1T	One-Time Charge
Hosted Services additional server deployment	CB-DEP.OA-HS-A-1T	One-Time Charge
Platform Configuration Service	CB-DEP.CBS-PC-1T	One-Time Charge
Localization Solution	CB-DEP.LOCALIZE-1T	One-Time Charge
Localization Solution Maintenance	CB-DEP.LOCALIZE-MNT-1Y	Annual Charge
Integration Development Service	CB-DEP.INTGR-1T	One-Time Charge
Integration Maintenance Service	CB-DEP.INTGR-MNT-1Y	Annual Charge
Platform Migration Service	CB-DEP.MIGRATE-1T	One-Time Charge
Advanced Upgrade Assistance	CB-DEP.UPGRADE-1T	One-Time Charge
Synchronization of Microsoft Office 365 Subscriptions	CB-DEP.MIGRATE-1T	One-Time Charge

2. IMPLEMENTATION SERVICES OVERVIEW

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

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

Our Implementation Engineers, Architects, and Cloud Professionals are the heart of our business. When you work with CloudBlue, you get access to a deep bench of cloud experts for the set up and optimization and delivering a finished platform that meets your unique business needs ready for use.

Our implementation services help clients to rapidly achieve the business goals for utilizing cloud strategy. We will help with planning, build, quality validation & verification, and support.

2.2 PLATFORM IMPLEMENTATION

SKU: CB-DEP.CBD-SETUP-1T

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

2.2.1 Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful installation of the platform, but doing the following:

- a. Create cloud infrastructure for the staging and production environments – Resource Group, Application Gateway, Traffic Manager Profiles, IP Addresses and Virtual Networks, App Service Plans, API Gateway, SQL Database, Storage, Backup Services (for Dedicated PaaS only);
- b. Deploy a standardized CloudBlue platform template of an agreed size (small/medium/large) for both staging and production environments including the core platform modules and Marketplace (for Dedicated PaaS only);
- c. Deploy a standard set of native connectors and plug-ins for the platform as defined in the master template (Office 365, Azure CSP, Dropbox, Connect and Rated Data Export for exporting billable data from the platform) (for Dedicated PaaS only);
- d. Deploy additional connectors for the platform as required (for Dedicated PaaS only);
- e. Deploy standardized Reseller tenant templates for staging and production environments;
- f. Deploy a standardized configuration of the core platform modules, Marketplace, Rated Data Export, reports, notification templates and approval workflows;
- g. Deploy default branding for the platform Reseller tenants and Marketplace;
- h. Deploy a standardized default product catalogue / SKUs for the standard set of connectors;
- i. Deploy a standardized monitoring solution; and
- j. Deploy a selected Disaster Recovery solution (optional).

2.2.2 Configure Milestone

The purpose of this phase is to perform necessary Platform configuration for the customer, and includes the following:

- a. Create pre-work documents capturing the required business configuration of the product catalogue, Marketplace, approval workflows, reports;
- b. Register the platform in the Connect Service Provider portal and establish connections with selected ISVs products (optional);
- c. Deploy the business configuration of the platform to the staging system. Production system configuration is to be deployed when the staging system configuration passes User Acceptance Testing;
- d. Set up the technical configuration of the platform – SSL certificates, SMTP server settings, SFTP setup for Rated Data Export;
- e. Upload Reseller-specific branding and localization for the platform tenants, customer notifications and Marketplace in the staging environment;
- f. Create a Sales Channel/Reseller/Operating Company configuration;
- g. Collaborate and iterate on pre-work documents and the business configuration of the staging system; and
- h. Hand over to Customer Operations team and CloudBlue Managed Services (optional).

2.2.3 Verify Milestone

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

- a. Perform unit testing of deployed modules and infrastructure configuration – both platform and connectors;
- b. Perform testing of customer ordering, upgrade/downgrade and cancellation scenarios on the staging system;
- c. Perform a guided walkthrough for primary business scenarios for the 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 staging environment configuration to graduate to production;
- g. Clone the configuration of the staging system to the production system – including the connectors, product catalogue, Marketplace configuration, approval workflows, branding for the platform tenants and Marketplace, Rated Data Export, reports and customer notification templates; and
- h. Provide support for production verification testing and resolve issues.

2.3 CONNECT PROVIDER SETUP

SKU: CB-DEP.CONN-SETUP-OA-1T

This Service is based on three phases to complete the delivery of the setup of Connect. The Connect Provider Setup service enables customers to use the Connect platform to offer Connect-based products in the customer's CloudBlue platform environments. Connect allows Providers to brand (white-label) various aspects of its portals.

2.3.1 Install Milestone

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

- a. Deployment of inbound and outbound proxies to communicate with Connect - in customer's staging and production platform environments;
- b. Setup of monitoring for the integration of Customer's platform environments with Connect – in the context of the existing CloudBlue-managed monitoring system (in case such system is already deployed and managed by CloudBlue);
- c. Portals Branding. Different portals of Connect (Vendor Portal, Provider Portal and Customer Activation Screens) support branding. In order to setup Branding within Connect, there is pre-work that needs to be provided by the Customer. The information that is to be gathered for Branding includes the following attributes:
 - I. Email Notifications Branding - Connect sends in multiple cases emails to different actors, for example when a vendor receives a new request, Connect may send him a notification;
 - II. User Agreement Branding - Connect may enforce the acceptance of a user agreement each time that a user is enrolled on any of its portals. 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 Ingram Micro staff) or redirect users to any external URL of the ticketing system, managed externally.

2.3.2 Configure Milestone

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

- a. Addition of a Connect Service Provider Portal tenancy;
- b. Addition of a Connect Vendor Portal tenancy (optional);
- c. Registration of customer's platform environments in Connect;
- d. Deployment of a test Connect APS package to Customer's platform environments for integration validation purposes; and
- e. Hand-over to Customer Operations team and CloudBlue Managed Services (optional).

2.3.3 Verify Milestone

The purpose of this phase is to verify that the 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 Connect APS package;
- c. Guided walkthrough for primary business scenarios for the 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 .

2.3.4 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 Connect.

2.3.5 Exclusions

The following are exclusions of this service:

- a. Functional customizations of Customer's platform;
- b. Functional customizations of the Connect Provider and Vendor portals;
- 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; and
- 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.).

2.4 CONNECT RESELLER SETUP

SKU: CB-DEP.CONN-SETUP-OARS-1T

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

2.4.1 Install Milestone

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

2.4.2 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 Connect Marketplace within a customer's Connect Provider account;
- b. Creation of a Connect Vendor for the Customer (optional);
- c. Creation of a test/example Product within the Customer's Connect Vendor (optional);
- d. Creation of a connection for the test/example Product with the Customer's new Connect Marketplace;
- e. Publishing of the test/example Product in the 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).

2.4.3 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 the 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 .

2.4.4 Pre-requisites

This Service has the following pre-requisites:

- a. Customer's platform environments are already integrated with Connect, i.e. 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.

2.5 SELF-DEPLOYED CONNECTOR VALIDATION SERVICE

SKU: CB-DEP.OA-SDCCVC-1T

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

2.5.1 Install Milestone

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

2.5.2 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 the customer

2.5.3 Verify Milestone

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

2.5.4 Assumptions

- a. Each Connector package in any given environment (Production, Staging, etc..) is treated as a single entity
- b. Customer/Ingram Micro (IM) will cover all the items relating to granting access and getting approvals for Datacom's access to the environment
- c. Datacom will be able to deliver the validation/certification work remotely
- d. Maximum of 2 SKUs are verified during the certification dry run
- e. The subject Connector has been successfully "Previewed" by the Vendor before and operational
- f. Any additional recertification requirement (e.g. failure on the first run or due to ISV changes) is charged according to the pricing described in the **Error! Reference source not found.Error! Reference source not found.**

2.5.5 Exclusions

- a. Installation of the platform, package itself
- b. Any code changes to the connector package
- c. Vendor portal changes /configuration

2.6 APS CONTROLLER PROXY DEPLOYMENT

SKU: CB-DEP.OA-APSC-1T

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

2.6.1 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.

2.6.2 Configure Milestone

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

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

2.6.3 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.

2.7 APS PACKAGE DEPLOYMENT

SKU: CB-DEP.OA-CNCT-ST-1T

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

2.7.1 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.

2.7.2 Configure Milestone

The purpose of this phase is to perform necessary Platform configuration for the 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).

2.7.3 Verify Milestone

The purpose of this phase is to have the 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 the 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.

2.8 SYNDICATION TYPE I CONNECTOR DEPLOYMENT

SKU: CB-DEP.OA-SYND1-1T

This Service is based on three phases to complete the delivery of a Type I Connector – The application backend (endpoint) is fully configured on provider's side and Ingram Micro credentials are used for the configuration.

2.8.1 Install Milestone

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

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

2.8.2 Configure Milestone

The purpose of this phase is to perform necessary Platform configuration for the 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).

2.8.3 Verify Milestone

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

- 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 the Customer staff;
- d. Provide test support for User Acceptance Testing;
- g. Track, manage, report on, collaborate on and resolve defects; and
- h. Obtain Customer acceptance for the deployed connector configuration.

2.9 SYNDICATION TYPE II CONNECTOR DEPLOYMENT

SKU: CB-DEP.OA-SYND2-1T

This Service is based on three phases to complete the delivery of a Type II Connector - Application backend (endpoint) is configured on the Ingram Micro side and there is no application backend (endpoint) on provider's side.

2.9.1 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. APS Controller proxy deployment and configuration;
- b. Verify prework (licenses, resources, service templates, service plans); and
- c. Apply APS specific configuration settings.

2.9.2 Configure Milestone

The purpose of this phase is to perform necessary Platform configuration for the 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).

2.9.3 Verify Milestone

The purpose of this phase is to have the Customer sign off that User Acceptance Testing is complete and ready for business cutover. Perform unit testing of the deployed connector:

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

2.10 VALUE ADDED RESELLER DEPLOYMENT

SKU: CB-DEP.OA-VAR-1T

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

2.10.1 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;

2.10.2 Configure Milestone

The purpose of this phase is to perform necessary Platform configuration for the 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, Recourse Category, Online Store.

2.10.3 Verify Milestone

The purpose of this phase is to have the 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.

2.11 ADDITIONAL SERVICE PLAN DEPLOYMENT

SKU: CB-DEP.OA-SP-1T

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

2.11.1 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;

2.11.2 Configure Milestone

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

- a. Configure service plan according to the prework.

2.11.3 Verify Milestone

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

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

2.12 PLUG-IN DEPLOYMENT

SKU: CB-DEP.OA-PG-1T

This Service 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

2.12.1 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. Prework validation; and
- c. Plugin deployment.

2.12.2 Configure Milestone

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

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

2.12.3 Verify Milestone

The purpose of this phase is to have the 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).

2.13 OACI STANDALONE DEPLOYMENT

SKU: CB-DEP.OA-OACI-ST-1T

This Service is based on three phases to complete the delivery of the OACI module.

2.13.1 Install Milestone

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

- a. Create VM OS template for OACI;
- b. Get OACI IM credentials; and
- c. Install the necessary packages.

2.13.2 Configure Milestone

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

- a. Configure HTTPS for OACI API;
- b. Register VM template on a shared storage on another node;
- c. Configure Internet access for private-net only VMs; and
- d. Set Measurable and UOM for OACI resource types.

2.13.3 Verify Milestone

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

- a. Provision subscription;
- b. Verify VPS limits;
- c. Verify VPS bandwidth limit;
- d. Verify traffic accounting;
- e. Switch service plan;
- f. VPS management operations;
- g. Review resource usage statistics;
- h. Install Plesk in VPS;
- i. Sync Plesk domains with OA; and
- j. Delete VPS and subscription.

2.14 OACI CLUSTERED DEPLOYMENT

SKU: CB-DEP.OA-OACI-CL-1T

This Service is based on three phases to complete the delivery of an OACI cluster.

2.14.1 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. Create VM OS template for OACI;
- b. Get OACI IM credentials;
- c. Install the necessary packages; and
- d. Deploy storage cluster.

2.14.2 Configure Milestone

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

- a. Configure HTTPS for OACI API;
- b. Register VM template on a shared storage on another node;
- c. Configure Internet access for private-net only VMs; and
- d. Set Measurable and UOM for OACI resource types.

2.14.3 Verify Milestone

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

- a. Provision subscription;
- b. Verify VPS limits;
- c. Verify VPS bandwidth limit;
- d. Verify traffic accounting;
- e. Switch service plan;
- f. VPS management operations;
- g. Review resource usage statistics;
- h. Install Plesk in VPS;
- i. Sync Plesk domains with OA;
- j. Delete VPS and subscription;
- k. Inter-VPS connection;
- l. Install Plesk in VPS;
- m. Sync Plesk domains with OA; and
- n. Delete VPS and subscription.

2.15 WEBHOSTING PLESK STANDALONE DEPLOYMENT

SKU: CB-DEP.OA-WHP-ST-1T

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

2.15.1 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.

2.15.2 Configure Milestone

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

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

2.15.3 Verify Milestone

The purpose of this phase is to have the 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 the 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.

2.16 HOSTED SERVICES ADDITIONAL SERVER DEPLOYMENT

SKU: CB-DEP.OA-HS-A-1T

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

2.16.1 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.

2.16.2 Configure Milestone

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

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

2.16.3 Verify Milestone

The purpose of this phase is to have the 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.

2.17 PLATFORM CONFIGURATION SERVICE

SKU: CB-DEP.CBS-PC-1T

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

2.17.1 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.

2.17.2 Configure Milestone

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

- a. Transition of platform modules (Shared Hosting, Plesk, OACI) from a platform to the 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.

2.17.3 Verify Milestone

The purpose of this phase is to have the Customer sign off that User Acceptance Testing is complete and ready for business cutover. The services organization will work with the Customer to support business cutover activities to the Platform, and will work together with the Customer and the 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 the 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.

2.18 LOCALIZATION SOLUTION

SKU: CB-DEP.LOCALIZE-1T

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

2.18.1 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.

2.18.2 Configure Milestone

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

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

2.18.3 Verify Milestone

The purpose of this phase is to have the 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).

2.18.4 Localization Solution Maintenance

SKU: CB-DEP.LOCALIZE-MNT-1Y

In addition to providing a one-time service, an additional “Localization Solution Maintenance” service is required for the Localization Solution Service. It is billed on an annual basis in advance as part of the support for the localization framework that is used and includes 3rd level support, updates, patches, reinstall, locale management and IP retention and management.

3. INTEGRATION SERVICES OVERVIEW

The goal of integration services is to seamlessly mesh the CloudBlue platform into your organization. CloudBlue Integration Services provide an enterprise grade implementation of the subjects covered in the Integration guide, applying our experience and knowledge of integrating into your 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 Integration Services are initially focused on the implementation of a new CloudBlue platform they are equally appropriate throughout the lifecycle as your business grows and changes.

Integration services are a complete managed process that cover the full range of tasks to identify, agree and deliver a seamless integration, as well as the on-going support to ensure the long-term delivery of value.

3.2 INTEGRATION DEVELOPMENT SERVICE

SKU: CB-DEP.INTGR-1T

This Service is based on three phases to complete the delivery of the CloudBlue platform. These services range in size and complexity. A Technical Scoping document will be jointly agreed with the customer for sign-off.

Integration Services are a value-added support services that can be configured to meet your discrete needs, combining personalized services of our specialist integration architects, with our experience of delivering the CloudBlue platform into a wide range of businesses.

3.2.1 Design Phase

The purpose of this phase is to define and plan the integration, setting the foundation for the successful integration of the platform into your organization. This phase will;

- a. Generate the Technical Scoping document
- b. Generate a High-Level Architecture positioning the CloudBlue platform within your organization
- c. Determine and agree a plan to deliver the integration as agreed

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

- d. Agreeing and identifying the position of the CloudBlue platform within the wider context of your organization. Working through the options relevant for your organization's landscape and goals.
- e. Mapping the standard Customer Journeys supported by the CloudBlue platform to your specific requirements, operation and business outcomes. Identifying how the CloudBlue platform will cooperate with the other aspects of your organization in term of systems, people and process.
- f. 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.
- g. Mapping the interaction between your 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.
- h. Determining an appropriate hosting and deployment model of to ensure that your security performance and compliance requirements are met.
- i. Developing an implementation plan to achieve the above; either as a single delivery or a staged roadmap as appropriate.

3.2.2 Build Phase

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

3.2.3 Accept Phase

The purpose of this phase is to sign off that UAT is complete and ready for business cutover. Ingram will work with you to support business cutover activities to the integrated platform, and to the 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

3.2.4 Integration Maintenance Service

SKU: CB-DEP.INTGR-MNT-1Y

This Service is based on a previous Integration Service deployment. It is billed on an annual basis in advance and provides on going certainty for the operation of the deployed integration environment 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 implemented 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 can be enhanced to include support for on-going change and enhancements to the integration on a prioritized basis

4. MIGRATION SERVICES 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 customer accounts and to migrate existing subscriptions.

CloudBlue has developed several processes for migrating information from one system to another. 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.

Our CloudBlue specialists will help you build your migration strategy, assess your portfolio, review your cost structure and identify the best-fit cloud platform for your needs.

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

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

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

CloudBlue Upgrade Services are based on the standard model for platform upgrades and service specific modules built which can be leveraged to import customer accounts and to migrate existing subscriptions.

CloudBlue has developed specific upgrade procedures to enable customers to migrate to the latest version with minimal impact to the customers business. Upgrade Services uses tools and a framework for each upgrade to prepare, test, upgrade and verify the installation.

Our CloudBlue specialists will help you build your upgrade plan, assess your existing environment for upgrade readiness and provide a report post upgrade. Keeping up to date with the latest version of the platform enables you to leverage the latest technology and schemas available for either business workflow, provider functionality and platform security.

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

UPGRDENT	Upgrade of platform versions	Provide upgrade services to customers that are subscribed to the basic support option
UPGRDEOL	Upgrade of out of support platforms	Provide upgrade services to customer with platforms versions that are out of support

4.2 ADVANCED UPGRADE ASSISTANCE

SKU: CB-DEP.UPGRADE-1T

Those customers that are on a version that has exceeded the End of Maintenance Milestone, CloudBlue recommends the following service as a paid engagement. 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. Upgrade project coordinator will provide consultative assistance and follow up during customer's User Acceptance Testing for the developed on the pre-upgrade stage set of scenarios.

CloudBlue provides upgrade assistance to all its customers and this service is included into specific services packages. Customers with Legacy TAM and/or Managed Services subscriptions will have upgrade coordination provided by CloudBlue.

Customers who are on Basic Maintenance and Support will have only Basic upgrade assistance provided, excluding any upgrade project coordination and assistance on Prepare Milestone and Validate Milestone stages.

Basic upgrade assistance is provided as follows:

- a. Scheduling the upgrade to any available slot in the upgrade schedule;
- b. Upgrade pre-check that allows upgrade team to verify if platform is ready for upgrade;
- c. Upgrade execution (upload distribution and upgrade scripts, run upgrade script); and
- d. Basic check-up of main services up & running (any remaining issues are communicated to customer to report them to support team for investigation).

To be done by Customer:

- a. Upgrade project coordination and execution;
- b. Platform readiness for the upgrade against release notes, existing issues and pre-check results;
- c. Pre-upgrade or post-upgrade issues follow-up – all issues are to be handled by customer with or without CloudBlue support team assistance; and
- d. Post-upgrade testing.

4.2.1 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; and
- n. Customer specific post-upgrade test scenarios development.

4.2.2 Import Milestone

The purpose of this phase is to perform necessary Platform configuration for the 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).

4.2.3 Validate Milestone

The purpose of this phase is to have the Customer sign off that User Acceptance Testing is complete and ready for business cutover. The services organization will work with the Customer to support business cutover activities to the Platform, and will work together with the Customer and the 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); and
- d. Issue tracker follow-up until full resolution.

4.3 PLATFORM MIGRATION SERVICE

SKU: CB-DEP.MIGRATE-1T

4.3.1 Prepare Milestone

The purpose of this phase is to launch the project, gather and define all information required for providing the tasks for the successful installation of the platform to;

- 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

4.3.2 Import Milestone

The purpose of this phase is to perform necessary Platform configuration for the 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.
 - 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.

4.3.3 Validate Milestone

The purpose of this phase is to have the customer sign off that UAT is complete and ready for business cutover. Ingram will work with Customer to support business cutover activities to the Platform, and to work together with Customer and 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

4.3.4 Assumptions

- a. Past reconciliation of orders has been done for orders.
- b. No order history is imported.

4.3.5 Exclusions

- a. CSV preparation
- b. Migration of order/subscription history.

4.4 SYNCHRONIZATION OF MICROSOFT OFFICE 365 SUBSCRIPTIONS

SKU: CB-DEP.MIGRATE-1T

This service synchronizes changes between the CloudBlue Platform and Microsoft Partner Centre. Customers creating and managing Office 365 subscriptions directly in Microsoft Partner Centre have potentially developed inconsistencies between the data there and the CloudBlue Platform. Customers may need a synchronization of O365 subscriptions with Microsoft to be provided.

4.4.1 Prepare Milestone

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

- a. Review and compare Platform to CSP subscriptions; and
- b. Prepare inconsistent New and Existing customers lists for synchronization.

4.4.2 Import Milestone

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

New customers: Conduct an analysis of the accounts and classify into categories below for action:

- a. Create customer accounts in the Platform; and
- b. Create subscriptions using CSP import tool shipped with the Platform.

Existing customers: Conduct an analysis of the accounts and classify into categories below for action:

- a. Existing customers with modification of license count:
 - I. Place a change order in the CloudBlue platform to change the number of licenses.
- b. Existing customers with new subscription:
 - I. Import the subscription using CSP import tool.
- c. Existing customers with terminated subscription where the subscription exists in CloudBlue Platform, but not in Microsoft:
 - I. Disconnect subscription tenant from Microsoft (by an APS API call); and
 - II. Place a subscription cancellation order in CloudBlue Platform to destroy the subscription.
- d. Existing customers in CloudBlue Platform, but not CSP:
 - I. Review the full list in CloudBlue Platform database to export all customers with their O365 subdomains and then compare to the lists;
 - II. Disconnect subscription tenant from Microsoft; and
 - III. Place an account cancellation order in CloudBlue Platform.

4.4.3 Validate Milestone

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

- a. A report to be provided in machine-readable format, with the current state of each customer to be used by middleware systems that must have the info updated after the project is completed.

5. DEFINITIONS

Capitalized terms used in this Service Description, and not otherwise defined in the Agreement, have the meaning given below.

Capitalized term	Description
Dedicated PaaS	A dedicated platform environment setup, hosted, and managed by Ingram Micro on behalf of the customer in a specific geographical zone.
Operating Country	An Operating Country, generally Ingram Micro supports a single country, with additional Operating Countries added to the platform for an additional fee.
On-Premise	A dedicated platform environment setup, hosted, and managed by the customer, and hosted by a third-party or in their own Data Center facility.
Production Environment	A revenue-generating production platform environment
Staging Environment	A non-production, non-revenue-generating environment used by developers to model impacts to the Customer environment or test upgrades.